green4 SOLUTIONS

CRM Driven Solutions for Sport & Leisure

GREEN 4 CORPORATE SALES

USER GUIDE

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ABOUT THIS DOCUMENT

This document describes the functionality available through the Green 4 Corporate Sales module.

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DOCUMENT CONTROL

Version	Date	Change	Initials
00.01	15/03/13	This is a new document	MR
00.02	14/05/13	Updated to use opportunity and order	MR
00.03	03/12/13	Updated to include service activities	MR
00.04	11/04/14	Updated to include quotes	MR

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INTRODUCTION

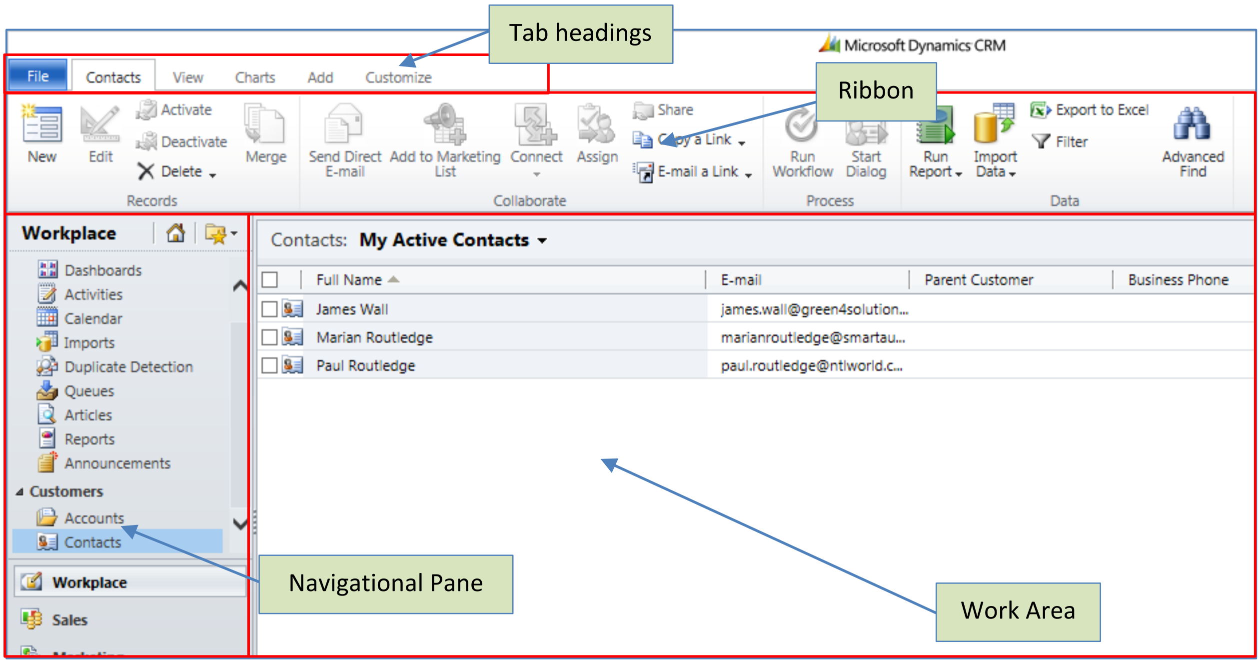
The purpose of this document is to introduce you to the Green 4 Corporate Sales module and guide you through the functionality available. Depending upon your installation of Green 4 Corporate Sales, and the permissions that have been granted to you, this guide may describe functionality that is not currently available to you, for more information please contact your system administrator. The Green 4 Corporate Sales module is built on Microsoft Dynamics CRM.

APPLICATION LAYOUT

When working in Microsoft CRM, there are a number of functional areas that you should be aware of. In order to help you to complete the tasks described in this guide, the following section identifies and describes the areas you will encounter.

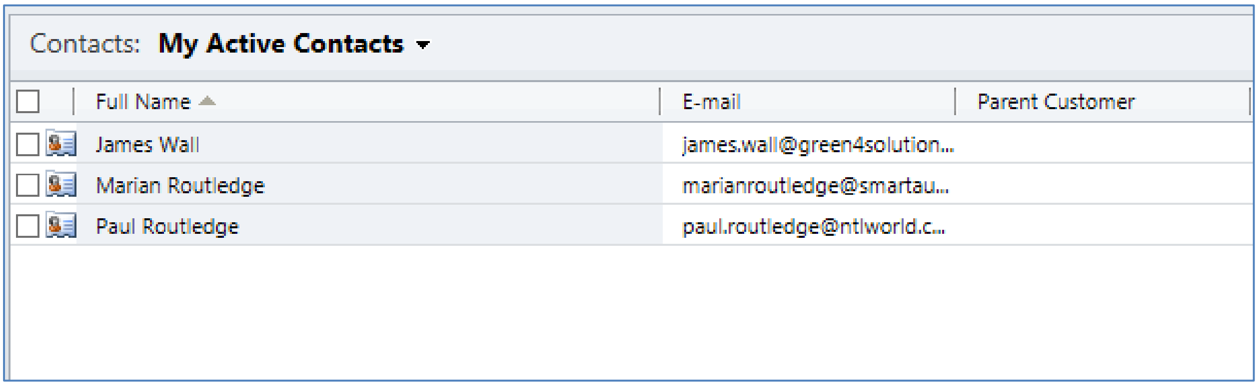
The key functional areas of the Microsoft CRM window are:

- **Navigation Pane.** Used to select functional areas of the application, for example select Contacts to manage individuals within Microsoft CRM. The functionality available via the navigation pane is spread across a number of folders, which can be accessed by selecting the appropriate folder in the navigation pane, e.g. Workplace, Sales, Marketing, etc.
- **Ribbon.** The ribbon will display the options available to you in the current view. The options available on the ribbon will differ as you move around the application.
- **Tab Headings.** The options available via the ribbon may be spread across a number of tabs. To view the options on a tab, select the appropriate tab heading.
- **Work Area.** The information held in Microsoft CRM will be displayed in the work area of the window. The content displayed will differ depending upon the option selected in the navigation pane and may include views, dashboards and calendars.



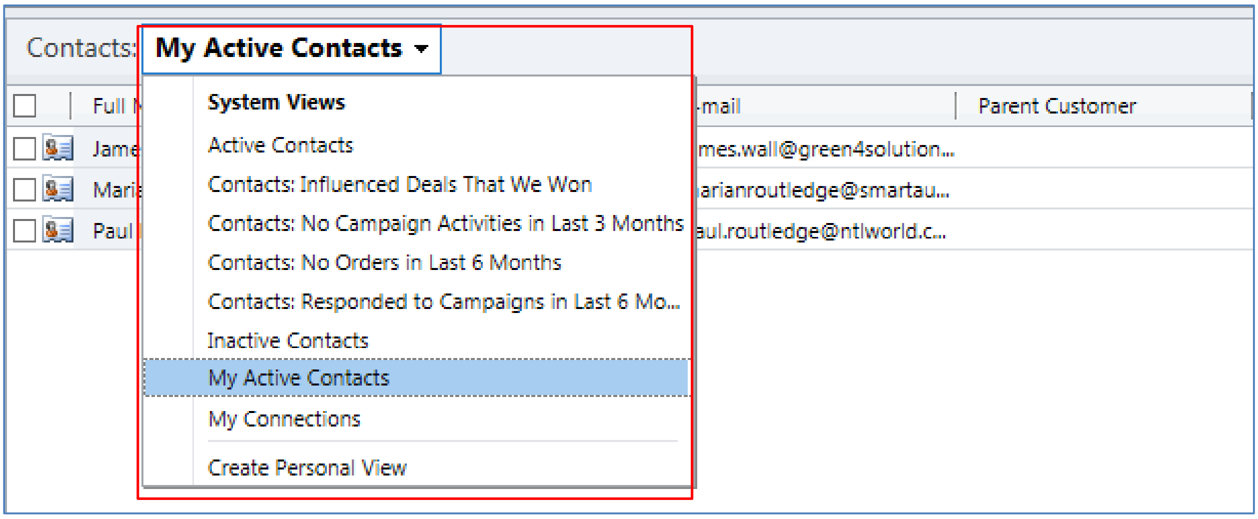
VIEWS

Within Microsoft CRM, lists of data, for example a list of contacts, are displayed in views. Views have filters applied to limit the data that is displayed. For example **My Active Contacts** will only display contact records that you own and that are set to active in the database. An example is shown below:

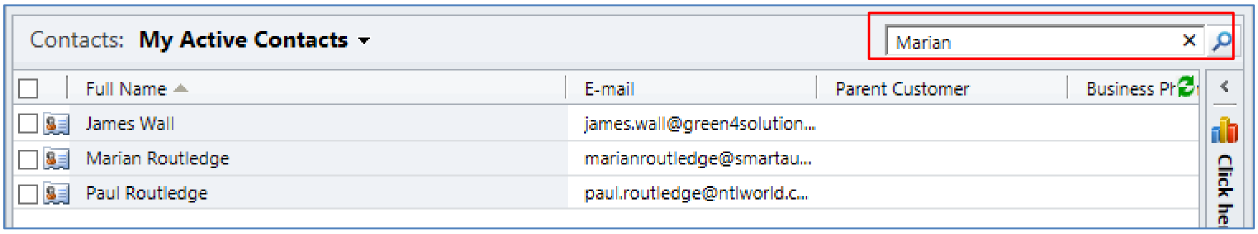


A number of actions are available to help you identify the information you are interested in within the view:

- **Change View.** When you select an entity (for example contacts) in the navigation panel, your default view will be automatically displayed. However you can select an alternative view using the tab headings at the top of the view. A list of available views will be listed. To pick a different view click on the appropriate option in the list:

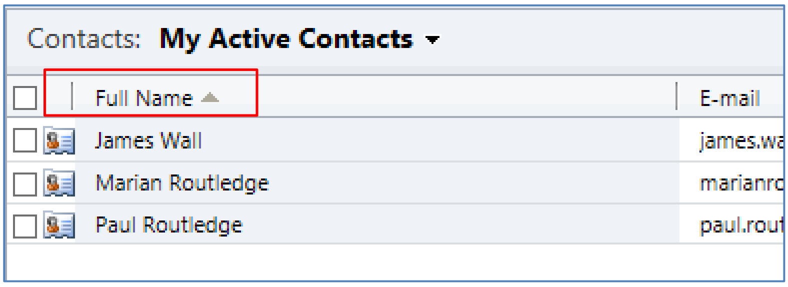


- **Search for a Record.** All views are searchable, for example a list of contacts can be searched using the contact's name, email or linked account. To carry out a search, enter the search term into the text box at the top of the view and click the button.



