



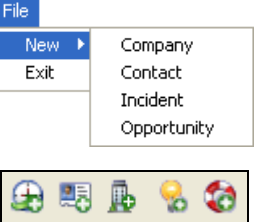

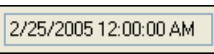

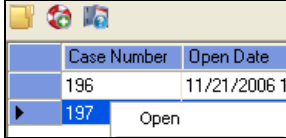



Quick Reference Sheet Oncontact CRM 6.1 Software

- Use the **Links** tab to link external documents to **Company, Contact, Activity, Opportunity, Incident, Project Management** records.
- Almost all **right-click menu options** have toolbar **button counterparts**.
- **Quick Add** windows to add a **Contact, Company, Opportunity and Incident**

What you see	What it does
	<p>Activity</p> <p>Contact – on Quick Find type first name(sp)last name or last name & click Go </p> <p>Company – on Quick Find type company name & click Go </p> <p>Opportunity – on Quick Find add Opportunity name & click Go </p> <p>Incident – on Quick Find add Incident number & click Go </p>
	<p>To add a record.</p> <ul style="list-style-type: none"> ◆ File > New to add Company, Contact, Incident, Opportunity ◆ Any icon with a green plus  means add a new record (New Activity, Contact, Company, Opportunity and Incident)
	Display only. You can't change this information.
	Button with ellipses. You can add more than one entry for this type of data.
	Search icon next to a field. Sends you to a zoom window so you can find data to return to the field.
	<p>Drop-down field choices.</p> <ul style="list-style-type: none"> ◆ Click the Arrow to see the choices ◆ Choose the blank line to clear the field
	<p>To open a record.</p> <ul style="list-style-type: none"> ◆ Click the Open  icon, or ◆ Choose Open from the right-click menu, or ◆ Double click on the row header  197