

























Find Records Fast	
<b>Finding one record</b>	Use <b>Quick Find</b> : In the title bar of a list or detail view, click the  button.
<b>Finding records and creating a group</b>	Use <b>Lookups</b> : On the <b>Lookup</b> menu, point to the type of record you are looking for, click the criteria you want to look for, enter the search information in the box, and then click the  (Find) button. Select <b>Create a temporary group containing all results</b> , and then click <b>OK</b> .
<b>Using SpeedSearch</b>	Click the  <b>SpeedSearch</b> button in the toolbar. You can: <ul style="list-style-type: none"> <li>Match on <b>all words</b> <b>any words</b> <b>the exact phrase</b></li> <li>Use natural language</li> <li>Search <b>on the root</b> <b>by thesaurus</b> <b>on sound like</b></li> <li>Use <b>Boolean</b> search criteria</li> </ul>
<b>Seeing a list of recently-viewed items</b>	On the tool bar, click the  <b>History</b> button, and select an item from the list.

Commonly Used Icons			
Finding Service and Support Features	Working with Records	Moving Around	
Contacts 	Find 	First	
Ticket List 	Calendar 	Previous	
Contracts 	Ellipsis 	Next	
Returns 	E-mail 	Last	
Defects 	Web 	Back	
	View address 	Forward	
Save 	Undo 	List View	





# Infor CRM v8.5



## Quick Reference Card

for the Service and Support User

Work the Way I Want To	
<b>Using groups</b>	Create groups for records you want to track.
<b>Accessing your groups</b>	Do one of the following: <ul style="list-style-type: none"> <li>On a Main view, in list view layout, click a group tab.</li> <li>On the <b>View</b> menu, click <b>Groups</b>.</li> </ul>
<b>Selecting records to create a group</b>	<ol style="list-style-type: none"> <li>From any Main view, in list view layout, select one or more records. To select more than one record, hold down <b>[Ctrl]</b> as you click each item.</li> <li>Right-click anywhere in the grid and click <b>Add Selected Members to New Group</b>.</li> <li>Use <b>Query Builder</b> to define group properties, layout, sorting, appearance defaults.</li> <li>Click <b>OK</b>.</li> </ol>
<b>Sharing your group with other users</b>	<ol style="list-style-type: none"> <li>Open the list view containing the group you want to share.</li> <li>Right-click the group tab, and select <b>Share Group</b>.</li> <li>In the <b>Owner Assignment</b> dialog box, click <b>Add</b>.</li> <li>Click the <b>Users</b>, <b>Departments</b>, or <b>Teams</b> tab, select who you want to share your group with, and click <b>OK</b>.</li> <li>Click <b>OK</b>.</li> </ol>
<b>Setting user options</b>	On the <b>Tools</b> menu, click <b>Options</b> , and use each tab to set specific options.
<b>Managing customer service defaults and options</b>	<p>On the <b>Tools</b> menu, point to <b>Manage</b>, and then click <b>Customer Service Defaults</b>.</p> <p>On the <b>Tools</b> menu, point to <b>Manage</b>, click <b>Customer Service Options</b>, and use each tab to set specific options.</p>

Get My Tasks Done	
<b>Receiving reminders</b>	Use <b>Activity Reminder</b> to notify you of your alarms, past due activities, and unconfirmed activities. <ul style="list-style-type: none"> <li>On the <b>Tools</b> menu, click <b>Activity Reminder</b>.</li> </ul>
<b>Viewing my activities</b>	Use <b>Activities List</b> view to manage your scheduled activities and events by type. Select the time frame for the displayed items. <ul style="list-style-type: none"> <li>On the Navigation Bar, click  <b>Activities</b> or press <b>F7</b>.</li> </ul>
<b>Using my calendar</b>	Manage your time and keep track of scheduled activities and events. View your schedule by the day, week, month, or year. You may also be able to view other users' activities and events. <ul style="list-style-type: none"> <li>On the Navigation Bar, click  <b>Calendar</b> or press <b>F4</b>.</li> </ul>
<b>Scheduling a call, meeting, or to-do</b>	On the <b>Schedule</b> menu, do one of the following: <ul style="list-style-type: none"> <li>Click the type of activity you want to add.</li> <li>Press <b>Shift+F3</b> for a phone call.</li> <li>Press <b>Alt+F3</b> for a meeting.</li> <li>Press <b>Ctrl+F3</b> for a to-do.</li> </ul>
<b>Inviting other users</b>	Use the <b>Members</b> or <b>Attendees</b> tab to invite other CRM users to a phone call or meeting.
<b>Completing an activity</b>	Do one of the following: <ul style="list-style-type: none"> <li>Right-click the activity you want to complete and click <b>Complete Activity</b>.</li> <li>On the <b>Schedule</b> menu, click <b>Complete Activity</b>.</li> </ul>
<b>Adding records</b>	On the <b>Insert</b> menu, select the type of record you want to add – contact, ticket, defect, return, or note.
<b>Checking on notes and history</b>	Open a record's detail view and click the <b>Notes/History</b> tab. Use the filters to narrow the list.

Get Help	
<b>Finding scenarios to walk you through tasks</b>	To find the Getting Started Guide go to <b>Start&gt; Programs&gt; Saleslogix&gt;Documentation</b> .
<b>Opening online Help</b>	See help for a specific page or form or to search for a topic in the help system. <ul style="list-style-type: none"> <li>Click the <b>Help</b> button or press <b>F1</b> to open the help system.</li> </ul>

Communicate Effectively	
<b>Sending an e-mail</b>	Do one of the following: <ul style="list-style-type: none"> <li>On the <b>Write</b> menu, click <b>E-mail</b>.</li> <li>On the toolbar, click the  <b>E-mail</b> button.</li> <li>Next to an e-mail address in a detail view, click the  <b>E-mail</b> button.</li> </ul>
<b>Making notes on a record</b>	On the <b>Insert</b> menu, click <b>Note</b> .
<b>Creating form letters, e-mail, and faxes</b>	<ol style="list-style-type: none"> <li>On the <b>Write</b> menu, click <b>Mail Merge</b>.</li> <li>Use the <b>Merge</b> and <b>History</b> tabs to select a template, records to include, the type of output to create (e-mail, fax, file, or printer), and history options.</li> <li>Click <b>Merge</b>.</li> </ol>

Meet My Goals	
<b>Creating and assigning activity contracts</b>	On the <b>Insert</b> menu, click <b>Contract</b> . Contracts may be based on days, hours, incidents or monetary value, or may be perpetual. <p>In the account's detail view, click the <b>Contracts</b> tab to see if a contract exists, and the type of contract.</p>
<b>Adding and processing tickets and defects</b>	On the <b>Insert</b> menu, click <b>Ticket</b> or <b>Defect</b> . The <b>Area</b> , <b>Category</b> , and <b>Issue</b> boxes determine who it will be assigned to. <p>Use the <b>Punch In/ Punch Out</b> button to log time against a ticket as you are working on it.</p> <p>When processing is complete, change the <b>Status</b> to <b>Closed</b>.</p>
<b>Enabling returns</b>	Create authorization for a customer to return a product. On the <b>Insert</b> menu, click <b>Return</b> . A return must be associated with a ticket. <p>Use the <b>Return Detail</b> view to add product and shipping information. After the return is complete, change the <b>Status</b> to <b>Closed</b>.</p>
<b>Adding comments, description, or resolution information</b>	Use the <b>Comments</b> , <b>Description</b> , or <b>Resolution</b> boxes to include additional information about tickets, defects, or returns. <p>To insert your user name, date, and time information press <b>Shift + F9</b>.</p>