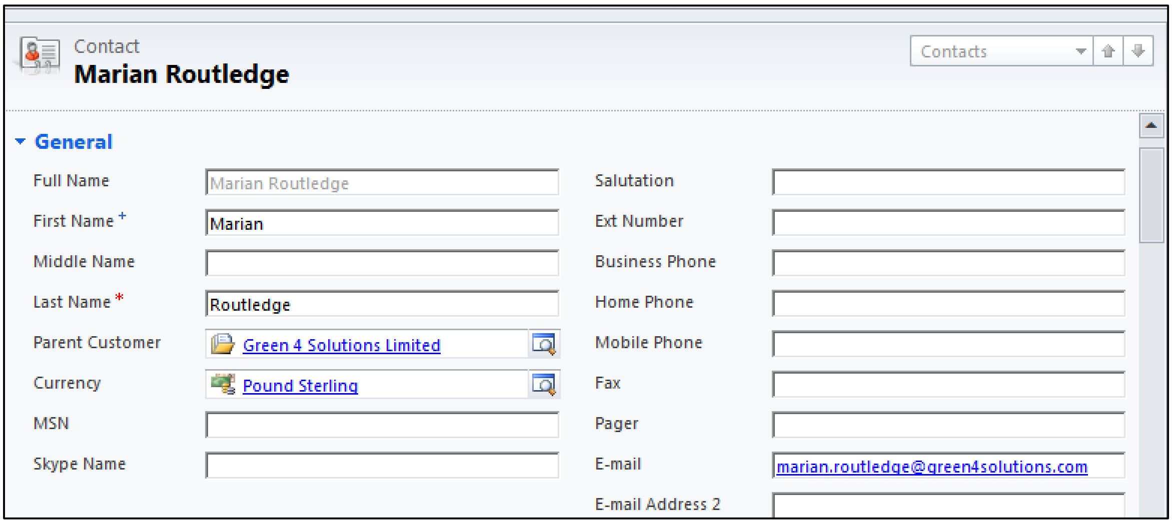
The list of records displayed will update to shown only those records matching the keyword entered. If you are unsure of the exact search term, you can enter the wildcard character (*) before the search term. For example to search for all accounts with "electrical" in their name, enter *electrical.

- **Sort the List.** You can sort the list on any of the columns displayed. To sort on a column click in the column header. An arrow head will be displayed in the column header to indicate the sort order. Click the column header again to reverse the sort.

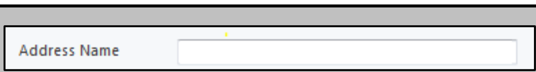
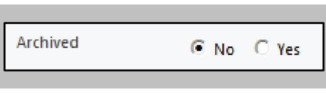
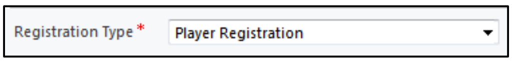


FORMS

Within Microsoft CRM information is collected using forms (an example of which is shown below).



When using forms to enter information, you will be faced with a number of field types, which are described in the following table.

Field Name	Appearance	Description
Text		Enter the requested information directly into the box provided
Date		Enter the date directly into the box provided, or, click the calendar symbol ( ) alongside the field to open a calendar from which the date can be selected.
Selection		Click the required answer.
Drop-Down		Select the required option from the list of values provided. To access the list of values click the arrow head ( ) alongside the field.
Look Up		Select the required value from those displayed in the Look Up Record dialog. To open the Look Up Record dialog select the icon alongside the field. Using the Look Up Record dialog you will be able to search for the appropriate record. If the required value is not displayed, select **New** to create a new record.

CONTACT AND ACCOUNT MANAGEMENT

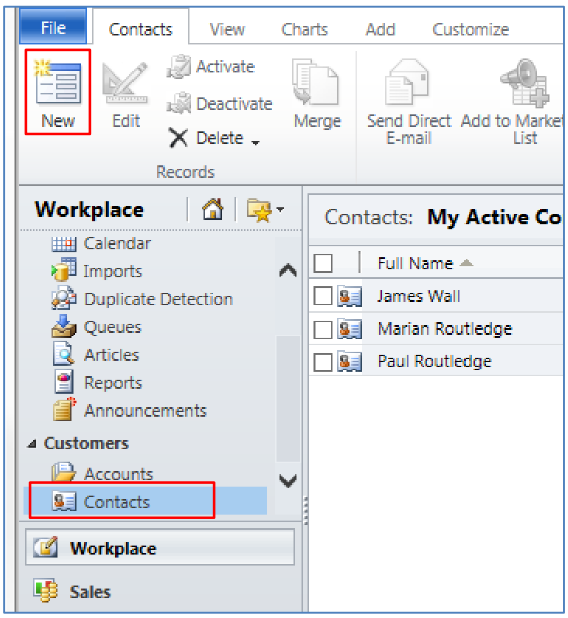
Contacts and accounts are key records within Microsoft CRM. Contacts are used to represent individuals, whereas accounts are used to represent the organisations and businesses that you interact with. Contacts and accounts can be linked within Microsoft CRM.

The following sections describe how to work with contacts and accounts in Microsoft CRM.

CREATE A CONTACT

To create a contact in Microsoft CRM:

1. Select **Contacts** in the **Workplace > Customers** Navigation Panel. A list of contacts meeting the current view criteria will be displayed.
2. Before creating a new contact in Microsoft CRM, it is important to carry out a search to ensure the contact details do not already exist in the database. To search for a contact:
    a. Enter the contact's name into the search box at the top of the view. You can use name, email or parent customer. To widen the search use the wildcard (*) character.
    b. Click the button.
    c. A list of all contacts matching the search term entered will be displayed.
3. Once you are satisfied the contact does not already exist, select **New** on the ribbon to create a new contact record.



4. A blank Contact form will be displayed. Complete the requested information before selecting **Save & Close** on the ribbon.

Use the **Parent Customer** field to link the contact to an account record (for example the company the contact represents). When you select the icon alongside the field a list of existing account records will be displayed, select the appropriate record from those listed. If an appropriate account record is not listed, select **New** to create a new account record.

EDIT A CONTACT

To edit a contact in Green 4 CRM:

1. Select **Contacts** in the **Workplace > Customers** Navigation Panel. A list of contacts meeting the current view criteria will be displayed.
2. Carry out a search for the contact of interest.
3. Double-click over the appropriate contact record. The details will be opened in the form view.
4. Modify the details as required and select **Save & Close** on the ribbon.

DEACTIVATE A CONTACT

It is recommended that when a contact is no longer active, their record in CRM is deactivated rather than deleted from the database. When a record is deactivated the details remain in the system but are hidden from the majority of views.

To deactivate a contact record in Green 4 CRM:

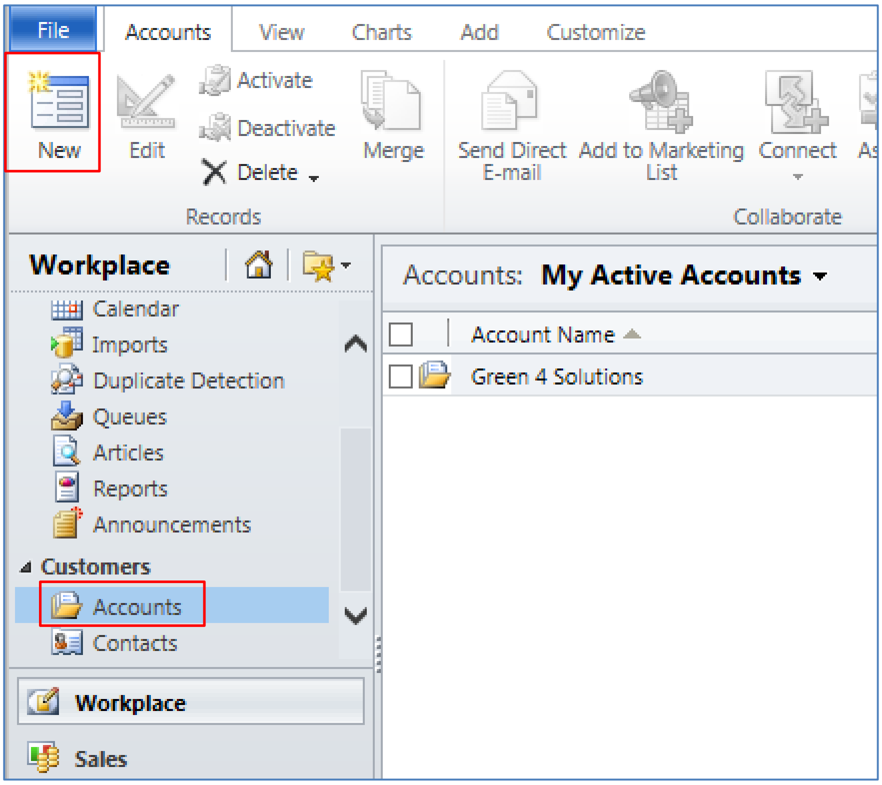
1. Select **Contacts** in the **Workplace > Customers** Navigation Panel. A list of contacts meeting the current view criteria will be displayed.
2. Carry out a search for the contact of interest.
3. Double-click over the appropriate contact record. The details will be opened in the form view.
4. Select **Deactivate** on the ribbon.
5. The Confirm Contact Deactivation dialog will be displayed. Select **OK** to continue.

A contact record can be re-activated at a later date if required. The Advanced Find dialog may have to be used to search for the deactivated record. A record that has been deactivated cannot be changed.

CREATE AN ACCOUNT

To create an account in Microsoft CRM:

1. Select **Accounts** in the **Workplace > Customers** Navigation Panel. A list of accounts meeting the current view criteria will be displayed.
2. Before creating a new account in Microsoft CRM, it is important to carry out a search first to ensure the account details do not already exist in the database. To search for an account:
   a. Enter the account's name into the search box at the top of the view. To widen the search use the wildcard (*) character.
   b. Click the button.
   c. A list of all accounts matching the search term entered will be displayed.
3. Once you are satisfied the account does not already exist, select **New** on the ribbon to create a new account record.



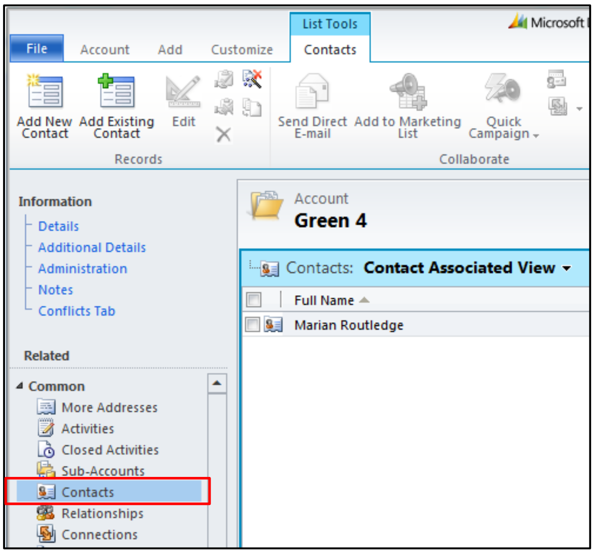
4. A blank account form will be displayed. Complete the requested information before selecting **Save & Close** on the ribbon.

When adding address details for the organisation it is useful to name the addresses (e.g. shipping or accounts) as this will allow you to look-up and assign the address details to orders. The names used for addresses are arbitrary, but should be carefully selected to ensure you can identify the correct address from the name only.

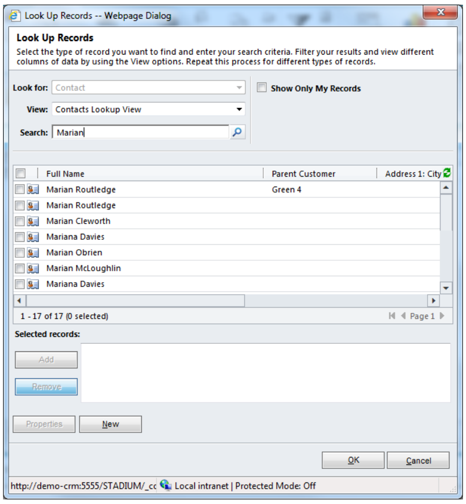
ADDING CONTACTS TO AN ACCOUNT

To add contacts to an account record:

1. Select **Account** in the **Workplace > Customers** Navigation Panel. A list of Accounts meeting the current view criteria will be displayed.
2. Carry out a search for the account you are interested in.
3. Double-click over the appropriate account record. The details will be opened in the form view.
4. In the Form Navigation Panel, select **Contacts**. A list of contacts associated with the account will be displayed:



5. To link a contact that already exists in the database to the account carry out the following:
   - Click **Add Existing Contact** on the ribbon.
   - The Look Up Records dialog will be displayed:



   - In the **Search** box enter the name of the person you wish to add to the account (the wildcard * can be used to broaden the search) before clicking the button.
   - A list of contacts meeting the search criteria will be displayed.
   - Click on the contact you wish to add to the account.
   - Once the details are complete select **OK** to return to the Account form.

