Infor Education
Master Infor products.
Maximize your potential.

Infor CRM: v8.4 Using Web Training Workbook

Infor CRM
July 9, 2018
Course code: 01_0610840_IEN0171_CRM

Table of contents

About this workbook

Welcome to this Infor Education course! We hope you will find this learning experience enjoyable and instructive. This Training Workbook is designed to support the following forms of learning:

- Classroom instructor-led training
- Virtual instructor-led training
- Self-directed learning

This Training Workbook is not intended for use as a product user guide.

Activity data

You will be asked to complete some practice exercises during this course. Step-by-step instructions are provided in this guide to assist you with completing the exercises. Where necessary, data columns are included for your reference.

Your instructor will provide more information on systems used in class, including server addresses, login IDs, and passwords.

Self-directed learning

If you are taking this course as self-directed learning, there may be instructor-recorded presentations and/or simulations available to assist you.

If instructor-recorded presentations are available, a hyperlink to the recording will be included on the first page of each corresponding Lesson.

If simulations are available, the demos and exercises throughout this Training Workbook will include hyperlinks that allow you to view and/or practice the execution of the demo or exercise in a simulated training environment.

Learning Libraries

Learning Libraries in Infor Campus include learning materials that are available to you online, anytime, anywhere. These materials can supplement instructor-led training, providing you with additional learning resources to support your day-to-day business tasks and activities.

Please note that if you accessed this Training Workbook directly via a Learning Library, you will not have access to the Infor Education Training Environment that is provided with all instructor-led and most self-directed learning course versions, as referenced above. Therefore, you will not be able to practice the exercises in the specific Training Environment for which the exercises in this Training Workbook were written.

Symbols used in this workbook

Hands-on exercise (“Exercise”)	Your notes	Question
Instructor demonstration (“Demo”)	Important note	Answer
Can be used for either (“Scenario” or “Discussion”)	Critical note	Task simulation
For your reference		

Course overview

Estimated time

.25 hours

Learning objectives

Upon completion of this course, you'll be able to:

- Navigate the Infor CRM workspace.
- Build new relationships.
- Keep track of interactions.
- Distribute information to customers.
- Keep track of sales.
- Provide support.

Topics

- Course description and agenda

Course description and agenda

This course covers how to build new relationships, track interactions and sales, and provide support. The recommended agenda suggests completing Lessons 1-2 on Day 1, Lessons 3-4 on Day 2, and Lessons 5-6 on Day 3. You are welcome to work ahead if you have time. This training is for Infor CRM v8.4. Previous course name/code: Infor CRM: v8.4 Using Web/ 01_0610830_IEN0107_ICM.

Course duration

24 hours

Prerequisite knowledge

To optimize your learning experience, Infor recommends you have the following knowledge prior to attending this course:

- Experience with Microsoft Windows.
- Experience with Microsoft Outlook.
- Basic computer skills including how to use a mouse, open and close windows, and access items from a Menu Bar or Toolbar.

Audience

- Customer User
- Pre-Sales Consultant
- Business Consultant
- Technical Consultant
- Support
- System Administrator

System requirements

- Infor CRM Training Environment

Reference materials

Infor CRM reference materials are available from the following locations:

- Infor CRM Help menu
- Infor Xtreme®

Course agenda

The agenda below details the contents of this course, including lesson-level learning objectives and supporting objectives.

Lesson	Lesson title	Learning objectives	Day
Course overview		Review course expectations.	1
1	Introduction to Infor CRM	• Determine the difference between Online and Offline clients. • Sign in to Infor CRM and adjust startup options. • Navigate the Infor CRM workspace. • Update and save data. • Search Infor CRM Help to accomplish a task.	1
2	Building new relationships	• Explain the difference between accounts, contacts, and leads. • Define account ownership and list available options. • Insert new lead and contact/account records. • Identify available options for importing data. • Create groups of records based on custom criteria. • Accurately update relationships as they change.	1
3	Keeping track of interactions	• Explain the difference between activities, history records, and notes. • Record sent and received emails to history. • Discuss options for inviting contacts to scheduled meeting or phone call activities. • Schedule activities on your calendar and manage activity reminders. • Become familiar with additional email integration tools. • Use contact processes to streamline activity scheduling and follow-ups.	2
4	Distributing information to customers	• Explain the differences between library, attachments, letters/mail merge, literature requests, and campaigns.	2

Lesson	Lesson title	Learning objectives	Day
		• Use the Infor CRM library to attach a file to an email and save it to the appropriate record within Infor CRM. • Distinguish between template types and understand how mail merge fields work. • Send a mail merge for a group of records and select appropriate history options. • Explain how Infor CRM handles the literature request and fulfillment process. • Describe the data campaigns track and how Infor CRM uses data to calculate results.	
5	Keeping track of sales	• Describe products/packages, opportunities, and dashboards/reports. • Summarize sales potential and weighted values as they relate to close probability. • Convert products to assets when an opportunity is won. • Describe the benefits of using a sales process as it relates to your pipeline. • Identify available opportunity statistics/reports, and use the dashboard to monitor sales performance.	3
6	Providing support	• Explain the differences between contracts, tickets, returns, and defects. • Describe how different contract types are used to calculate the remaining value on a contract. • Identify an authorized service contact and a covered asset. • Describe the notification options for ticket assignment. • Explain what a SpeedSearch index is and how to add items to an index. • Track assets during a return. • Explain the differences between defects and tickets.	3
Course summary		Debrief course.	3

Appendix

This section contains information that is not part of the instructional content of this course, but provides additional related reference information.

Appendix	Appendix title	Content description
Appendix A	User accounts	This appendix provides a reference for student and instructor login credentials.

Lesson 1: Introduction to Infor CRM

Estimated time

4 hours

Learning objectives

In this lesson, you will:

- Determine the differences between Online and Offline clients.
- Sign in to Infor CRM and adjust startup options.
- Navigate the Infor CRM workspace.
- Update and save data.
- Search Infor CRM Help to accomplish a task.

Topics

- Your training experience
- The Infor CRM environment
- The Infor CRM client workspace
- Infor CRM Main views
- Infor CRM help
- Lesson review
- Check your understanding

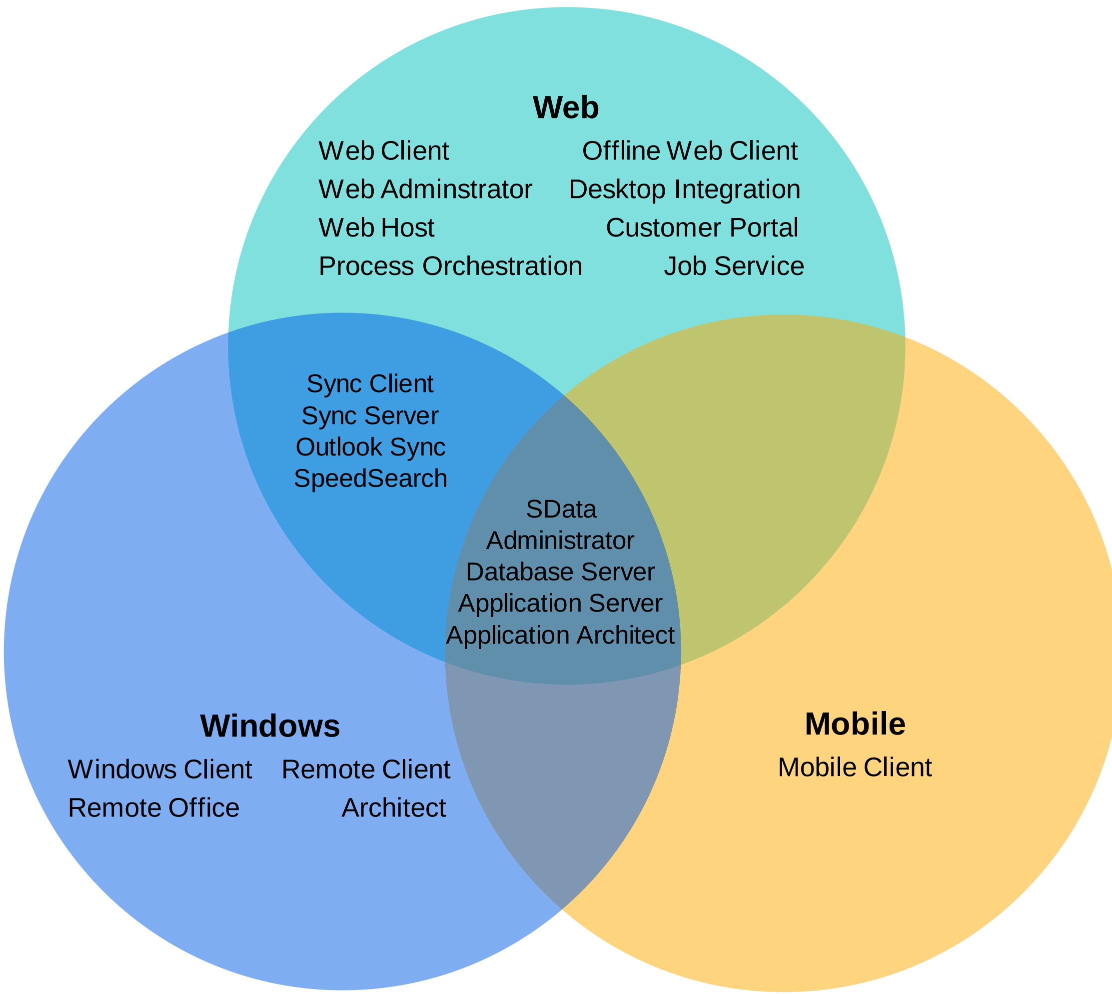
Your training experience

Infor CRM is a customer relationship management solution enabling higher sales performance in small and midsized businesses through sales automation and integration to accounting and business management applications. The Infor CRM client empowers you to be a more effective seller and provides the information and tools needed to make profitable business decisions.

Before using Infor CRM, let's discuss how to make your training experience valuable.

Defining your role in Infor CRM

Infor CRM includes features for sales, service/support, and marketing tasks. Features that most closely align to each role are displayed below, with several features applying to multiple roles. If you specialize in one role more than others, note features most applicable to you and adjust your training experience accordingly.



Getting to know the sample data

The Infor CRM evaluation database known as SALESLOGIX_EVAL includes sample data used in this training course. Sample data belongs to a fictitious company known as Phoenix Computers. Knowing how Phoenix Computers is set up helps you understand concepts in future lessons.

Phoenix Computers sells products and services related to computer software, hardware, and technical support. They service approximately 1,000 accounts with 1,000 contacts in over 18 countries.

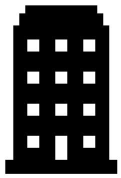
Phoenix Computers	1,000 contacts / 18 countries

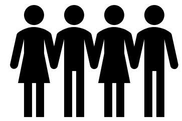
Phoenix Computers has a staff of 27 people who have access to Infor CRM. The organization is divided into ten departments: Channel Sales, Customer Service, Development, Field Sales, Inside Sales, IS, Marketing, PSG, Sales, and Tech Support.

Phoenix Computers	27 employees / 10 departments

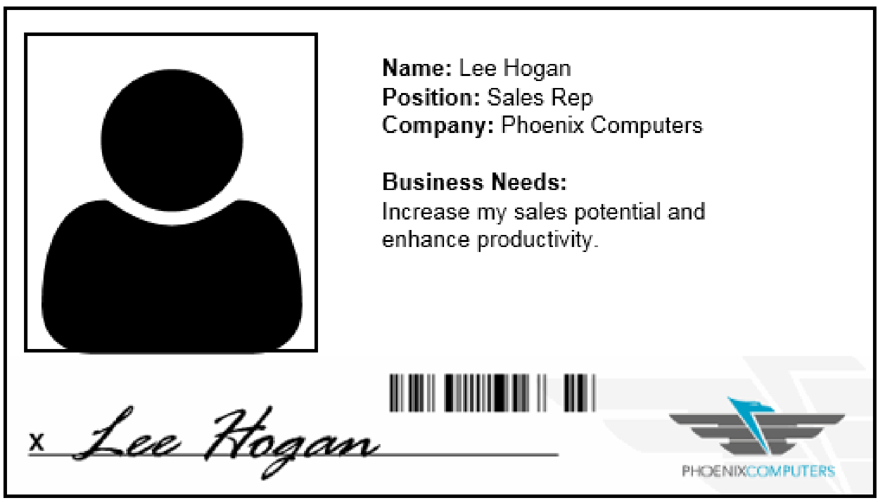
Phoenix Computers uses “teams” to group people from different departments according to physical region or specialty: Asia/Pac, EMEA, Global, Midwest, Northeast, Northwest, Southeast, Southwest, Tech Support—Hardware, and Tech Support—Software.

Phoenix Computers	10 teams consisting of people from different departments





The user account used during training is Lee Hogan. Lee is a Field Sales Executive on the Midwest team.



Lee Hogan reports directly to Lou Pizzutti (Sales Manager, America) who reports directly to Pam Schwartz (VP of Sales).

The Infor CRM environment

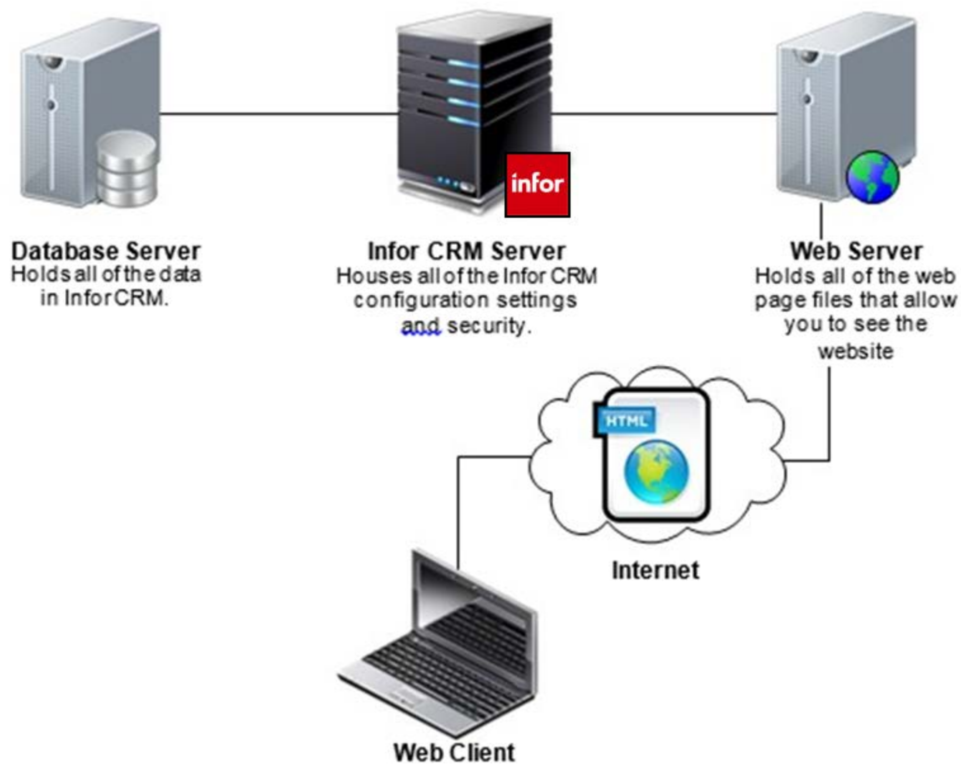
Infor CRM tracks customer relationships. You may access the application using a Windows Client (installed program), Web Client (website), or Mobile Client (HTML5-compatible device). You can also access Infor CRM data from within Microsoft Outlook using Infor CRM Xbar for Outlook ®. This course is designed for the Infor CRM Web Client.

The Infor CRM client (Web) operates in an online or offline mode.

Online: You always have an internet connection

The following diagram shows Infor CRM communicating with a central database. Any data entered through the Infor CRM interface is stored in the main Infor CRM database shared by other Infor CRM users within your company (Windows, Web, or Mobile).

To access Infor CRM, sign in to your browser. No installation is required to get started.

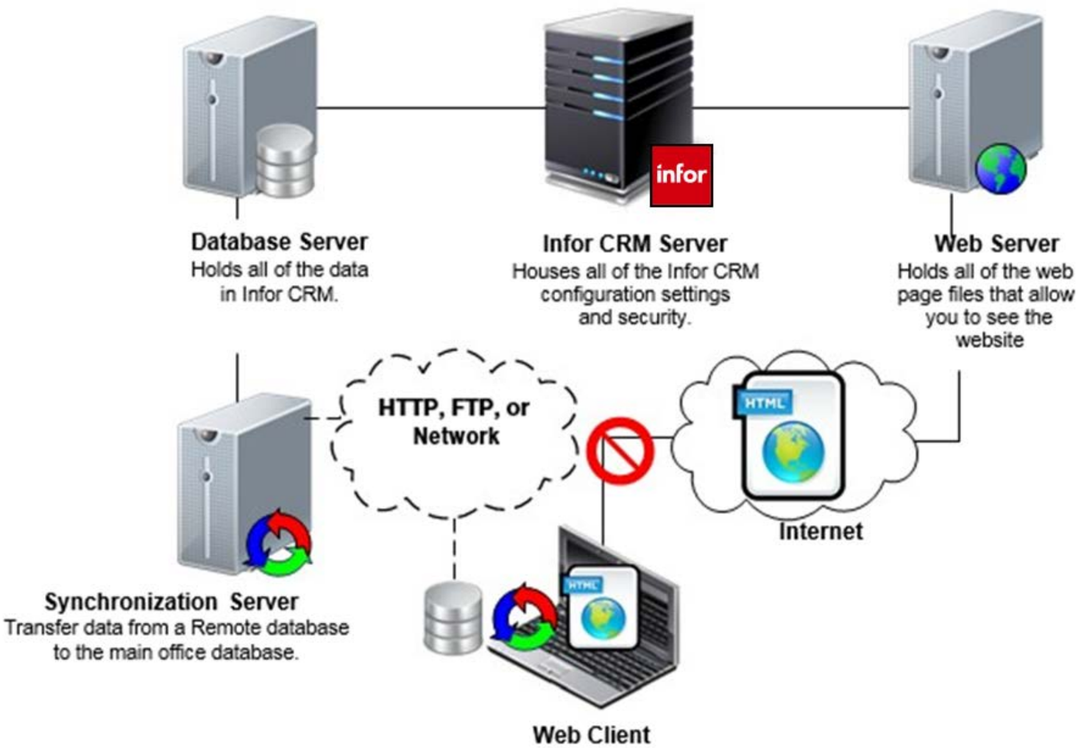


Online Infor CRM Environment

Offline: You don't always have an Internet connection

If you're frequently offline due to travel or other reasons, use the Offline Web Client by installing a personal web server, a synchronization client, and a remote database. With this configuration, you continue accessing web pages through a browser; however, content and data reside locally instead of on the main web server. The data you see in the Web Client interface is a subset of the main office database. Local (offline) data is periodically synchronized with the main database server. By installing these tools, an Internet connection isn't required to use Infor CRM web. You can remain in offline mode for some time.

When an Internet connection is established again, you may initiate a synchronization process using the Synchronization Client installed on your computer. The Synchronization Client sends and receives changes to and from the main office database via the Synchronization Server. The synchronization process ensures you're always working with the latest data and other Infor CRM users have access to updates you've made while offline.



Offline Infor CRM Environment

During this course, you will access the Infor CRM Web Client using the online mode. Features are the same in online and offline mode. Advise your instructor if you plan to use offline mode outside of this training course and review Appendix A for additional information.

Logging on to Infor CRM Web

To sign in to Infor CRM, you must have the following information:

- User ID
- Password (may be blank)
- URL for your company's Web Client home page (for online mode) or personal web portal (for offline mode).

Tip: Set the home page as your default page in your browser for easy access. From Internet Explorer, click **Tools**, click **Internet Options**, and then click **Use Current**.

Usernames

This class uses sample accounts for a fictitious company named Phoenix Computers, Inc. You will typically log in as Lee Hogan (Lee), a Midwest Sales Executive. Usernames are not case sensitive.

Passwords

Passwords prevent unauthorized access to customer information. This course doesn't require a password to sign in to Infor CRM using a sample user from the SALESLOGIX_EVAL database. In your company, your administrator may set up a password for you.

- Passwords are case-sensitive (i.e. *"Password"* is different than *"password"*).
- You can change your password after signing in by clicking **Tools**, clicking **Options**, and then clicking the **Change Password** tab.
- If you forget your password, contact your administrator to reset it.

Your company might utilize pass-through authentication, in which the Administrator has configured Infor CRM user logins to be mapped to a corresponding Windows user login. When pass-through authentication is configured, Infor CRM users do not need to enter a user name and password to login to the web application.

Infor CRM Office Integration

The Infor CRM Office Integration module provides the ability to drag and drop attachments from a file explorer window onto an Infor CRM record detail, and use Mail Merge functionality in Internet Explorer versions 9 and above. You will learn more about specific features later in this course, but when getting started with the Infor CRM web client, one of the first steps you will take will be to install the Office Integration module.

Exercise 1.1: Installing the optional Office Integration and signing in to Infor CRM

In this exercise, you will install the Infor CRM Office Integration Module and sign in to Infor CRM for the first time.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Verify you are logged in to the Training Desktop. If not, log in following instructions provided by your course instructor.

Note: If you are taking this course as self-directed learning, follow the instructions on the course Lab On Demand screen.

Part 1: Install the Infor CRM Office Integration Module

1. Open **Internet Explorer**.

   Although you can use Chrome 23+ or Firefox 24+ to access most of the features in the core web application, we use Internet Explorer because it supports Mail Merge which isn't available when using other browsers.

2. Open **Infor CRM Web Client**.
3. Type *Lee* in the **Username** field. No password is required.
4. Click **Sign in**.
5. Select **Tools > Options** from the menu bar.
6. Click the **General** tab.
7. Click **Install Office Integration** within the **Infor CRM Enhancements** area.

   The Office Integration link may display as installed because other files, such as Infor Xbar have been installed as part of the training environment. In a typical production environment, this link is active. **Note:** Click the button to install **Office Integration** even if appears dimmed.

8. Click **Run**. The **Welcome to the InstallShield Wizard for Office Integration** screen opens.
9. Click **Next**. The **Ready to Install the Program** screen opens.
10. Click **Install**.
11. Click **Finish** when the **Office Integration Module** finishes installing.

    When the installation is complete, a message may appear at the bottom of the screen, prompting you to **Enable** or **Disable** the **Infor CRM Mail Merge Internet Explorer Browser Helper** add-on.

12. Click **Enable**.

Part 2: Change your startup options

1. Select **Tools > Options** from the menu bar.
2. Click the **General** tab.
3. Select **Accounts** from the **Show on Startup** drop-down list.
4. Click **Save** in the upper right corner of the page.

Demo: Navigating the Infor CRM Web Client

This demonstration shows how to navigate the Infor CRM Web Client interface.

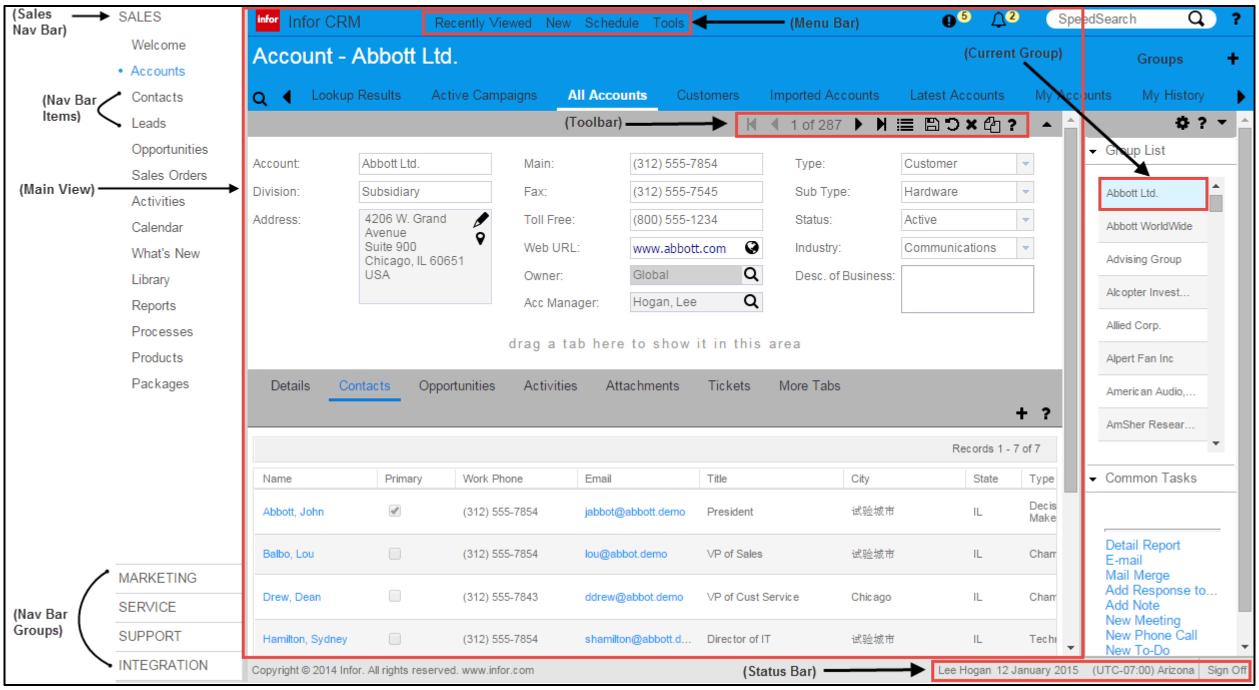
Notes:

- To prepare the system for future exercises, this demo must be completed.
- If you are taking this course as classroom or virtual instructor-led training, your instructor will demonstrate this task.
- If you are taking this course as self-directed learning, you must complete the steps in this demonstration.

Click here to view a demo and/or practice this task

The Infor CRM Web Client workspace

Before reviewing the features in the Infor CRM Web Client, it's important to learn to navigate the workspace so you may find information quickly. The following figure identifies components of the workspace. The Abbott Ltd. Account detail view is shown in the example.



Using the Nav Bar

The Nav Bar is the vertical row of feature groupings on the left side of the workspace. Each group in the Nav Bar contains links to various views for working with data. To access views and data relevant to your job function, expand the appropriate Nav Bar group, and then click the desired view.

Action	Description
Expanding a Nav Bar group	Click a Nav Bar group to expand the group.
Open a main view	Click a group to open the corresponding main view.
Right-click a Nav Bar group	Right-click a Nav Bar group to open view-specific functions.

Views appearing in more than one Nav Bar group are marked with an asterisk *.

Sales Nav Bar group

The following table identifies the **Sales** Nav Bar group and provides a description for its functions.

Name	Description
Welcome	Displays an introduction to the Infor CRM Web Client, with common tasks and links to the Infor CRM Web Client Help.
Accounts	Opens the Accounts main view used to manage company information with which you do business.
Contacts*	Opens the Contacts main view used to manage customer or individual information with which you do business. Contacts belong to accounts.
Leads*	Opens the Leads main view used to manage potential customer or account information.
Opportunities	Opens the Opportunities main view used to manage potential sales information to an account.
Quotes	Opens the Quotes view which may be used to generate quotes that can then be emailed or used to generate proposals to share with Accounts and Contacts.
Sales Orders	Opens the Sales Orders view which is used to track the products purchased by your accounts. Sales orders include information such as, the date the sales order was made, the date the sales order was promised to the customer and its status.
Activities*	Opens a list view of your activities. Tabs allow you to look at specific activities such as meetings, phone calls, and to-dos.
Calendar*	Opens the current day's calendar. Tabs allow you to display the calendar by day, week, month, or year.
What's New	Opens the What's New view used to see changes made to the database by other Infor CRM users.
Library*	Opens a list of library items such as company documents and marketing collateral which you can view or send to customers.
Reports*	Opens the Reports main view used to filter, preview, download, save, or print reports.
Processes	Opens the Processes main view used to schedule new or view existing processes.
Products*	Opens the Products main view used to manage product information.
Packages*	Opens the Packages main view used to manage packages which are one or more products sold as a set.

Marketing Nav Bar group

The following table identifies the **Marketing** Nav Bar group and provides a description for its function. Icons not listed are also available within the **Sales** Nav Bar group (Contacts, Activities, Calendar, Library, Reports, and Leads).

Name	Description
Campaigns	Opens the Campaign main view used to design, perform, and track outbound campaigns.

Service Nav Bar group

The following table identifies the **Service** Nav Bar group and provides a description for its functions. Icons not listed are also available within the **Service** Nav Bar group (Contacts, Activities, Calendar, and Reports).

Name	Description
Tickets*	Opens the **Ticket** main view used to record customer inquiries or complaints.
Contracts	Opens the **Contract** main view used to manage service agreements to track service and support.
Returns	Opens the **Returns** main view used to manage product returns or replacements.
Standard Problems	Opens the **Standard Problems** index.
Standard Resolutions	Opens the **Standard Resolutions** index.

Support Nav Bar group

The following table identifies the **Support** Nav Bar group and provides a description for its function. Icons not listed are also available within the **Support** Nav Bar group (Contacts, Ticket List, Activities, Calendar, and Reports).

Name	Description
Defects	Opens the **Defects** main view used to manage product defects.

