





Sage SalesLogix v8.0



Quick Reference Card for the Service and Support User

Find Records Fast	
Finding one record	Use Quick Find : In the title bar of a list or detail view, click the button.
Finding records and creating a group	Use Lookups : On the Lookup 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 Create a temporary group containing all results , and then click OK .
Using SpeedSearch	Click the SpeedSearch button in the toolbar. You can: <ul style="list-style-type: none"> Match on all words any words the exact phrase Use natural language Search on the root by thesaurus on sound like Use Boolean search criteria
Seeing a list of recently-viewed items	On the tool bar, click the History 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	

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

Get My Tasks Done	
Receiving reminders	Use Activity Reminder to notify you of your alarms, past due activities, and unconfirmed activities. <ul style="list-style-type: none"> On the Tools menu, click Activity Reminder.
Viewing my activities	Use Activities List view to manage your scheduled activities and events by type. Select the time frame for the displayed items. <ul style="list-style-type: none"> On the Navigation Bar, click  Activities or press F7.
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 or press F4.
Scheduling a call, meeting, or to-do	On the Schedule menu, do one of the following: <ul style="list-style-type: none"> Click the type of activity you want to add. Press Shift+F3 for a phone call. Press Alt+F3 for a meeting. Press Ctrl+F3 for a to-do.
Inviting other users	Use the Members or Attendees tab to invite other Sage SalesLogix users to a phone call or meeting.
Completing an activity	Do one of the following: <ul style="list-style-type: none"> Right-click the activity you want to complete and click Complete Activity. On the Schedule menu, click Complete Activity.
Adding records	On the Insert menu, select the type of record you want to add – contact, ticket, defect, return, or note.
Checking on notes and history	Open a record's detail view and click the Notes/History tab. Use the filters to narrow the list.
Get Help	
Finding scenarios to walk you through tasks in Sage SalesLogix	To find the Getting Started Guide go to Start> Programs> Sage SalesLogix>Documentation .
Opening online Help	See help for a specific page or form or to search for a topic in the help system. <ul style="list-style-type: none"> Click the Help button or press F1 to open the help system.

Communicate Effectively	
Sending an e-mail	Do one of the following: <ul style="list-style-type: none"> On the Write menu, click E-mail. On the toolbar, click the  E-mail button. Next to an e-mail address in a detail view, click the  E-mail button.
Making notes on a record	On the Insert menu, click Note .
Creating form letters, e-mail, and faxes	<ol style="list-style-type: none"> On the Write menu, click Mail Merge. Use the Merge and History tabs to select a template, records to include, the type of output to create (e-mail, fax, file, or printer), and history options. Click Merge.
Meet My Goals	
Creating and assigning activity contracts	On the Insert menu, click Contract . Contracts may be based on days, hours, incidents or monetary value, or may be perpetual. In the account's detail view, click the Contracts tab to see if a contract exists, and the type of contract.
Adding and processing tickets and defects	On the Insert menu, click Ticket or Defect . The Area , Category , and Issue boxes determine who it will be assigned to. Use the Punch In/ Punch Out button to log time against a ticket as you are working on it. When processing is complete, change the Status to Closed .
Enabling returns	Create authorization for a customer to return a product. On the Insert menu, click Return . A return must be associated with a ticket. Use the Return Detail view to add product and shipping information. After the return is complete, change the Status to Closed .
Adding comments, description, or resolution information	Use the Comments , Description , or Resolution boxes to include additional information about tickets, defects, or returns. To insert your user name, date, and time information press Shift + F9 .