Multiple contacts can be added simultaneously using the method described above.

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6. To link contact that doesn't already exist in the database to the account record, use the **New** button on the Look Up Records dialog to open a blank contact form allowing you to enter the details of the new contact. When you select **Save& Close** on the contact record you will be redirected to the Look Up Records dialog, where you will be able to select the newly created contact.
7. Once the details are complete select **Save & Close** on the ribbon to save the account details.

EDIT AN ACCOUNT

To edit an account in Green 4 CRM:

1. Select **Account** in the **Workplace** Navigation Panel. A list of Accounts meeting the current view criteria will be displayed.
2. Carry out a search for the account.
3. Double-click over the appropriate account record. The details will be opened in the form view.
4. Modify the details as required and select **Save & Close** on the ribbon.

DEACTIVATE AN ACCOUNT

It is recommended that when an account is no longer active, the customer's record in CRM is deactivated rather than deleted from the database. When a record is deactivated the details remain in the system but are hidden from the majority of views.

To deactivate an account record in Green 4 CRM:

1. Select **Account** in the **Workplace > Customers** Navigation Panel. A list of accounts meeting the current view criteria will be displayed.
2. Carry out a search for the account.
3. Double-click over the appropriate account record. The details will be opened in the form view.
4. Select **Deactivate** on the ribbon.
5. The Confirm Account Deactivation dialog will be displayed. Select **OK** to continue.

An account record can be re-activated at a later date if required. The Advanced Find dialog may have to be used to search for the deactivated record.

ACTIVITIES

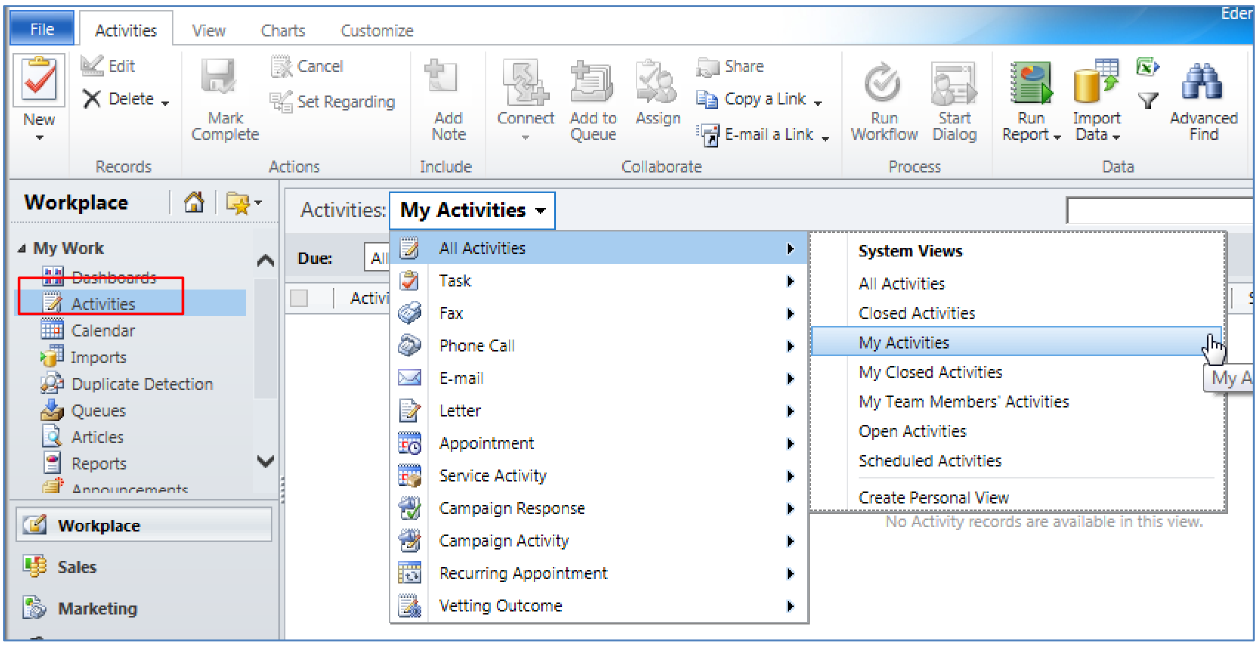
Microsoft CRM provides a basic activity management system that enables you to schedule or log activities associated with the various records in the database, such as opportunities, leads, contacts, accounts, or cases. Activities are used to record interactions you have with customers, and therefore allow you to build up a history of the interactions you have had with each of your customers. Example activities include:

- Recording an incoming telephone call
- Recording an outgoing telephone call
- Linking emails sent and received to the customer
- Adding a to-do task to an order e.g. print tickets
- Creating a record of an appointment with a client

VIEWING YOUR ACTIVITIES

To view the activities that have been assigned to you carry out the following:

1. In the **Workplace > My Work** navigation pane, select **Activities**. The activities list view will be opened displaying all activities that meet the view criteria.
2. To view your activities, select the **All Activities > My Activities** from the drop-down list at the top of the view.



3.

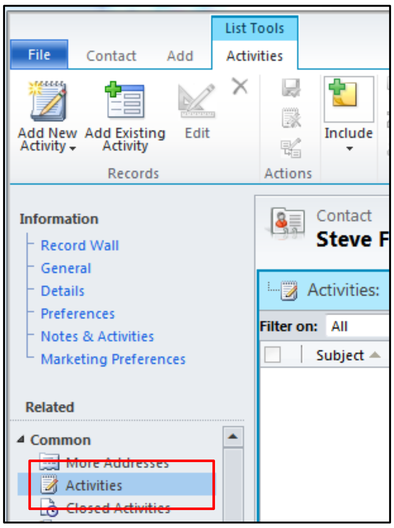
4. The view will be refreshed to display only the activities that have been assigned to you. To open the details of an activity, double-click over the row of interest.

You can select to view activities of a particular type only, for example to view your telephone calls select **Phone Calls > My Phone Calls** from the drop down list.

VIEWING OPEN ACTIVITIES LINKED TO A CONTACT OR AN ACCOUNT

To view the activities related to a contact or an account:

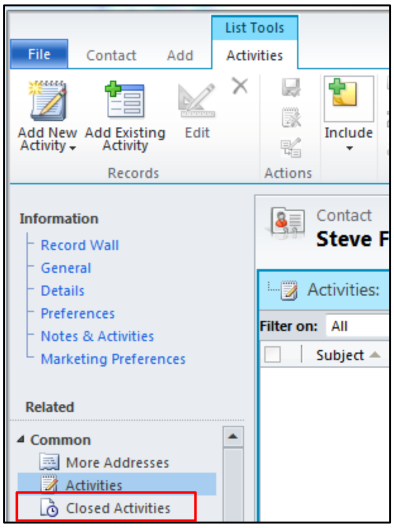
1. Open the appropriate contact or account record in the form view.
2. To view activities that are still open (i.e. have not been completed) select **Activities** in the form navigation panel. A list of open activities linked to the contact or account will be displayed.



VIEWING ACTIVITY HISTORY

To view the activities related to a contact or account that have been closed and completed:

1. Open the appropriate contact or account record in the form view.
2. Select **Closed Activities** in the form navigation panel. A list of completed activities linked to the contact or account will be displayed.

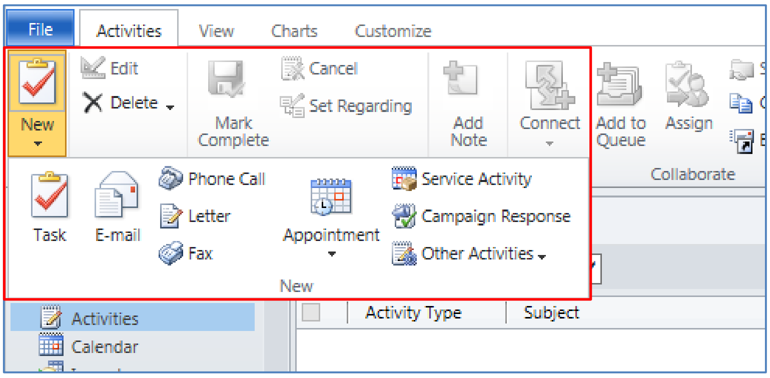


CREATING AN ACTIVITY FROM WORKPLACE

To create an activity within Microsoft CRM:

1. In the **Workplace > My Work** navigation pane, select **Activities**. The activities list view will be opened displaying all activities that meet the view criteria.

2. Select New followed by the activity type that you wish to create on the ribbon, for example select **Task**, **Phone Call** or **Appointment**.



3. Once the activity type has been selected, the appropriate form will be displayed. Complete the requested information including:

   - **Subject**. Enter a descriptive name for the activity.
   - **Regarding**. Use to link the activity to another record, for example event or person.
   - **Owner**. Your Microsoft CRM username will be automatically entered.
   - **Duration.** Enter the duration of the activity.
   - **Due**. Enter when the activity is due to be completed.

If you select to create an Appointment, it will be necessary to select **View in CRM** on the ribbon to view the full CRM form.

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4. Once the information is complete select **Save and Close** on the ribbon.

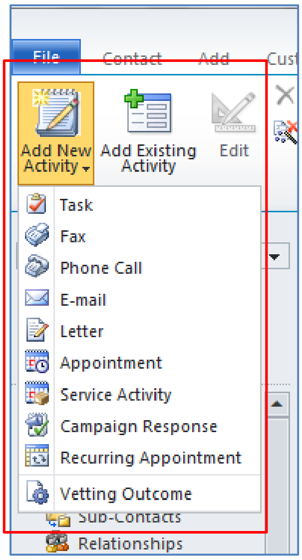
5. The following activity types will be displayed in Outlook:

   - Appointments will appear in the your Outlook Calendar
   - Tasks will be added to your Outlook Task List.

CREATING AN ACTIVITY FROM A CONTACT OR ACCOUNT

To create an activity related to a contact or account:

1. Open the appropriate contact or account record in the form view.
2. Select **Activities** in the form navigation panel. A list of activities linked to the contact or account will be displayed.
3. Select **Add New Activity** from the ribbon. A list of available activities will be displayed:



4. Once the activity type has been selected, the appropriate form will be displayed. Complete the requested information including:
   - **Subject**. Enter a descriptive name for the activity.
   - **Regarding**. Use to link the activity to another record, for example event or person.
   - **Owner**. Your Microsoft CRM username will be automatically entered.
   - **Duration.** Enter the duration of the activity.
   - **Due**. Enter when the activity is due to be completed.

If you select to create an Appointment, it will be necessary to select **View in CRM** on the ribbon to view the full CRM form.

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5. Once the information is complete select **Save and Close** on the ribbon.