Using the menu bar

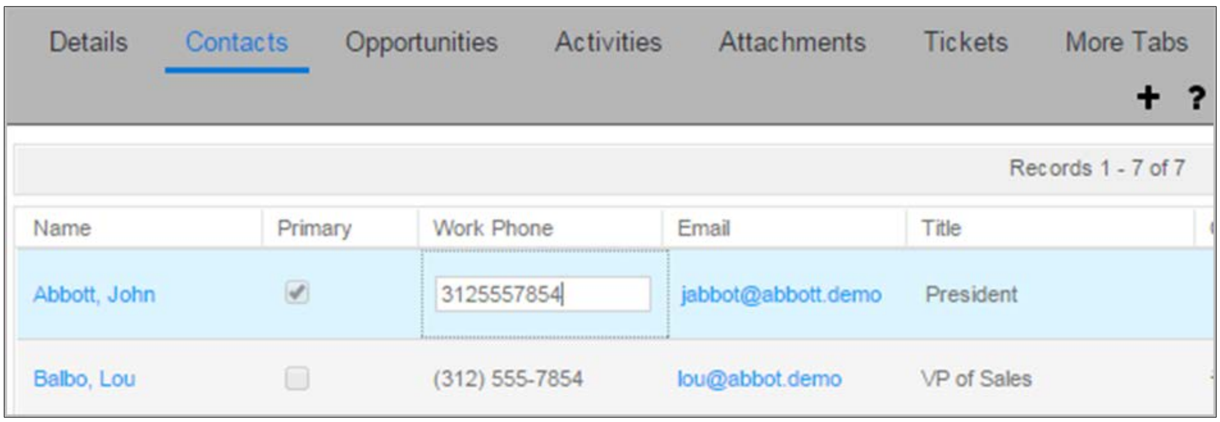
The menu bar contains commands for commonly used Infor CRM operations. Select a menu option by clicking the item. **Recently Viewed** is a commonly-used menu item to quickly navigate to previously viewed pages. The **Write** menu is only available if you have Enhanced Features installed. Your administrator may disable menu items from your account.

Using shortcut (right-click) menus

Right-clicking activates menus in many areas of Infor CRM. Right-clicking these areas displays menus relevant to the current view, however, not all areas have right-click menus.

Editing items in a grid

When you see an item in a grid, click once inside the cell to edit data. Not all data grids have editable cells.



Using the toolbar

The **toolbar** provides quick access to common Infor CRM functions. Icons are context-sensitive meaning some icons may not be visible if they aren't applicable to the current view.

Icon	Function	Description
	List view	Displays different views visited since your last sign in to Infor CRM.
	Save	Saves your changes. Infor CRM prompts you to save changes before navigating away from a view.
	Reset	Clears the current data in the view.
	Delete	Deletes the current record.

	Copy	Copies the current information to your Windows clipboard.
?	Help	Opens Infor CRM Help for the current view.

Using the status bar

The status bar is located at the bottom of your workspace. It displays information about your current session, such as date and time, username logged on, time zone (click to change), and an option to sign off. By default, the system logs you off after 30 minutes.

Infor CRM main views

The content in the middle of Infor CRM is the main view. A main view appears either as a detail view, which shows details for a single record or as a list view, which shows all records in the selected group.

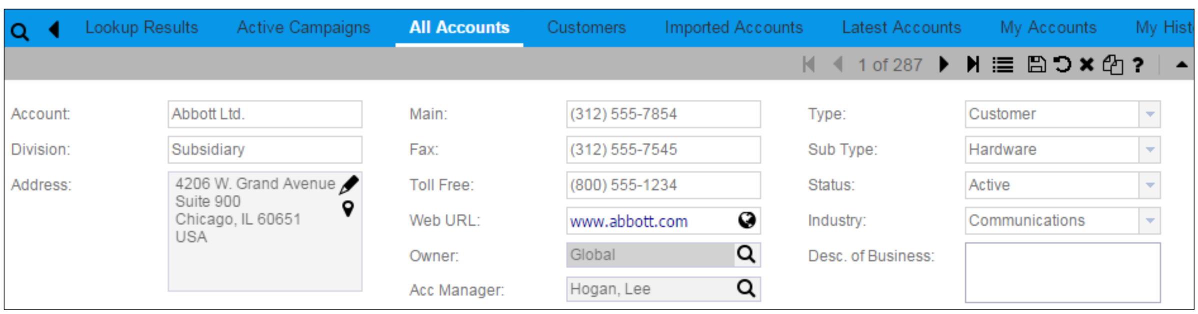
View Type	Description
Detail	Shows details for a single record.
List	Shows a list of records grouped into different tabs.
Summary	Shows a list of records which display like a snapshot or rolodex.

Using a detail view

The detail view displays specific information for an account, contact, lead, or opportunity. The detail view contains three distinct areas: detail area, middle pane, and tab area.

Detail area

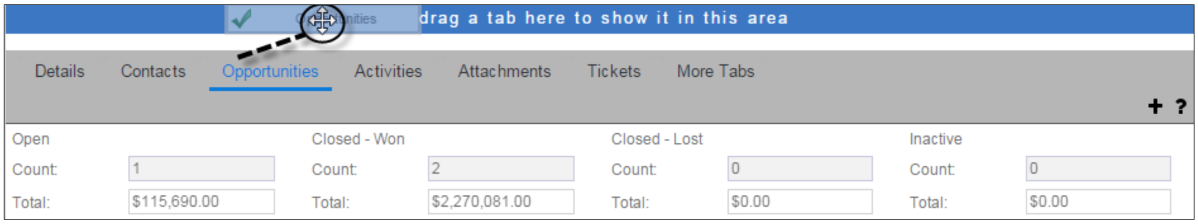
The detail area contains the primary information for a record. You cannot move this area to another location.



Middle pane

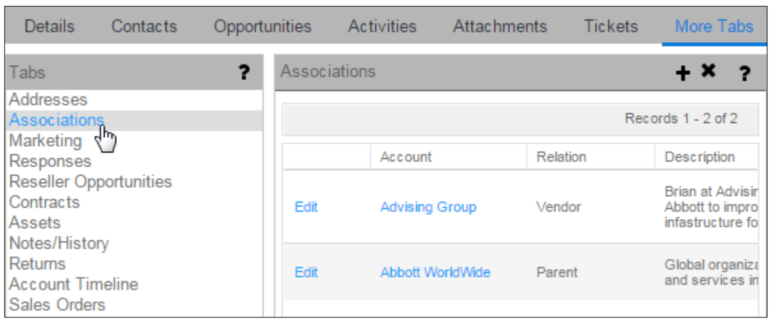
The middle pane is a workspace for displaying frequently used tabs from the tab area. To move a tab into the middle pane, drag and drop it from the tab area. A green check mark indicates you're in the correct area. **Note**: The green check mark appears as you are dragging the tab. A red **X** might also appear, which indicates you cannot drop that tab into the area you are in.

You can drag as many tabs as you want into this area and they can be in any order. Your tabs save for the next session, including tab order.



Tab area

The tab area contains additional views created to display data associated with a selected record.



You can customize which tabs appear in the tab area and rearrange the order in which they appear.

- To rearrange the tab order, click and drag a tab.
- To hide a tab, drag it to the **More Tabs** tab.
- To view more tabs, click the **More Tabs** tab and then click the tab you want to show.

Using list view

The list view displays a collection of records by group. You'll learn more about groups later in this course.

The information can be sorted in ascending or descending order by clicking a column header. Data sorted in ascending order is designated by an up arrow. To change the sort direction, click the column header again. To turn on/off check boxes in front of records, select **Tools > Options** and then click the **General** tab.

Using the task pane

The task pane along the right side of the screen contains additional options as described below.

Filters

Filters narrow the list of records in a list view group. The available filters are based on the columns in the selected list view. To customize the list of filters to only include the filters you use for each group, use the **Edit Filters** option.

Filters are saved on your computer until your browser cache is cleared.

Each filter consists of the criteria you select. When you apply a filter, only the records that meet all the criteria display. For example:

- **Account filter criteria**: A, M
- **City filter criteria**: Ann Harbor, Atlanta
- **Records returned**: All records starting with A or M and located in Ann Harbor, Atlanta

Common Tasks

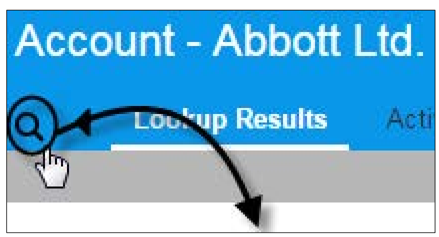
Common Tasks help you efficiently complete routine tasks. The available options depend on the record type and type of view where you are working. If you do not select records before selecting a common task, you are asked if all records in the group should be used. If you click **OK**, all group records will be selected regardless of filters, and the action will be applied to all records in the group.

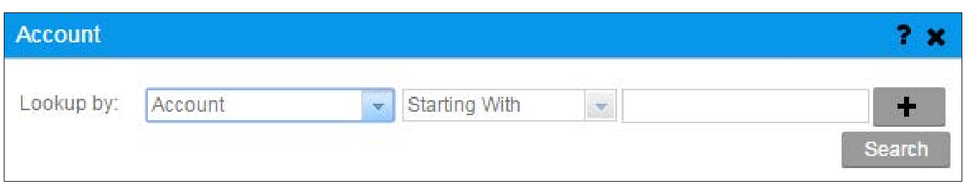
Navigating records

When you have a main view open for **Accounts, Contacts, Leads, Opportunities, Campaigns, Contracts, Defects, Returns,** or **Tickets**, you can quickly find records by using **Lookup**, **Nav** arrows, or **Group** tabs.

Lookup

Lookup searches for a record depending on the current view. It's located on the title bar of a main view and is available in both detail and list view modes.





The following are examples of a **Lookup** search:

- **A**: Finds all accounts that start with the letter "A"
- **AB**: Finds all accounts that starts with the letters "Ab"
- **[blank]**: Displays all records

Asterisks (*) are not recognized within the **Lookup** field. To find results that contain a certain letter or string of letters, use the **Query Builder** tool.

Change the default **Lookup Condition** by selecting **Tools > Options** and then clicking the **Group** tab. Available choices include: **starting with**, **contains**, **equal to**, and **not equal to**.

Nav arrows

Navigation arrows scroll forward or back through records in a group or go directly to the first or last record. The total number of records in the current group appears between the buttons. Nav arrows are only available from the detail view of a record.

Group tabs

Group tabs can be used to switch to a different group of records by selecting the tab you want to view. The manage groups options in the upper right corner of the current view can also be used to either switch to a different group of records or show/hide groups.

Exercise 1.2: Updating and saving data

In this exercise, you will update data and save the changes.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Select the **Sales** Nav Bar **> Accounts** group if it is not open already.
2. Click **Lookup** from the lookup bar.
3. Type *Three-D* in the **Lookup by** field and click **Search**.
4. Open the **Three-D Systems** detail view by clicking the account name (record 1 of 1 in the **Lookup Results** group).

   The **Lookup Results** group holds the results of the last search. This record stays in the **Lookup Results** group until you conduct another search.
5. Click the **Details** tab from the tab area.
6. Select **Good** from the **Credit Rating** drop-down list.

   This list shows all items in the **Credit Rating** drop-down list. Other drop-down lists look similar to this. Your administrator decides what values are available for each drop-down list, which item is selected by default, and whether you can add or edit items. Ask your administrator to grant you access to the **Administration** menu to add items to a drop-down list.
7. Click outside of the **Credit Rating** field.

   Because you made a change to a value, you must click **Save** to commit it to the database. Notice there is an indicator of unsaved data near the top of the view.

   For training purposes, let's see what happens if you forget to save.
8. Click list view from the toolbar at the top of the detail view. A **Confirm Navigation** window opens.

9. Click **Stay on this page** to remain on the **Three-D Systems** record.

   Note: To turn off this prompt, select **Tools > Options,** and then click the **General** tab.

10. Type *30000* in the **Yearly Revenue** field and tab out.

    Infor CRM automatically adds the dollar sign and decimal.

    "What happens if I can't type in a field?" Your administrator turns on/off read/write access for certain Infor CRM users. Contact your administrator for access to a feature or field.

11. Click **Save**.

    The record is updated. Any Infor CRM user with access to the Three-D Systems account record e.g. the Midwest team sees it listed under **Modified Accounts** if they visit the **What's New** view. Let's see what this looks like.

12. Select the **Sales** Nav Bar **> What's New** group.

    The Three-D systems account record opens under the **Modified Accounts** heading. Although you cannot view the updated field, it does list your username next to the line item.

    Tip: To see updates at the field level, view the **Account Summary** account report or **History Summary** report for a list of updates made to an account.

Infor CRM Help

Context-sensitive online Help is available for all features in the Infor CRM client.

Using Help

View the complete contents and index, search for a specific topic, and add topics to a favorites list for easy access.

Launching Help

- To launch **Help**, click **Help** in the upper right corner of the screen and select **Web Client Help** from the drop-down list.
- To launch **Help** specific to a window or view, click **Help** in the upper right corner.

Exercise 1.3: Using Infor CRM Help

In this exercise, you will use Infor CRM Help to change a default setting.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

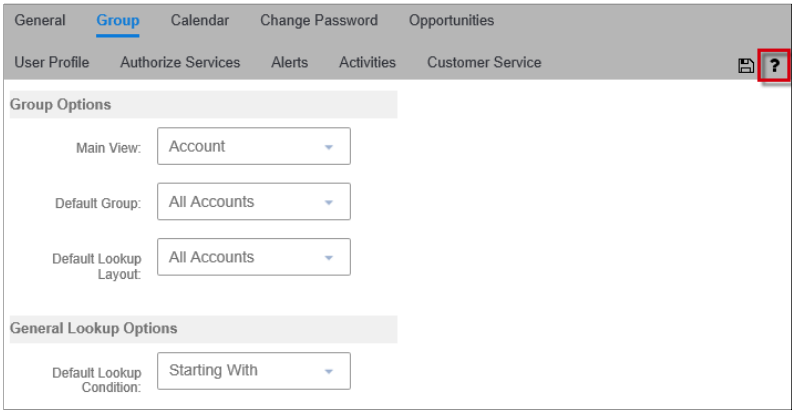
Exercise steps

1. Select **Help > Web Client Help** in Infor CRM. The **Help** window opens.
2. Click **Search**.
3. Type *default group* in the **Search** field and click **Search**.
4. Select **Setting a Default Group** from the list of topics. According to the **Help** topic, you can set a default group for any main view using two methods. The following steps show those methods.
5. Close the **Help** window.
6. Select the **Sales** Nav Bar **> Accounts** group.
7. Right-click **My Accounts** and select **Set as Default**.
8. Select **Tools > Options** from the menu bar.
9. Click the **Group** tab.
10. Verify **Account** is selected from the **Main View** drop-down list.

    Note: Use this drop-down list to select the default main view.

    Notice the **Default Group** has been set to **My Accounts**. There is another drop-down list we're unsure about: **Default Lookup Layout**. Let's find out what this option does.

11. Click **Help** within the **Group** tab.



This is context-sensitive help. You're immediately taken to the Help topic most relevant to the current screen. According to step **3c**, choose a group that includes all columns you may want to search by in a lookup. It suggests for the **Contact** view that all lookups should use the **Latest Contacts** group. Let's change the layout to the **Latest Accounts** group or the **Account** view.

12. Close the **Help** window.
13. Select **Latest Accounts** from the **Default Lookup Layout** drop-down list.
14. Click **Save**.
15. Click **Sign Off** from the status bar.
16. Click **Return to Sign In Page**.
17. Type *Lee* in the **Username** field. No password is required.
18. Click **Sign In**.

Notice the **Accounts** view and **My Accounts** group appear upon sign in since you selected this as the default group in the last exercise. The layout doesn't change because the **Latest Accounts** group uses the same layout as the other groups.

Lesson review

What's the difference between online and offline clients?

The Infor CRM Web Client operates in an Online or Offline mode. If you always have an Internet connection, you use the online mode. This is the most common mode as it provides a direct connection to your company's Infor CRM database. If you're frequently disconnected from the Internet due to travel or other reasons you may use the Offline Client. Your administrator installs a set of local websites on your computer, a synchronization client, and a remote database which initiate a process called synchronization. Synchronization sends and receives changes to and from the main office database. The synchronization process ensures you're always working with the latest data and other Infor CRM users have access to updates you've made while offline.

How do I sign in to Infor CRM and adjust my startup options?

To sign in to the Infor CRM Web Client you must have a username and password. Infor CRM displays the Welcome page when you first sign in to Infor CRM. Set a different default view by clicking **Tools > Options**. Set a default group by right-clicking a tab and selecting **Set as Default**.

How do I navigate the Infor CRM workspace?

The middle of the Infor CRM client interface is the main view which can appear as any of the following:

- Detail view which shows details for a single record.
- List view which shows a list of all records.
- Summary view which shows a snapshot of each record in a rolodex format.

Use the Nav Bar to open a different main view and use the menu bar to perform quick actions for inserting, scheduling, or importing/exporting data.

How do I update and save data?

When making changes to data within a detail view you must click **Save** before moving to another record. By default, Infor CRM prompts a confirmation for unsaved data before moving to a new record.

How do I search Infor CRM Help to learn how to perform a task?

Infor CRM Help is context-sensitive and provides details about the screen currently open within the workspace.

Check your understanding

Jane is a salesperson for Acme, Ltd. She frequently travels to meet with clients at their place of business and thus, does not have continuous access to an Internet connection, but she does need access to her Infor CRM data. Which of the following client configurations would be best for Jane?

a. Infor CRM Web client
b. Infor CRM Windows client
c. Infor CRM Offline Web client

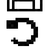
Steve works as a support analyst for his company, and primarily uses the Tickets view in Infor CRM. How can he set this as his initial view so he sees it immediately after logging into Infor CRM?

a. Right-click the Tickets Nav Bar and select Set as default
b. Select Tools > Options > General > Show on Startup > Tickets
c. If that was the last view he used, it will appear next time he logs in
d. Select View > Options > Show on Startup >Tickets

Which of the following navigation bar views is used to manage information for companies with which you do business?

a. Companies
b. Contacts
c. Accounts
d. Clients

Which of the following toolbar buttons is used to save changes in Infor CRM?

a. 
b. 
c. 
d. 

How do you access the help files in Infor CRM?

Lesson 2: Building new relationships

Estimated time

4 hours

Learning objectives

After completing this lesson, you will be able to <terminal learning objective for lesson X>. In this lesson, you will:

- Explain the differences between accounts, contacts, and leads.
- Define account ownership and list the available options.
- Insert new lead and contact/account records.
- Identify the options for importing data.
- Create groups of records based on custom criteria.
- Accurately update relationships as they change.

Topics

- How does Infor CRM represent different relationships?
- What information should I collect?
- How do I insert a new record?
- Can I import data?
- Grouping data
- What happens when relationships change?
- Lesson review
- Check your understanding

How does Infor CRM represent different relationships?

Building new relationships with people and companies keeps your business growing. Infor CRM helps maintain these relationships by making it easy to enter new data including accounts, contacts, and leads, and arrange them into meaningful groups.

Accounts, contacts, and leads represent organizations and individuals you interact with as you fulfill sales, marketing, or service responsibilities. You'll work with these entities in different ways depending on your purposes for interaction. An account identifies a company, a contact identifies a person at an account, and a lead identifies a person at an unqualified company, i.e. the company has not yet been entered as an account.

Accounts

Accounts represent qualified companies you do business with. Accounts can contain one or many contacts and are owned by an individual Infor CRM user, team of users, or everyone. Accounts are often categorized by their type such as customer, partner, vendor, or even competitor.

Contacts

Contacts are key people associated with an account. When creating a contact in Infor CRM, you must specify an associated account. Additionally, a contact can only belong to one account. As with accounts, contacts are assumed to be qualified – that is, their address and other relevant contact information has typically been verified as accurate.

Leads

Leads are potential customers (contacts or accounts) that have not been qualified. They are often acquired by word-of-mouth, purchasing a lead list, or other means. Thus, leads should be contacted to validate contact information, level of interest in your products/services, etc. After leads have been qualified, they can be converted to or merged with a contact and account.

Do I have to use leads?

Interactions with leads are different than interactions with accounts and contacts so keeping them separate makes sense. However, some companies using Infor CRM choose not to use leads. Setting the account type to "Lead" or "Prospect" allows them to group accounts differently than accounts with a type of "Customer." Be consistent with the method your Infor CRM team is using.

What information should I collect?

When you make a new connection with an account, contact, or lead, you're able to enter data into Infor CRM as a new record. Add, update, and refine information throughout the life-cycle of each record.

The following items are important when entering a new record. Most of this information is from the client. The last two items you determine yourself.

- **Name (required):** This is the account, contact, or lead/company. You'll use this value in searches, notes and other correspondences.
- **Email, Web, and/or Phone:** This information is not required. It allows you to quickly search the database for matching records to avoid entering a duplicate record. The more data you have the more definitive the search.
- **Type:** This value only applies to accounts and is not required. If you choose an account type, the account will automatically be added to an appropriate group. This allows you to better search and sort information.
- **Owner (required):** This value determines which other Infor CRM users at your company can see the record. This value is important to determine the appropriate players in your company to manage certain accounts. This may be based on region, information sensitivity, or rank. Options for choosing an account owner for a new record depend on how your administrator configures Infor CRM.

  In the training environment Lee Hogan is on the Midwest sales team for Phoenix Computers. The following table shows his available options for choosing a new account owner.

Possible Owner	Users Who See the Account
Lee Hogan (or another user)	By default, only Lee Hogan and the Infor CRM administrator would see this account. However, in the SALESLOGIX_EVAL database, the administrator has configured Lee's user profile so his supervisor's, Lou Pizzuti and Pam Schwartz, and Administrative Assistant, John Smith can see any accounts owned by Lee.
Midwest (or another team)	Any other Infor CRM user who is part of the Midwest team can see this account. Likewise, Lee can see any other account owned by the Midwest team that was added by another Infor CRM user.
Everyone	All Infor CRM users can see this account.
Everyone (view only)	All Infor CRM users can see this account but only the administrator can make changes to the account information.

Taking into consideration the most important items we reviewed, here’s an ideal list of detail data you can collect for each connection:

Account	**Contact**
Account (Name)	Account
Account Manager	Account Status (defaulted from Account)
Address (multiple)	Account Type (defaulted from Account)
Credit Rating	Address (multiple)
Description of Business	Alumni
Division	Asst.
Employees	Authorized Service Contract (yes/no)
Fax	Birthday
Industry	Children
Lead Source	Contact (Name)
Main (Phone)	Contact Status
Misc. Phone	Contact Type
Owner	Cuisine Preference
Parent	Dear (Salutation)
Region	Department
SIC Code	Email
Status	Email 2
Sub-Type	Email 3
Ticker Symbol	Employer(s)
Time Zone	Fax
Toll Free	Home (Phone)
Type	Interests
Web	Lead Source
Yearly Revenue	Mobile (Phone)
Lead	Other
Address (multiple)	Owner (defaulted from account)
Comments	Pager
Company (Name)	Preferred Contact (method)
Description of Business	Primary Contact (yes/no)
Email	Referred By
Industry	Solicitation options
Interested in	Spouse
Lead Source	Time Zone
Name	Title
	Web

Phone SIC Code Solicitation options Title Toll Free Web	Work (Phone)

How do I insert a new record?

Inserting a new record into Infor CRM is easy. Here are some ways to insert a contact and/or account.

Menu Item	Description
Menu bar	Select **New > Account/Contact** or select **New > Account**.
Right-click menu	Right-click a Nav Bar group to use view specific functions.

Exercise 2.1: Keeping track of new relationships

In this exercise, you will add a new contact, account, and lead.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Part 1: Add a new contact

1. Select **New > Account/Contact** from the menu bar. The **Insert Contact/Account** screen opens.
2. Type *George Miller* in the **Contact** field.

The **Contact** field contains an **Edit** icon (pencil) which helps format names with titles, middle names, or suffixes.

3. Type *AdGlow Industries* in the **Account** field.
4. Type *g.miller@adglow.demo* in the **Email** field.
5. Type *www.adglow.demo* in the **Web** field.
6. Type *555-555-3838* in the **Work Phone** field.
7. Click **Look for Matching Records**.

   This process searches the database against the data you entered such as Email, Web, Phone, Contact, or Account for existing records with this same information. This check prevents you from inserting a duplicate record.

   The **Look for Matching Records** window opens indicating no matches are found.
8. Click **Cancel** to return to the **Insert Contact/Account** window.

9. Select **Owner** from the **Title** drop-down list or type *Owner* in the **Title** field.
10. Double-click inside the **Address** field to open the **Address** window.
11. Type the following information into the appropriate fields:

    1234 West River Drive, St. Louis, MO 63102
12. Click **OK** to close the **Address** window.

    The address you entered automatically populates the account address information.
13. Verify **Hogan, Lee** (default) is selected in the **Account Manager** field.

    Account Manager is the person responsible for the account. This field does not affect ownership. The individual listed here sees this account in his or her **My Accounts** group.
14. Verify **Prospect** (default) is selected in the **Type** field.

    As with **All Accounts** and **My Accounts**, **Type** determines the group AdGlow is added to. In this scenario, Lee should see AdGlow in his **My Prospects** group.
15. Search and select **Midwest** (team) in the **Owner** field.
16. Search and select **Trade Show – General** in the **Lead Source** field.

    The **Lead Source** isn't needed right now but any information is important to track if you have it. For example, later you may decide to do a marketing campaign that targets all contacts you met at a trade show.

    Because we still need to enter Brenda Harrison's information for the same company, click **Save and New**. The **Insert Contacts/Account** screen refreshes and keeps all the information you will reuse for your second contact.
17. Type *Brenda Harrison* in the **Contact** field.
18. Type *b.harrison@adglow.demo* in the **Email** field.
19. Type *555-555-3839* in the **Phone** field.
20. Click **Look for Matching Records**. No records match the selection criteria.

    Look for Matching Records didn't include the account in the search because it's already set to use the existing account just created for AdGlow Industries.
21. Click **Cancel** to return to the **Insert Contact/Account** window.
22. Select **Managing Director** from the **Title** drop-down list or type *Managing Director* in the **Title** field.
23. Click **Save**.

    The **Contact** detail view for Brenda Harrison displays. You have an opportunity to enter additional details not asked on the **Insert Contact/Account** window such as contact type or number of employees.
24. Select **Gate Keeper** from the **Contact Type** drop-down list and click **Save**.
25. Click the **AdGlow Industries** account link.
26. Click the **Details** tab.

    Note: You may need to click the **More Tabs** first.
27. Type *300* in the **Employees** field.

28. Click **Save**.

Part 2: Add a lead

1. Select **New > Lead** from the menu bar.
2. Type *Tim Marks* in the **Name** field.
3. Type *t.marks@gmail.demo* in the **Email** field.
4. Type *Marks, Tim* in the **Company** field.
5. Type *Tech support services* in the **Interested in** field.
6. Search and select **Word of Mouth/Referral – General** in the **Lead Source** field.
7. Click **OK**.
8. Click **Look for Matching Records**. No records match the selection criteria.
9. Click **Cancel** to return to the **Insert Lead** window.
10. Click **Save** to insert the lead record. The **Lead** detail view opens for Tim Marks.

Importing data

Importing account/contact data

It's not common practice to import account/contact data. Before you use Infor CRM, your administrator has probably worked with your company's Business Partner to perform a one-time import of data from an older system. After the initial upload completes, Infor CRM recommends inserting any additional records manually as they are discovered.

If your circumstances are different and you need to import account/contact data, you must have access to the Import Wizard (ImportWiz.exe) which your administrator installs as a separate utility on your computer. It's rare for administrators to provide access to this tool without proper training because a faulty import may accidentally corrupt the database for other Infor CRM users. The Import Wizard allows you to import a large amount of data from another database or from a text file. Contact your administrator to discuss your needs for this tool.

Importing lead data

Importing a group of lead records generally has fewer implications and is more typical than account/contact imports. It's common to purchase or generate a lead list from a third-party source so the default install of Infor CRM includes a lead import feature.

Before you can import a list of leads, be sure your list is saved as a delimited file using commas, spaces, or tabs in one of three formats:

- *.csv
- *.txt
- *.prn

Exercise 2.2: Importing a lead list

In this exercise, you will import a lead list.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Select **Tools > Import Leads** from the menu bar. The **Import Leads** window opens.
2. Click **Browse** in the "**Select a file containing Leads information to start**" field and browse to **C:\Classfiles\EndUser**.
3. Select the **LeadList.csv** file and then click **Open**.
4. Search and select **Midwest** in the **Default Owner** field.

5. Search and select **Web – General** in the **Default Lead Source** field.
6. Verify the "**Add Imported Leads to ad hoc group**" check box is clear.
7. Click **Next**. The **Define Delimiter** screen opens.

   Infor CRM has automatically determined the file uses a comma for the delimiter and the first row contains field names as shown by the marked check box.
8. Click **Next** again. The **Map Fields** screen opens.

   Some fields have already been matched and are shown in the left pane. The unmatched fields have either a blank space or use an alternative term not used by Infor CRM.
9. Select the **Phone** field in the left pane and the **Work Phone** field in the right pane.
10. Click **Match**.
11. Repeat **Step 9 and 10** to match the **Zip** field in the left pane with the **Address. Postal Code** field in the right pane.

    You may receive more lists in this format so let's save these matching field selections as a template. These fields are automatically matched the next time you sign in.
12. Click **Save As Import Template**. The **Save Template** window opens.
13. Type *Standard Lead Import* in the **Description** field.
14. Click **Save**. The **Map Fields** screen opens.
15. Click **Next**. The **Manage Duplicates** screen opens.
16. Click **Next** again. The **Select Import Actions** screen opens.
17. Click **Next** again. The **Review** screen opens.
18. Click **Submit**.

    Infor CRM begins importing leads. An Import Number is assigned for future reference from the **Import History** window.
19. Click **Close** once the import finishes.
20. Select **Tools > Import History** from the menu bar.

    The **Status** column may indicate either **Processing** or **Completed**. If completed, the **Imported Count** column should indicate seven.
21. Select the **Sales** Nav Bar **> Leads** group.
22. Click the **Latest Leads** group in the **Lead list** view. The seven leads that were just imported and the new lead you created earlier are displayed.

- The **Latest Leads** group shows lead records with a **Modify Date** within the last 30 days.
- The **Touched Leads** group shows lead records with a **Modify Date** within the last 10 days and a **Status** of New, Qualified, or Follow-up.
- The **Untouched Leads** group shows lead records that have not been modified within the last 10 days and have a **Status** of New, Qualified, or Follow-up.

