Sage SalesLogix® Quick Reference Card *for the Service and Support User*

Activity/History	Toolbar	Shortcut Keys
Insert a new ticket		CTRL + T
Insert a new contract		
Insert a new return		CTRL + R
Insert a new defect		
Insert new contact/account		INSERT
Insert a note		F9

Navigation	Toolbar	Shortcut Keys
Go back to the previous item viewed		CTRL + SHIFT + PGUP
Go forward to the next item viewed		CTRL + SHIFT + PGDOWN
Display a history of items viewed		CTRL + SHIFT + HOME
Display List/Detail View		F8
Display List/Detail split view		CTRL + F8
View the next record in a group		PGDOWN
View the previous record in a group		PGUP

Navigation	Navigation Bar	Shortcut Keys
View contacts		SHIFT + F6
View tickets		SHIFT + F10
View contracts		
View defects		SHIFT + F12
View returns		
View calendar		F4
View activities		F7
View reports		

Actions	Toolbar	Shortcut Keys
Insert a username/date/time stamp		SHIFT + F9
Open a pick list or lookup		F2
Open context-sensitive Help		F1
Open Quick Find or Lookup		CTRL + F
Open SpeedSearch		SHIFT + CTRL + F
Refresh the current view/Refresh all views		F5/CTRL + F5

Navigating in the Sage SalesLogix Client

NavBar Buttons		Use the buttons on the Navigation Bar to switch between views of the same type
Nav Bar Group Buttons	Dashboards Sales Marketing Service Support	Use the Group buttons on the Navigation Bar to locate icons that have been organized into logical groups. For example, the Marketing group includes Contacts, Activities, Calendar, Leads, Library, Reports and Campaigns.

Sage SalesLogix for Service and Support

- Helps you track, qualify and resolve customer questions and open issues.
  - **Tickets** track customer problems, issues, and questions
  - **Contracts** are agreements between accounts and your company to provide service and support for products sold. Use contracts to determine how much work has been performed for a specified amount of hours, dollars, days, or incidents.
- Helps you manage product problems and returns.
  - **Defects** track and describe product problems and feature requests.
  - **Returns** enable you to accept a product back from the customer with a replacement or account credit and process the receipt and shipment of products.

NOTE: **Sage SalesLogix is highly customizable. Your system administrator can change many views and features and can set your access rights. As a result, you may not be able to use all the features explained in this Quick Reference Card, and some views may look different.**

General Tips

Find tickets, defects, returns, and contracts by name, or tickets by ID	1 In the list view, press **CTRL + F**, type the name (or part of it) or ID, and then press **ENTER**. 2 Select a record, and then press **ENTER**.
Do a quick lookup and then save the results as a group	1 On any detail or list view, click the **Tickets**, **Defects**, **Returns**, or **Contracts** text with the Find button (magnifying glass) located in the upper left title bar of the view. 2 Type the text you want to find, and then click . 3 To save the results, select the **Create a temporary group containing all results** check box.
View options	1 Point to a NavBar button, field, tab, record, or area. 2 Right-click to display options.

Groups

To access groups	1 From any Main view, press F8, or click . Select a group tab, then right-click to access group options.
To create an ad hoc group	1 In a list view, select multiple records, and then right-click. 2 Click **Add Selected Members to Existing Group** or **Add Selected Members to New Group**.
To share a group with other users	1 Right-click the group tab, and then click **Share Group**. 2 Click **Add**, and then select the specific users, departments, or teams you want to have access to this group. 3 Select the users you want in the group, and then click **OK**.

Area – Category - Issue

Area, category and issue values help define and categorize a particular product, service, or feature of your company's business.

To select Area - Category - Issue values for a ticket or defect	1 In the **Ticket** or **Defect Detail** view, in the **Area** box, click the menu button. 2 In the **Select Area - Category - Issue** dialog box, in the **Area** list, select an appropriate value for the customer's problem. 3 In the **Category** list, select an appropriate value for the customer's problem. 4 In the **Issue** list, select an appropriate value for the customer's problem. 5 Click **OK**.

Tickets

To add a ticket	1 On the toolbar, click **Insert New Ticket**. 2 Complete the required information, and then click **OK**. 3 If necessary, use the **Related Assets** tab to associate any assets to the ticket.
To Punch In or Punch Out of a Ticket	1 Open the Ticket Detail view for an existing ticket or insert a new ticket. 2 Click **Punch In** to begin tracking time on the ticket. 3 Click **Punch Out** to stop tracking time on the ticket.

Defects

To add a defect	1 On the toolbar, click **Insert New Defect**. 2 Complete the required information, and then click **OK**. 3 If necessary, add defect tasks and any associated products, returns or tickets using the Defect Detail view tabs.
To close a defect	1 Open the **Defect Detail** view. 2 Make any necessary changes and ensure the resolution information is complete. 3 In the **Status** box, click the ellipsis button, and then select **Closed** from the list.

Contracts

Types of Contracts	➢ Days – tracked according to the number of support days purchased by the customer. ➢ Hours – tracked according to the number of hours purchased by the customer. ➢ Incidents – tracked according to the number of service calls purchased by the customer. ➢ Value – tracked according to the price of the contract purchased by the customer. ➢ Perpetual – Contract has no limits
To add a contract	1 On the toolbar, click **Insert New Contract**. 2 Complete the required information, and then click **OK**. 3 If necessary, use the **Covered Assets** tab to associate any assets to the contract.

Returns

To add a return	1 On the toolbar, click **Insert New Return**. 2 Complete the required information, and then click **OK**.
To close a return	1 Open the **Return Detail** view and verify that the Return contains all of the necessary information. 2 In the **Status** box, select **Closed**, and then click **Save**.

SpeedSearch

Search Option	Returns results that…
Match on all words	Contain all of the keywords (AND)
Match on any words	Contain any of the keywords (OR)
Match the exact phrase	Contain the exact keyword phrase
Boolean	Match some keywords but exclude others (AND, OR, NOT)
Natural language	Are sorted by relevance based on the number of times the keywords occur and their proximity to each other
Root	Contain the root keyword "Print" returns: "print", "printer", and "printing"
Thesaurus	Contain words similar in meaning to the keywords
Sound like	Contain words that sound like the keyword but are spelled differently

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