SET REGARDING FOR AN ACTIVITY

The Regarding field enables you to attach an activity to an additional record within CRM, such as an order, opportunity or case. By associating the activity with an additional record, you can then see the activity from any of those records. For example if the regarding field is set to an Opportunity, when the opportunity record is viewed the activity will be listed under the Activities area of the opportunity form. Essentially, setting a regarding field allows you to develop a rolled up view of your Activities.

To set the regarding record for an activity

1. In the **Workplace > My Work** navigation pane, select **Activities**. The activities list view will be opened displaying all activities that meet the view criteria.
2. Highlight the activity that you wish to set the regarding for.

3. Select **Set Regarding** on the ribbon.
4. The Set Regarding dialog will be displayed. Click the Look Up button to open the Look Up Dialog and select the appropriate record. When using the Look Up Dialog, ensure the **Look For** field is set to the correct record type.
5. Click **OK** to save the changes.

ASSIGNING AN ACTIVITY TO ANOTHER USER

By default activities that you create will be assigned to you. To assign an activity to another user carry out the following:

1. In the **Workplace > My Work** navigation pane, select **Activities**. The activities list view will be opened displaying all activities that meet the view criteria.
2. Highlight the activity that you wish to assign.
3. The Assign to Team or User dialog will be displayed. Click the Look Up button to open the Look Up Dialog and select the appropriate record.
4. Once the details are complete select **OK** to save the changes.

COMPLETING AN ACTIVITY

Once an activity has been completed, it is necessary to set the record to complete in Microsoft CRM as described below:

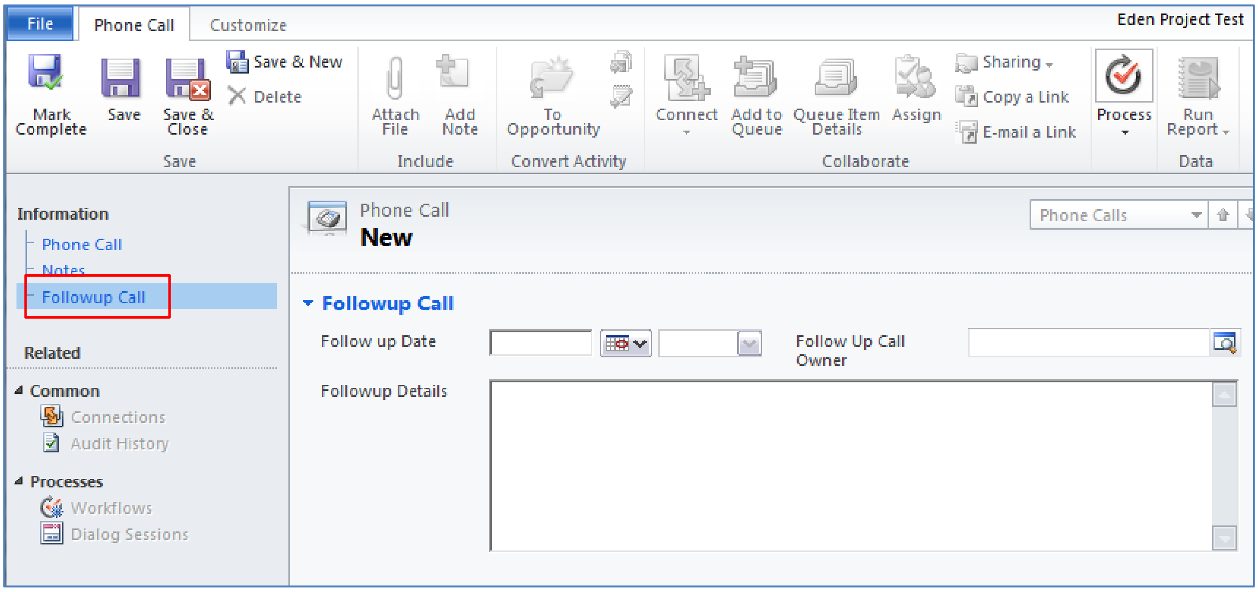
1. In the **Workplace > My Work** navigation pane, select **Activities**. The activities list view will be opened displaying all activities that meet the view criteria.
2. Highlight the activity that you wish to set to complete.
3. Select **Mark as Complete** from the ribbon.
4. The Close dialog will be displayed. Complete the details before selecting **OK** to continue.
5. Alternatively, depending upon the activity type you may be able to
    - Convert the activity to an Opportunity
    - Convert the activity to a Case
    - Promote the activity to a Response
    - Convert the activity to a Lead

    When one of the above options is selected from the ribbon, the convert dialog will be displayed allowing you to define the properties of conversion. Enter the requested details before selecting **OK** to continue.

FOLLOW UP TELEPHONE CALL

When managing telephone calls you may wish to create a follow up call, for example to remind you to contact the customer to confirm their order details a week later. To automatically create a follow up call carry out the following:

1. With the Phone Call details open in the form view select **Followup Call** in the Navigation Panel:



2. Complete the following details:

   - **Follow up Date.** Enter the date and time when the follow up call will be due.
   - **Follow Up Call Owner.** Select the CRM user who will be responsible for making the call. The owner field will determine the "My Activities" schedule the call will be placed on.
   - **Follow up Details.** Enter the details required to make the follow up call.

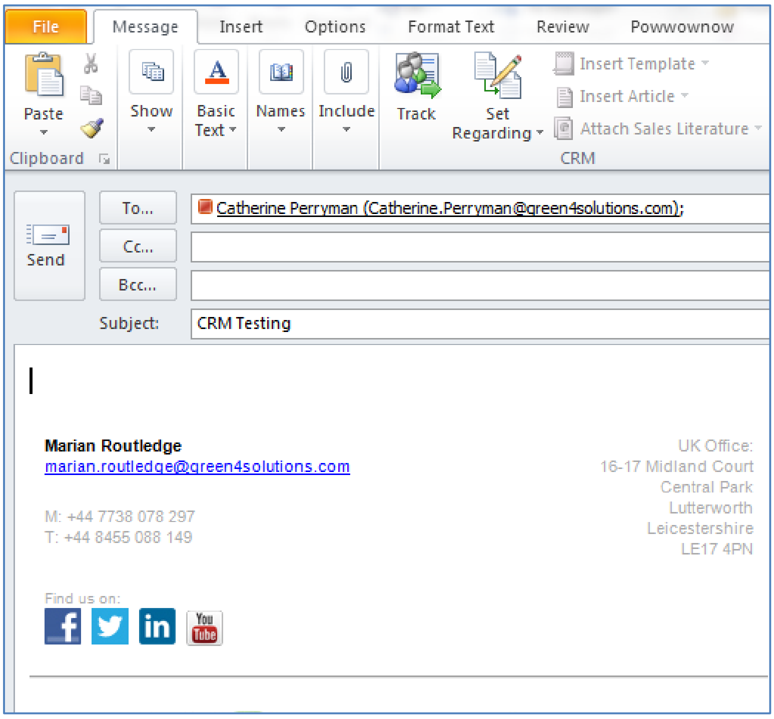
3. The follow up call will be automatically created using the details entered when the original call is set to complete (select **Mark Complete** on the ribbon). The follow up call will be assigned to the user entered into the Follow up Call Owner field. If this field is left blank, the owner of the original call will be set as the owner of the follow up.

TRACKING EMAILS

When you use the Microsoft Outlook CRM client, you have the ability to automatically track emails against a contact in CRM. When you select to track an email (either incoming or outgoing) all replies are automatically tracked into CRM, ensuring the whole conversation is recorded against the customer record within CRM. The tracked emails are saved under the **Completed Activities** tab of the contact form.

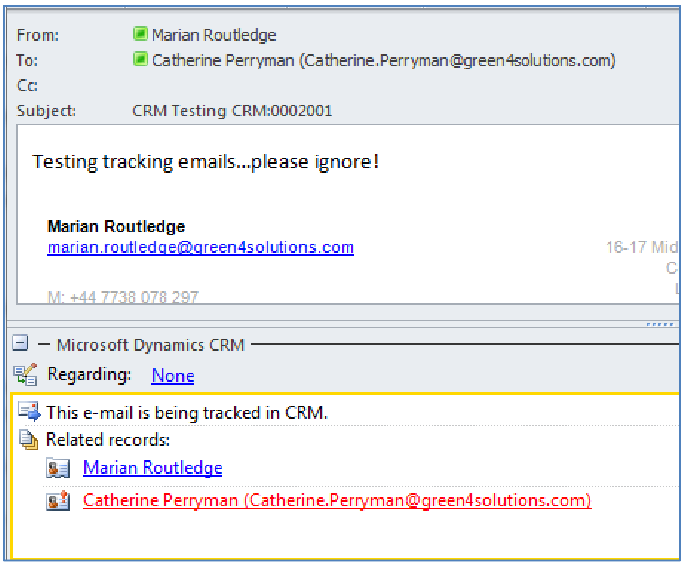
To track an email:

1. With the email open, click the **Track** button on the ribbon as shown below:

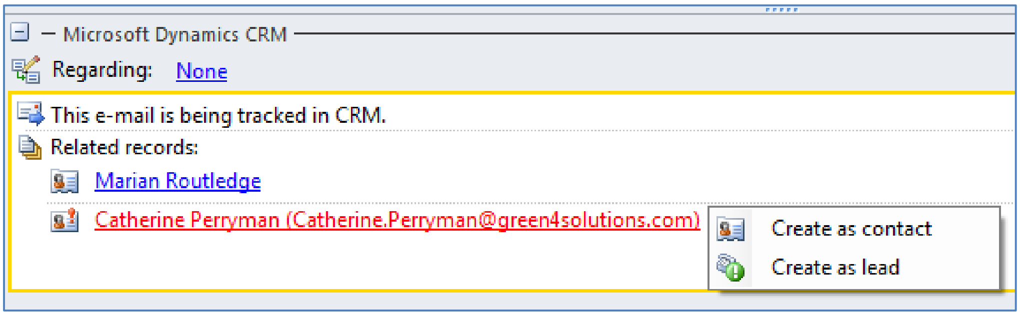


The Track button will be available on both outgoing and incoming emails.

2. When the email is sent (or immediately if you are tracking an incoming email) an activity will be created against the contact in CRM.
3. If the contact does not already exist in CRM you will need to create a new contact record. To create a new record:
    a. Open the sent email in Outlook
    b. Scroll to the bottom of the email to view the Microsoft CRM area:



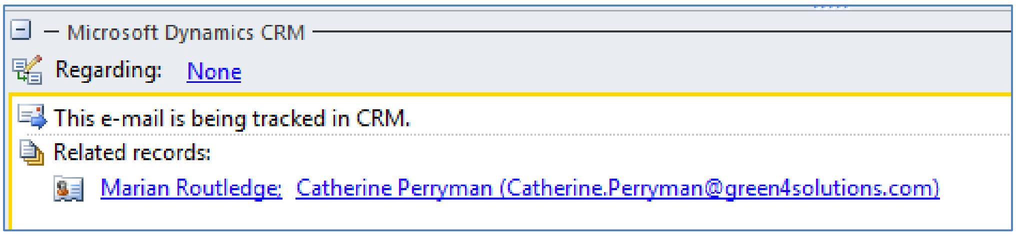
    c. Any email addresses that cannot be matched with CRM will be listed in red.
    d. To create a new contact from the email address, click over the name to display a pop up menu:



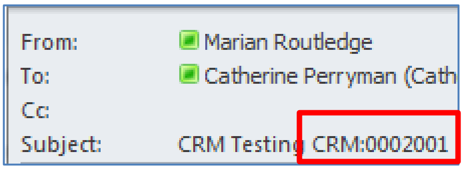
e. Select **Create as Contact** from the menu.

f. A CRM contact form showing the information known will be displayed. Complete the information, ensuring all mandatory fields are filled, before selecting **Save & Close** on the ribbon.

g. The email message will be redisplayed with the CRM details updated:



Once an email has been tracked, any replies received will be automatically tracked providing the CRM token (highlighted below) in the subject heading remains unchanged:



BREAKING CONTACT & ACCOUNT RELATIONSHIPS

When you create an activity record against a contact that is linked to an account, a copy of the activity will be automatically saved against the account record. Consequently if the contact – account link is broken (because the employee leaves for example), a record of the activity will always remain with both the contact record and the account record, ensuring you have a complete picture of all activity with an organisation and an individual.