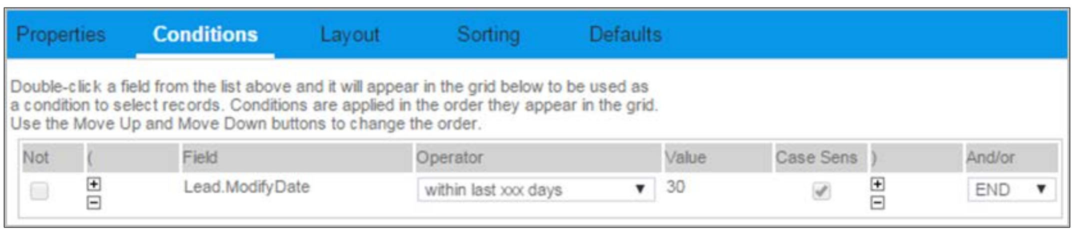
Grouping data

The tabs at the top of every main view represent groups. The following two groups are always available:

- **Lookup Results**: This group always appears as the first tab. It contains a temporary set of records from your last lookup and is overwritten each time you perform a new lookup; it keeps your most recent search results easily accessible.
- **All [Main View entity]:** This group generally appears as the second tab because it starts with "A," however, tabs are sorted alphabetically so other tabs may become before it. The **All** group shows all records for the selected view that the current user has permission to access. There are no "where" conditions applied to it.

Groups with conditions

Groups with conditions show records meeting one or more criteria. Create this type of group when saving results from a lookup or when creating a new group using Query Builder. For example, right-click the **Latest Leads** group and click **Edit** to launch the **Query Builder**. The **Conditions** tab says to show records where the **Modify Date** is within the last 30 days.



Groups with conditions are dynamic. If you edit a record so it no longer fits the group criteria it no longer appears in that group. For example, create a lookup to search for active accounts that purchased your product during the past year. Save this lookup as a group. As active accounts purchase a product they are automatically added to the group and remain there the next 365 days unless they purchase an additional product.

Groups without conditions

Groups not based on a condition are called ad hoc. These groups contain records that are manually added. For example, you can create an ad hoc group of contacts with whom you play golf by adding those contacts from memory rather than a field in the database.

Can I share a group with other Infor CRM users?

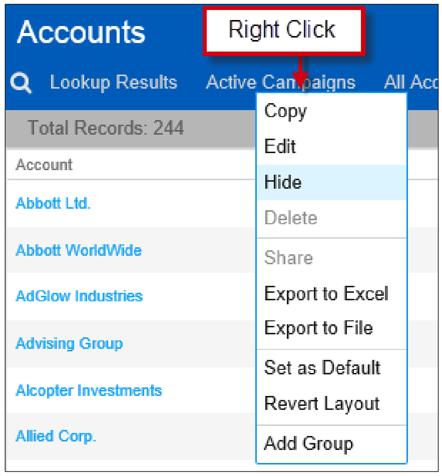
If you create a group that other Infor CRM users find useful, you can share the group with specific users, departments, or teams. After sharing the group, users whom you shared it with can see the group the next time they sign in to Infor CRM or refresh their view.

You can only share groups you create. For example, if Lee shares a group with Dan, Dan cannot share the same group with Lois unless Dan makes a copy and shares this copy. The Infor CRM administrator sees all created groups whether they are shared or not.

Can I remove a group?

The list view becomes crowded if you have many groups. You can only delete groups you've created and cannot delete groups shared with you. This means unless you're the Infor CRM administrator you cannot edit or delete any of the out-of-the-box groups because they are owned by everyone.

To clear space, hide groups less frequently used.



To unhide a group, click **Groups** and select the **Visible** check box.

Exercise 2.3: Organizing data into custom groups

In this exercise, you will save the results from a lookup as an ad hoc group and then save the results as an ad hoc group, as well as create a group with custom conditions (dynamic).

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Part 1: Save the results from a lookup as an ad hoc group

1. Select **Lookup** from the **Accounts list** view. The **Account** dialog box opens.
2. Set the **Lookup by** fields to **State Equal to IL**.
3. Click **Add Condition.** The **Account** dialog box opens.
4. Set the **And** fields to **Status Equal to Inactive**.
5. Click **Search**.

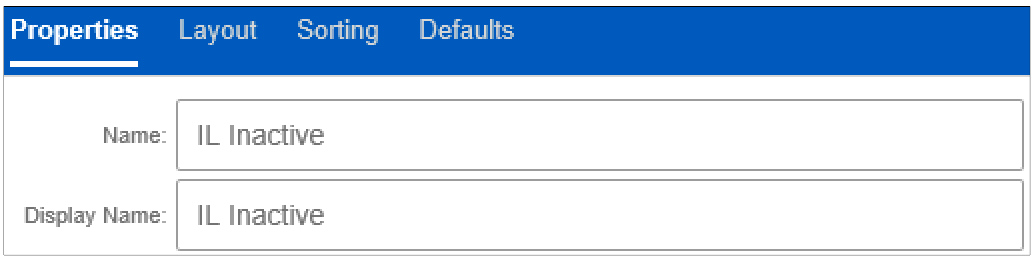
The results appear in the **Lookup Results** group and represent accounts in Illinois with an inactive status. Click list view to see all results.

6. Highlight the list of accounts by clicking near the account name of the first result, holding down the **Shift** key, and then clicking near the account name of the last result.
7. Right-click anywhere in the highlighted area and then click **Save Records as Group**.
8. Type *IL Inactive* in the **Group Name** field.
9. Click **OK**.

   The list view refreshed with the new **IL Inactive** group. Let's view this group within the Query Builder to see how it's set up.

10. Right-click the **IL Inactive** group and then click **Edit**. The **Query Builder** window opens.

    Notice there is no **Conditions** tab. This means this group is saved as an ad hoc group. If one of the accounts in this group changes its status or state, it remains in this group.



11. Click **Cancel** to close the **Query Builder**.

    The **Query Builder** is a sophisticated lookup tool you can use to set conditions on almost any field in the database with more operator choices than "equal to." Let's imagine you want to do an upgrade campaign targeting customers who purchased a Dell Latitude or Dell OptiPlex two or more years ago.

Part 2: Create a group with custom conditions (dynamic)

1. Click **Add Group** in the upper right corner. The **Query Builder** window opens.

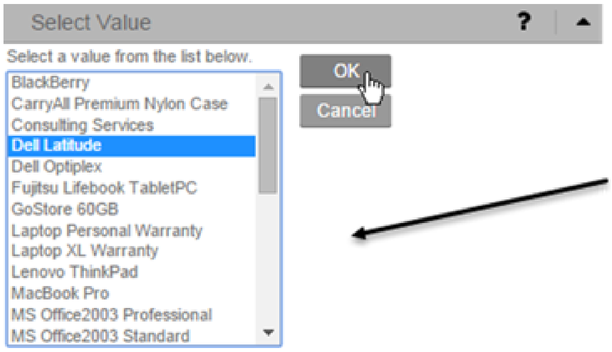
   Notice the Query Builder has a **Conditions** tab which means this new group will be dynamic.

2. Click the **Properties** tab.
3. Type *Dell Promo* in the **Name** and **Display Name** fields.
4. Click the **Conditions** tab.
5. Expand the **ACCOUNT** node and then click the **ACCOUNTPRODUCT** node from the upper left pane.

   If you don't see the ACCOUNTPRODUCT node, save the group and then edit it.

6. Double-click **Product Name** from the list of available **Account Product** fields in the right pane.
7. Click **Browse** in the **Value Is** field.
8. Click **Dell Latitude**.

9. Click **OK**.



Values that appear when you click Browse are pulled from the current database. They do not represent all possible values. For example, if you do not see a relevant product listed, it means a customer has not yet purchased that product.

10. Click **OK** again to close the **Assign Condition** window. The new condition appears within the **Conditions** tab.

    Complete the following steps to add another condition for the Dell OptiPlex.

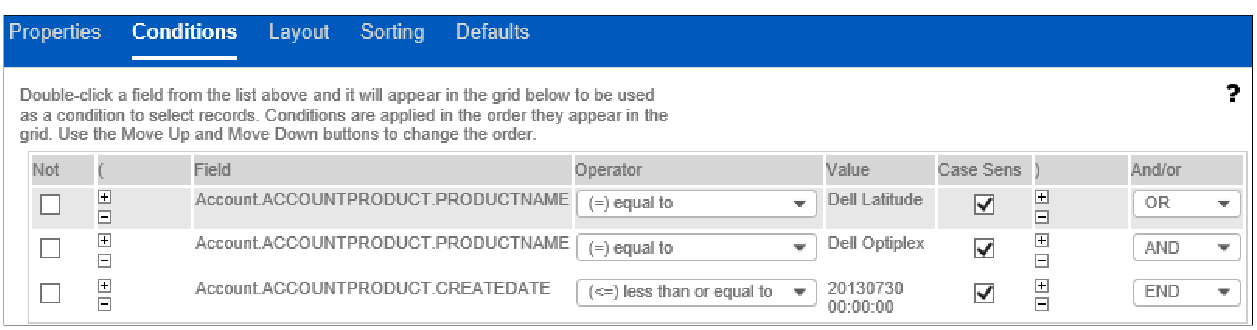
11. Double-click the **Product Name** field from the right pane again. The **Assign Condition** window opens.
12. Click **Browse**.
13. Click **Dell OptiPlex.**
14. Click **OK**.
15. Click **OK** again to close the **Assign Condition** window.

    The new condition appears within the **Conditions** tab.

16. Select **OR** from the **And/or** drop-down list in the **Dell Latitude** row.

    The query returns accounts which bought either the Dell Latitude or the Dell OptiPlex. Let's add another condition to narrow the results to products purchased two or more years ago.

17. Double-click **Create Date** from the list of available Account Product fields in the right pane. The **Assign Condition** window opens.
18. Change the operator to **(<=) less than or equal to**.
19. Click the **Calendar** and adjust the year to two years prior to today.
20. Click **OK** to close the calendar.
21. Click **OK** again to close the **Assign Condition** window. The new condition appears within the **Conditions** tab.



22. Click the **Defaults** tab and select the **Return Distinct Rows Only** check box.

Note: If this check box is cleared you can see accounts listed more than once if more than one product is purchased.

23. Click **OK** to close the **Query Builder**. The **Accounts** list view shows the new **Dell Promo** group tab.
24. Click the **Winter Software Marketing** account to view details.
25. Click the **More Tabs** tab from the tab area and then click **Assets**.

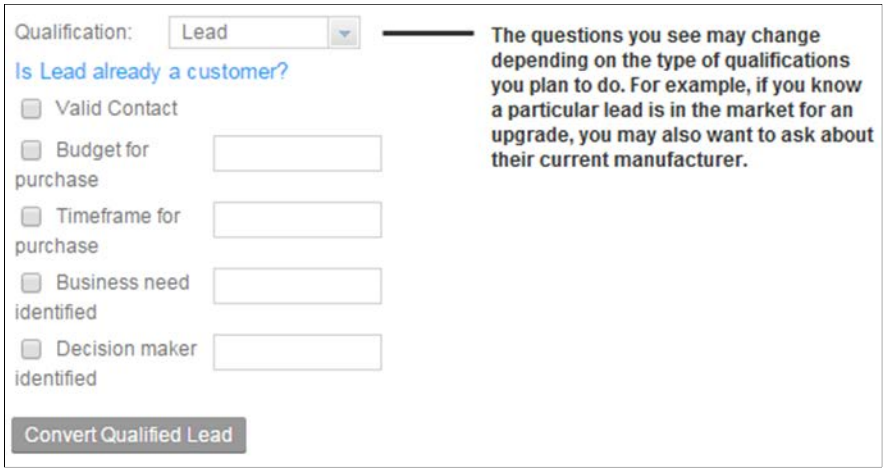
    Now you can see details about matching products (Dell Latitude). In this example, 1000 Dell Latitudes are potentially ready for an upgrade.

What happens when relationships change?

Contacts and coworkers often move around. There are several ways to accurately reflect those changes within Infor CRM.

Convert a lead to a contact/account

Most organizations have an inside sales staff responsible for qualifying. To aid the qualification process, Infor CRM displays a short list of questions within a **Lead** detail view to make quick notes about the qualification criteria that matters most to your sales team.



After qualifying a lead, you may convert the record into a separate contact and account record. Any attachment(s), note(s), or history record(s) associated to the lead also move under the appropriate tabs in the new contact record. The lead record no longer exists. The conversion process also checks existing account and contact records to prevent the insertion of a duplicate record.

Create contact or account associations

Many of your relationships may be related to one another. Use associations to create a business or personal relationship between contacts or accounts.

- Contact associations identify relationships between contacts such as contractors, vendors, and suppliers.
- Account associations identify relationships between accounts such as divisions or subsidiaries.

Association Type	Examples
Account to Account	• Artistic Supply is a Vendor of Mortgage Masters • Mortgage Masters is a Division of Artistic Supply • Artistic Supply is a Parent of Mortgage Masters
Contact to Contact	• Richard Jones is a Contractor of John Abbott • John Abbott is a Friend of Richard Jones • Richard Jones is an Employer of John Abbott

Account to Contact	• Artistic Supply uses Richard Jones as a Contractor.

Contacts are only associated with other contacts and accounts are only associated with other accounts. Manage associations on the **Associations** tab of a **Contact** or **Account** detail view.

Change account ownership

The account owner determines who sees a record. If you accidentally change the owner to another team of which you're not a member, you and your whole team lose access to that account. Because a simple change to account ownership can adversely affect other Infor CRM users, the only users allowed to change ownership are the account owner (if owned by an individual), the account team owner (if owned by a team), or the Infor CRM administrator.

If an Infor CRM user decides to leave the company, the Infor CRM administrator can adjust ownership using a territory realignment tool. All user's activities can be assigned to someone else.

Tip: Run the **Territoryrealign** account report to view a list of all accounts owned by you and/or your team. This is useful in the event of a territory realignment.

Move a contact to another account

If a contact leaves his or her present company and joins another company that exists in your Infor CRM database, you can accurately reflect the change by moving the contact's record to an existing account record. The move feature allows you to move the contact and either move or reassign associated data to a more appropriate contact on the original account. To move contacts, click **Move** in the **Contact** detail view toolbar.

Here are your options when moving a contact to another account:

Move activity information related to the contact to the new account.	**OR**	Do not move activities. Reassign activity information to another contact on the source account.
Move notes/history information related to the contact to the new account.	**OR**	Do not move notes/history information. Reassign information to another contact on the source account.
Reassign open items, e.g., active attachments, literature requests, sales orders, and opportunities to another contact on the source account.		Not optional.
Reassign closed/fulfilled literature requests and opportunities to another contact on the source account.		Not optional.
Reassign open tickets, returns, and contracts to another contact on the source account.		Not optional.

Duplicate a contact

You can also duplicate a contact for another account. This is useful if a contact joins another company and you want to associate the contact with both accounts. This enables you to retain original information while duplicating data on the target account. To duplicate move contacts, click **Duplicate Contact** in the **Contact** detail view toolbar.

Here are your options when duplicating a contact:

Create an association between the contacts by selecting **Associate the contact in the target account with the source contact**.	**OR**	Duplicate the contact without creating an association between the target and source contacts.
Replace the contact's address and phone information with the target account's default information by selecting **Use the target account's address and phone number information**.	**OR**	Retain the source contact's address and phone information when copied to the new target account.
Move activities, notes, and history with the contact to the new account.	**OR**	Do not move activities, notes, and history with the contact to the new account.

Resolve duplicates

What happens if you and your coworker enter the same account? Infor CRM keeps both records in the database but now your company is maintaining the contact information twice and logging activities and history in two locations. Infor CRM recommends checking for duplicates once a week.

Automatically fix duplicates

Click **Tools > Check for Duplicates** to search for duplicate accounts, contacts, or lead records. This option may be unavailable because your administrator may want to ensure no one runs this wizard at peak times during the day.

Use the **Duplicate Wizard** to find duplicates. You can set a minimum match score to qualify possible duplicates. The default duplicate match scores use the following ranges:

- **100 to 100** = Duplicate
- **80 to 99** = Possible duplicate
- **0 to 79** = Not a duplicate

A record is assigned a match score if any of the match filters (Account/Company, Industry, State, Main Phone, Web Address, Postal Code/Zip, Toll Free, or City) meet the following criteria:

- Contains another grammatical form of the word (stemming)
- Contains a word that sounds similar (phonic)
- Contains a synonym of the word (uses the Thesaurus)

- Contains a word with similar spelling that has between 1 and 10 characters different. **Note:** The default fuzziness level is set to 2 characters.

When you run the **Duplicate Checker**, the job is in the **Process Duplicate Records** main view. Possible duplicates have a "Possible Duplicate" status until the match is merged with an existing record. The status then changes to "Merged." If you ignore the match, the status changes to "Not a Duplicate".

When merging a record with an existing record, Infor CRM gives you the option to choose which values to keep in each record. The **Source** record is the record created most recently; the **Target** record is the record created first.

Manually fix duplicates

If you find duplicates on your own, you can manually merge the two selected records by selecting the check box to the left of the record and right-clicking the selection. Choose **Merge Records**. Infor CRM provides a preview of the merge action.

Exercise 2.4: Converting a lead

In this exercise, you will convert a lead.

Notes:

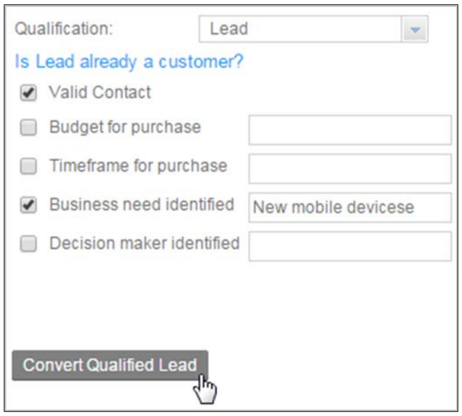
- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

[Click here to view a demo and/or practice this task]

Exercise steps

1. Select the **Sales** Nav Bar **> Leads** group.
2. Click the **All Leads** group tab.
3. Open **Mark Edward's** lead detail view. Notice Mark's company is listed as Advanced Machine & EngrgCo. This is the account name.
4. Select **Lead** from the **Qualification** drop-down list.
5. Select the **Valid Contact** check box.

   Note: This check box doesn't do anything more than serve as an indicator to others that you've verified this person exists and has potential interest.
6. Select the **Business need identified** check box and type *New mobile devices* in the adjacent field.
7. Click **Save**.
8. Click **Convert Qualified Lead**. The **Convert Lead** window opens and automatically looks for an existing record.



Notice there are no matching contact or account records with the default search criteria. Let's explore these default search settings and expand the search criteria.

9. Select the **Match any of the selected filters** radio button.
10. Clear the **Email** check box.
11. Select the **First Name**, **Last Name**, and **Account/Company** check boxes.
12. Click **Update Potential Matches**.
    - The default setting on the **Advanced Options** tab looks for matching criteria up to two characters different from the selected values of the current lead record.
    - The match score indicates how close each potential match is to the criteria.
    - Because none of the potential matches show Mark Edwards' information you are confident that he doesn't already exist in the database.
13. Click **Convert**.

    The **Contact** detail view for Mark Edwards opens. The account name appears below his name and opens in a separate main view.

The previous record for Mark Edwards is no longer available because you successfully converted him to a contact.

Lesson review

What is the difference between accounts, contacts, and leads?

Infor CRM relies on accounts, contacts, and leads. You work with each of these entities differently depending on your purposes for interaction. An account identifies a company, a contact identifies a person at an account, and a lead identifies a person at an unqualified company, i.e., has not yet been entered as an account.

What is account ownership and what are the available options?

When creating an account, you must choose an account owner. This value determines who sees the record. Options for choosing an account owner depend on how the administrator configures Infor CRM. There are generally four options: yourself (or another individual user), your team (or another team), everyone, or everyone (view only).

What does it mean to insert a new lead and contact/account records?

When you meet new people, you can enter them as a contact or lead. A contact must have an account. Accounts and contacts are qualified companies and individuals you already know. Unlike accounts and contacts, leads represent both the person and the company. Leads differ from accounts and contacts because they have yet to be contacted by your company and verified as a valid prospect.

What are the available options for importing data?

It's not common practice to import account and contact records. An **Import Wizard** may be available to you but seek training from your administrator on this tool before using it.

Importing leads is more widely encouraged. It's common to purchase or generate a lead list from a third-party source so Infor CRM built the lead import feature into the out-of-the-box product.

? How do I create groups of records based on custom criteria?

! You can create groups with or without conditions. Groups based off conditions update automatically when a record no longer meets the criteria or a new record doesn't meet it.

If you create a group other Infor CRM users find useful, you can share the group with specific users, departments, or teams. You can only share and delete groups you create.

The list view becomes crowded if you have many groups. Delete groups you've created or hide groups used less frequently.

? How do I accurately update relationships as they change?

! Contacts and coworkers often move and change addresses. There are several ways to accurately reflect those changes within Infor CRM such as:

- Convert a lead to a contact/account after qualifying a lead.
- Make contact or account associations when some of your relationships know each other.
- Change account ownership when a coworker leaves.
- Move a contact to another account when a contact leaves his or her company.
- Duplicate a contact to copy data to a new account.
- Resolve duplicates when two records are entered with the same information.

Check your understanding

Leads are key people associated with a qualified account.

a) True
b) False

The Infor CRM user that is assigned as the primary person responsible for maintaining the account, and who has full control of the account (Read/Write/View) is called the __________.

a) Manager
b) Account representative
c) Owner
d) Primary contact

Bob has recently been meeting with a new client named James Daily regarding the purchase of 20 new laptops and a service contract to cover maintenance and support. James' information has been verified, but he doesn't exist in the Infor CRM database yet. Bob would like to enter James' information so he can track the progress of this opportunity. How should Bob proceed?

a) Bob should insert a new lead for James by clicking New > Lead
b) Bob should insert a new lead for James by clicking Import > Lead
c) Bob should insert a new account and contact by clicking Import > Account/Contact
d) Bob should insert a new account and contact by clicking New > Account/Contact

Jane has purchased a list of prospective customers that she would like to load into Infor CRM. How can she accomplish this task in the most efficient manner?

a) Import the list using the Tools > Import Leads option
b) Restore the list using the Tools > Restore option
c) Manually enter the list as new leads using the New > Lead option
d) Import the list using the New > Lead List option

Groups can be created using conditional statements so that when record data changes, the records in the group can dynamically update adding/removing records based on the conditional statements.

a) True
b) False

For existing Leads, how can you quickly create a Contact and Account for the Lead after he/she has been verified and qualified?

a) Select New > Account/Contact
b) Select Insert > Lead and enter information about the lead
c) Select Convert Qualified Lead on the Lead detail page

Lesson 3: Keeping track of interactions

Estimated time

4 hours

Learning objectives

In this lesson, you will:

- Explain the difference between activities, history records, and notes.
- Record sent and received emails to history.
- Discuss options for inviting contacts to scheduled meeting or phone call activities.
- Schedule activities on your calendar and manage activity reminders.
- Become familiar with additional email integration tools.
- Use contact processes to streamline activity scheduling and follow-ups.

Topics

- How does Infor CRM represent different interactions?
- How do I record email messages to history?
- How do I schedule an activity?
- More email integration options
- Streamlining customer interactions
- Lesson review
- Check your understanding

How does Infor CRM represent different interactions?

A typical day at the office might include sending emails, scheduling meetings, making phone calls, and completing items on your to-do list. It's important to track that information in Infor CRM so you or another Infor CRM user can refer to it as you review daily priorities and build relationships with your sales clients.

Infor CRM primarily relies on activities, history records, and notes.

- An activity refers to a scheduled interaction not yet taken place.
- A history item refers to a completed activity or email.
- A note is any other entry you include about an account, contact, or lead for other Infor CRM users to see.

Activities

Any phone call, meeting, or to-do you schedule is referred to as an activity. Activities appear on your Infor CRM calendar and on any other calendaring systems outside Infor CRM such as Microsoft Outlook (if integration is enabled). Additionally, if your administrator has allowed it, you and other Infor CRM users can see each other's Infor CRM calendars.

Infor CRM also allows you to track personal activities and events on your calendar. Personal activities can only be scheduled with personal contacts enabled by your administrator and events do not reference an interaction with an account, contact, or lead.

History records

A history record is any phone call, meeting, or to-do that you've completed although some history records may not be scheduled as an activity. For example, you can document an interaction after it has taken place so there is no activity to schedule.

History records can also be emails sent or received. Emails are automatically saved as history records whenever **Send to CRM** is used within Outlook or drag-and-drop an email from Outlook into Infor CRM.

History records allow you to view these interactions to view what was said, who was involved, when it occurred, and where it took place.

Notes

Notes are automatically added whenever a history record with contents in the **Notes** field is created. If you have additional information to capture about a contact or account that is not the result of an activity, you can manually add time-stamped notes.

Exercise 3.1: Making a phone call and recording it to history

In this exercise, you will record a phone call and record it to history.

Notes:

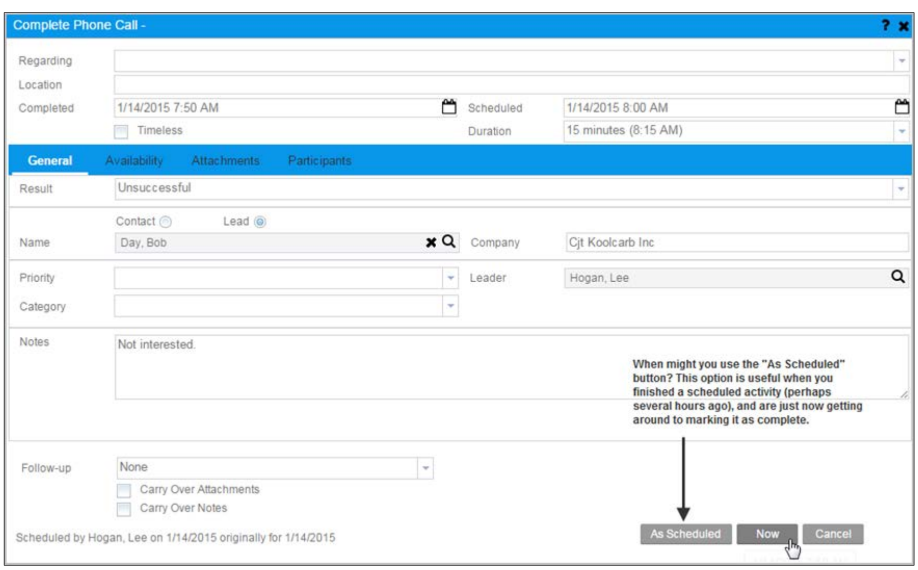
- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Select the **Sales** Nav Bar **> Leads** group.
2. Open **Bob Day's lead** detail view.
3. Select **Schedule > Complete an Activity** from the menu bar. The **Complete an Activity** window opens.
4. Verify **Phone Call** is selected within the **Create a New Unscheduled Activity to Complete** area and click **Continue**. The **Complete Phone Call** window opens.

   This window allows you to collect additional information about the phone call which may be useful for reporting or grouping. You can also schedule a new activity directly from this window.
5. Type *Service plan* in the **Regarding** field.
6. Select **Unsuccessful** from the **Result** drop-down list.
7. Select **Cold Call** from the **Category** drop-down list.
8. Type *Not interested* in the **Notes** field.
9. Click **Now** to complete the history record with the current timestamp.



Notice on **Bob Day's** lead detail view he has a new history record in the **Notes/History** tab.


Details
Notes/History
Activities
Attachments
Marketing
Responses
Type
Date/Time
User
Regarding
Result
Category
Phone Call
7/30/2015, 2:43 PM
Hogan, Lee
Unsuccessful
Cold Call

How do I record email messages?

Email messages can be tracked as history items. When you have Microsoft Outlook and Infor CRM installed, you can simply drag an email message from Outlook to the Notes/History tab of a detail record to record history details related to the message. If your administrator has also installed Infor Xbar, you can take advantage of several additional features including:

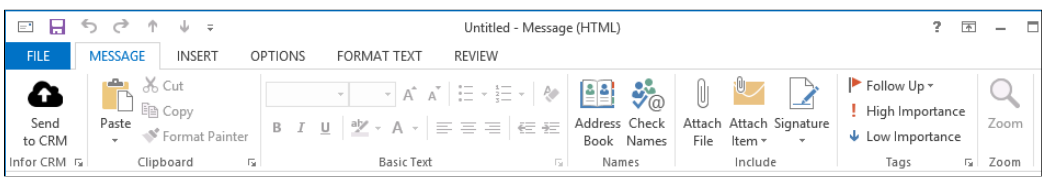
- Managing contacts, activities, tickets, and opportunities within the context of Microsoft Outlook
- Synchronizing Contacts and Calendar data with Microsoft Outlook
- Dragging and dropping email and attachments from Microsoft Outlook, as well as records from your desktop.
- Record history when sending a message by clicking **Send to CRM** in an Outlook message window

Infor Xbar is a separate application and requires additional server and client configuration. For more information about how to use it, view the help files within the Xbar add-on.

Activities

Click **Write** and then click **Email** to compose and send an email without exiting Infor CRM. You don't need to open Outlook although Infor CRM may prompt for credential validation.

When using Infor CRM, there are two options to consider when sending a message from Outlook. Either click **Send** to send an email message without recording the message to Infor CRM history or click **Send to CRM** to send the message and record the message to an Infor CRM as a history item for the corresponding contact or lead.



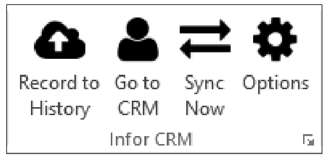
Send Infor CRM email from Outlook

The **Send to CRM** command requires Infor Xbar to be installed.

Unless the history prompt is cancelled (if turned on) or Infor CRM cannot locate the record (prompt is disabled), the history record appears in the **Notes/History** tab.

I've received an email from an Infor CRM contact

To add a message to Infor CRM from your Outlook Inbox or **Sent Items** folder, select the message and click **Record to History**.



Alternatively, drag-and-drop the message into the **Notes/History** tab of the appropriate record in Infor CRM.

