


Find Records Fast

Using Filters

On any list view, in the Task Pane, in the **Filters** section, expand the filters and select the check boxes for the information you want to see in your group.

Using Lookups

Click the  (Lookup) tab in a list or detail view, or right-click an item in the Navigation Bar and select the **Lookup** option (not available for all views).

Using SpeedSearch

Click the  (SpeedSearch) button in the toolbar. You can:

- Select the **record types** to search.
- Match on **all words**, **any words**, **the exact phrase**
- Use natural language
- Search **on the root**, **by thesaurus**, **on sounds like**

Seeing a list of recently-viewed items

On the tool bar, click **Recently Viewed** and select an item from the list.

Work the Way I Want To

Using groups

Create groups for records you want to track.

Accessing your groups

On a list or detail view click a group tab, or in the title bar click **Groups**.

Selecting records to create a group

1. From a list view, select one or more records. To select more than one record, hold down [Ctrl] as you click each item.
2. In the Task Pane, under **Common Tasks**, click **Save Records as Group**.
3. Use Query Builder to define group properties, layout, sorting, or defaults.
4. Click **OK**.

Sharing your group with other users

1. Open the list view containing the group you want to share.
2. Right-click the group tab, and then select **Share**.
3. In the Share Group dialog box, click **Add**.
4. Click the **Users**, **Departments**, or **Teams** tab, select who you want to share your group with, and click **OK**.
5. Click **OK**.

Setting user options

- On the **Tools** menu, click **Options**, and use each tab to set specific options.















Infor CRM SLX v9.x

Quick Reference Card





for the Web User

Commonly Used Icons

Working with Records


Find		Refresh		Add	
Calendar		Email		Associate	
Save		Web		Delete	
Reset		View Address		Edit	

Moving Around

First		Next	
Previous		Last	

Communicate Effectively

Sending an e-mail

On the **Compose** menu click **Email Contact** or **Email Lead**. Or on a detail view, click  next to an email address

Creating form letters and emails

1. On the **Compose** menu, click **Mail Merge**.
2. Use the tabs to select a template, records to include, the type of output to create (email, file), and history options.
3. Click **OK**.

Get My Tasks Done	
Receiving alerts	See Alerts and Past Due notifications in the menu bar.
Viewing my activities	Use the Activities List view to manage your scheduled activities and events by type. Select the time frame for the displayed items. On the Navigation Bar , click Activities .
Using my calendar	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"> On the Navigation Bar, click Calendar.
Scheduling a call, meeting, or to-do	On the Schedule menu, click the activity to add.
Inviting other users	Use the Availability tab to invite other Infor CRM SLX users to a phone call or meeting.
Completing an activity	<ul style="list-style-type: none"> Open the activity and click Complete. On the Schedule menu, click Complete Activity. On the Log menu, click the activity to log to history.
Adding records	On the New menu, select record to add.
Checking on notes and history	Open a record's detail view and click the Notes/History tab. Use the filters to narrow the list.
Using the Dashboard	Display and interact with a variety of performance and analysis tools in a dashboard format. <ul style="list-style-type: none"> On the Navigation Bar, click Dashboard.
Using the Infor CRM SLX Mail Merge for Microsoft Word add-in	Use the Mail Merge for Microsoft Word add-in to manage templates and perform mail merges in Microsoft Word. To install: <ol style="list-style-type: none"> Expand the Tools menu, click Options, click General tab. Click Install Mail Merge for Microsoft Word.
Get Help	
Finding scenarios	On the menu bar, click ? , and then click Getting Started Guide .
Opening online Help	<ul style="list-style-type: none"> Click ? (Help) to open the help system.

Meet My Goals	
Adding and qualifying leads	<p>Do one of the following:</p> <ul style="list-style-type: none"> To add a single lead, on the New menu, click Lead. To import a list of leads, on the Tools menu, click Import Leads. <p>Use the lead qualification check boxes on the Lead Detail view to validate information and determine if the lead is ready to be converted to a contact and account. To convert a qualified lead, click Convert Qualified Lead.</p>
Creating and launching campaigns	<p>To create a campaign, on the New menu, click Campaign.</p> <p>Select targets, define stages and tasks, and add products to a campaign. When the campaign is ready, click Launch. Use the stages and tasks and target responses to monitor the campaign's progress and success.</p>
Pursuing opportunities	<p>On the New menu, click Opportunity. Use sales processes to manage your sales pipeline.</p> <p>When an opportunity is won or lost, change the Status to Closed-Won or Closed-Lost and enter reasons for closing the opportunity.</p>
Making sales orders	<p>On the New menu, click Sales Order.</p> <p>Use sales orders to track products purchased by an account.</p>
Adding and processing tickets and defects	<p>On the New menu, click Ticket or Defect. The Area, Category, and Issue boxes determine who it will be assigned to.</p> <p>Use the Punch In/ Punch Out button to log time against a ticket as you are working on it.</p> <p>When processing is complete, change the Status to Closed.</p>
Enabling returns	<p>Create authorization for a customer to return a product.</p> <p>On the New menu, click Return. A return must be associated with a ticket.</p> <p>Use the Return Detail view to add product and shipping information. After the return is complete, change the Status to Closed.</p>
Creating and assigning contracts	<p>On the New menu, click Contract. Contracts may be based on days, hours, incidents or monetary value, or may be perpetual.</p> <p>In the account's detail view, click the Contracts tab to see if a contract exists, and the type of contract.</p>