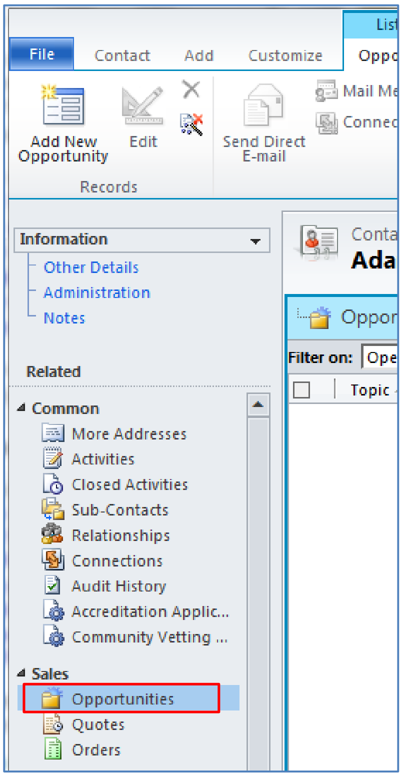
MANAGING OPPORTUNITIES

CAPTURE AN OPPORTUNITY

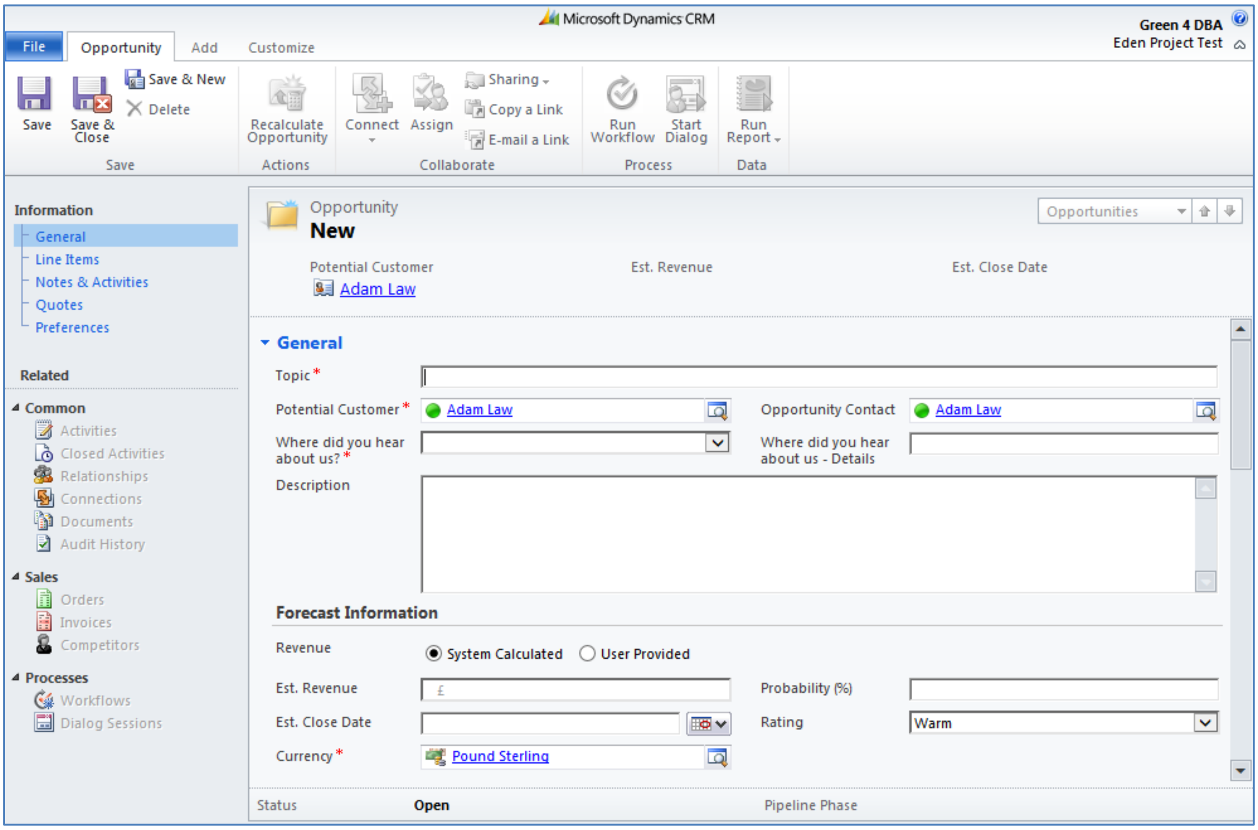
Using Microsoft CRM, opportunities can be recorded and linked to the relevant account or customer. Opportunities can be considered as potential orders, and therefore they contain the same information as an order, but the details remain unconfirmed. You may create an opportunity when you contact a customer and they appear interested in the offering, but cannot confirm the order immediately. You can link scheduled activities to the opportunity, for example a call back can be scheduled for a week's time, ensuring that you follow up on any potential sales in a timely manner.

To create an opportunity in Microsoft CRM against a contact:

1. Select **Contacts** in the **Workplace > Customers** Navigation Panel. A list of contacts meeting the current view criteria will be displayed.
2. Carry out a search for the contact
3. Double-click over the appropriate contact record. The details will be opened in the form view.
4. Select **Opportunities** under the **Sales** heading on the form navigation panel (highlighted below).



5. Select **Add New Opportunity** on the ribbon.
6. A blank Opportunity form will be displayed:

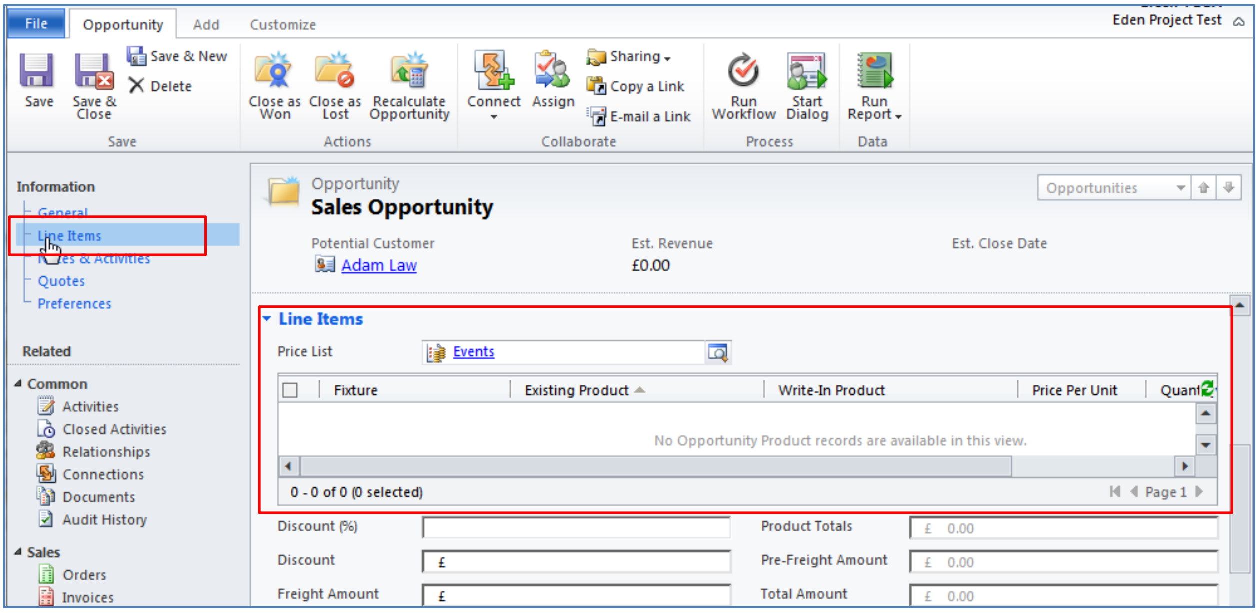


7. Complete the following details:

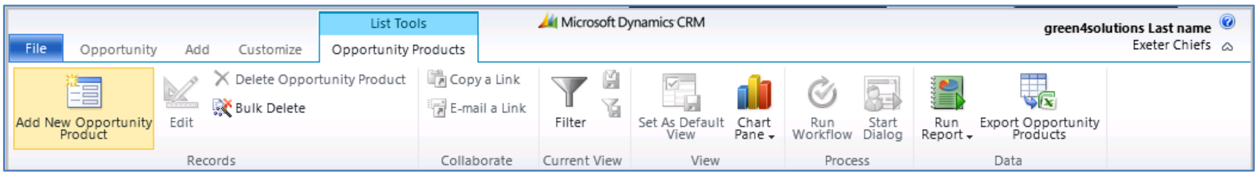
- **Topic.** Enter a topic for the opportunity, for example the name of the event the opportunity relates to.
- **Potential Customer.** The name of the potential customer will be automatically entered. If the opportunity was generated from an account record, the name of the primary contact at the organisation will be entered into the **Customer Contact** field. The Customer Contact can be changed if required.
- **Where did you hear about us?** Use the drop-down list to select the source of enquiry.
- **Currency.** The currency field will be automatically set to the default currency for your system. Leave unchanged.
- **Price List.** Use the Look Up Records dialog to select the price list to be linked to the opportunity. The price list selected will determine the products available to you and the prices charged for products added to the opportunity.

8. Select **Save** on the ribbon to save the details entered but leave the opportunity form open.

9. Select Line Items in the form navigation panel. The Line Items grid will be displayed. The Line Items grid is used to add the products the customer is interested in purchasing.