The **Record to History** command requires Infor Xbar to be installed.

I want to see my Infor CRM contacts in Outlook

To view contact information from within Outlook, use **Go to Infor CRM** or add contacts to Outlook. Alternatively, if Infor Xbar is installed, you can view Contact, Activity, Ticket and Opportunity data inline within Outlook.

Go to Infor CRM

When you receive a message from an Infor CRM contact **Go to Infor CRM** allows you to automatically open the contact's detail view in Infor CRM. This feature is only available if the Infor CRM address book installed.

The **Go to Infor CRM** command requires Infor Xbar to be installed.

Add contacts to Outlook

Manually copy/paste the information for a contact into Outlook. Use **Copy Contact Information to Clipboard** on the **Contact** detail view toolbar to make this process easier.

How do I send an email to a large group of leads or contacts?

Infor CRM supports mail merge and campaigns for sending bulk emails.

Exercise 3.2: Changing email history options and sending an email to a contact on an account

In this exercise, you will change your email history options and to send an email to a contact on an account.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Part 1: Change your email history options

1. Right-click **Desktop Manager** from the task bar and select **Open**.
2. Select the **Display History Details before saving** check box from the **History Options** area.

   Infor CRM prompts you to complete additional information about a history record when an email is sent using **Send to CRM.** The **History Options** area can also prompt a notification whenever Infor CRM finds a duplicate record or if a contact cannot be found using the email address used.

3. Select the **Prompt for Duplicate Contacts** and **Prompt for Unresolved** check boxes from the **History Options** area.
4. Click **OK**.

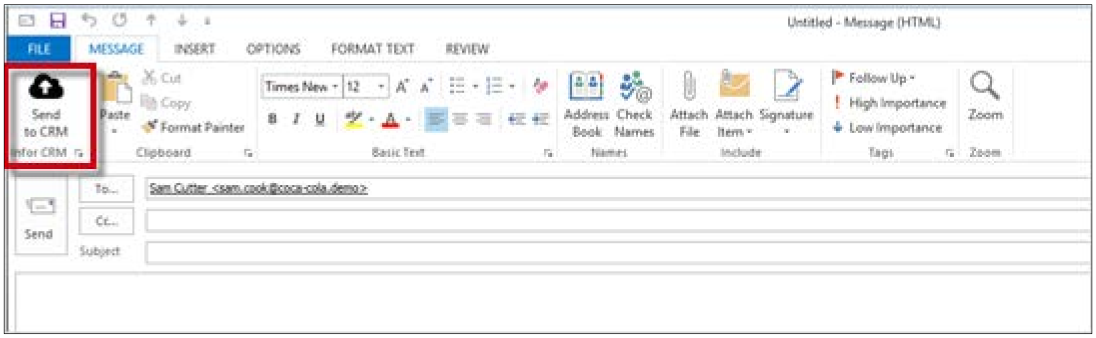
   The next time you use **Send to CRM** to send an email, you're prompted with the **Complete Email** window. Two history records are created on the **Notes/History** tab of the appropriate record within Infor CRM, one for the email itself and one for the email plus history metadata unless you click **Cancel**.

Part 2: Send an email to a contact on an account

1. Open the **Coca-Cola Company Account (in Atlanta)** detail view.
2. Select **Write > Email** from the menu bar.
3. Select **Sam Cutter** in the **Select a Contact** window.
4. Click **OK**.

   A new Outlook message draft opens. The email address of the selected contact is already added to the **To** field.

5. Add a subject and a message in the body.
6. Click **Send to CRM**.

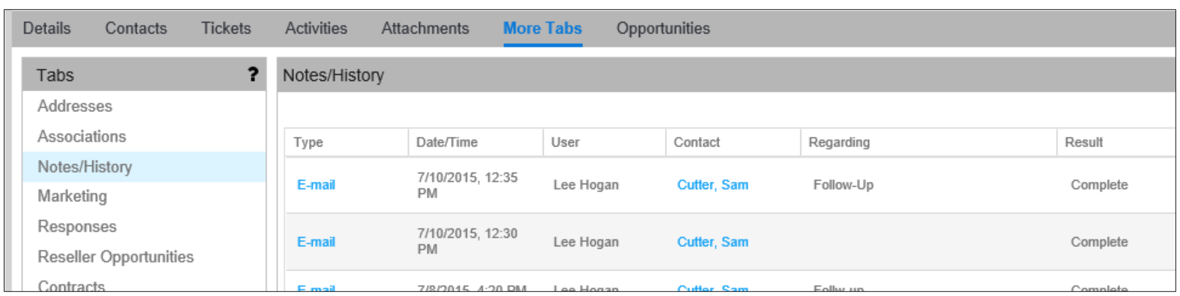


Note: If Outlook opens the “Do you want to use Infor CRM Connector in Outlook?” window, click **No**.

A **Complete Email** window opens for Sam Cutter. The window may open behind the main browser window. If it does, click the red Infor CRM icon on your taskbar. This is an unscheduled but completed to-do activity. This window opens so you can edit the notes or add metadata to the history record. For example, your company may set email priority or set the **Result** field to something other than **Complete**. You can also click **Cancel** to avoid creating a history record.

7. Click **OK** to create a history record.
8. Click the **Notes/History** tab on **Sam Cutter’s** or the **Coca-Cola** detail view. The history record for Sam Cutter opens and includes the contents of the email message.

   Note: History records for other contacts on the account also appear.



You can also view a copy of the history record on the **Notes/History** tab of the **Contact** detail view for Sam Cutter.

Part 3: Change your email history options again by turning off the history details

The next time you send an email message using **Send to CRM** you will not be prompted for history information. The history record is saved with the default setting.

1. Right-click **Desktop Manager** from the task bar and select **Open**.
2. Clear the **Display History Details before saving** check box in the **History Options** area.
3. Click **OK**.

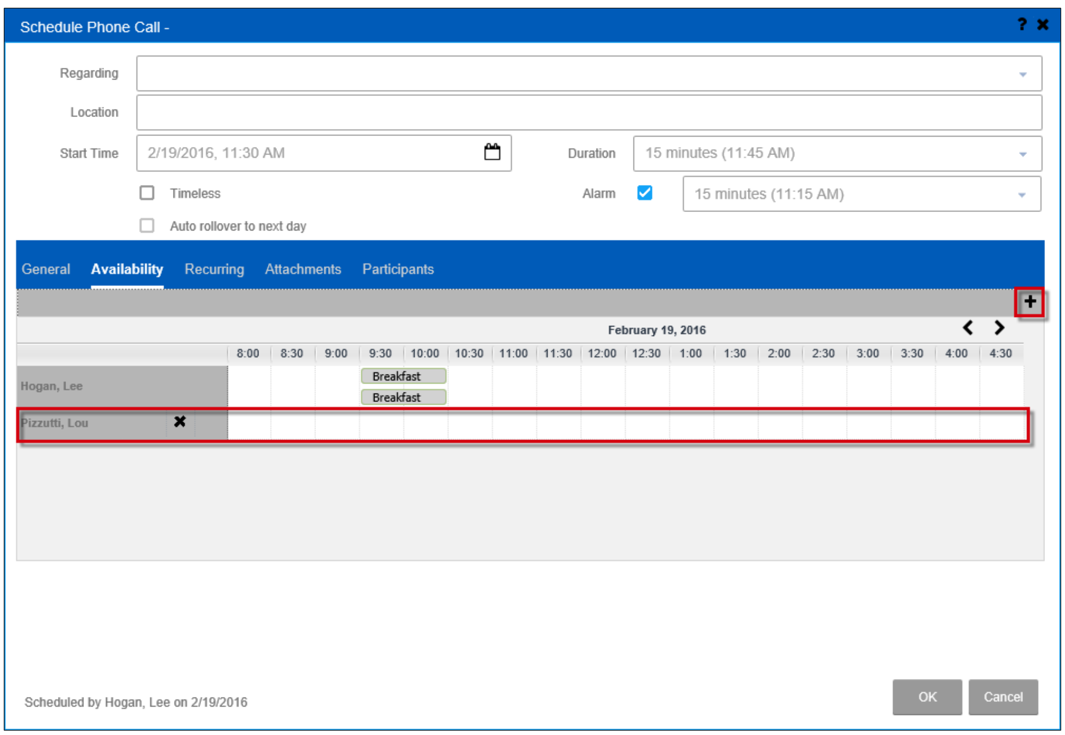
How do I schedule an activity?

Scheduling an activity in Infor CRM is easy. Here are some ways to insert an activity (meeting, phone call, or to-do).

Action	Description
Nav Bar	Right-click **Activities** from the **Sales, Marketing, Service,** or **Support Nav Bar**.
Menu Bar/Hot Key	Click **Schedule** and then the activity name or press the appropriate key combination on your keyboard.
Common Tasks	Click the activity link in the **Common Tasks** pane in the **Contact** detail view.

Can I invite other Infor CRM users to attend?

You can add another Infor CRM user whenever you schedule a new meeting or phone call in Infor CRM. The user's availability information populates from the Infor CRM calendar.



Can I invite a contact or lead to attend?

Infor CRM isn't designed to replace your existing mail/calendar application and it doesn't notify a contact or lead when you schedule a meeting or phone call activity in Infor CRM. A scheduled activity serves primarily to organize and remember daily tasks, show other Infor CRM users what's happening with a record, and record the item to history when the activity is complete. At a macro level your organization may compare the number of completed activities with sales achievement.

How do I support interactions that require invitation and coordination between Microsoft Outlook and Infor CRM?

Schedule the Outlook meeting request separately

Use Outlook to send a meeting request to an Infor CRM contact by using the Infor CRM Address Book within Outlook. After a meeting is confirmed, replicate the details as a scheduled activity within Infor CRM.

Invite an attendee after the Outlook appointment has been scheduled by Infor CRM

If you use Outlook Sync to synchronize activities, a new appointment with no recipients appears on your Outlook calendar when you schedule an Infor CRM activity. The appointment automatically contains the notes and details entered in Infor CRM. Open the appointment in Outlook, add the attendee from the Infor CRM Address Book, and send an invitation update.

Outlook allows you to invite more than one recipient to an appointment but Infor CRM doesn't. If more than one recipient is selected, you must replicate the activity within Infor CRM to create a history record for each additional recipient.

Exercise 3.3: Scheduling a meeting and viewing reminders

In this exercise, you will schedule a meeting and confirm a meeting request using the Activity Reminder window.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

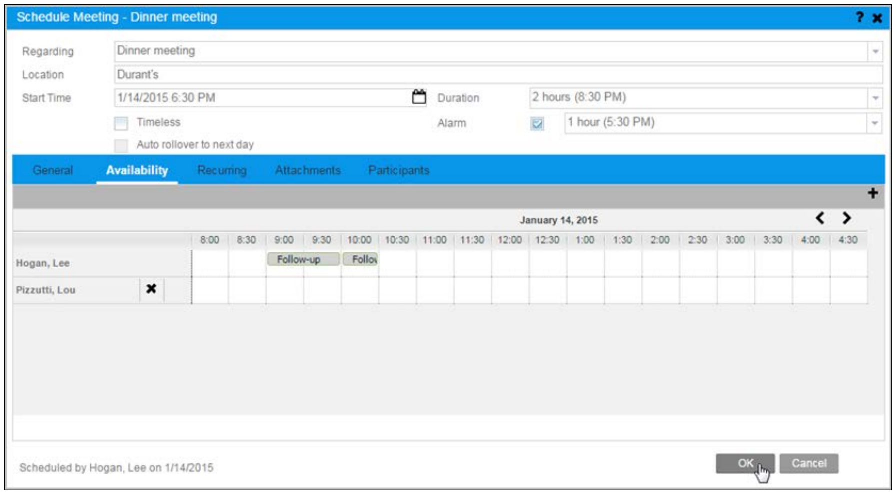
Click here to view a demo and/or practice this task

Exercise steps

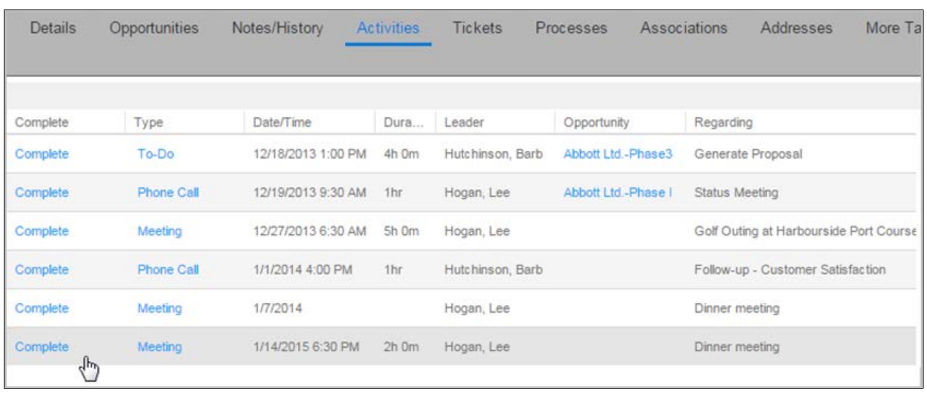
Part 1: Schedule a meeting

1. Open the **Contact** detail view for **John Abbott**.
2. Select S**chedule > Meeting** from the menu bar. The **Schedule Meeting** window opens.
3. Select **Dinner meeting** from the **Regarding** drop-down list.
4. Type *Durant's* in the **Location** field.
5. Select **6:30 PM** from the **Start Time** drop-down list.
6. Click **OK**.
7. Select **2 hours** from the **Duration** drop-down list.
8. Type *Discuss next quarter's initiatives* in the **Notes** field.

9. Click the **Availability** tab.
10. Click **Add** to lookup members and resources. The **Add Members and Resources** window opens.
11. Select **Pizzutti, Lou** from the list of available members.
12. Click **Add Selected**.
13. Click **OK**.

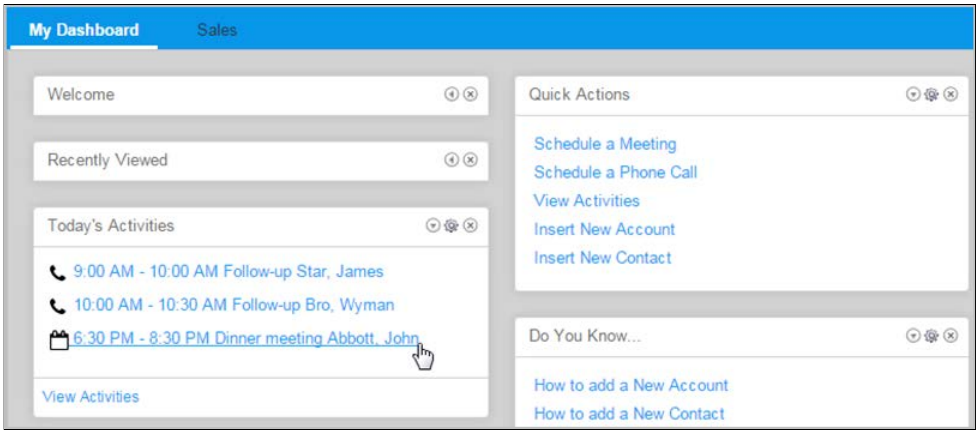


Let's see where Infor CRM shows this new activity. Under John Abbott's contact detail record you can find the activity in the **Activities** tab.

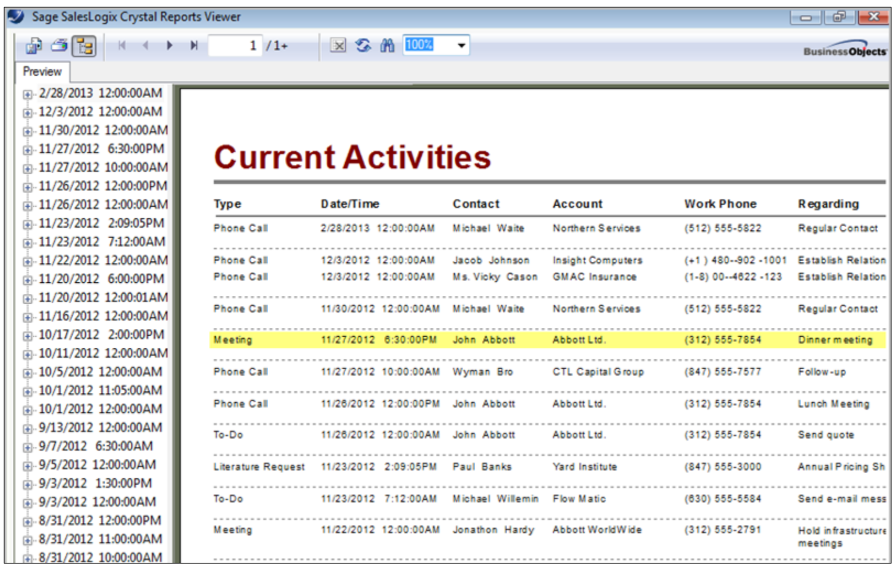


You can also see the activity when you open the **Activities** detail view from the Nav Bar and in the Infor CRM calendar.

If you scheduled the activity for today, you would see it appear on the **My Dashboard** tab on the **Welcome** screen. This is what it would look like for tomorrow:



Finally, you can also see this activity added to the **Current Activities Report**:



Tip: When prompted to enter values, do not use a lower value to see all.

Part 2: Confirm a meeting request using the Activity Reminder window

1. Click **Sign Off**.
2. Click **Return to Sign in Page**.
3. Type *LouP* in the **Username** field. No password is required.
4. Click **Sign In.** The **Alerts** window opens.

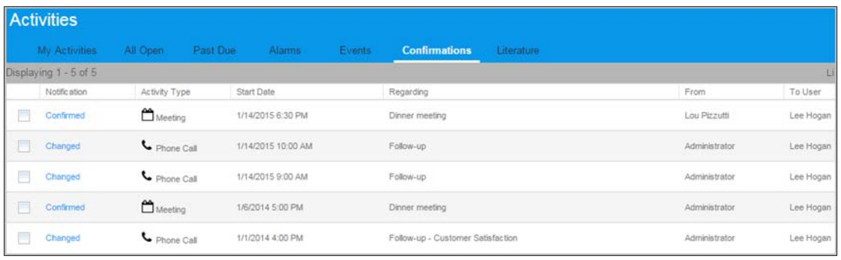
   Until alerts are snoozed or turned off by selecting **Tools > Options > Alerts**, the **Alerts** window continues to open for upcoming scheduled, timeless, unconfirmed, or recurring activity reminders. Current activities are listed first, followed by past due activities in red text, and finally unconfirmed activities on a separate tab. Timeless activities aren't considered past due until 24 hours after the time they were scheduled.

5. Click the **Unconfirmed** tab. The dinner meeting Lee Hogan scheduled appears.

   Note: In the Infor CRM calendar, the activity has a hashed bar at the top to indicate its unconfirmed status.

6. Click **Accept**. **Note:** The **Dinner meeting** activity alarm is temporarily removed from the **Alarms** tab until it activates 1 hour prior to the activity.
7. Click **Snooze All** to close the **Alerts** window.

   Note: The Infor CRM calendar has removed the hashed bar at the top of the meeting.
8. Click **Sign Off**.
9. Click **Return to Sign in Page**.
10. Type *Lee* in the **Username** field. No password is required.
11. Click **Sign In**.
12. Select the **Sales** Nav Bar **> Activities** group.
13. Click the **Confirmations** tab. Lou's confirmation appears.



More integration options

You've explored the primary email integration features within Infor CRM. There are also three additional options that may be available to you depending on how your administrator chooses to set up the company's preferences.

Outlook Sync

Outlook Sync for Infor CRM is a more sophisticated integration tool providing full synchronization with Outlook. Data syncs between applications whenever there is an update. Outlook Sync provides the ability to sync to-dos as tasks and contacts which Advanced Outlook Integration (AOI) doesn't provide. Outlook Sync is available for both Windows and Web users and it's configurable per user. However, it requires a light-weight client application to be installed and configured on each user's machine. Additionally, Outlook Sync requires your Infor CRM administrator to deploy the SData portal as part of your implementation.

Configuring Outlook Sync

Once your administrator enables Outlook Sync, synchronization and integration preferences should be configured in Microsoft Outlook. The Connection and Send to CRM/Record to History options may already be configured for Web Client users that set their options in the Infor CRM Desktop Manager. You can configure different settings for different types of records. For example, you can enable one-way sync for contacts and two-way sync for calendar items. You must also create a contact sync group for the contacts you want to synchronize between Outlook and Infor CRM.

Outlook Sync allows each Infor CRM Client to personalize their synchronization preferences including what data to sync and how often to sync.

Understanding contact synchronization with Outlook

Synchronizing contacts between Infor CRM and Outlook enables you to change a contact record in either application and have the change reflected in both applications. During a synchronization cycle, Infor CRM compares fields in both applications and makes changes to ensure both applications contain the same information. For example, if a record has been added to Outlook but not to Infor CRM, that record is added to Infor CRM.

Contact sync behavior

- Contacts are linked based on email address.
- If the same record is updated in both applications during the same sync cycle the latest change takes effect.
- Deleting a contact in Infor CRM moves the contact from the contact sync folder to a deleted items folder.
- Deleting a contact in Outlook removes the contact from the contact sync group but doesn't delete the contact from Infor CRM.

Understanding calendar synchronization with Outlook

Calendar integration allows you to synchronize your calendar between Infor CRM and Outlook. Your administrator must configure and grant permission before you can synchronize calendars with Outlook. During a synchronization cycle Infor CRM compares fields in both applications and makes changes to ensure both applications contain the same information.

Calendar sync behavior

- If the same record is updated in both applications during the same sync cycle the latest change takes effect.
- Deleting an activity in either application deletes the activity in both applications.
- Member and resource information is not synchronized.
- If the user is a member or a leader of an activity when the activity is synchronized the user gets their own activity record.
- Unconfirmed and confirmed activities sync.
- Activities declined before a synchronization cycle are not synchronized.
- Activities declined after a synchronization cycle are removed from the user's calendar in both applications.
- Activity types in Infor CRM may synchronize to different activity types in Outlook. See the **Understanding Calendar Data Exchange** table for details.
- Activity attachments are not synchronized between Infor CRM and Outlook.
- There are other Outlook Sync options in Outlook that prevent appointments and tasks scheduled prior to a selected date from synchronizing. However, edited activities including snoozing or dismissing an alarm after the selected date and any past occurrences of a current recurring activity will synchronize.

Infor CRM Sync for Exchange

Infor CRM Sync for Exchange is an alternative to Outlook Sync. Unlike Outlook Sync which is a client application installed for each user, Sync for Exchange is a server-side application your administrator or Infor installs on your Infor CRM server. Once installed, your administrator sets the rules to determine which contacts, activities, and to-dos are linked.

Sync for Exchange doesn't require an Outlook Windows Client to run; you can use it with other Microsoft Exchange mail clients. However, Sync for Exchange sets the synchronization direction system- wide whereas Outlook Sync gives individual users the choice to determine which items sync and in which directions.

Sync for Exchange is not covered in this training course.

Exercise 3.4: Configuring Outlook Sync and synchronizing information between Infor CRM and Outlook

In this exercise, you will prepare contacts for Outlook Sync, configure and test Outlook for Outlook Sync, and synchronize a contact from Outlook to Infor CRM.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Part 1: Prepare contacts for Outlook Sync

1. Select the **Sales** Nav Bar **> Contacts** group.
2. Press **Shift** and select all contacts whose last names begin with “A.”
3. Right-click in the highlighted area and select S**ave Records as a Group**.
4. Type *Outlook* in the **Group Name** field.
5. Click **OK**.

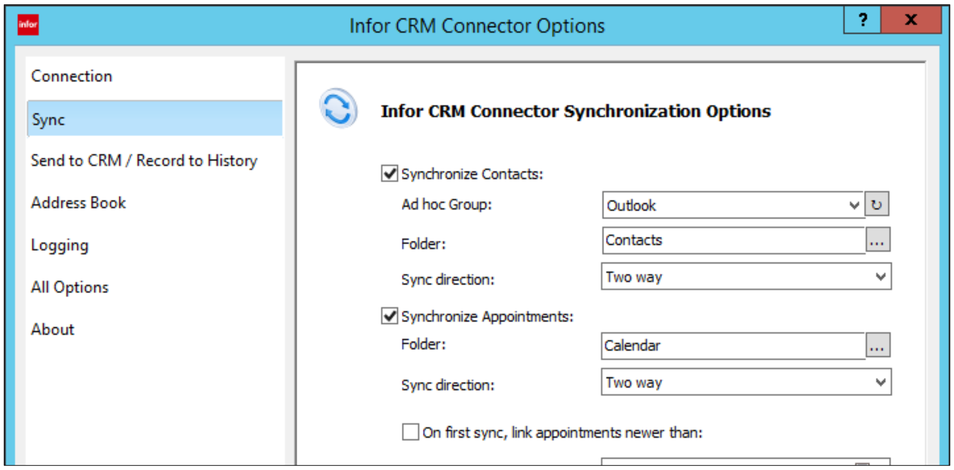
Part 2: Configure and test Outlook for Outlook Sync

1. Launch **Outlook**.

   Note you may need to search for Outlook.

   Click **No** if Outlook asks to use the **Infor CRM Connector**.

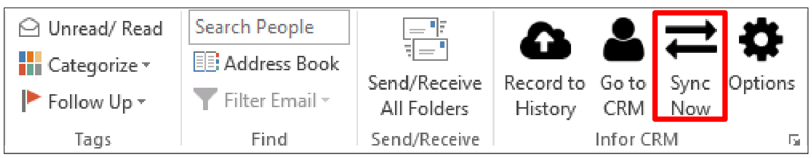
2. Select **File > Infor CRM Connecter Options**.
3. Verify the **Server** field lists the following server: **http://srv10:3333/*sdata***.
4. Verify **Lee** is selected in the **Username** field.
5. **Click Test.**
6. Click **OK** if the test is successful.
7. Click the **Sync** tab. The **Infor CRM Connector Synchronization Options** screen opens.
8. Select the **Synchronize Contacts** check box.
9. Select **Outlook** from the **Ad hoc Group** drop-down list.
10. Verify **Contacts** is selected in the **Folder** field.
11. Verify **Two way** is selected in the **Sync direction** field.
12. Select the **Synchronize Appointments** check box.
13. Verify **Calendar** is selected in the **Folder** field.
14. Verify **Two Way** is selected in the **Sync direction** field.



15. Click **OK**.

    If you get an Infor CRM Connector Options message, click **Yes**.

16. Click **Sync Now** to perform an immediate synchronization.

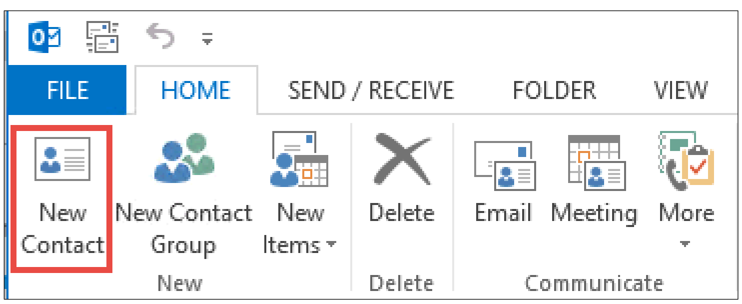


17. Click **People** in Outlook to verify the sync is successful.

    You may need to scroll through the contact names to see the contacts whose last name begins with "A."

Part 3: Synchronize a contact from Outlook to Infor CRM

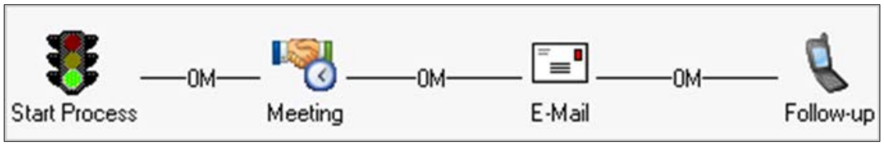
1. Click **New Contact** within Outlook.



2. Type *Adam Ant* in the **Full Name** field.
3. Click **Save & Close**.
4. Click the **Home** tab in Outlook.
5. Click **Sync Now** to synchronize with Infor CRM.
6. Open the **Infor CRM Web Client**.
7. Select the **Sales** Nav Bar **> Contacts** group.
8. Click the **Outlook group** tab. Your new contact is listed.

Streamlining customer interactions

Contact processes can streamline your customer interactions. Contact processes automate repetitive tasks, implement sales processes, and initiate interactions with customers. Consider the following example:



- Infor CRM prompts you to complete a meeting activity when this process scans in the Windows client. The process can start automatically depending on how it's designed.
- When a meeting activity is marked complete the next task is invoked (unless placed on hold) and an email is sent to the contact using a template.
- When the email is sent, the next task is invoked. A phone call activity is then scheduled on your calendar in two weeks.

Can I schedule a contact process for a lead?

No. To schedule a process such as a lead track you must convert the targeted leads to contacts and save them in a temporary ad hoc group to separate them from other contacts. Then schedule the process for the group.

Can I schedule a contact process for a group?

Unlike the Windows Client, the Web Client allows you to schedule a contact process for one contact at a time.

Can I create my own contact process?

Only the administrator or someone with access to the Infor CRM Architect can create contact processes. Contact your administrator to request a contact process. Here are the kinds of tasks a contact process can include:

- **Activity** – Schedule a meeting, phone call, or to-do.
- **Output** – Send a letter, email, fax, or schedule a literature request.
- **Decision** – Check a value in the database to determine what to execute next.
- **Plugin** – Print a report, start another process, make a database change, open a main view, or run a script.

What happens after a process is scheduled?

You or another Infor CRM user can assign you as a process owner. When you scan a process for which you are the owner, the process manager runs and executes the next task in the process provided the process is not waiting for a condition to be fulfilled or a time lapse to end.

You can monitor the status of processes and change the status of any processes In Process, Starting, Suspended, or Waiting.

