



















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

Get Help	
Finding scenarios to walk you through tasks	To find the Getting Started Guide go to Start> Programs> Saleslogix>Documentation .
Opening online Help	<ul style="list-style-type: none"> Click the Help button or press F1 to open the help system.

Commonly Used Icons				
Finding Sales and Marketing Features	Working with Records		Moving Around	
Accounts 	Find 	First 		
Contacts 	Calendar 	Previous 		
Leads 	Ellipsis 	Next 		
Opportunities 	E-mail 	Last 		
Campaigns 	Web 	Back 		
Library 	View address 	Forward 		
Sales Dashboard 	Save  Undo 	List View 		










Infor CRM v8.3

Quick Reference Card

for the Sales and Marketing User

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, and 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 then 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.

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 Infor CRM 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, account, lead, opportunity, campaign, 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.
Using my Sales 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  Sales Dashboard.
Creating a literature request	Send information to your prospect or customers. On the Schedule menu, click Literature Request .
Seeing a list of recently-viewed items	On the tool bar, click the  History button, and select an item from the list.

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.
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.
Adding and qualifying leads	
Adding and qualifying leads	<p>On the Insert menu, do one of the following:</p> <ul style="list-style-type: none"> To add a single lead, click Lead. To import a list of leads, 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>On the Insert 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 Insert menu, click Opportunity. Use sales processes to manage your sales pipeline.</p> <p>On the toolbar, click  Opportunity Statistics to display opportunity statistics. 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	Use sales orders to add billing/shipping addresses and products to an opportunity. On the Opportunity Detail view, click the Sales Orders tab, right-click and select Insert Sales Order .