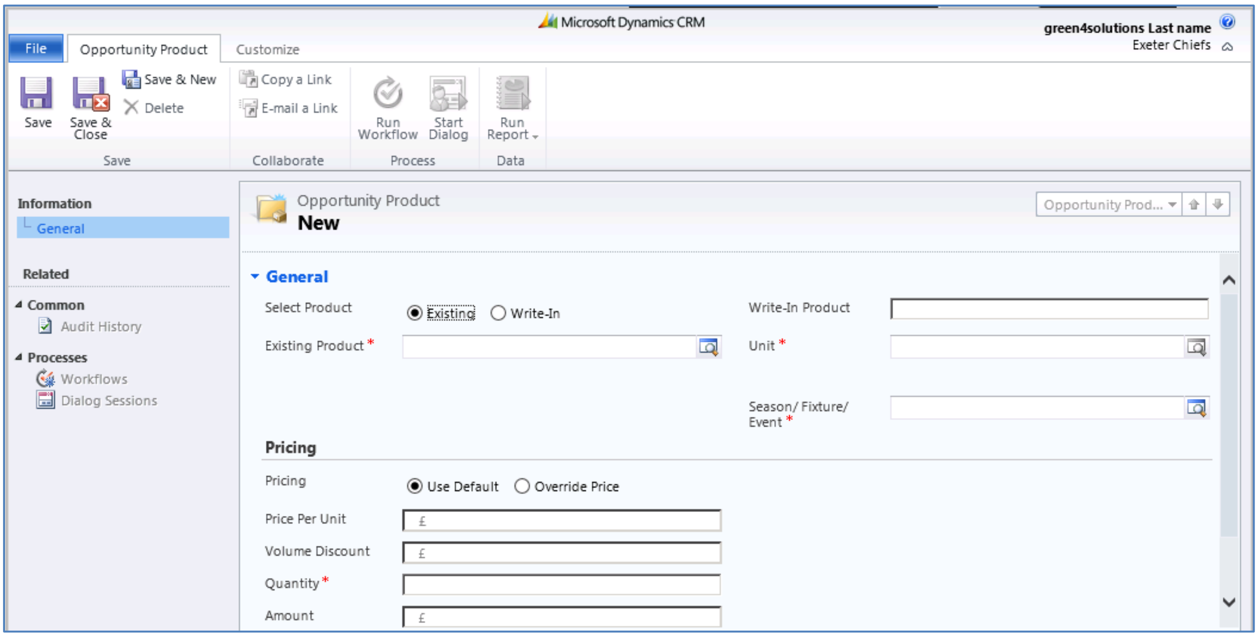


10. Using the mouse, click inside the grid (highlighted above). The ribbon will change to display the **List Tools Opportunity Products** tab:



11. Select **Add New Opportunity Product** on the ribbon.

12. A blank Opportunity Product form will be displayed:



13. Complete the following details:

- **Existing Product.** Use the Look Up Records dialog to search for the product the customer is interested in.
- **Select Product.** Ensure the **Existing** option is selected. The **Write In** product should only be used if entering the details of an ad hoc product that is not in your product catalogue.
- **Unit.** Use the Look Up Records dialog to select the default unit for the selected product.

- **Write-In Product.** Use to enter the name of an ad hoc product that does not exist in your catalogue.
- **Event.** Use the Look Up Records dialog to search for the event that the product relates to. If the event does not already exist, select **New** on the Look Up Records dialog.
- **Quantity.** Enter the number of places the customer is requesting.

14. Select **Save** on the ribbon to save the details entered but leave the form open.
15. The Pricing information will automatically update using the prices held within the system for the selected product. If required you can manually change the price charged as follows:
    - **Manual Discount.** To offer a manual discount on the total price charged, enter the amount into the Manual Discount field. For example to discount the price by £100 enter 100.
    - **Override Price.** To discount each individual place, for example to charge £80 pounds instead of £100 per place booked, select the **Override Price** option. When this option is selected you will be able to manually enter a **price per unit.**

    To see the effects of the changes made to the prices, select **Save** on the ribbon. The form will remain open but the pricing details will be updated to reflect the changes made.
16. Once the details are complete select **Save & Close** on the ribbon.
17. The Opportunity form will be re-displayed. The newly added product will be listed in the Line Items grid.

Multiple products can be added to the opportunity using the method described above. The products added do not have to relate to the same event.

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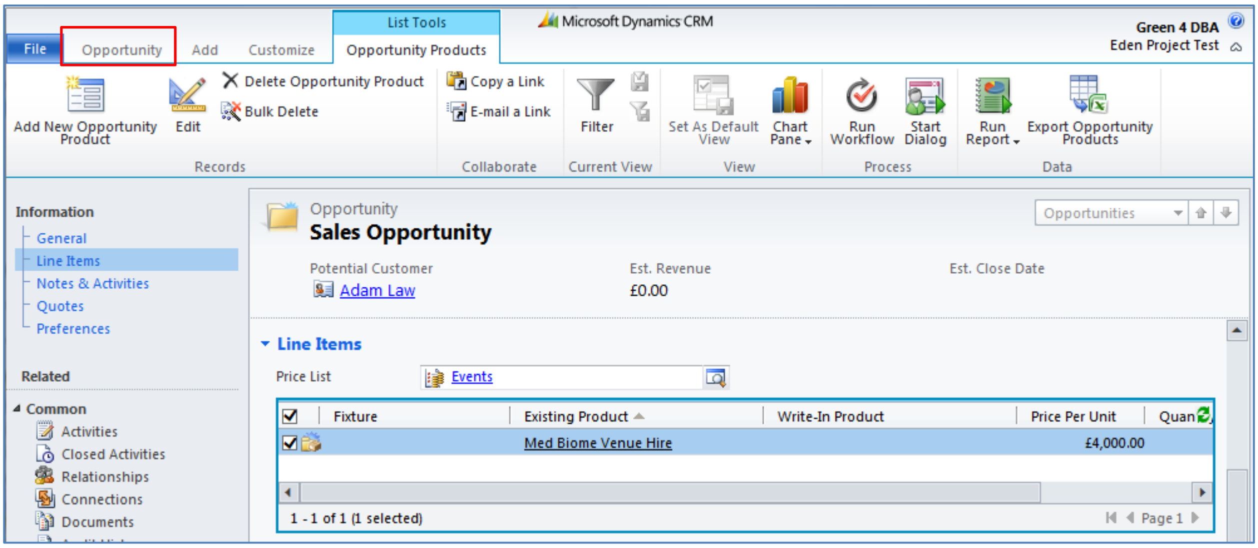
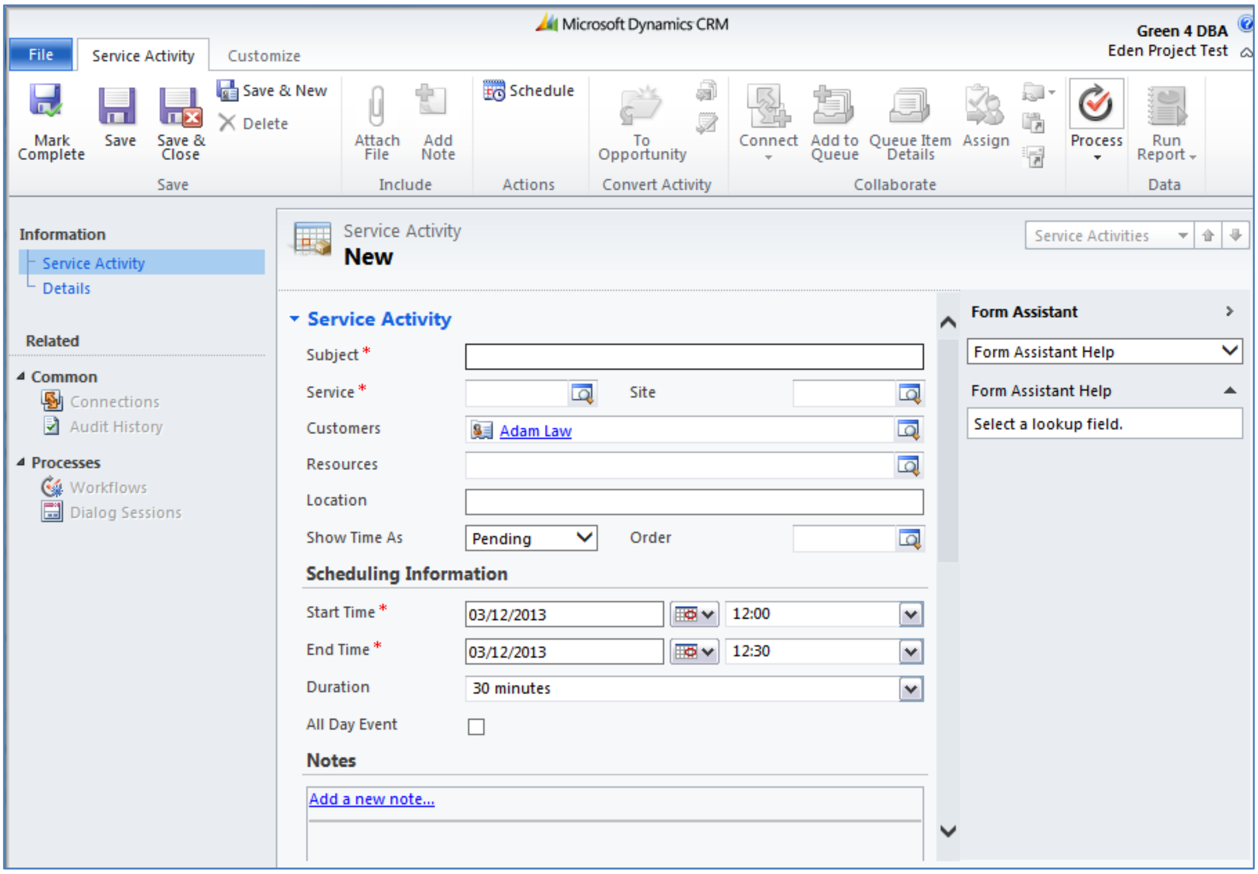
18. Select **Save** on the ribbon to update the opportunity pricing information (note it may be necessary to select the **Opportunity** tab (highlighted in the image below) at the top of the form):



CREATING A SERVICE ACTIVITY (TO BOOK A RESOURCE)

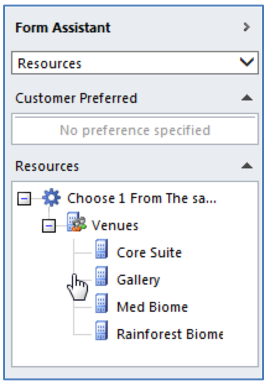
If the opportunity relates to a limited resource, for example a venue booking or a guided tour booking, it is necessary to create a service activity to tentatively book the resource as described below:

1. With the Opportunity open in the form view, select **Activities** in the form navigation area.
2. On the ribbon select **Add New Activity > Service Activity**.
3. A blank service activity form will be displayed:



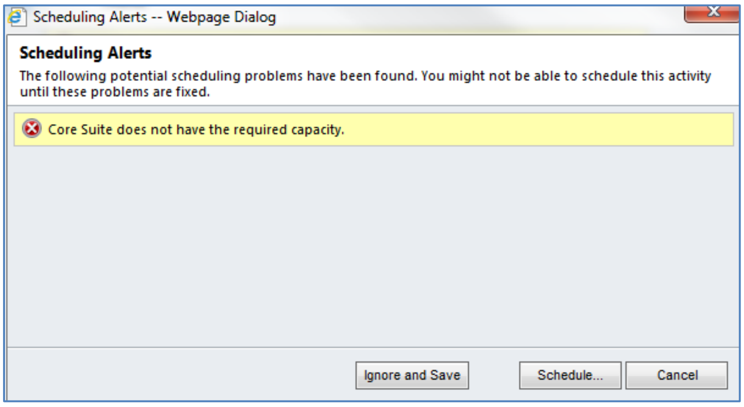
4. Enter the following details:

- **Subject.** Enter the subject for the activity, for example Booking – Smith.
- **Service.** Use the Look Up Records dialog to select the appropriate service, for example **Venue Booking**.
- **Customer.** The customer field will be automatically created with details from the opportunity.
- **Resources.** When you click into the resources field the Form Assistant area will become populated with the resources available for the service you have selected. For example in the image below a list of venues are listed. Pick the appropriate resource you wish to book.



- **Show Time As.** By default this will be set to **Pending**, however you can use the drop-down list to change the status of the activity.
- **Start Time/End Time.** Enter the start and end dates and time of the event.