Windows client users

Infor CRM recommends Infor CRM Windows Client users scan processes once a day but be aware the process engine uses system resources. If the process manager scans processes automatically at regular intervals set your preferences in the Windows Client by clicking Tools, clicking Options, and then clicking the Other tab. This option is useful if different tasks in the same process are assigned to different people and you need to execute a task as soon as it becomes possible.

If a process runs once a day but the time lapse between two tasks is less than one day only one task a day can be executed automatically. Manually initiate a process any time.

To set a process in motion before the scheduled time, trigger the next task. This ignores all conditions and forces the next task in the selected process to execute.

Can I use contact processes without the Windows Client?

Yes, although the Process Manager is only available in the Windows Client. Your administrator can design processes requiring no intervention and can automatically execute tasks.

How do I delete a process?

To determine which processes to delete, specify the status and date of last action. Processes with a status and last action date on or before the date selected are deleted regardless of the process owner.

Exercise 3.5: Scheduling a contact process

In this exercise, you will create a group of contacts, schedule a contact process, and monitor a process status.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

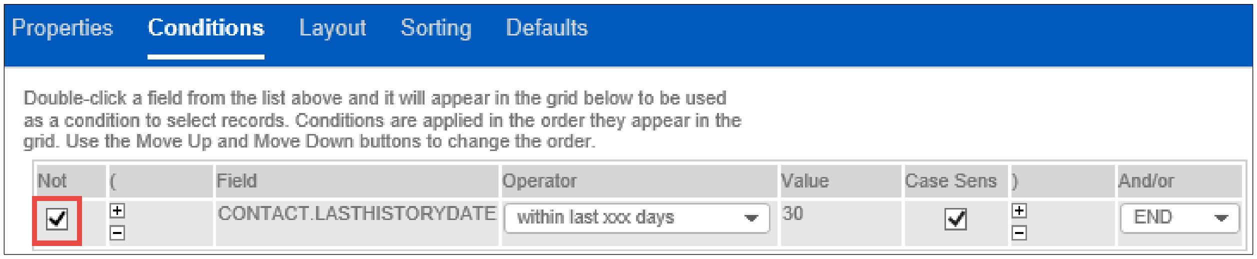
Click here to view a demo and/or practice this task

Exercise steps

Part 1: Create a group of contacts

1. Open the **Contacts list** view and then click **Add Group**. The **Query Builder** window opens.
2. Type *Last Touched 30 Days* in the **Name** and **Display Name** fields.
3. Click the **Conditions** tab.
4. Click the **Contact** node and double-click **Last History Date** in the right column. The **Assign Condition** window opens.
5. Select **within last xxx days** from the **Operator** drop-down list.
6. Type *30* in the **Value Is** field.

7. Click **OK**.
8. Select the **Not** check box in the **Conditions** tab.



9. Click **OK** to close the Query Builder.

Part 2: Schedule a contact process

1. Click the contact record for **Joe Garcia** from the **Last Touched 30 days** contacts group.
2. Click the **Processes** tab and then click **Add**. The **Schedule Process** window opens.
3. Select **Casual Follow-up** from the **Process Type** drop-down list.
4. Click **Schedule**.

   The process status indicates it's starting.

Part 3: Monitor a process status

1. Select the **Sales** Nav Bar **> Processes** group.
2. Click the **Starting** tab. The process you scheduled is located here.

Part 4: Scan a process by signing in to the Windows Client

1. Click the **Start** menu.
2. Click **All Programs** (this appears as a down arrow).
3. Scroll to the **Saleslogix** section and open **Infor CRM Client**. This is the **Infor CRM Windows Client**.
4. Type *Lee* in the **Username** field. No password required.
5. Open the **Contacts** detail view for **Joe Garcia**.
6. Click the **Processes** tab.
7. Right-click the **Casual Follow-up** process and select **Scan This Process**. The **Edit Completed Meeting for Joe Garcia** window opens.

   Depending on how your administrator designs this process one of several actions can occur. In this scenario, the first task recorded a history item for a completed item. You're going to complete the meeting, however in a real-world scenario, if you are to click **Cancel**, the status of the process changes to **Suspended** until placed back to **In Progress**.
8. Click **OK**.

   Because your administrator didn't set a time lapse in-between the meeting and email tasks, the **Process Ready for Execution** window opens for the next task. This window allows you to control the next task in the process.
9. Click **Cancel Scan**.

10. Close the **Infor CRM Windows Client**.
11. Return to the **Web Client** and click **Refresh** in your browser's toolbar.
12. Click the **In Process** tab from the **Processes main** view.

    Notice the process moved from the **Starting** tab to the **In Process** tab and you can see when the last action took place. You can also **Suspend** or **Abort** the process from this tab.

    The next task in this process is to record a history record for an email and launch the new email message from a template to send to the contact. When a history record for the email is completed an activity for the contact shows on the Infor CRM calendar 14 days from today and the process moves to the **Completed** tab in the Web Client.

Lesson review

What are the differences between activities, history records, and notes?

It's important to track interactions with customers for analytics, reporting, and future reference. An activity refers to a scheduled interaction not yet taken place, a history item refers to a completed activity or email both of which can include notes, and a note refers to any text entry included for an account, contact, or lead visible to other Infor CRM users.

How do I record sent and received emails to history?

Infor CRM provides standard integration with Microsoft Outlook allowing you to create history records from the contents of an email message either by using **Send to CRM** when a message is sent or by dragging-and-dropping a message from Outlook into the appropriate **Notes/History** tab in Infor CRM.

What are the options for inviting contacts to scheduled meeting or phone call activities?

Infor CRM is not designed to replace your existing mail/calendar application and it doesn't notify a contact or lead when you schedule a meeting or phone call activity in Infor CRM. A scheduled activity primarily serves to organize and remember daily tasks, show other Infor CRM users what's happening with a record, and easily record the item to history when the activity is complete.

To support interactions requiring invitations and coordination between Microsoft Outlook and Infor CRM you can schedule the Outlook meeting request separately or invite an attendee after the Outlook appointment has been scheduled by Infor CRM.

How do I schedule activities on my calendar and manage activity reminders?

A scheduled activity can be viewed in multiple locations throughout Infor CRM. The first is the **Activity Reminder** window which includes all upcoming or past due scheduled, timeless, unconfirmed, or recurring activities having an alarm. This window allows you to interact with scheduled activities by viewing details, completing activities, viewing them on your calendar, and confirming activities to which you've been invited by other Infor CRM users.

How do I become familiar with additional email integration tools?

In addition to using Send to CRM and Infor CRM address book which are commonly-used standard integration features, Infor CRM also supports an additional but optional integration feature known as Outlook Sync. Outlook Sync provides full calendar and contact synchronization between Infor CRM and Outlook. Outlook Sync automatically synchronizes items on your Outlook calendar with items on your Infor CRM calendar; any updates to an activity apply to both records automatically. You can also limit synchronization directions if you only want to sync from Outlook to Infor CRM or from Infor CRM to Outlook.

Infor Xbar is another optional component that provides a dynamic view of Infor CRM contact, activity, and opportunity data within the context of the Outlook application.

How do I use contact processes to streamline activity scheduling and follow-ups?

Contact processes can streamline your customer interactions. Contact processes automate repetitive tasks, implement a sales process, and provide a consistent way of initiating a series of interactions with customers.

You cannot schedule a contact process for a lead or design your own contact processes. Contact your Infor CRM administrator to request one.

Check your understanding

Lee Hogan just met with John Abbott for breakfast to discuss new product offerings. Now that Lee is back in the office, he wants to record the details of the meeting. Which of the following should he use to record the details and specify the meeting has already occurred?

a. History
b. Activity
c. Note
d. Ticket

Lee is about to send a follow-up email to John Abbott to thank him for the meeting. Assuming Lee has Microsoft Outlook, Xbar, and Desktop integration installed, which of the following options may he use to attach the email message to John Abbott's record (select two)?

a. Select Record to History when sending the message
b. Click Send to CRM when he sends the message
c. Drag and drop the message on the Send to CRM button before he sends the message
d. Drag and drop the message to John Abbott's contact detail page

Infor CRM automatically sends an invitation to external contacts when you schedule a meeting or phone call with them.

a. True
b. False

Which of the following views enables you to view upcoming and past due activities for multiple contacts simultaneously (select two)?

a. Calendar
b. Activities tab in any detail view
c. Activity Reminder window
d. History tab in any detail view

Lee has several contacts in Infor CRM that he would like to make available in Outlook as well. What feature can Lee use to keep his Infor CRM and Outlook contacts up-to-date?

a. Outlook replication
b. Infor CRM synchronization
c. Outlook synchronization
d. Infor CRM replication

Jane has several steps that she typically performs after she qualifies a lead that include following up with the contact via phone and email. What can her Administrator create to help Jane automate these routine tasks?

Lesson 4: Distributing information

Estimated time

4 hours

Learning objectives

In this lesson, you will:

- Explain the difference between library, attachments, letters/mail merge, literature requests, and campaigns.
- Use the Infor CRM Library to attach a file to an email and save it to the appropriate record within Infor CRM.
- Distinguish between template types and understand how mail merge fields work.
- Send a mail merge for a group of records and select appropriate history options.
- Explain how Infor CRM handles the literature request and fulfillment process.
- Describe the data campaigns track and how Infor CRM uses this data to calculate results.

Topics

- How can Infor CRM help me distribute information to customers?
- How do I add an attachment?
- Managing templates
- Managing company literature
- Managing campaigns
- Lesson review
- Check your understanding

How can Infor CRM help me distribute information to customers?

Sending information to customers can generate interest in your products and services. Using Infor CRM during this process allows you to streamline your efforts track, reuse, and analyze data for further insight.

Infor CRM includes several features to organize and distribute information to your customers such as the library, attachments, literature requests, letters/mail merge, and track results via campaigns.

Library and attachments

The Infor CRM library is a repository of information accessible to all Infor CRM users. Library files are used for self-reference or to send as attachments to contacts and leads. Information in the library is generally generic and may include compatibility check lists or installation guides. **Note:** Only your administrator or someone with a librarian role can add files to the library.

In addition to attaching files from the library you can attach other files such as contract agreements or screen shots of an error message. Whenever you Send to CRM an email with attachments, Infor CRM gives you the option to save those attachments to the appropriate record in Infor CRM.

Manually add attachments for internal reference to an Infor CRM record by dragging-and-dropping the attachment into the appropriate **Attachments** tab, uploading them using a traditional file upload utility, or by adding a link to a URL or Google Doc.

The drag-and-drop feature is only available if you have installed **Desktop Manager**. If you are an offline client user, request attachments or library items through synchronization.

Letters and mail merge

Infor CRM can save Microsoft Word templates to easily create personalized letters for your customers. If you're sending the same letter to a group of contacts or leads Infor CRM mail merge can create a batch of multiple personalized letters with corresponding address labels. Send a letter as an electronic attachment, as an email message, or as a printed document to mail.

Literature requests

Most companies manage company literature and marketing collateral from a central location so requests are handled more efficiently. Submitting a request through Infor CRM streamlines the fulfillment process. For example, sales personnel make literature requests when sending specific information to their customers such as bound annual reports, a new customer kit, or other promotional gifts. Marketing then sends the physical material for delivery.

Campaigns

Campaign tools provide a sophisticated method of tracking marketing efforts within Infor CRM for product promotions via print or email. Create stages and tasks to manage the project during its design and testing phase and select a group of targets from Infor CRM. Link response data to potential sales opportunities to measure success of the total campaign effort.

As an add-on product Infor CRM supports a robust email marketing engine embedded into the Infor CRM product where you can design outbound email campaigns, create online customer surveys, configure drip marketing, track click-and-open data, and act on the results.

How do I add an attachment?

Attach a file or URL to a record in Infor CRM using one of the following methods:

Action	Description
Drag-and-drop	Drag-and-drop a file from your computer into the **Attachments** tab of the appropriate Infor CRM record.
Add file or add URL	Click to insert a file or URL from the **Attachments** tab of the appropriate Infor CRM record.

Exercise 4.1: Saving an email attachment to Infor CRM

In this exercise, you will send an email from Infor CRM with an attachment.

Notes:

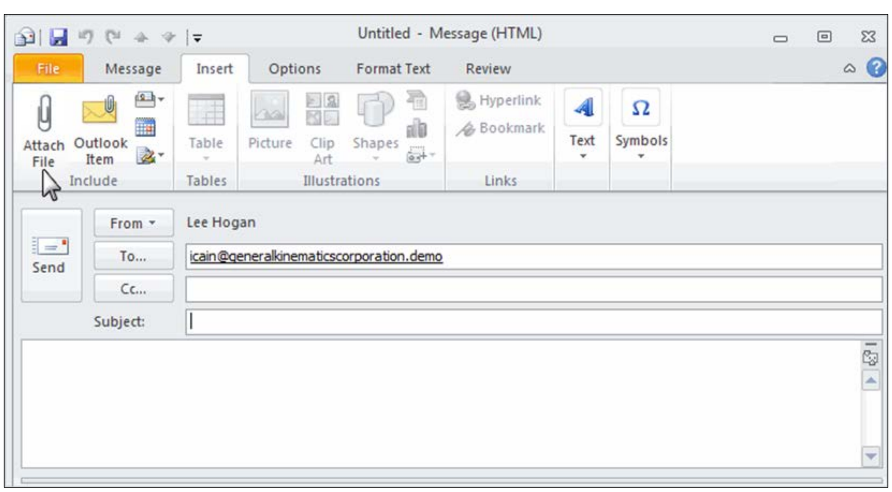
- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Open the **Lead** detail view for **Ingrid Cain**.
2. Select **Write > Email** from the menu bar.

   If you're not signed in to Outlook as Lee, Infor CRM prompts you to sign in. An Outlook Untitled - Message window opens with Ingrid Cain's email address in the **To** field.
3. Click the **Insert** tab and then click **Attach File**.



4. Browse to **C:\Classfiles\ImpAdmin\Library** in the **Insert File** window.
5. Double-click **inforCRM_mobile_brochure.pdf**.

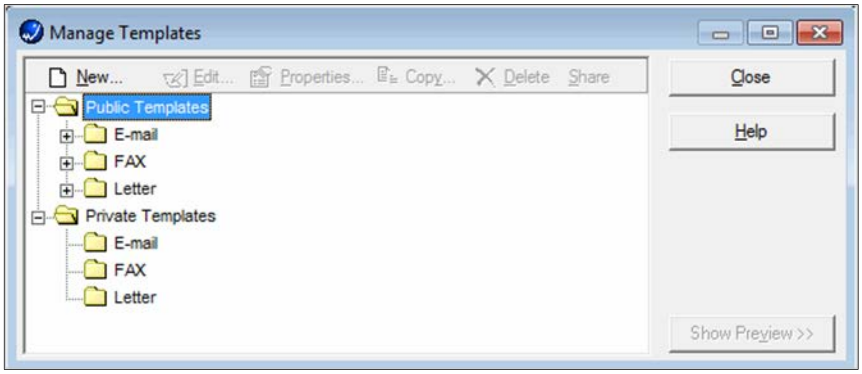
   Outlook adds the file as an attachment to the email.
6. Add a **Subject** and **body** to the email and then click **Send to CRM.**

   Note: Send to CRM is on the **Message** tab. Because you're using **Send to CRM**, Infor CRM prompts you to save the attachment in addition to the email message contents.
7. Click **Yes** to return to the **Lead** detail view for **Ingrid Cain**.
8. Click the **Attachments** tab.

   The attachment is saved to Ingrid's record. You may need to refresh the page. If/When you qualify and convert Ingrid to a contact the attachment and history move with her record.

Managing templates

Create and save templates to send personalized correspondences to your customers. To view available templates, click the **Write** menu and select **Manage Templates**. The **Manage Templates** dialog box opens.



Available templates

What is the difference between private and public templates?

Public templates are created and distributed by the system administrator and stored in the **Public Templates** folder. Public templates are usually released to all users. If no Public templates display in Infor CRM, you can create a new template or copy a Public template and make it a Private template for your use.

Private templates are created by a user and are automatically stored in the **Private Templates** folder. If no Private templates display in Infor CRM, you can create a new template or copy a Public template and make it a Private template for your own use. The owner of a Private template can release it to another user. It is recommended that the owner copy the Private template and the release the copy to other users.

How do I create a template?

To create a template, click **New** or double-click a public template and copy it into your **Private Templates** folder. From there, you can customize the template with edits visible only to you.

How do I share a template with another user?

To share a template, you must first make a copy. This is done for each user you plan to share your template with. One copy at a time, edit the template properties and choose a new template Owner. Infor CRM moves the copied template from your folder and displays it in the other user's corresponding private template folder. Any edits made hereafter to the original template are visible only to you and any edits the user makes to the copy are visible only to that user.

Contact your administrator if you create a template to share with other Infor CRM users. He or she may add it to the public templates folder preventing you from having to manually copy and share a template user by user.

What's the difference between template type and family?

To create a new template in Infor CRM, begin by choosing one of the default base template types for either an email, fax, or letter. Set preferences for each base template type for both Contacts and Leads by clicking **Tools**, **Options**, and the **Other** tab. The type determines what options are available to edit. For example, an email or fax template type allows you to set a Subject line separate from the body whereas a letter template type doesn't. An email template type also includes different merge fields which allow you to insert clickable hyperlinks.

The Family determines which of your private folders to save the template in. Choose the family matching the template type.

When should I use mail merge?

A mail merge sends a letter, fax, or email to a group of contacts or leads simultaneously. Always preview the selected template before you start a mail merge and make any changes if necessary. Also, consider your customers' solicitation preferences before doing mail merge which allows you to skip any records which have the **Do Not Solicit** check box marked in their record.

Exercise 4.2: Creating a new cover letter template

In this exercise, you will create a new letter template and edit its options.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Part 1: Create a new letter template

1. Select **Write > Manage Templates** from the menu bar.
2. Click **New**. The **Properties for: New Word Template** dialog box opens.
3. Select the **Letter** radio button within the **Template Type** area.
4. Type *Cover Letter* in the **Name** field.
5. Select **Letter** from the **Family** drop-down list.
6. Click **OK**. The **Letter Editor** window opens.

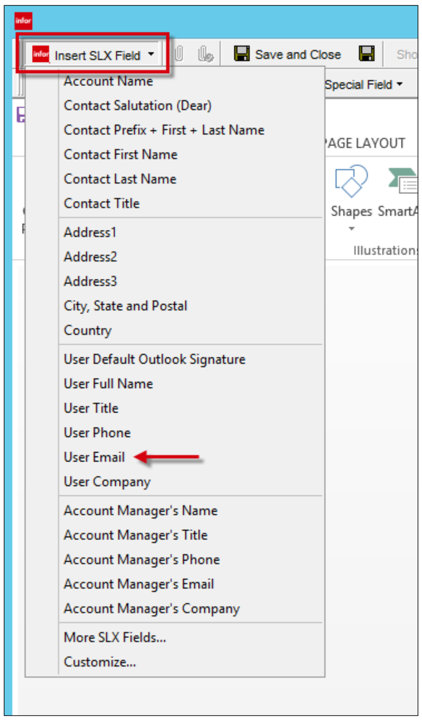
   Because your base letter template is set for you, the template that opens already has merge fields enclosed by <<>> and placeholder text. Merge fields automatically pull information from the selected contact record at runtime when you're ready to use the template.
7. Type *Phoenix Computers* as the letter heading.

8. Type *Attached is our annual pricing list. I want to get this to you so you can start planning your purchases for the year. Please contact me to discuss these products and talk about volume discounts* in the body of the letter.

Part 2: Make changes to the merge field

First, let's add your email address to your signature.

1. Place your cursor under the <<**Userinfo_Title**>> field.
2. Select **Insert SLX Field > User Email**. The <<**Userinfor_Email**>> merge field appears in the document.



Tip: You may be asking yourself why you didn't type your email address directly into the letter instead of adding it as a merge field. This option works too because it's a private template, however adding a merge field to the template can be used as is if it's shared with another Infor CRM user.

Now, let's remove the <<**Contact_Salutation**>> field. Why? In the SALESLOGIX_EVAL database not many of your contacts use the **Dear** field. If data isn't entered in this field, the merge field can't pull in data and it will be blank, e.g. Dear [blank]. Instead, let's replace it with the contact's first name only.

3. Delete the <<**Contact_Salutation**>> field.
4. Select **Insert SLX Field > Contact First Name**. The <<**Contact_Firstname**>> merge field appears in the document. Add a comma to follow the first name.

July 31, 2015

«Address_Address1»
«Address_Address2»
«Address_City/State/Zip»
«Address_Country»

Dear «Contact_Firstname»

Attached is our annual pricing list. I want to get this to you so you can start planning your purchases for the year. Please contact me to discuss these products and talk about volume discounts.

Sincerely,

«Userinfo_Username»
«Userinfo_Title»
«Userinfo_Email»

5. Click **Edit Fields**. The **Infor CRM Mail Merge Field Editor** window opens.
6. Select the **Contact_Firstname** field from the left side columns.
7. Select **First Capital** from the **Special Format** drop-down list.

   Setting this preference ensures the contact name is listed with a capital letter for the first letter in the name. This also applies to any record entered with a lower case.
8. Click **OK**.
9. Click **Save and Close** in the **Letter Editor**.

   Infor CRM saves the letter within the **Letter** folder under **Private Templates**. Double-click the file to edit the letter any time.
10. Close the **Manage Templates** window.

    Now you can use the letter the next time you schedule a literature request for a pricing list.

Exercise 4.3: Using mail merge from an email template

In this exercise, you will edit an email template and send a mail merge.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Select the **Sales** Nav Bar **> Leads** group.

2. Select **Write > Mail Merge** from the menu bar. The **Mail Merge** window opens.
3. Click **Browse** within the **Template** field. The **Select a Template** window opens.
4. Expand the **Email** folder within **Public Templates** and select **Base Email (Lead)**.
5. Click **OK** to return to the **Mail Merge** window.

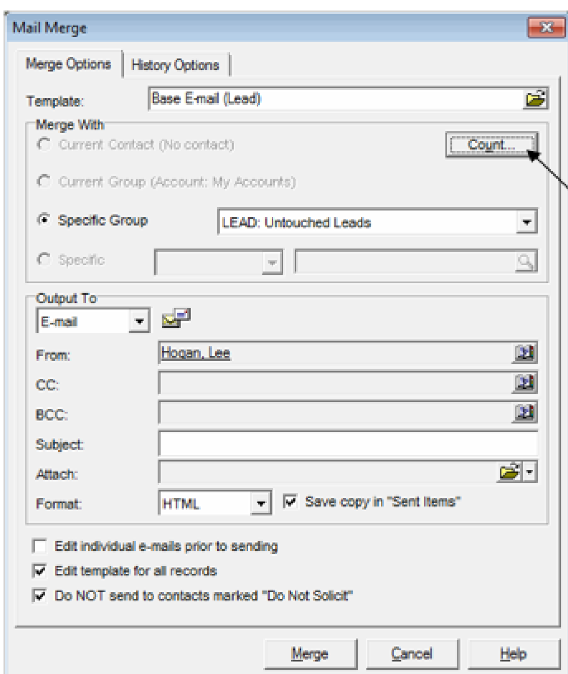
   Tip: Ideally you should edit this template first. For this example, use the base email template specified by the administrator to exercise the mail merge functionality without spending a lot of time on the content.

6. Select the **Specific Group** radio button.
7. Select **LEAD: Untouched Leads**.
8. Leave **Email** selected in the **Output To** field.

   Note: Other options such as CC, BCC, Subject, and Attach are set by the template if they exist. Let's look at the remaining check boxes at the bottom of the **Mail Merge** window.

   - The **Save copy in "Sent Items"** check box saves a copy of the email message in your Outlook sent items folder.
   - The **Edit individual emails prior to sending** check box adds a personal message for each lead record in the selected group.
   - The **Edit templates for all records** check box edits the template before sending it to all records. Any personal message included is sent to everyone in the selected group.
   - The **Do NOT send to contacts marked "Do Not Solicit"** option is selected by default.

9. Select the **Edit template for all records** check box.



If you click Count, you can find out how many records are included in the group—which accounts for exclusion due to the solicitation preferences. In our example, we have over 40.

10. Click the **History Options** tab.

    This tab allows you to choose how you track an action within the **Notes/History** tab for each recipient. The default option saves a history record but it doesn't add a second history record for the email. You can also choose to schedule a follow-up meeting, phone call, or to-do with each record placing a corresponding activity on your Infor CRM calendar.

11. Leave all defaulted options on the **History Options** tab.
12. Click **Merge**. The **Edit Template** window opens.
13. Type *Phoenix Computers: Get to Know Us!* in the **Subject** field.
14. Type *We are a full-service computer hardware and service company. Check us out at http://phoenixcomputers.demo* in the body of the message.
15. Click **Save and Close**.

    Infor CRM doesn't save your changes to the template, only for this one-time merge.

    Infor CRM begins processing the mail merge. This process may take a few moments depending on the number of recipients. Infor CRM notifies you when one or more of your recipients has an improperly formatted email address preventing you from completing the merge.

    When the process completes, Infor CRM returns you to your most recent view. Also, within Outlook a new message for each lead in the group appears in your Sent Items folder.

    A new history record appears under the Notes/History tab of each record included in the merge.

Managing company literature

To add company literature to Infor CRM you must have access to the **Literature Items** Nav Bar within the **Administration** tab. Outside the training environment this view may be limited to users in charge of fulfillment orders because they have knowledge of costs, quantities on hand, reorder quantity, and expiration dates.

How do I schedule a literature request?

Schedule a literature request by clicking the **Literature Requests** tab in the **Contact** or **Account** detail view or by selecting **Schedule > Literature Request**. You can request the following:

- Number of copies to include in the package
- When to send the package
- How to send the package
- Whether to include a personal cover letter with the package
- Which contact(s) should receive the package.

You cannot schedule literature requests for leads.

How is the fulfillment team notified when I schedule a new literature request?

In addition to the related activity screens, each literature request also appears within the Literature Requests view by clicking Tools and then clicking Literature Request Management. Generally, only users who handle fulfillment have access to this menu. Your administrator must ensure those responsible for fulfillment can access appropriate records. If the user is not part of the appropriate team he or she cannot see requests in their Literature Fulfillment window.

If you have been assigned to literature fulfillment you don't receive a notification. You're responsible for opening the Literature Fulfillment view and checking for new requests according to a schedule that's appropriate for your company's demand. Click the Refresh link from the Common Tasks pane in the Literature Fulfillment view so you always see the latest data.

How does Infor CRM process a literature request?

A literature request activity remains open until the request is marked complete which then converts to history on the Notes/History tab of the appropriate record. Any of the following actions mark the activity as complete:

- The most common action is when a literature fulfillment team member clicks **Fulfill** within the **Literature Requests** window. Using **Fulfill** sends a list of required literature to your designated printer along with a copy of any cover letter if included in the request. You can gather the required literature from your onsite location and prepare it for shipment and delivery using this printout.
- The literature fulfillment team member clicks **Complete** within the **Literature Requests** window. This action is used if you don't need a printout of the required literature. If you don't have any cover letters or address labels to print the **Complete** option removes the request from the queue.

How do I know when one of my literature requests has been processed?

Completed literature requests appear in the Notes/History tab preceded by the word Completed.

Exercise 4.4: Scheduling a literature request

In this exercise, you will schedule a literature request.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Open the **Contact** detail view for **Paul Banks**.
2. Select **Schedule > Literature Request** from the menu bar. The **Schedule Literature Request** window opens.
3. Type *Annual Pricing Sheet* in the **Description** field.
4. Type tomorrow's date in the **Send** by field.
5. Select **UPS** from the **Send Via** drop-down list.
6. Select **High** from the **Priority** drop-down list.
7. Select the **on a separate page** radio button under **Print Literature List**.

   This option prints the list of items in your request on a separate page from your cover letter. This means the fulfillment team can include your cover letter in the package and discard the list of items once they're gathered.
8. Click **Search** in the **Cover** field. The **Select a Template** window opens.
9. Expand the **Letter** folder under **Private Template** and then click **Cover Letter**.
10. Click **OK**.
11. Double-click the **Qty** value field within the **Available Items** pane for the **Pricing Sheet**.
12. Type *1* in the **Qty** field and tab out.
13. Click **Save**. The request is queued to be processed.
14. Click **Tools** > **Literature Request Management** from the menu bar to view the request.

Managing campaigns

A campaign involves several people within your organization such as marketing, design, product management, sales, and customers. Infor CRM keeps this information in one spot so everyone can manage efforts prior to launch and track responses after launch. Campaign data identifies the successfulness of each campaign in terms of direct sales opportunities generated from the effort.

Who can see campaign data?

Like accounts, campaigns have an **Owner** field which determines who sees the record. If everyone can see the campaign record additional security is applied when viewing the **Targets** or **Responses** tabs which show contacts or leads to which you have access.

How are users notified when they are assigned a campaign task?

Campaign stages and tasks track the progress of a campaign prior to its launch. They are primarily used to identify the following:

- Start and end dates
- Estimated and actual costs
- Status

This data is useful when aggregated on the Budget/Results tab and other analytic tools.

Assign any of the following entities to a campaign task:

- Infor CRM user or team
- Infor CRM department
- Infor CRM contact
- Other individual (outside of Infor CRM)
- None

Unlike Infor CRM activities, campaign tasks don't appear on your calendar and generally aren't associated with a customer record although it's an option. If you assign someone a task the user isn't notified through Infor CRM unless he or she views the task within the campaign stage. Instead, a common practice is for the campaign manager to export the stages/tasks list to an Excel document and distribute to the appropriate members. This is only available in the Windows client.

Who are my campaign targets?

Targets refer to campaign recipients. You can create a target list dependent of your intended audience. Schedule targets from one of the following:

- Leads (unqualified)
- Accounts (only the primary contact)
- Accounts (all contacts)
- Contacts (individuals)

After selecting one of these options you can further refine the target list by the following:

- Company
- Industry
- SIC
- Title

- Products owned (if not a lead)
- Status
- City
- State
- Postal code
- Lead source
- Import source
- Create date
- Solicitation preference

You can also add targets from a Lead or Contact group.

How does Infor CRM process responses?

If a campaign is the result of an email blast responses are tracked automatically. Infor CRM knows whether the recipient received the email, opened the email, or clicked any links.

If a campaign is the result of another lead source such as general advertising, direct mail, telemarketing, or a trade show the responses are not tracked automatically. Instead, you must manually add response records when received either verbally or via an electronic communication. The response rate is tracked on the **Budget/Results** tab.

If an opportunity, e.g. potential sale is generated from a campaign you can associate the potential dollar amount from the opportunity to results for a more accurate measurement of return on investment.

Exercise 4.5: Creating a direct mail campaign

In this exercise, you will create and launch a new campaign.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

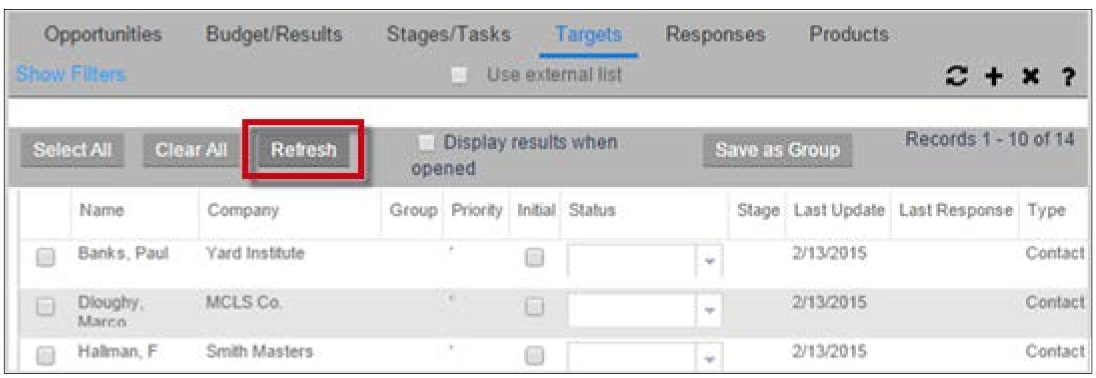
Exercise steps

Part 1: Create a new campaign

1. Select **New > Campaign** from the menu bar. The **Insert Campaign** window opens.
2. Type *Dell Latitude Promo* in the **Campaign Name** field.
3. Type *Dell Latitude Promo models* in the **Description** field.
4. Type *Generate new sales in the education market* in the **Objective** field.
5. Type *Additional 10% off bulk orders* in the **Call to Action** field.
6. Search and select **Direct Mail – General** from the **Lead Sources** field.

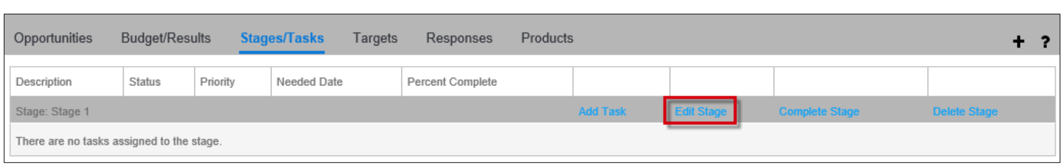
7. Click **OK**.
8. Type the date 60 days from today in the **End Date** field.
9. Click **Save**. The **Campaign** detail view opens.
10. Click the **Products** tab and then click **Add Product**. The **Lookup Product** window opens.
11. Double-click **Dell Latitude**.
12. Click the **Targets** tab and then click **Add Target**. The **Lookup Targets** window opens.
13. Select the **Accounts (only Primary Contact)** radio button.
14. Select the **Industry** check box.
15. Select **Contains** and **Education** from the drop-down lists.
16. Click **How Many?** Fourteen targets are returned.

17. Click **Search** to populate the grid with the matching targets. Scroll to the bottom the window to view the list, if necessary.
18. Click **Add Targets**.
19. Click **Refresh** from the **Targets** tab. The selected targets populate in the grid.



Tip: Alternative to refreshing, you can select the **Display results when opened** check box. This option is cleared by default to avoid a slow response in the event of a large list.

20. Click the **Stages/Tasks** tab and then click **Edit Stage**. The **Edit Stage** window opens.



21. Type *Design* in the **Description** field.
22. Type the date two weeks from today in the **End Date** field.
23. Click **OK**.
24. Click **Add Task** in the **Stage Design** pane.

25. Type *Postcard Creative* in the **Description** field
26. Type the date ten days from today in the **Needed Date** field.
27. Type *2,500* in the **Estimated Cost** field.
28. Type *7* in the **Estimated Hours** field.
29. Search for **Brian McNulty** and double-click his name in the **Assign To** field.
30. Click **OK** to return to the **Stages/Tasks** tab.
31. Click **Add Task** in the **Stage Design** pane.
32. Type *Postcard Printed* in the **Description** field.
33. Type the date two weeks from today in the **Needed Date** field.
34. Type *3,000* in the **Estimated Cost** field.
35. Type 3 in the **Estimated Hours** field.
36. Search for **Brian McNulty** and double-click his name in the **Assign To** field.
37. Click **OK** to return to the **Stages/Tasks** tab.

Part 2: Imagine a couple of weeks have passed and the postcard is almost ready to launch

1. Open the **Stages/Tasks** tab from the **Campaign** detail view for **Dell Latitude Promo**.
2. Locate the **Postcard Creative** task and click **Complete**.
3. Type *2,400* in the **Actual Cost** field.
4. Type *8* in the **Actual Hours** field.
5. Click **OK**.
6. Locate the **Postcard Printed** task and click **Complete**. The **Complete Task** window opens.
7. Type *2,850* in the **Actual Cost** field.
8. Type *2* in the **Actual Hours** field.
9. Click **OK**.

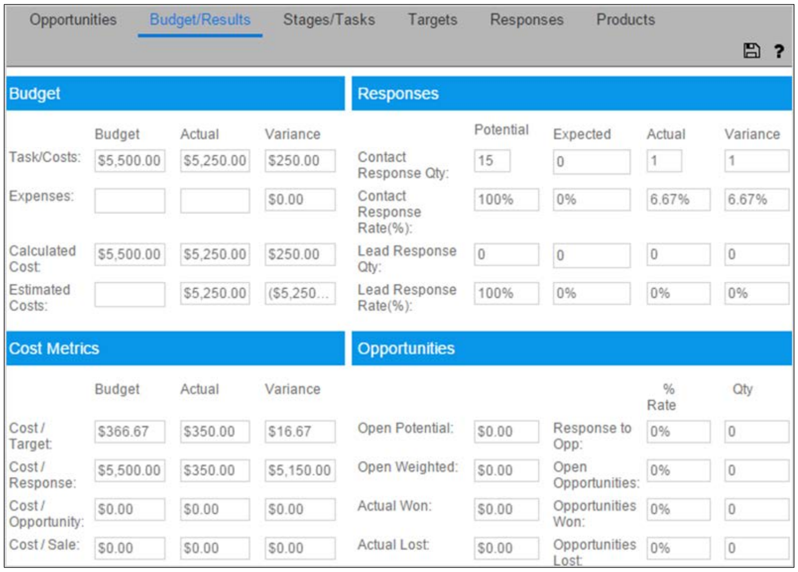
Part 3: Imagine that the postcards have been printed and are scheduled for shipment today

1. Click **Launch** from the **Campaign** detail view for **Dell Latitude Promo**.

   The option dims and states “Launched.” Let’s imagine a few days have passed and a contact, Paul Banks calls to inquire about the promotion.
2. Click the **Responses** tab.
3. Click **Add Campaign Response**. The **Add Target Response** window opens.

   Paul Banks’ name appears in the **Contact** field.
4. Select **Phone** from the **Response Method** drop-down list.
5. Search and select **Direct Mail – General** from the **Lead Source** field.
6. Click **OK** twice.
7. Click the **Budgets/Results** tab.

As responses come in, the metrics from the responses update accordingly. **Budget** and **Cost Metrics** values are calculated based on the stages and task. Currently, there are no opportunities associated with this campaign.



Tip: The **Campaign Summary** marketing report includes summary data for actual amounts won per campaign.

Lesson review

What are the differences between library, attachments, letters/mail merge, literature requests, and campaigns?

The library stores documents users can reference and send as attachments to customers. Letters and mail merge create personalized correspondences sent to groups of contacts or leads. Literature requests refer to company documents and promotional items submitted to a central fulfillment team. Campaign tools track marketing efforts within Infor CRM for various product promotions via print or email.

How do I use the Infor CRM library to attach a file to an email and save it to the appropriate record within Infor CRM?

Whenever you Send to CRM an email with attachments Infor CRM gives you the option to save those attachments to the corresponding record in Infor CRM. In addition to attaching files from the library you can attach other files to your correspondence specific to a customer, e.g. contract agreements or screen shots of an error message.

What is the difference between template types and how do mail merge fields work?

To create a new template in Infor CRM, begin by choosing one of the default base template types for either an email, fax, or letter. Set preferences for each base template type for both Contacts and Leads by clicking **Tools**, clicking **Options**, and then clicking the **Other** tab. The type determines which options are available to edit. For example, an email or fax template type allows you to set a Subject line separate from the body whereas a letter type does not.

Merge fields automatically pull information from the selected contact record at runtime.

How do I send a mail merge to a group of records and select appropriate history options?

Mail merge allows you to send a letter, fax, or email to a group of contacts or leads simultaneously. Preview the selected template before starting a mail merge and make any changes if necessary. Also, consider customers' solicitation preferences before doing a mail merge.

The default option saves a history record but doesn't add a second history record of the email. You can choose to schedule a follow-up meeting, phone call, or to-do with each record which places a corresponding activity on your Infor CRM calendar. Use caution when scheduling a follow-up for a large group as an activity appears on your calendar for each recipient in the group.

How does Infor CRM handle a literature request and the fulfillment process?

Specify the following when creating a literature request is created for a package: number of copies to include, the send date, whether to include a personal cover letter, and which contact(s) to send to. Each request appears as an activity on your calendar and on the **Activities** and **Literature Request** tabs of the appropriate record. In addition to the related activity screens, each literature request also appears within the **Literature Fulfillment** window. If you have been assigned to literature fulfillment, then you're responsible for opening the Literature Requests view to check for new requests according to a schedule appropriate for your company's demand.

What data does a campaign track and how do Infor CRM users use that data to calculate results?

Infor CRM displays budget and result information using costs, e.g. budget vs actual which are tracked within the campaign stages and tasks. Response data is calculated using the number of targets assigned to a campaign. If any opportunities are the result of a campaign that data also contributes to the campaigns overall success.

Check your understanding

Which of the following describes the feature used to send personalized correspondence to groups of contacts or leads?

a. Library
b. Attachments
c. Literature request
d. Mail merge

Which of the following template types may be created in Infor CRM (select three)?

a. Email
b. Fax
c. Letter
d. Literature request

When performing a mail merge, a history entry is recorded for each contact/lead that the message sent to?

a. True
b. False

A client has requested a new pricing sheet. Typically, your customer service team handles requests for brochures and other print collateral. How should you record this in Infor CRM so the appropriate individuals in your organization can fulfill this request?

a. Create a new mail merge for the request
b. Create a new literature request
c. Create a new template
d. Create a new opportunity

Your company is launching a new promotion offering a free 6-month service plan with any purchase over $10,000. You have created a new campaign to track the tasks related to, and the success of the promotion. What types of data can you specifically track related to the campaign (select three)?

a. Opportunities
b. Budget
c. Literature requests
d. Responses

Lesson 5: Keeping track of sales

Estimated time

4 hours

Learning objectives

In this lesson, you will:

- Describe products/packages, opportunities, and dashboard/reports.
- Summarize sales potential and weighted values as they relate to close probability.
- Convert products to assets when you win an opportunity.
- Describe potential options for generating quotes and sales orders from Infor CRM.
- Describe the benefits of using a sales process as it related to your pipeline.
- Identify available opportunity statistics/reports and use the dashboard to monitor sales performance.

Topics

- How does Infor CRM track sales data?
- Managing products and packages
- Updating opportunities
- Tracking your sales pipeline
- Monitoring sales performance
- Lesson review
- Check your understanding

How does Infor CRM track sales data?

Gauging your customers' potential interest and actual purchases helps forecast revenue and track your sales pipeline. Infor CRM includes features to help track sales such as products/packages, opportunities, and dashboards/reports.

Products and packages

Products refer to the goods and/or services your company sells. Products help determine sales revenue potential when added to an opportunity.

Packages represent a method for grouping a set of products for ease of bulk pricing and order entry. For example, you can bundle three products into one package to add all items to an opportunity with one click.

Opportunities

Opportunities track data before, during, and after a sale. You can track data related to products, competitors, involved contacts, estimated close date, close probability, status, and more. You can also generate a sales order or quote and use opportunities to populate your sales pipeline.

Dashboards and reports

Out-of-the-box, Infor CRM provides a Sales Dashboard to monitor individual performance, discover patterns, and make strategic sales decisions. It is accessible via the Welcome page. You can maintain one or more personalized dashboard tabs and, with the appropriate permissions, you can modify dashboards provided by Infor CRM or customized by your administrator.

You can format the data on the dashboard using widgets to gain insight into organizational and individual performance. The data can be visualized in a pie, bar or column chart, pipeline, or line graph, or you can view the detailed data in a list. A widget is a dynamic, reusable element of the interface that displays the data you specify. Widgets are available for the following:

- Open opportunities by sum of sales potential
- Recent lead creation history
- My active trend
- All open opportunities
- My completed activities by type
- Top opportunities
- Active campaigns
- Open defect distribution

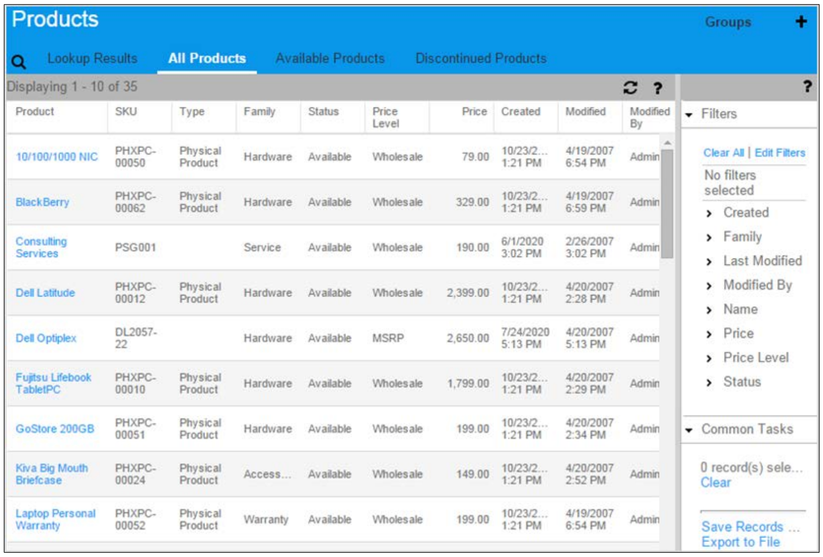
In addition to the dashboard, Infor CRM offers several opportunity reports.

What other options for business intelligence and analytics does Infor CRM offer?

Infor CRM has an add-on product called Infor CRM Advanced Analytics which provides a more advanced, robust analytics and data discovery tool using TIBCO Spotfire.

Managing products and packages

The **Products** list view shows all products available to add to an opportunity, campaign, or asset to an account or contact record.



Can I add products?

To add a new product to Infor CRM you must have access to the **Product** context menu, located by clicking the Sales Nav Bar, and right-clicking Products. Similarly, a new Package, which is a group of Products, can be created the same way from the Products context menu. These menus are typically limited to users who are responsible for products because of the person's extensive knowledge of descriptions, costs, SKU's, and pricing.

Can I import product data into Infor CRM?

No. Infor CRM doesn't provide an import method for inserting product data. Instead, each product or package is added one by one. If your administrator can access the database server, he or she may be able to import data directly from a SQL script. However, this method is not supported.

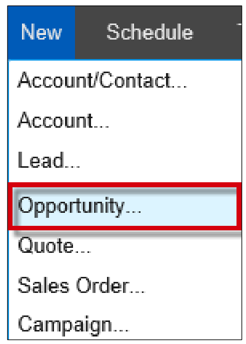
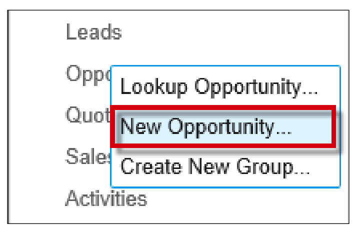
Can I attach more than one price to a product?

Yes. You can attach more than one price to a product such as a wholesale and a retail price. Other Infor CRM users who add the product to an opportunity can choose which price level to apply. You can also apply custom discount percentages to any product attached to an opportunity.

If your company supports multi-currency your administrator must enable this feature. When enabled, your administrator can set exchange rates for any currency. Products are listed with the default currency your administrator selects, however, you can change the currency when adding products to an opportunity.

How do I add an opportunity?

You can insert an opportunity into Infor CRM in a variety of ways:

Area	Action	Image
Toolbar	Click the **Include Opportunity (+)** button from the toolbar on the **Opportunities** tab of a record.	
Menu bar	Select **New > Opportunity**.	
Right-click menu	Right-click a Nav Bar to use view specific functions.	

Tip: Select defaults for new opportunities from the **Tools > Options > Opportunities** tab.

Exercise 5.1: Add a new opportunity

In this exercise, you will add an opportunity.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

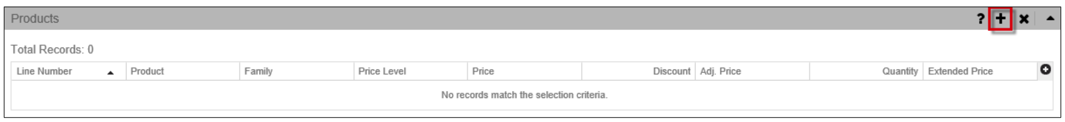
Click here to view a demo and/or practice this task

Exercise steps

1. Open the **Account** detail view for **Flow Matic**.
2. Select **New > Opportunity** from the menu bar.

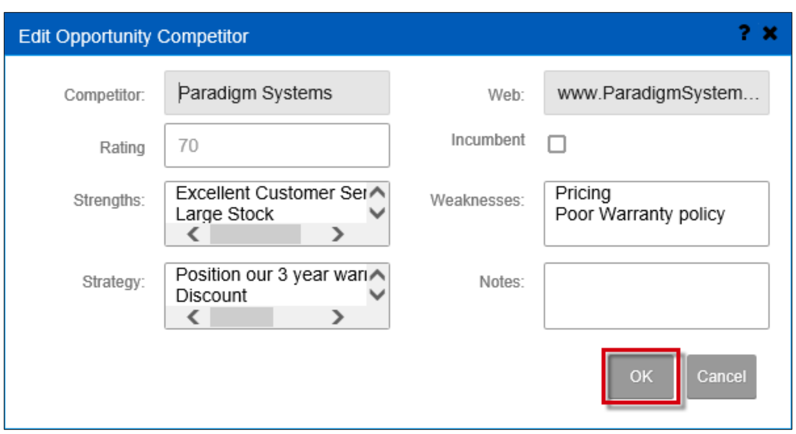
   By default, the description is listed as “Flow Matic-Phase-3.” To turn off the description, click **Tools**, click **Options**, and then click the **Opportunities** tab. Other defaults for this new opportunity include the **Estimated Close Date** and **Close Probability** which is set to 1%. The close probability is important because it’s multiplied against the potential dollar amount of the sale to calculate the weighted dollar amount.
3. Select **Add-On** from the **Type** drop-down list.

   Note: Although this value isn’t required its good practice to track as much information as you know when inserting a new record so you can use the data later for lookups, groups, and reports.
4. Click **Include Product** from the **Products** pane.



5. Select **MacBook Pro** from the list of available products and then click **Add Selected**.
6. Click **Close**.
7. Type *300* in the **Quantity** field and tab out of the field.
8. Type *5* in the **Discount** field and tab out of the field. The **Extended** and **Total** values update accordingly. The new total of $712,215.00 represents the sales potential for this opportunity.
9. Click **Add Competitor** from the **Competitors** pane. The **Lookup Competitor** window opens.
10. Click **Search**.
11. Select **Paradigm Systems**.
12. Click **OK**. The **Edit Opportunity Competitor** window opens.

    Tip: To add competitors to this list you must have access to the **Competitors** item within the **Administration Nav Bar**.
13. Click **OK** again in the **Edit Opportunity Competitor** window.

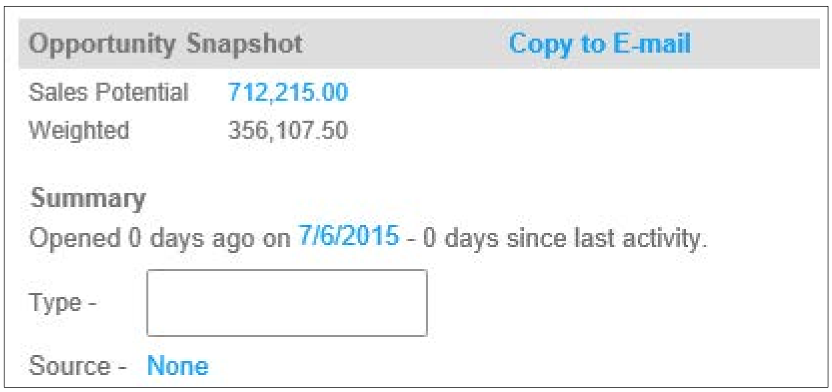


Note: Linda Alvarez is automatically added as a contact in the **Contacts** pane because she is listed as the primary contact for the account. Let's add Michael and identify him as the decision maker.

14. Click **Include Contact** in the **Contacts** pane. The **Lookup Contact** window opens.
15. Search for **Michael Willemin** by typing *Willemin* in the **Lookup by** field.
16. Select **Michael Willemin** and click **Add Selected** or double-click his name to add him to the list and return to the **Insert Opportunity** window.
17. Click **Save** to insert the opportunity.

    The **Opportunity Snapshot** lists the value and summary of the new opportunity. The weighted value is set to $7,122.15 which is the sales potential multiplied by the probability.

18. Adjust the **Probability** to **50%** and click **Save**. The **Opportunity Snapshot** lists the new weighted value as $356,107.50.



19. Click **Opportunity Summary** from the **More Tabs** tab.

    This tab tracks interactions related to the opportunity until close.

Updating opportunities

Sales teams frequently interact with customers by scheduling activities during a sale and tracking this information within Infor CRM.

What opportunity information is commonly updated during a sale?

Use the **Opportunity** detail view to:

- Add more products
- Add notes
- Add comments
- Change the probability

To make a change to a group of opportunities right-click the selection of opportunities and click **Update Opportunities**. The **Update Opportunities** window opens. You can make the following changes to one or more of your opportunities:

- Account manager
- Estimated close
- Comments
- Add to forecast
- Close probability

What if my company uses multi-currency?

If your administrator has granted you access you can adjust the rate per opportunity or sales order, lock in a rate as it applies to a specific opportunity, and set personal default currency.

When enabled, you have the following two additional line items in the **Opportunity Snapshot**:

- **Currency**: Click to choose the currency for the opportunity. If your administrator has allowed it, you can define the exchange rate if different from the default and decide whether to lock a currency rate for the duration of the opportunity or sales order.
- **My Currency**: This value applies to the default currency which can be set by clicking **Tools**, clicking **Options**, and then clicking the **General** tab**. Note:** This option is only visible if multi-currency is enabled.

What happens when I change the opportunity status?

An opportunity status indicates the present state of the opportunity which affects the data in your dashboard and reports. You can set the status to one of the following:

- **Open**: The opportunity is new. Sales potential is weighted against the close probability. Open opportunities attached to a stage in a sales process make up your opportunity pipeline.
- **Closed – Won**: The opportunity closed successfully. Sales potential is compared to actual amount. You have the option to convert products to serialized assets. If a customer purchases a package, then all products within the package are listed individually as assets under the customer’s **Account** detail view.
- **Closed – Lost**: The opportunity closed unsuccessfully. Sales potential is compared to actual amount ($0.00).
- **Inactive**: The opportunity is neither new nor closed.

How does Infor CRM use opportunity information to place an order?

An opportunity serves as a record of the sale and includes information such as who was involved and what factors contributed to the close of that sale. A sales order or quote stores information used by back-end accounting and purchase order systems to process quotes or invoices and shipment.

Infor CRM doesn't automatically create sales orders for you. If you choose to track sales orders within Infor CRM, the following options are available for getting the order to your back-end accounting systems:

- **Infor CRM integration tools:** If your company uses an Infor Enterprise Resource Planning (ERP) product such as Infor LN, Infor LX, Infor SyteLine, Distribution A+, or Distribution SX.e then your Infor business partner or Infor Consulting Services representative may configure an integration module called Infor CRM Back Office Extension (ICBOE) to automatically transfer order data between systems.
- **Manual processing:** If your company uses a non-Infor ERP product you can still use sales orders. However, orders are manually pulled from Infor CRM and delivered or inputted into the appropriate system. Use the **Sales Order Detail** report to export sales order data in a printable format or a format which can be imported into another system. For example, CSV, Tab Separated Values, or Excel.

What's the difference between a sales order and a quote?

Typically, a quote is used to provide a potential customer with an estimated purchase cost for budget considerations and/or approval. A sales order is a confirmed purchase that is yet to be fulfilled and shipped. A sales order tracks products purchased by your accounts, and includes information such as the date the sales order was made, the date the sales order was promised to the customer, and its status. Sales Orders or Quotes can be created from an existing Opportunity.

Exercise 5.2: Creating a quote, closing an opportunity, and creating a sales order

In this exercise, you will create a quote, close an opportunity, create a sales order, and assign serial numbers to assets.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

[Click here to view a demo and/or practice this task]

Exercise steps

Part 1: Create a quote

1. Open the **Opportunity** detail view for **Flow Matic-Phase 3**.
2. Click **Add Quote** within the **Opportunity Tasks** area. The **Quote** detail screen opens.

   Notice product, Ship To, and Bill To information has been copied automatically from the Opportunity details.

3. Select **<today's date>** in the **Start Date** field.
4. Select **<a date 60 days from today>** in the **Expiration Date** field.
5. Click **Save**.
6. Click **Detail Report** within the **Common Tasks** area.
7. Click the **Quote Detail** link when the report job completes. This opens the quote PDF.

   This PDF could be sent to your customer if requested.

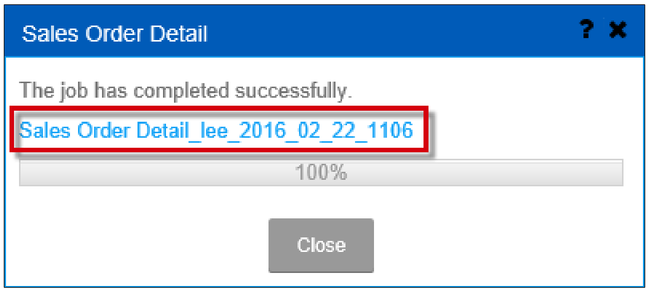
Part 2: Imagine the customer has accepted the quote and would like to complete the purchase. Next, it's time to close the opportunity

1. Open the **Opportunity** detail view for **Flow Matic-Phase 3**.
2. Select **Closed – Won** from the **Status** drop-down list. The **Opportunity Closed Won** window opens.
3. Type *Better Price* in the **Reason Won** field.
4. Click **Add Competitor**.
5. Search and select **Paradigm Systems**.
6. Click **OK**.
7. Click **OK** again. The **Close Probability** is set to **100 (percent)** in the **Opportunity** detail view. Also, the Opportunity Snapshot now shows the Actual Amount equal to the Sales Potential.

   In addition to updating the **Opportunity** detail view field, closing/winning the opportunity automatically converts all products to assets under the account record. Assets are tracked under the account's record to refer to for support, defects, or returns.
8. Open the **Account** detail view for **Flow Matic** by clicking **Flow Matic** from the detail view of your opportunity.
9. Click **Assets** from the **More Tabs** tab. Notice the entry for 300 MacBook Pros.

Part 3: Create a sales order

1. Click **Sales Orders** from the **More Tabs** tab.
2. Click **Insert Sales Order**. The **Insert Sales Order** window opens.
3. Click **Find** in the **Account Manager field**. The **Lookup User** window opens.
4. Select **Lee Hogan**.
5. Click **OK**.
6. Type *001-00-019530* in the **Purchase Order** field.
7. Click **Save**. The sales order is created and the detail view is displayed.
8. Click **Detail Report** under **Common Tasks**.
9. Click the link to open your report.



10. The sales order information displays in a printable format:

Part 4: Imagine the order has processed and you've received the serial numbers assigned to the order

1. Open the **Accounts** detail view for **Flow Matic**.
2. Click the **Assets** tab.
3. Click **Edit** next to the MacBook Pro product. The **MacBook Pro edit** window opens.
4. Click the **Assign Serial Numbers** link.
5. Type *MBP-* in the **Serial Number Prefix** field.
6. Type *000* in the **Serial Number Start** field.
7. Type *1* in the **Serial Number Increment** field.
8. Click **Assign**.

   You'll notice MacBook Pro no longer shows as a quantity of 300. Instead, there is a quantity of one for each with serial numbers incrementing with your prefix.

Tracking your sales pipeline

Use a sales process to keep track of your sales pipeline. From a detail level, a sales process shows the steps you should complete as you work towards making a sale. It prompts you to complete activities or change the close probability. For example, you might select a sales process called "Large Deals" for an opportunity with large potential revenue and which requires more structure than smaller deals. What opportunity information is commonly updated during a sale?

At a higher level, the stages in a process assigned to your opportunities give you a visual indicator for how your opportunities are progressing and can forecast how many deals should close each month to keep the pipeline steady.

How do I attach a sales process to an opportunity?