5. Select **Save** on the ribbon. If the resource picked does not have availability for the time selected an error will be displayed:



6. Once the details are complete select **Save & Close** on the ribbon to return to Opportunity record.
7. Select **Save & Close** on the ribbon to close the opportunity.

EDIT AN OPPORTUNITY

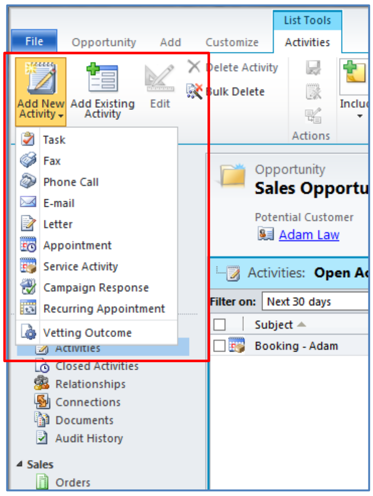
To edit an opportunity in Microsoft CRM:

1. Select **Opportunities** in the **Sales** Navigation Panel. A list of opportunities meeting the current view criteria will be displayed.
2. Carry out a search for the opportunity.
3. Double-click over the appropriate opportunity to open the details in the form view.
4. Edit the details as required before selecting **Save and Close** on the ribbon.

ADDING ACTIVITIES TO OPPORTUNITIES

To create an activity related to an opportunity:

1. Open the appropriate opportunity record in the form view.
2. Select **Activities** in the form navigation panel. A list of activities linked to the opportunity will be displayed.
3. Select **Add New Activity** from the ribbon. A list of available activities will be displayed:



1. Once the activity type has been selected, the appropriate form will be displayed. Complete the requested information including:
   - **Subject**. Enter a descriptive name for the activity.
   - **Regarding**. Use to link the activity to another record, for example event or person.

- **Owner**. Your Microsoft CRM username will be automatically entered.
- **Duration.** Enter the duration of the activity.
- **Due**. Enter when the activity is due to be completed.

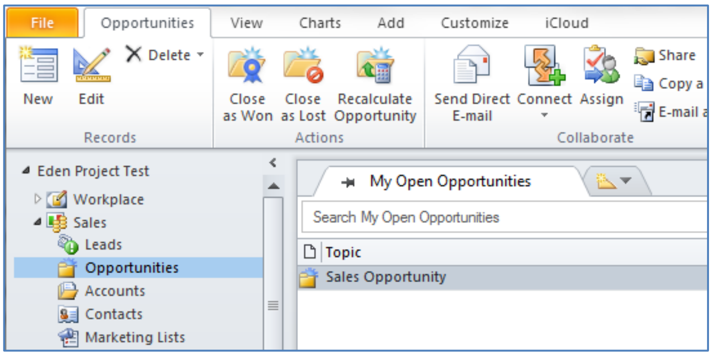
2. Once the information is complete select **Save & Close** on the ribbon.

CLOSE AN OPPORTUNITY AS LOST

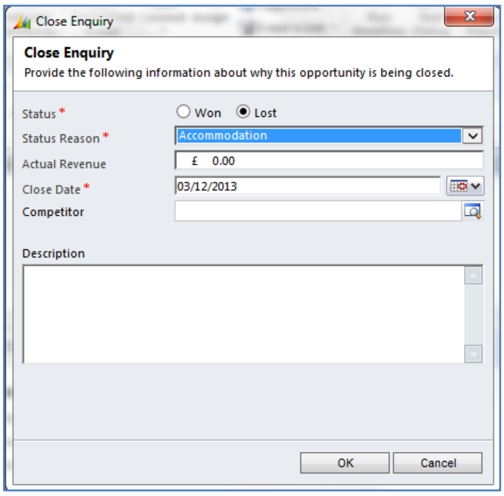
If an opportunity does not result in an order, it is best to deactivate the opportunity record. Deactivated opportunities remain within Microsoft CRM, but are not displayed in most views. Deactivated records can be re-activated if necessary, please contact your system administrator for assistance.

To deactivate an opportunity in Microsoft CRM:

1. Select **Opportunities** in the **Sales** Navigation Panel. A list of opportunities meeting the current view criteria will be displayed.
2. Highlight the opportunity to be deactivated as shown below:



3. Select **Close as Lost** from the ribbon.
4. The **Close Opportunity** dialog will be displayed.
5. The **Status** will be automatically set to **Lost**. Use the drop-down list to select the **Status Reason**.



6. Once the details are complete, select **OK** to continue.

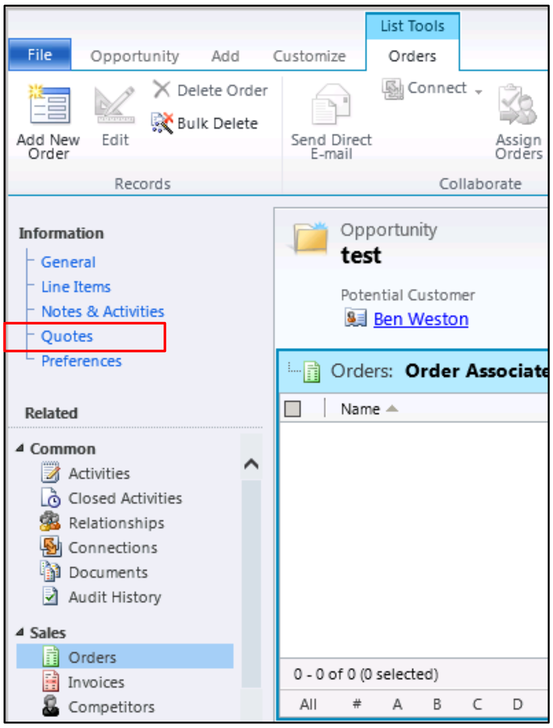
QUOTE MANAGEMENT

The quote entity within Microsoft CRM is used to record the details of a quote you are submitting to your customer. A quote can be created from an existing opportunity or be standalone.

CREATING A QUOTE FROM AN OPPORTUNITY

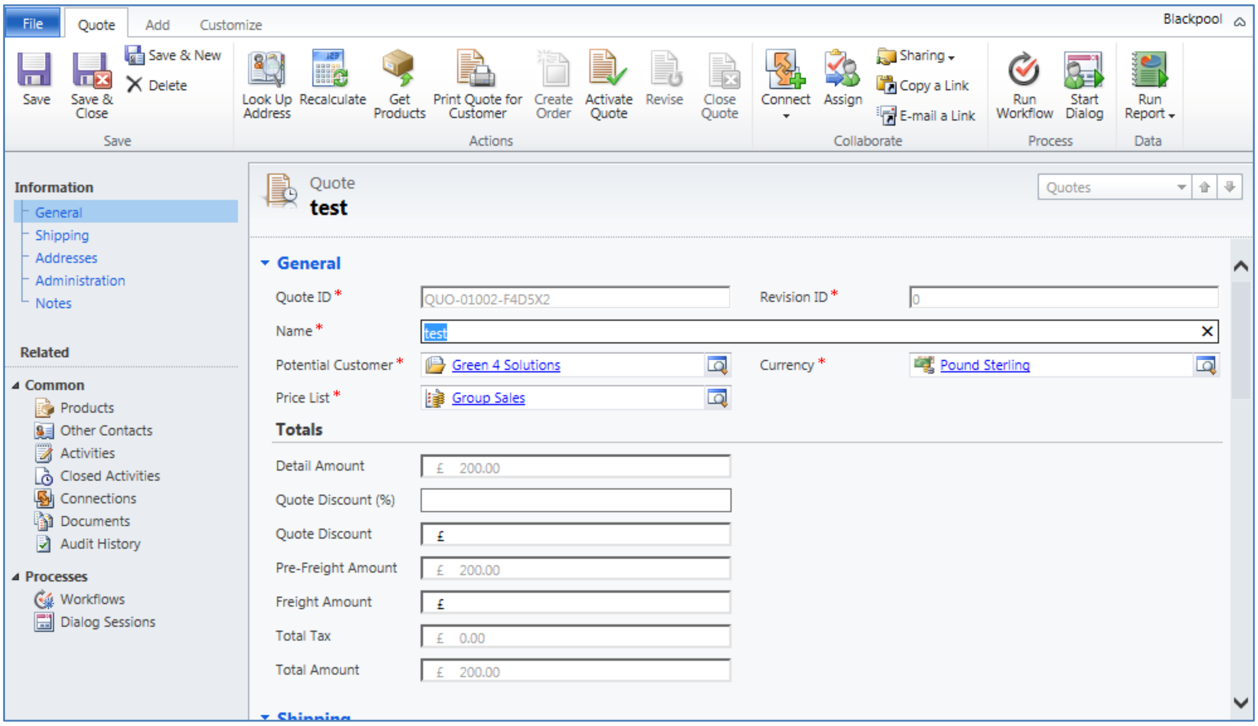
To convert an opportunity into an quote, carry out the following:

1. With the opportunity open in the form view, select **Quotes** in the form navigation panel:



2. Ensure you click into the Quotes table on the form. Select **Add New Quote** on the ribbon.

3. A new quote will be created and opened in the form view. The quote will automatically carry forward all of the information entered during the opportunity phase, for example product lines.



4. Additional products can be added by selecting **Products** in the form navigation area. Select **Add New Quote Product** on the ribbon.

5. Once the details are complete, select **Activate Quote** to lock the detail of the quote.

6. Quotes will be listed in CRM on the **Sales > Quotes** tab of the navigation area.

REVISING A QUOTE

If you wish to revise a quote, for example the customer has returned to you with additional/changed requirements carry out the following:

1. Open the quote details in the form view.

2. Select **Revise** on the ribbon.

3. A new quote record will be created (the previous quote will be deactivated). The new quote will copy the details from the previous version, but move the **Revision ID** on by 1.

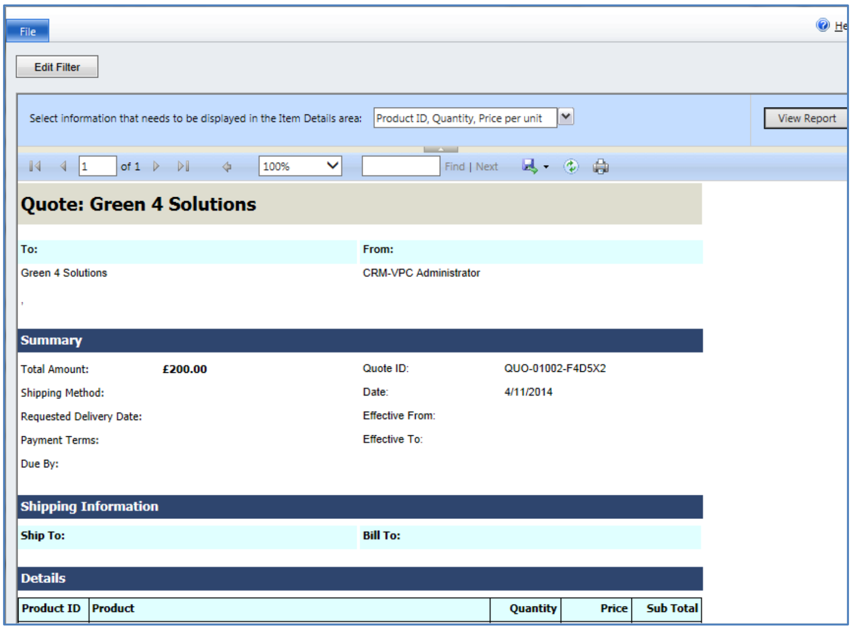
4. Once the changes have been made, select **Activate Quote** to lock down the details.