Before attaching a sales process to an opportunity your administrator must create one. The SALESLOGIX_EVAL database doesn't include sales processes to assign to a new opportunity but it does include hard-coded data applied to some existing opportunities. The stages in a sales process are unique to each business, although Infor CRM includes the following process steps and associated close probabilities:

- Prospect (1% close probability)
- Qualification (10% close probability)
- Needs analysis (25% close probability)
- Demonstration (50% close probability)
- Negotiation (75% close probability)
- Decision (100% close probability)

How does Infor CRM represent my sales pipeline?

Your sales pipeline can appear as a widget on a custom dashboard and in any other advanced analytic engine(s) your company uses with Infor CRM such as Infor CRM Visual Analyzer or Infor CRM Advanced Analytics.

Exercise 5.3: Visualizing the sales pipeline

In this exercise, you will update a sales process.

Out-of-the-box, Infor CRM doesn't include a graphical representation of the sales pipeline on the Sales dashboard, however Infor CRM does allow you to customize dashboards and create your own content. Let's add a widget to represent your sales pipeline so you can see how a sales process relates to the visualization.

Notes:

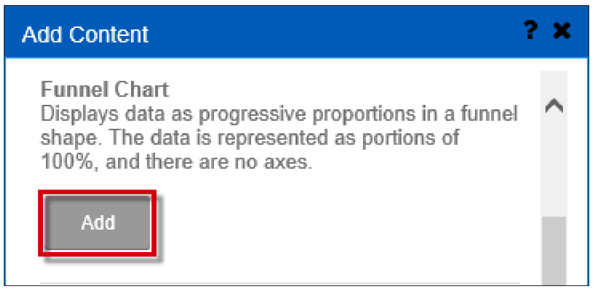
- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

Part 1: Visualize a sales pipeline

1. Select the **Sales** Nav Bar **> Welcome** group.
2. Right-click the **Sales dashboard** tab and select **New Tab**.
3. Type *Pipeline* in the **Title** field and then select the **One column** radio button.
4. Click **OK**.
5. Right-click the **Pipeline** tab and select **Add Content**. The **Add Content** window opens.
6. Click **Add** within the **Funnel Chart** area. The **Edit Widget Settings** window opens.



The options from which you can choose have been created in the SALESLOGIX_EVAL database. Contact your administrator to add an entity, dimension, or metric that doesn't exist in the drop-down list.

7. Type *My Sales Pipeline* in the **Title** field.
8. Select **Opportunity** from the **Entity** drop-down list.
9. Select **My Open Opportunities** from the **Group** drop-down list.
10. Select **Stage** from the **Dimension** drop-down list.
11. Select **Sum Sales Potential** from the **Metric** drop-down list.
12. Select the **Yes** radio button in the **Display Labels** field.
13. Click **OK**.

Tip: To understand dimension and metric values, think of a dimension as a bucket and a metric as sand. Inside a bucket you accumulate the related metrics. For example, create a bucket for each stage (1-Prospect, 2-Qualification, 3-Needs Analysis, 4-Demonstration, 5- Negotiation, and 6-Decision). Let's look at each opportunity where you are the Account Manager. Sort each opportunity to the appropriate bucket depending on their current stage. Within each bucket let's sum the sales potential and assign a total dollar amount to the dimension. This is reflected by the dimension's size in the funnel chart.

The **Pipeline Dashboard** contains a funnel widget representing the current sales pipeline. Hovering over a section of the funnel displays the sum of the sales potential of deals in that stage.

Part 2: Update a sales process to see how it affects your pipeline information

1. Open the **Opportunities** detail view for **Abbott Worldwide-Phase 1**.
2. Click the **Sales Process** tab.

Notice you’re currently in the “**2:Qualification**” stage. Within this stage, the last step you completed was setting an initial meeting from a phone call. Let’s imagine you’ve conducted the initial meeting and send a thank you email. Mark these steps as complete.

3. Select the **Initial Meeting - Qualification** and **Thank you email** check boxes.

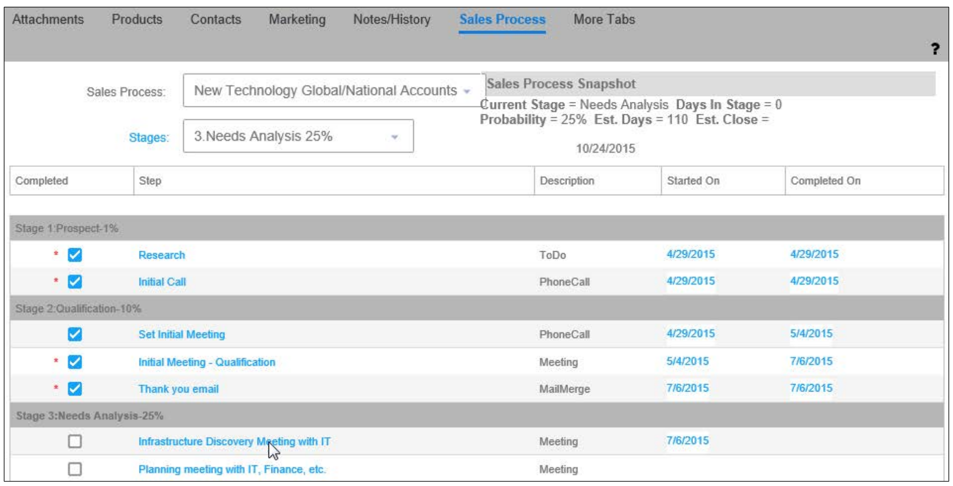
   Infor CRM automatically moves you to the next stage in the process, “**3:Needs Analysis**.” Completion dates are added to the previous steps and a start date is added to the first step in this new stage.

   Tip: In addition to completing all steps in a stage you can manually advance to the next stage by choosing it from the drop-down list at the top of the process. Depending on how the sales process is designed you may only advance one stage at a time. The **Sales Process Stage** analysis report indicates the number of times a stage is skipped or not completed.

4. Click **Save**.

5. Click the **Infrastructure Discovery Meeting with IT** step. The **Meeting – Hold infrastructure discovery meetings** window opens.

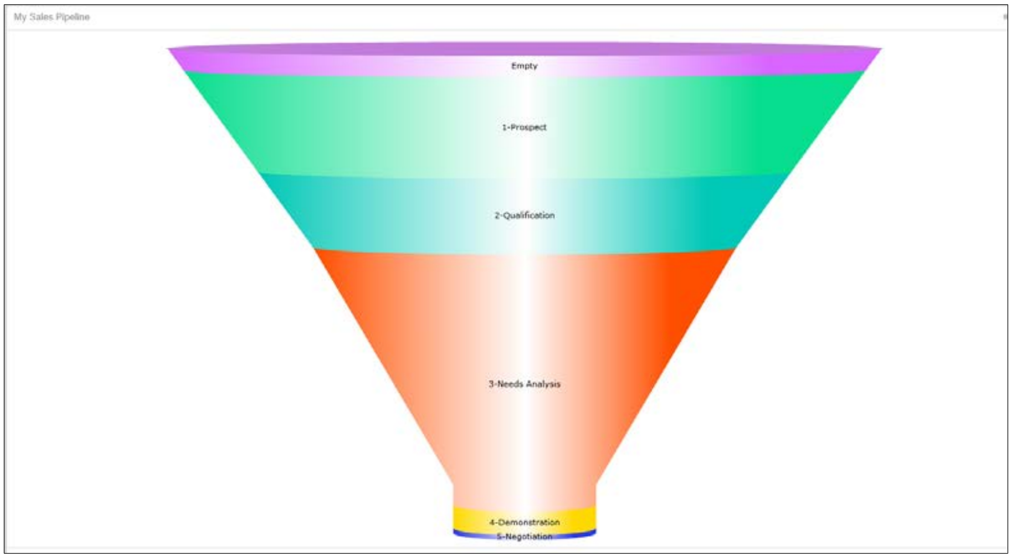
   This meeting request has values in the **Regarding, Notes,** and **Category** fields which set the parameters of the meeting. These values are set by an administrator.



6. Select **<tomorrow’s date>** in the **Start Time** field.

7. Click **OK**.

8. Return to the **Pipeline Dashboard** from the **Welcome** screen for a visual of your sales pipeline. You should see an additional opportunity in the “**3-Needs Analysis**” stage.


My Sales Pipeline
Empty
1-Prospect
2-Qualification
3-Needs Analysis
4-Demonstration
5-Negotiation

Monitoring sales performance

Monitor sales performance with **Opportunity Statistics**, **Reports**, and the **Sales Dashboard**.

How do I set my sales quota and fiscal calendar?

In the Infor CRM Windows Client click **Tools**, click **Manage**, and then click **Quota** to view or update a sales representative's expected sales quotas for each quarter. If you don't have access to this menu, your administrator must enter this data for you.

What are Opportunity Statistics?

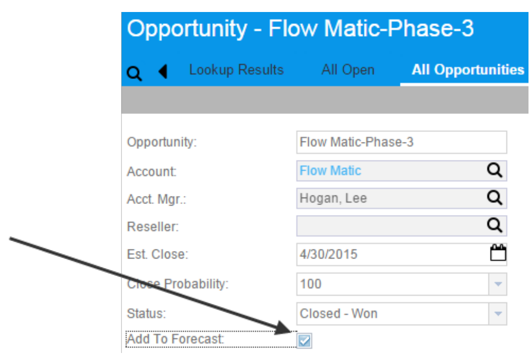
Opportunity Statistics are tools used to view snap-shots of sales data for selected records in an opportunity group. This enables you to perform ad-hoc analysis on your performance. Statistics are available for the following:

- Number of opportunities
- Sales potential total (average)
- Weighted potential total (average)
- Average close probability
- Actual amount total (average)
- Average number of days open
- Range of estimated close (min-max)

Additional information can be collected and reviewed by creating opportunity reports from the **Reports** view. Reports can be modified to output the data relevant to your needs. The following opportunity reports are available:

- Sales Process Stage Analysis
- Sales Process Step Usage
- Quota vs. Actual Sales
- Forecast by Account Manager
- Competitive Analysis

* The Forecast by Account Manager report shows opportunities that have the **Add to Forecast** check box selected.



What information can I find on the Sales Dashboard?

The **Sales Dashboard** shows a glimpse into your activity trends and business performance. The dashboard is made up of widgets which provide options to change the information you viewed within the graphs and grids. You can also add widgets to customize an existing or create your own dashboard.

The following default widgets are available in the **Sales Dashboard**:

- **Open Opportunities:** A bar chart showing sales potential by sum of sales potential for open opportunities.
- **Recent Lead Creation History:** A line chart showing leads created by month.
- **My Activity Trend:** A bar chart showing completed activity records to date.
- **My Pipeline:** A group list showing all opportunities for the currently logged on user.
- **My Completed Activities by Type:** A pie chart showing your completed activities by type.
- **My Top Opportunities:** A group list showing all open opportunity opportunities for the currently logged on user.
- **Active Campaigns:** A group list showing the top ten active campaigns by contact.

Exercise 5.4: Viewing opportunity statistics and running an opportunity report

In this exercise, you will run an opportunity report.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

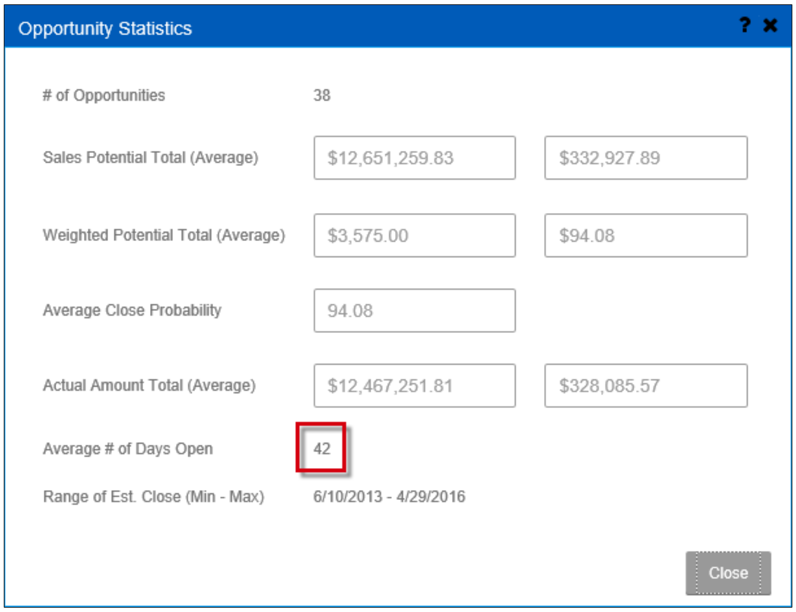
Click here to view a demo and/or practice this task

Exercise steps

1. Select the **Sales** Nav Bar **> Opportunities** group.
2. Click the **My Closed Opportunities** group.

   This group shows you opportunities either "Closed – Won" or "Closed – Lost."
3. Click **Opportunity Statistics** from the **Opportunity Tasks** pane in the lower right.
4. Click **Yes** in the **Infor CRM confirmation** window. The **Opportunity Statistics** window opens.

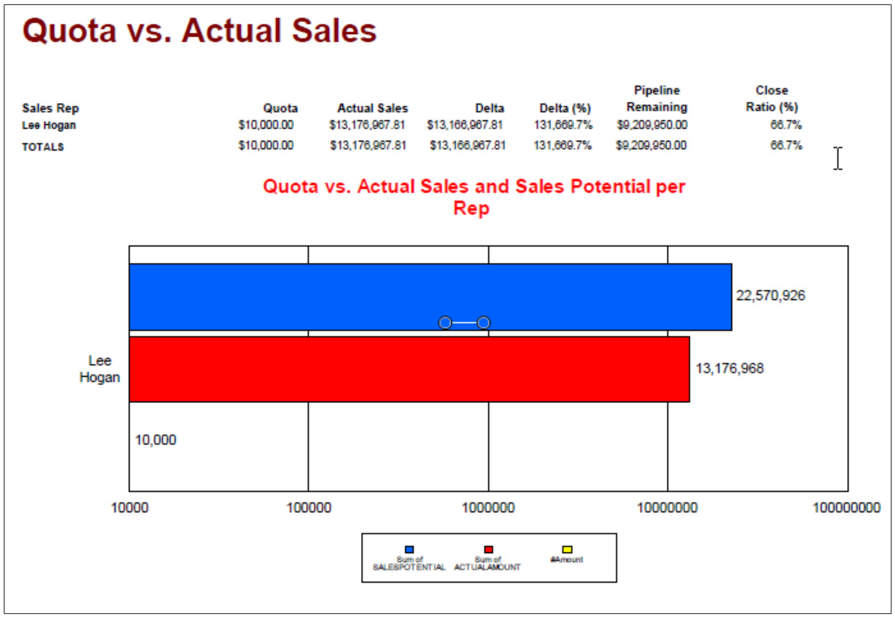
   This window shows aggregate data for all opportunities in this group. The average number of days each opportunity spent open was 42.

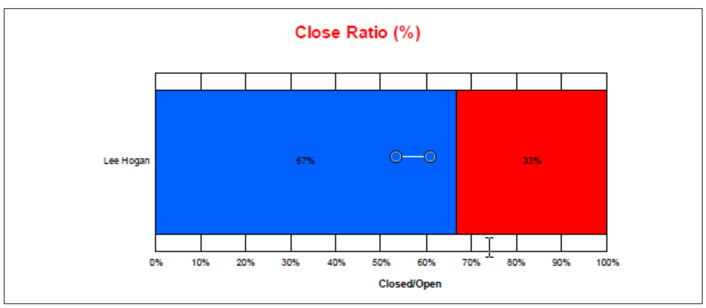


5. Click **Close**.
6. Click **Sales Nav Bar > Reports**.
7. Right-click the **Quota Vs Actual Sales** report and select **Run Report**. The **Select Records [Quota Vs Actual Sales]** report opens.

   This report shows data from all opportunity records.
8. Verify **[All Records]** is selected in the **Show records that match** field.
9. Click **Next**.

   Note: Use **[All Records]** with caution! Using this selection may bring back a very large selection of data. Be careful to use a smaller selection of data in a live environment.
10. Verify **PDF** is selected in the **Format** field.
11. Click **Finish**.
12. Click the link to open your report.





13. Close the report.

Exercise 5.5: Viewing sales performances and sales potential

In this exercise, you will view sales performance for YTD and view sales potential for the next 90 days.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

[Click here to view a demo and/or practice this task]

Exercise steps

Part 1: View sales performance for YTD

Create an **Opportunity** group titled **Closed Won YTD** which has the following conditions:

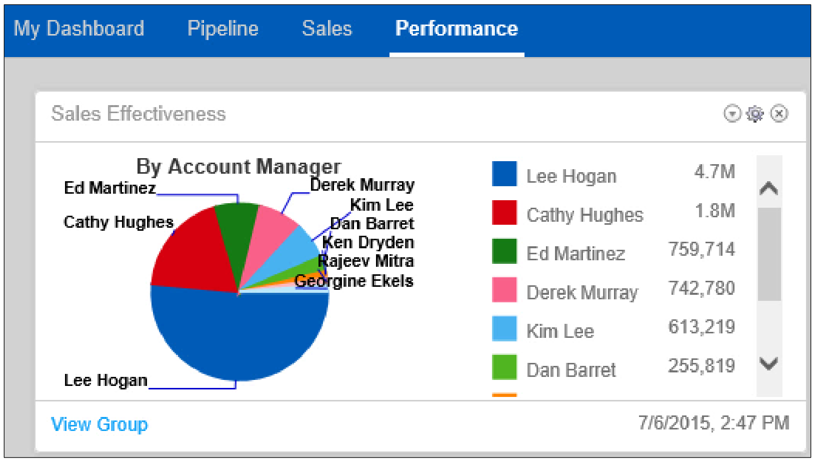
- OPPORTUNITY.STATUS (=) equal to Closed – Won

AND

- OPPORTUNITY.ACTUALCLOSE (>=) greater than or equal to January 1 of the current year. Let's assume this date is the start of your fiscal year for YTD).

1. Select the **Sales** Nav Bar **> Opportunities** group.
2. Click **Add Group** to add a group.
3. Type *Closed Won YTD* in the **Name** field.
4. Click the **Conditions** tab.
5. Select **Opportunity** from the **Query Builder** and double-click **Status** from the **Column** menu. The **Assign Condition** window opens.
6. Click **Browse** in the **Value is** field and select **Closed – Won**.
7. Click **OK**.
8. Select **Opportunity** from the **Query Builder** and double-click **Actual Close** from the **Column** menu. The **Assign Condition** window opens again.
9. Select **(>=) greater than or equal** to from the **Operator** drop-down list.
10. Click the **Calendar** in the **Value is** field and select **January 1, 2016**.
11. Click **OK**.
12. Click **OK** again to save the group.
13. Select the **Sales** Nav Bar **> Welcome** group.
14. Right-click the **Sales** tab and select **New Tab**.
15. Type *Performance* in the **Title** field.
16. Select the **Two columns split** radio button.
17. Click **OK**.
18. Right-click the **Performance** tab and select **Add Content**. The **Add Content** window opens.
19. Click **Add** under **Pie Chart**. The **Edit Widget Settings** window opens.
20. Type *Sales Effectiveness* in the **Title** field.
21. Type *By Account Manager* in the **Caption** field.
22. Select **Opportunity** from the **Entity** drop-down list.
23. Select **Closed Won YTD** from the **Group** drop-down list.
24. Select **Account Manager** from the **Dimension** drop-down list.
25. Select **Total Actual Amount** from the **Metric** drop-down list.
26. Select the **Yes** radio button to **Display a Legend**.
27. Select the **Yes** radio button to **Display Labels**.
28. Click **OK**.

   Lee Hogan is listed as the top sales person for the year.



Part 2: Create an Opportunity group titled Closing Soon that has the following conditions:

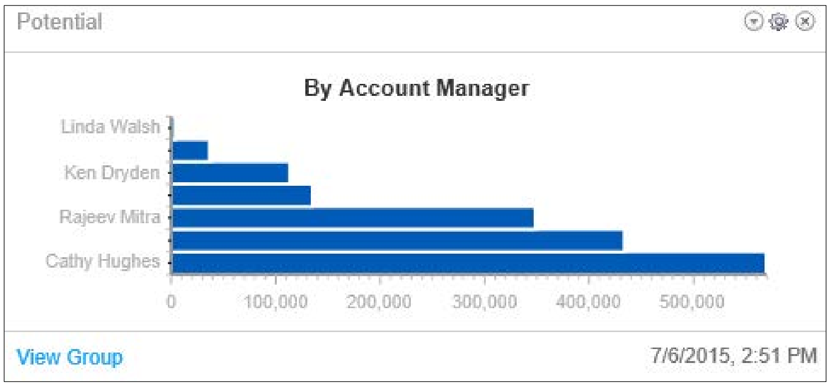
- OPPORTUNITY.STATUS (=) equal to Open

  AND

- OPPORTUNITY.ESTIMATEDCLOSE within next 30 days.

1. Select the **Sales** Nav Bar **> Opportunities** group.
2. Click **Add Group**.
3. Type *Closing Soon* in the **Name** field.
4. Click the **Conditions** tab.
5. Click **Opportunity** from the **Query Builder** and double-click **Status** from the **Column** menu. The **Assign Condition** window opens.
6. Click **Browse** in the **Value is** field and then select **Open**.
7. Click OK**.**
8. Select **And** from the **And/or** drop-down list.
9. Click the **Conditions** tab.
10. Click **Opportunity** from the **Query Builder** and double-click **Estimated Close** from the **Column** menu. The **Assign Condition** window opens.
11. Select **within next xxx days** from the **Operator** drop-down list.
12. Type *90* in the **Value is** field.
13. Click **OK**.
14. Click **OK** again to save the group.
15. Click the **Sales Nav Bar > Welcome**.
16. Right-click the **Performance** tab and then click **Add Content**. The **Add content** window opens.
17. Click **Add** under **Bar Chart**. The **Edit Widget Settings** window opens.
18. Type *Potential* in the **Title** field.
19. Type *By Account Manager* in the **Caption** field.

20. Select **Opportunity** from the **Entity** drop-down list.
21. Select **Closing Soon** from the **Group** drop-down list.
22. Select **Account Manager** from the **Dimension** drop-down list.
23. Select **Sum Sales Potential** from the **Metric** drop-down list.
24. Select the **Yes** radio button to **Display Labels**.
25. Click **OK**.
26. Drag-and-drop the new **Sales Potential** bar chart below the **Sales Effectiveness** pie chart. The data shows all Infor CRM users listed as the Account Manager on an open opportunity scheduled to close in the next 90 days for an account to which you have access.



Note: If data does not display, return to the Opportunity list and update several open opportunities with a close date within the next 90 days.

Part 2: Take a closer look at opportunities that the top performing user has in his/her pipeline by creating another widget

Depending on when your training image was created, the dates in the SALESLOGIX_EVAL database may show another user with the most sales potential for the next 90 days.

1. Right-click the **Performance** tab and select **Add Content**. The **Add Content** window **opens.**
2. Type *Sales Potential* in the **Title** field.
3. Select **Opportunity** from the **Entity** drop-down list.
4. Select **Closing Soon** from the **Group** drop-down list.
5. Click **OK**.
6. Drag-and-drop the **Sales Potential** group list to the right of the **Sales Effectiveness** and **Potential** widgets.

Lesson review

How would you describe products/packages, opportunities, and dashboards/reports?

Infor CRM includes several features to help track sales. Products refer to the goods and/or services your company sells. They help determine sales potential when added to an opportunity. Infor CRM uses opportunities to track data before, during, and after a sale. You can generate a quote or sales order from an opportunity or use opportunities to populate your sales pipeline if using sales processes. Out-of-the-box, Infor CRM provides a **Sales Dashboard** which monitors individual performance, discovers patterns, and makes strategic sales decisions. You can create your own dashboards and charts.

How would you summarize sales potential and weighted values as they relate to close probability?

The close probability times the sales potential equals the weighted amount. Close probability may change during the opportunity to reflect the most accurate amount. When using a sales process the close probability automatically updates based on the process stage.

How do I convert products to assets when I win an opportunity?

When you change the status of an opportunity to Closed – Won you have the option to convert products to serialized assets. Assets are tracked under the account's record should you need to identify them later for support, defects, or returns.

Merge fields automatically pull information from the selected contact record at runtime.

What options are there for generating a sales order from Infor CRM?

A sales order stores information used by the back-end accounting and purchase order systems to process invoices and shipments. Infor CRM doesn't automatically create sales orders. If you choose to track sales orders within Infor CRM, you can push the order to your back-end accounting system automatically by using the Infor CRM Back Office Extension or manually by using a report export.

What are the benefits of using a sales process as it relates to my pipeline?

Sales processes enable you to systematically implement best practice as a sales professional and track your sales pipeline. Specifically, a sales process provides steps to complete as you work to make a sale and prompts you to complete activities or change the close probability. At a more general level, this data forms the basis of sales reports and dashboards so you can evaluate opportunity progress, forecast how many deals will close each month, track performance, and ensure the sales pipeline is maintained.

How do I identify available opportunity statistics/reports and use the dashboard to monitor sales performance?

Opportunity statistics is a tool used for viewing snapshots of sales data for an opportunity group such as average sales potential, average weighted potential and average close probability. Although you can run additional opportunity reports from the **Nav Bar**, running an opportunity report from the **Opportunity Statistics** window shows data for the current opportunity group.

The **Sales Dashboard** shows a glimpse into your upcoming schedule and business performance. The dashboard is made up of widgets which provides options to change the information viewed within the charts and grids.

Check your understanding

Which of the following entities enables you to track sales deals, including the related contacts, accounts, and products?

a. Accounts
b. Campaigns
c. Opportunities
d. Dashboard

How does the close probability impact opportunity reporting?

____

____

____

____

When do you have the option to convert products that are associated with an opportunity to serialized assets?

a. When the opportunity is set to “Open”
b. When the opportunity is saved
c. When the opportunity is set to “Closed – Won”
d. When a sales order is created

You can create quotes and sales orders from an existing opportunity.

a. True
b. False

Which of the following are true when you use a sales process to track an opportunity (choose two)?

a. Sales processes provide a structured approach to tracking the progress of a sale
b. Sales processes cannot be customized
c. Sales processes can prompt you to complete activities related to the progress of a sale
d. Sales processes can automatically convert products to serialized assets

Which of the following can be customized to show visual representations of sales performance?

a. Sales Dashboard
b. Opportunity statistics window
c. Opportunity Summary – Sample report
d. Opportunities tab on a contact detail report

Lesson 6: Providing support

Estimated time

4 hours

Learning objectives

In this lesson, you will:

- Explain the difference between contracts, tickets, returns, and defects.
- Describe how different contract types are used to calculate the remaining value on a contract.
- Identify an authorized service contact and a covered asset.
- Describe the notification options for ticket assignment.
- Explain a SpeedSearch index and how to add items to an index.
- Track assets during a return.
- Explain the difference between a defect and a ticket.

Topics

- How does Infor CRM help me support customers?
- Managing contracts
- Managing tickets
- Managing returns
- Managing defects
- Lesson review
- Check your understanding

How does Infor CRM help me support customers?

Infor CRM includes several features to support customers such as contracts, tickets, returns, and defects.

Contracts

Contracts are service agreements or warranties providing customers an allotted amount of support. Service contracts define what specific support a customer receives, e.g., 80 support hours for 1600 dollars.

Tickets

Tickets are records of customer inquiries or complaints. Tickets allow customer service and support users to report, investigate, and close an inquiry or problem. If available, a ticket can be associated to a contract indicating who is billed and whether the contacts for the account are authorized to request service.

Returns

Returns are agreements to accept returned products from a customer for service, replacement, refund, or credit. Returns must accompany a ticket.

Defects

A defect is a record describing a problem with a product or process, or describes a feature request for a product or process. It is similar to a ticket although it’s typically routed to the people involved in the design or construction of the product, and they often resolve defects.

Managing contracts

What does a contract type indicate?

A contract type indicates units used for billing. You cannot change the contract type once the contract is saved. There are five default contract types from which to choose:

- **Days:** The contract is tracked according to the number of days of service the account has purchased. Only the **Days** contract allows you to select the **Begin with first ticket** check box.
- **Hours:** The contract is tracked according to the number of hours of service the account has purchased. The total time spent working on a ticket counts toward the remaining value left on the contract.
- **Incidents:** The contract is tracked according to the number of service calls the account has purchased. The total number of tickets counts toward the remaining value left on the contract.
- **Value:** The contract is tracked according to a dollar amount. The total cost of each ticket activity counts toward the remaining value left on the contract.
- **Perpetual:** The contract has no limit. The account can open an unlimited number of tickets and activities for an unlimited amount of time.

What assets are covered under a contract?

Your company determines which assets to include in a contract. By default, Infor CRM doesn’t associate assets to a new contract. To specify which assets are covered you must associate them to the contract once the contract is saved.

Once an asset is associated to a contract, Infor CRM doesn’t automatically associate the asset to new tickets assigned to the contract. To specify an asset involved in a ticket you must associate the asset to the ticket once the ticket is saved.

What happens when I activate a contract?

An active contract signifies to other Infor CRM users how they can begin associating tickets with the contract. Infor CRM users can also attach tickets to inactive or expired contracts. To view a list of expired contracts, run the **Support Expired Contracts** report.

How does a customer become an authorized service contact?

It is good practice to open each contact’s detail view when a contact is created on the account and determine which of those contacts are authorized to call in for support. This indicator helps other users check for authorized contacts by reviewing the account service information at the time of ticket creation.

Who can see contract data?

All contracts must be assigned to an account. Only Infor CRM users with access to the corresponding account record can see the contract.

Exercise 6.1: Creating a contract and associating assets

In this exercise, you will create a contract and associate covered assets to a contract.

Notes:

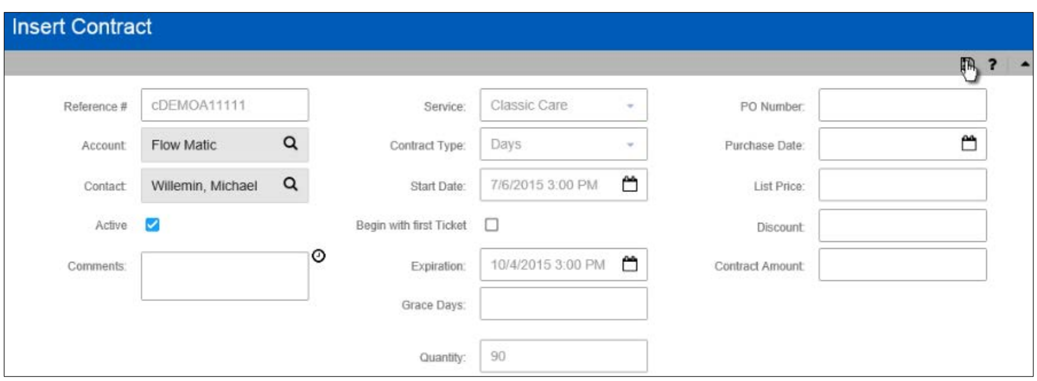
- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

[Click here to view a demo and/or practice this task]()

Exercise steps

1. Open the **Account** detail view for **Flow Matic**.
2. Select **New > Contract** from the menu bar. The **Insert Contract** window opens.
3. Type *cDEMOA11111* in the **Reference #** field.
4. Search and select **Willemin, Michael** in the **Contact** field.
5. Select the **Active** check box.
6. Select **Classic Care** from the **Service** drop-down list.
7. Select **Days** from the **Contract Type** drop-down list.
8. Type *90* in the **Quantity** field. The **Expiration** field dynamically updates.
9. Add any additional information you want to track and click **Save**.

   Note: Only some changes can be made after the contract is saved.



10. Select the **Service** Nav Bar **> Contracts** group.
11. Click **cDEMOA11111 for Flow Matic**.
12. Click the **Covered Assets** tab and then click **Associate Asset (+)**. The **Lookup Assets** window opens.
13. Select one of the MacBook Pro products and click **Add Selected**.

    The asset is now included under the contract.


Attachments
Comments
Covered Assets
Tickets
More Tabs
Product Name
SKU
Serial Number
Quantity
Contact
MacBook Pro
AP-357081
MBP-0
1

Managing tickets

Tickets track customer issues by monitoring the following:

- Time spent working on the issue
- Ticket progress

Tickets help to search for a resolution and can be assigned to other Infor CRM users depending on the issue.

Who can see ticket data?

All tickets must be assigned to an account. Only Infor CRM users with access to the corresponding account record can see the ticket.

How does Infor CRM track my time?

When creating a ticket, there is an option to **Punch In** which begins a timer. The timer runs until the ticket is saved or you **Punch Out**. Infor CRM can automatically punch in to a new ticket if you change your preferences in the **Customer Service Options** window. To view this window, open the Windows client, click **Tools**, click **Manage**, and then click **Customer Service Options.**

After the initial ticket creation, you and other Infor CRM users can continue to punch in/punch out to create more ticket activities. Edit the start or end time of any ticket activity to adjust the punch in or punch out time.

Additionally, you can create ticket activities based on other services which allow you to add records of time spent working on a ticket apart from punch in/punch out. For example, you can specify any labor charges, parts, or time for onsite consulting. If a ticket is assigned to a contract based on hours or value, then the cost of the ticket activity counts toward the remaining hours or value left on the contract.

How do I monitor ticket progress from other users?

Entering quality notes into the **Subject, Description,** and **Resolution** fields is beneficial when multiple Infor CRM users are involved with a ticket. Add a timestamp to differentiate your notes from other users' notes by pressing **SHIFT+F9**. This key combination adds your name and date or a timestamp depending on your preferences in the **Customer Service Options** window. To view this window, open the Windows client, click **Tools**, click **Manage**, and then click **Customer Service Options**.

Additionally, use the **Journal** tab to view a ticket's audit trail. The audit trail is a read-only view of any ticket activity and database changes made to the ticket.

How are other Infor CRM users notified when I assign them to tickets?

Each ticket includes an **Assigned To** field allowing you to select another Infor CRM user to manage the ticket. All Infor CRM users are available from the list; however, if you choose a user who hasn't been configured by your administrator to be available for calls, Infor CRM prompts you to choose another.

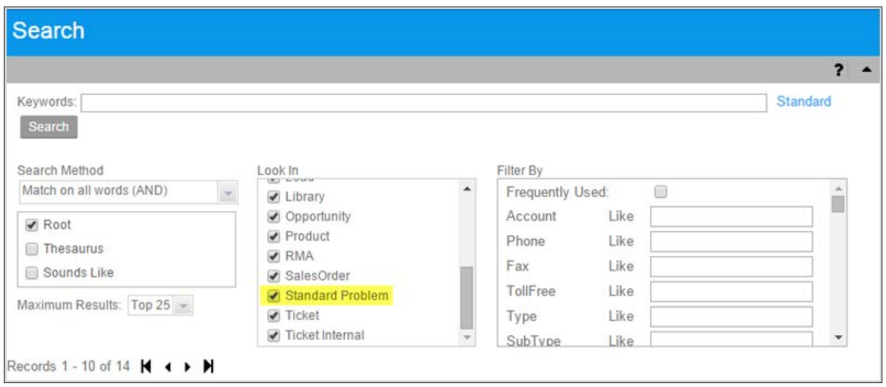
Tickets may also be automatically assigned based on settings configured by the Infor CRM administrator. When the administrator has configured auto-assignment, and associated specific users with support areas/issues/categories, then the **Assigned To** field is auto-populated with the name of the associated Infor CRM user.

Whether users are manually or automatically assigned to a ticket, you may manually notify a user of a ticket you've assigned to him or her by sending an email from within the **Insert Ticket** window or **Ticket** detail view. Additionally, users can find tickets assigned to them from the **My Tickets** tab in the **Ticket** detail view.

How do I find a ticket resolution?

Before you start working on tickets, it is recommended that your organization build a knowledgebase of commonly known issues/solutions within Infor CRM by clicking the **Service Nav Bar** and then clicking **Standard Problems** or **Standard Resolutions**.

Infor CRM users can search within indexes when conducting an advanced search using SpeedSearch which is a tool that finds information stored in the Infor CRM database using indexes or external files. For example, search through existing tickets or procedures to help solve a customer's issue or search for a specific document such as a sales presentation.

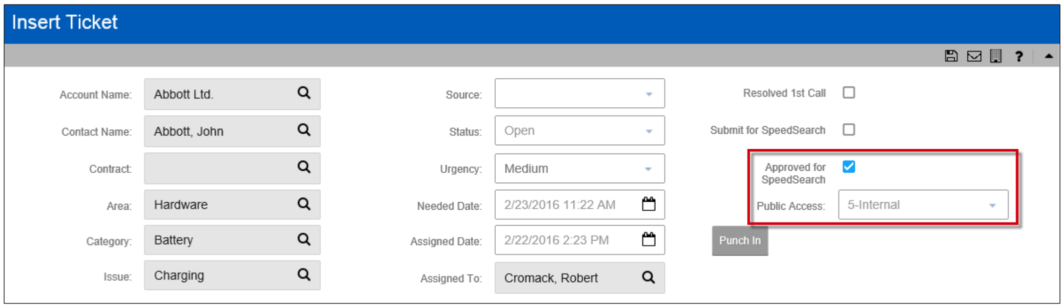


Which tickets are searchable within SpeedSearch?

By default, any Infor CRM user can select the **Submit for SpeedSearch** check box on the **Insert New Ticket** window or **Ticket** detail view. If selected, the ticket details are automatically added to the **Ticket Internal** index within SpeedSearch.

Ticket details may not be immediately searchable until the next schedule runs for building the index. If your administrator changes the **Default Public Access** to 1-Customer instead of 5-Internal, any new tickets submitted for SpeedSearch are added to both the **Ticket Internal** and **Ticket** indexes. The **Ticket Internal** index is searchable by your customers if your organization has configured the Infor CRM Customer Web Portal which allows customers to sign in to a limited version of Infor CRM and submit/edit/search their own company's tickets.

Administrators can turn on/off SpeedSearch Approval from the **Administration > Office Profiles >Service/Support** tab. By enabling the **Approval Process** option, Administrators may then grant Infor CRM Users permissions to approve SpeedSearch submissions (**Administration > Users > Service/Support** tab). Although all users can submit tickets for SpeedSearch, only those that have been granted permission to approve submissions will see an **Approved for SpeedSearch** check box and a Public Access drop-down list within the **Ticket** detail view.



To keep track of unapproved submissions, create a group in the Query Builder showing all tickets marked for submission but not yet approved.

How do I monitor customer service and support performance?

Infor CRM offers a variety of ticket reports to analyze billable time, compare call turn around, view escalated or unresolved tickets, compare problem types, view top performers of closed tickets, and more. Here is the complete list of available ticket reports:

- Support Billable Time
- Support Call Turn Around
- Support Escalated Tickets
- Support Follow-up
- Support Follow-up Statistics by Assigned
- Support Follow-up Statistics by Received
- Support Problem Analysis
- Support Problem Analysis by Area
- Support Ticket
- Support Ticket Knowledge Base Summary
- Support Ticket Status by Assigned
- Support Tickets Closed by Assigned
- Support Tickets Closed by Received
- Support Unresolved Tickets
- Support Weekly Recap
- Support Work Order

Exercise 6.2: Creating a ticket

In this exercise, you will create a ticket and assign another user.

Notes:

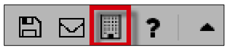
- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

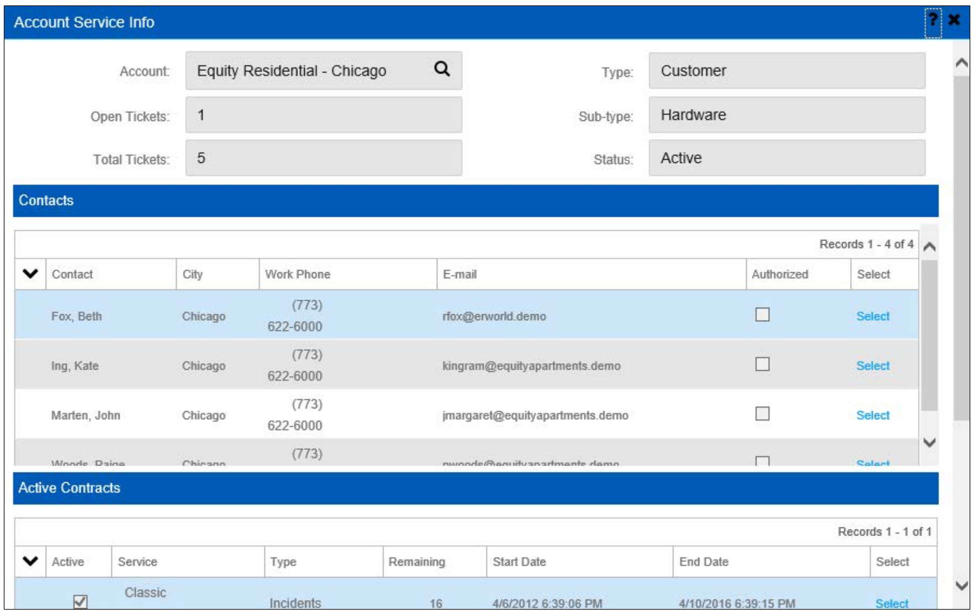
Click here to view a demo and/or practice this task

Exercise steps

1. Open the **Account** detail view for **Equity Residential – Chicago**.
2. Select **New > Ticket** from the menu bar. The **Insert Ticket** window opens.
3. Click **Account Service Information**. The **Account Service Info** window opens.

   The contract under the account covers basic calls but counts incidents instead of hours. You are not tracking your time for this ticket.

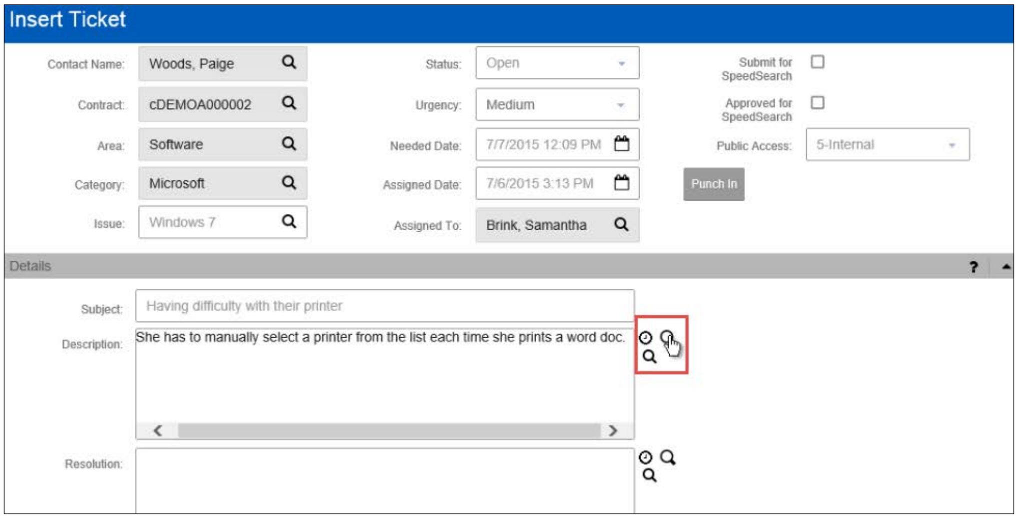




4. Click **Cancel** to return to the **Insert Ticket** window.
5. Search and select **Software** in the **Area** field.
6. Search and select **Microsoft** in the **Category** field.
7. Search and select **OfficePro** in the **Issue** field.
8. Select **Email** from the **Source** drop-down list.
9. Search and select **Brink, Samantha** in the **Assigned To** field.

   In the SALESLOGIX_EVAL database, Samantha Brink is authorized to accept calls. If your administrator enables auto-assignment the user assigned to the “Software” area is automatically assigned to this ticket.

10. Type Having difficulty setting default printer in the **Subject** field.
11. Type She must manually select a printer from the list each time she prints a Word doc in the **Description** field.
12. Click **SpeedSearch**. The **SpeedSearch** window opens.

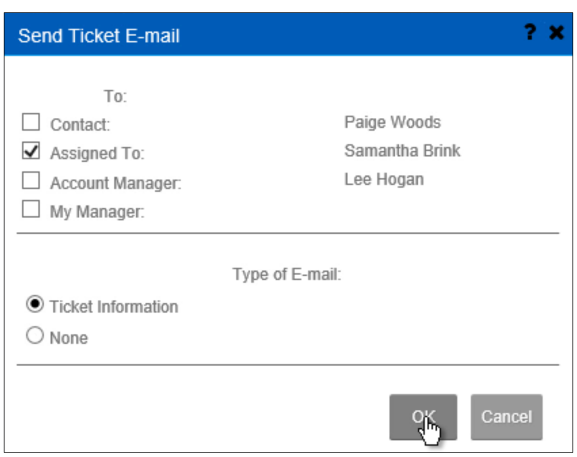


13. Type *printer* in the **Keywords** field and then click **Search**. The **SpeedSearch** results window opens.

    SpeedSearch lists several matching results. At a glimpse the results come from an Account or Contact record indicating these results aren't useful for resolving this ticket issue.

14. Click **Close** to return to the **Insert Ticket** window.
15. Click **Email Details** from the **Insert Ticket** toolbar. The **Send Ticket Email** window opens.
16. Clear the **Contact** check box.
17. Select the **Assigned To** check box.
18. Click **OK**.

    A new email message opens addressed to Samantha Brink at Phoenix Computers. The ticket information is included.



19. Click **Send** or **Send to CRM**.

If your email history preferences are set to **Prompt** you can optionally create a history record to attach to the ticket contacts record.

20. Click **Save** to add the ticket.

Exercise 6.3: Editing a ticket

In this exercise, you will edit a ticket.

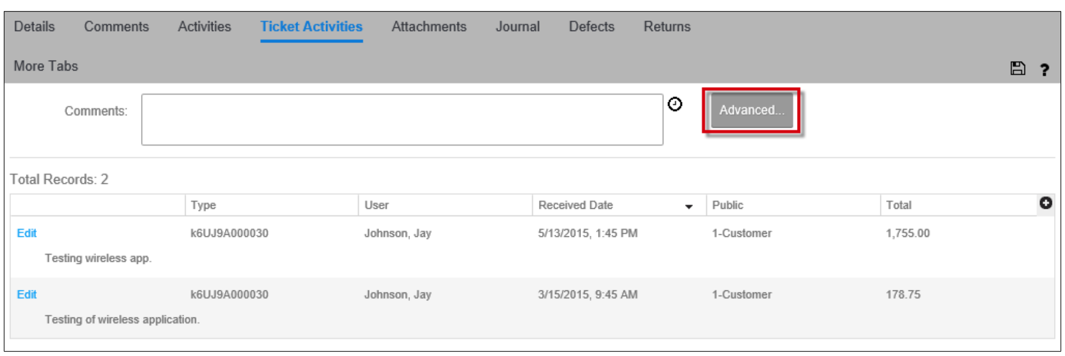
Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Select the **Service** Nav Bar **> Tickets** group.
2. Select **000-00-000015** for **Sunny Wireless**.
3. Click the **Details** tab.
4. Click inside the **Description** field and select **Date/Timestamp**. Infor CRM automatically adds a timestamp for Lee.
5. Type *Returned from on-site consulting (very successful)* under your name and click **Save**.
6. Click the **Ticket Activities** tab.
7. Click **Advanced**. The **Insert Ticket Activity** screen opens.



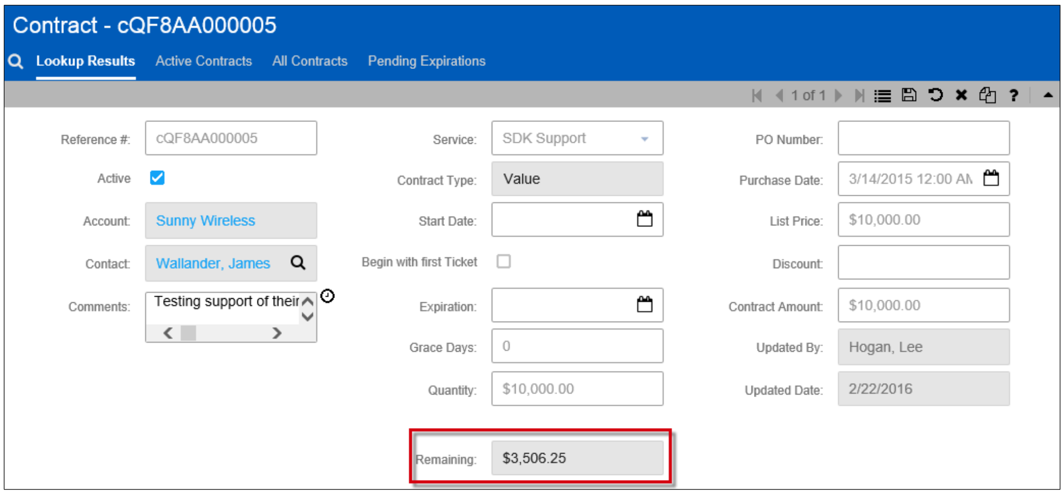
8. Type **On-Site** in the **Type** field.
9. Select yesterday's date in the **Start Date** field.
10. Click **OK** to accept the date and close the calendar.
11. Select today's date in the **End Date** field.
12. Click **OK** to accept the date and close the calendar.
13. Search and select **On Site Consulting rate/hr** from the **Charge Type** field.

    Your rate of $190 per hour is multiplied by the number of hours to calculate the **Total Fee** of about $4,560.00.

Tip: Administrators may manage activity types and rates from the **Tickets > Ticket Activity Rates** page in the Web client.

14. Click **Save**.
15. Click the **Contract** link from the **Tickets** detail view.

    The remaining value decreases from about $8,000.00 to approximately $3,500.00. Remaining equals quantity minus sum.



Managing returns

Infor CRM refers to some returns as RMAs (Return Material Authorizations). If your company accepts returns, use Infor CRM to document and track the process.

Who can see return data?

All returns must be assigned to a ticket determining which account the return is assigned to. Only users who have access to the corresponding account record can see the return.

Why is a ticket required for a return?

Creating a ticket determines if the issue is a misunderstanding, inappropriate use of the product, or a defect. The ticket record shows information about the issue and the steps taken to resolve it. The return record shows details about the return and shipment tracking.

How do I track assets during a return?

If the return issue requires specialized skills to resolve the problem and the product is small enough you can request that the customer send the item back for repair. Infor CRM tracks when you receive the asset.

If you send the customer a part or replacement product you can monitor when the customer receives the asset and assign a new serial number. New assets are automatically added to the account's record. If the original asset was covered under an existing contract you must manually associate the new asset to the contract when it applies.

Use the Support Return Material Authorization RMA Report to generate a packing slip for the RMA.

Exercise 6.4: Creating and monitoring a return

In this exercise, you will create a return and associate assets for the return and shipment.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

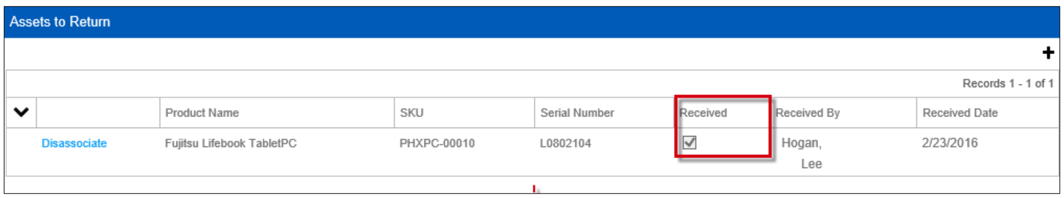
Click here to view a demo and/or practice this task

Exercise steps

1. Open the **Account** detail view for **Flow Matic**.
2. Click the **Tickets** tab and then click **Ticket ID 000-00-000028**.
3. Click the **Returns** tab and then click **Insert New Return**. The **Insert Return** window opens.
4. Click **Save**. The **Insert Return – 001-00-000017** window opens.

5. Click the **Details** tab.
6. Click **Associate Asset** in the **Assets to Return** pane. The **Lookup Account Product** window opens.
7. Click **Search**.
8. Click the **L0802104 Fujitsu Lifebook TabletPC** asset.
9. Click OK**.**
10. Click **Save**.

    The **Received** check box is automatically selected for the receiving representative whom marks this asset for return once the item is received from the customer.

11. Click the **Ship to Details** tab.
12. Select **FedEx (Priority)** from the **Ship Via** drop-down list.
13. Click **Add Return Shipped Product** in the **Assets To Ship** pane. The **Add Return Shipped Product** window opens.
14. Click **Search** in the **Received Product** field under the **Received Product** pane. The **Lookup Return Received Product** window opens.
15. Click **Search** again.
16. Select **Fujitsu Lifebook TabletPC PHXPC-00010**.
17. Click **OK**.
18. Click **Search** in the **Product** field under the **Shipped Product** pane. The **Lookup Product** window opens.
19. Click **Search** again.
20. Select **PHXPC-0010 Fujitsu Lifebook TabletPC**.
21. Click **OK**.
22. Select the **Shipped** check box. The date in the **Shipped Date** field dynamically updates to today's date.
23. Click **OK**.

    The new serial number is associated to the account under the **Assets** tab. If the original asset is covered under an existing contract, you must manually associate the new asset to the contract if it applies.

Managing defects

Defects report issues with a product or service for internal review and tracking.

Who can see defect data?

Like accounts and campaigns, defects have an **Owner** field determining which Infor CRM users see the record. If a ticket is associated to a defect, then only users with access to the associated account for the ticket can see the ticket or return entry in the **Tickets** tab of the defect.

How does Infor CRM track my time?

Similar to ticket activities, defect activities add records of time spent working on a defect. For example, repairing, replacing, or testing. This information is useful for reporting.

You or your administrator can define defect activity types and rates per hour from the **Customer Service Options** window. Your administrator can also determine the time units in minutes to use.

To see a list of defect activities and their total costs, run the **Support Defect Activities** defect report.

Exercise 6.5: Tracking a defect for review

In this exercise, you will create a defect.

Notes:

- If you are taking this course as classroom or virtual instructor-led training, observe as your instructor first demonstrates this exercise.
- If you are taking this course as self-directed learning, complete the steps below.

Click here to view a demo and/or practice this task

Exercise steps

1. Open the **Account** detail view for **Flow Matic**.
2. Select **New > Defect** from the menu bar. The **Insert Defect** screen opens.
3. Select **Smartphone** from the **Project** drop-down list.
4. Search and select **Hardware** in the **Area** field.
5. Search and select **Handheld Devices** in the **Category** field.
6. Search **OS\Software** in the **Issue** field.
7. Click **OK**.
8. Select **Pending** from the **Status** drop-down list.
9. Select **Code – Custom** from the **Type** drop-down list.
10. Select **Severity 3 – Low** from the **Severity** drop-down list.

11. Select Constant from the **Frequency** drop-down list.
12. Search and select **Everyone** in the **Assigned To** field.
13. Verify **Everyone** is selected in the **Owner** field.
14. Type *Screen Layout* in the **Subject** field.
15. Type "*Labels and fields are not equally spaced on the customer screen. Looks sloppy."* in the **Description** field.
16. Click **Save**. The **Defect** detail view opens.

    There are no tickets to associate with this defect because it was reported by you, an internal employee instead of a customer.

    When the development team reviews this defect, they can add a defect task to track their time spent resolving the issue.

Lesson review

What's the difference between contracts, tickets, returns, and defects?

Contracts are service agreements or warranties providing customers an allotted amount of support. Tickets are records of customer inquiries or complaints associated to a contract indicating who to bill and whether the contacts for the account are authorized to request service.

Returns are agreements to accept returned products from a customer for service, replacement, refund, or credit. Returns must accompany a ticket. A defect is a record describing a problem with a product or process, or describes a feature request for a product or process.

How are contract types used to calculate the remaining value on a contract?

Contract types include Days, Hours, Incidents, Value, and Perpetual. When a contract type is set to hours or days, ticket activities are used to calculate the remaining value on the contract.

How do I identify an authorized service contact and a covered asset?

The **Contact** detail view for a contact includes a check box to designate which contacts are authorized for support for their account. This indicator is viewable whenever you create a new ticket and review the account service information.

What are the notification options for ticket assignment?

Manually notify a user when assigning a ticket to him or her by sending an email from within the **Insert Ticket** window or **Ticket** detail view. When auto-notification is configured Infor CRM automatically opens a new email message with the contents of the ticket information addressed to the user. Users can find tickets assigned to them from the **My Tickets** tab in the **Ticket** detail view.

What is a SpeedSearch index and how do I add items to an index?

Before working on tickets, Infor CRM recommends your organization build a knowledgebase of commonly known issues/solutions within Infor CRM. You and other Infor CRM users can then search within these indexes when using SpeedSearch.

Ticket content can be added to the Ticket (public) and Ticket Internal (private) indexes if you submit a ticket for SpeedSearch. When the SpeedSearch Approval process is enabled your submissions may not automatically add to the index until another user approves it.

How do I track assets during a return?

All returns must be assigned to a ticket. When a customer contacts you for a return, creating a ticket determines if it's a misunderstanding, inappropriate use of the product, or a defect. The ticket record shows information about the issue and the steps taken to resolve it. The return record shows details about the return and shipment tracking.

When sending a part or replacement product back to the customer, monitor when the customer receives the asset and assign a new serial number. New assets are automatically added to the account's record. When the original asset is covered under an existing contract you must manually associate the new asset to the contract if it applies.

What's the difference between a defect and a ticket?

A defect is similar to a ticket although it's the people involved in the design or construction of the product who typically resolve defects. A defect doesn't need to be associated to an account and can have separate ownership.

Check your understanding

Which of the following entities would a support representative use to document and track status of a customer inquiry or complaint related to a product or service?

a. Contracts
b. Returns
c. Campaigns
d. Tickets

Jane's organization provides support contracts for the devices they sell. Support can be purchased for a specified time period (e.g. 90 days) or a specified dollar amount (e.g. $1500). Which of the following contracts should Jane's organization have setup in Infor CRM (select two)?

a. Days
b. Hours
c. Incidents
d. Value
e. Perpetual

Contracts cannot be linked to individual assets.

a. True
b. False

How are Infor CRM users notified when tickets are assigned to them in Infor CRM (web client)?

a. Manually be sending an email to the person assigned to the ticket
b. Automatically by sending a notification after the ticket is saved
c. Manually by viewing the Welcome dashboard

Samantha recently received a call from a customer that requested help accessing billing information. After opening a ticket, she used SpeedSearch to look for a resolution. Unfortunately, she did not find the resolution in the current index, but could resolve the customer's issue. How can Samantha add her resolution to the SpeedSearch index so others can access it in the event another customer calls with the same issue?

a. Select Punch-in to add it to the SpeedSearch index
b. Email the details of the resolution to her manager and request that it be added to the SpeedSearch index
c. Select Submit for SpeedSearch to add it to the SpeedSearch index
d. Select High – Urgency to automatically add it to the SpeedSearch index

A ticket is required for a return.

a. True
b. False

Tickets are used to report issues with a product or service for internal review and tracking.

a. True
b. False

Course summary

Estimated time

5 minutes

Learning objectives

Now that you have completed this course, you should be able to:

- Navigate the Infor CRM workspace.
- Build new relationships.
- Keep track of interactions.
- Distribute information to customers.
- Keep track of sales.
- Provide support.

Topics

- Course review

Appendix

The following are included in this section:

- Appendix A: User accounts

Appendix A: User accounts

Your instructor will assign you a student user ID from the table listed below to use for class exercises.
Note: If you are taking this course as self-directed learning, refer to the Training Desktop Login Instructions on the Lab On Demand page.

Infor CRM: v8.4 Using Web/			
Application	**User ID**	**User name**	**Password**
Infor CRM	Lee Hogan	Lee	<blank>
Infor CRM	Administrator	Admin	<blank>
Windows	Administrator	Administrator	password
SQL Server	sysdba	sysdba	Ma$t3rk3y