RUNNING QUOTE REPORT

From the quote you can generate a report using the information entered. This report can be issued to your customer.

1. To review a copy of the qupte, select **Run Report** followed by **<report name>** from the ribbon.

2. The quote details will open in the Report Viewer:



3. From the Report Viewer you can carry out the following actions:
   - **Export the Report.** Select the **Export** button ( ) to export the report. A drop-down list will be displayed allowing you to select the format used to save the report (e.g. CSV, PDF).
   - **Print the Report.** Select the **Print** button ( ) to print the report to an appropriate printer connected to the computer.
4. To close the report select **Close** from the **File** menu.

ORDER MANAGEMENT

The order entity within Microsoft CRM is used to record the details of confirmed orders within the corporate sales process. An order record can either be created from an existing quote, opportunity, or, can be created as a standalone record. Once an order record has been created, the management of the record is the same.

CREATING AN ORDER FROM A QUOTE

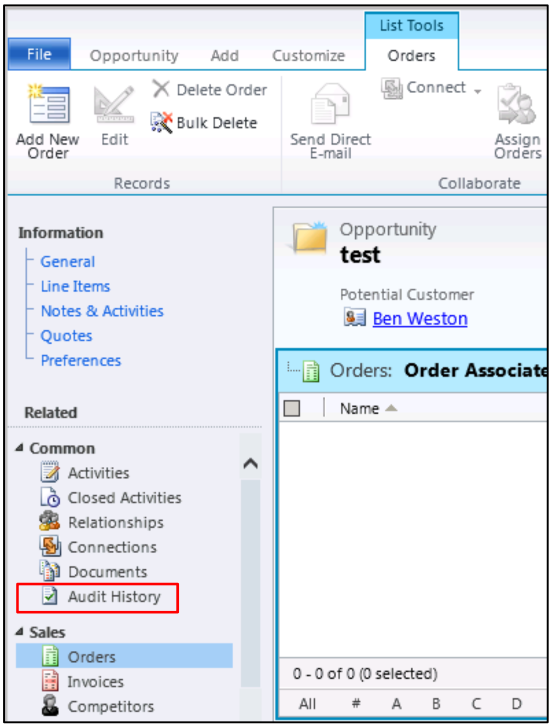
To convert a quote into an order, carry out the following:

1. With the quote open in the form view, select **Create Order** on the ribbon.
2. The Create Order dialog will be displayed. Complete the requested information before selecting **OK**.
3. The order will be displayed. All information entered during the creation of the quote will be displayed. The underlying quote and opportunity (if applicable) will be marked as closed.

CREATING AN ORDER FROM AN OPPORTUNITY

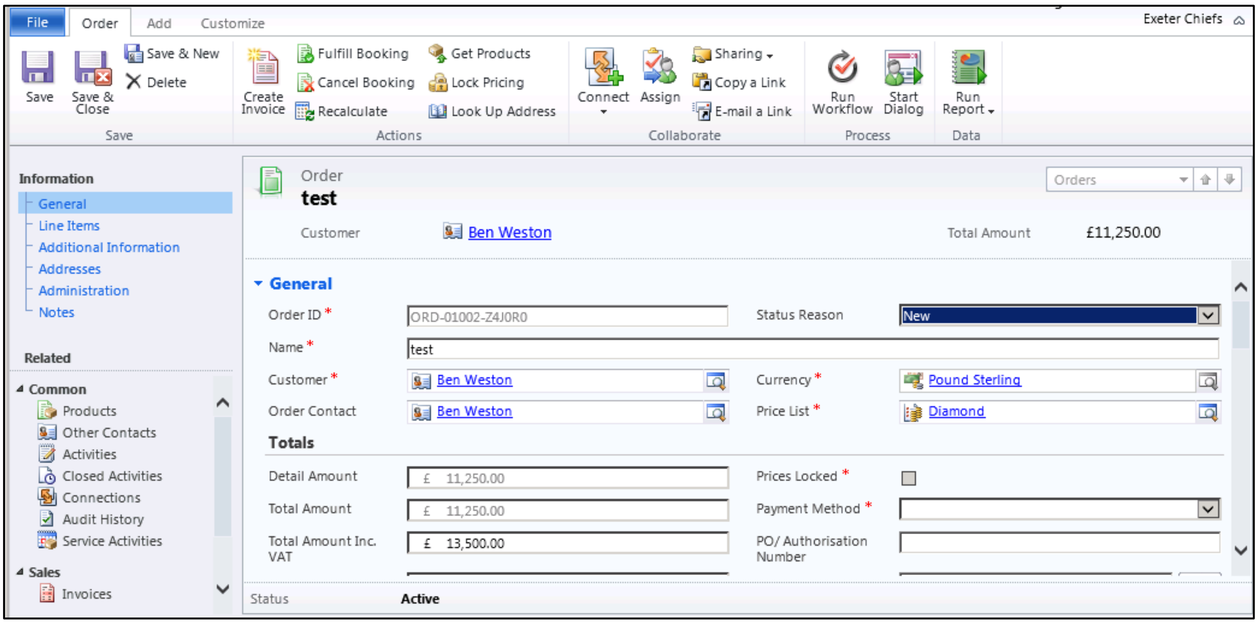
To convert an opportunity into an order, carry out the following:

1. With the opportunity open in the form view, select **Orders** in the form navigation panel:



2. Select **Add New Order** on the ribbon.

3. A new order will be created and opened in the form view. The order will automatically carry forward all of the information entered during the opportunity phase, for example product lines. When the order is created, the opportunity is automatically closed with a status of **Won**.



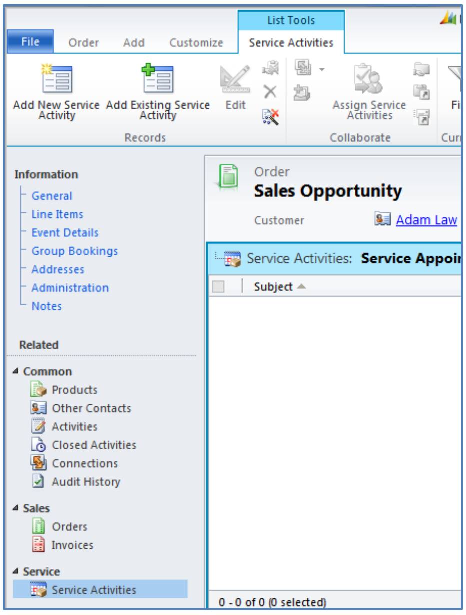
4. Complete the additional information requested, for example event details and group booking details. In addition you can open the individual line items and edit the details relating to those.

5. Once the details are complete, select **Save** to commit the order.

UPDATING SERVICE ACTIVITIES

If you are using service activities to book the use of resources carry out the following to update the activity:

1. With the order open, select **Service Activities** under the service area of the form navigation.



2. Select **Add Existing Service Activity** on the ribbon.

3. The Look Up Records dialog will be displayed allowing you to find the service activity created during the opportunity phase of the sales process. Select the activity before clicking **OK** to continue.

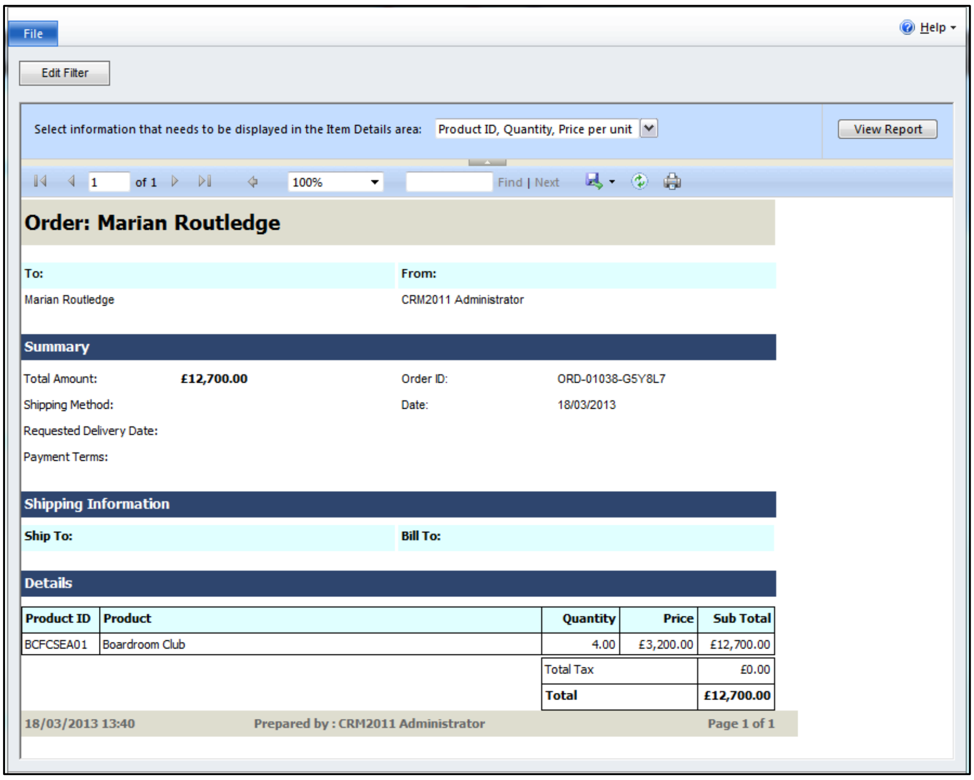
4. The activity will be listed under the Service Activities view on the opportunity form (it may be necessary to refresh the grid). If you need to update the activity, for example changed the status, double click over the activity name to open the details in the form view.

RUNNING SALES ORDER REPORTS

From the order you can generate a booking confirmation and event sheet using the information entered

5. To review a copy of the order, select **Run Report** followed by **<report name>** from the ribbon.

6. The order details will open in the Report Viewer:



7. From the Report Viewer you can carry out the following actions:

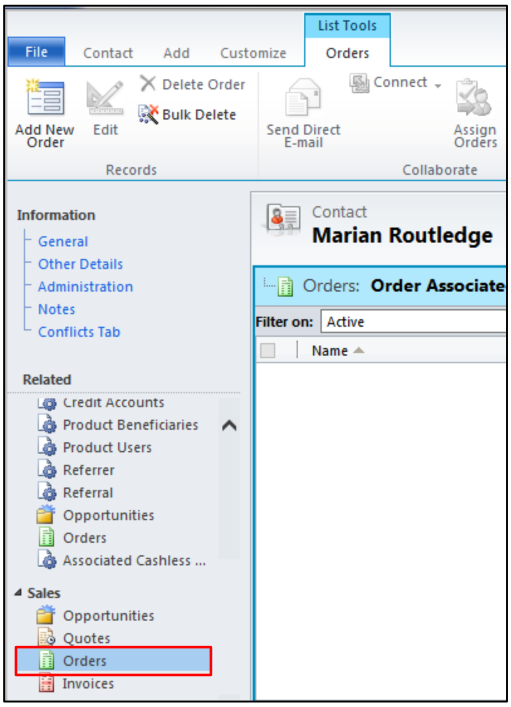
- **Export the Report.** Select the **Export** button ( ) to export the report. A drop-down list will be displayed allowing you to select the format used to save the report (e.g. CSV, PDF).
- **Print the Report.** Select the **Print** button ( ) to print the report to an appropriate printer connected to the computer.

8. To close the report select **Close** from the **File** menu.

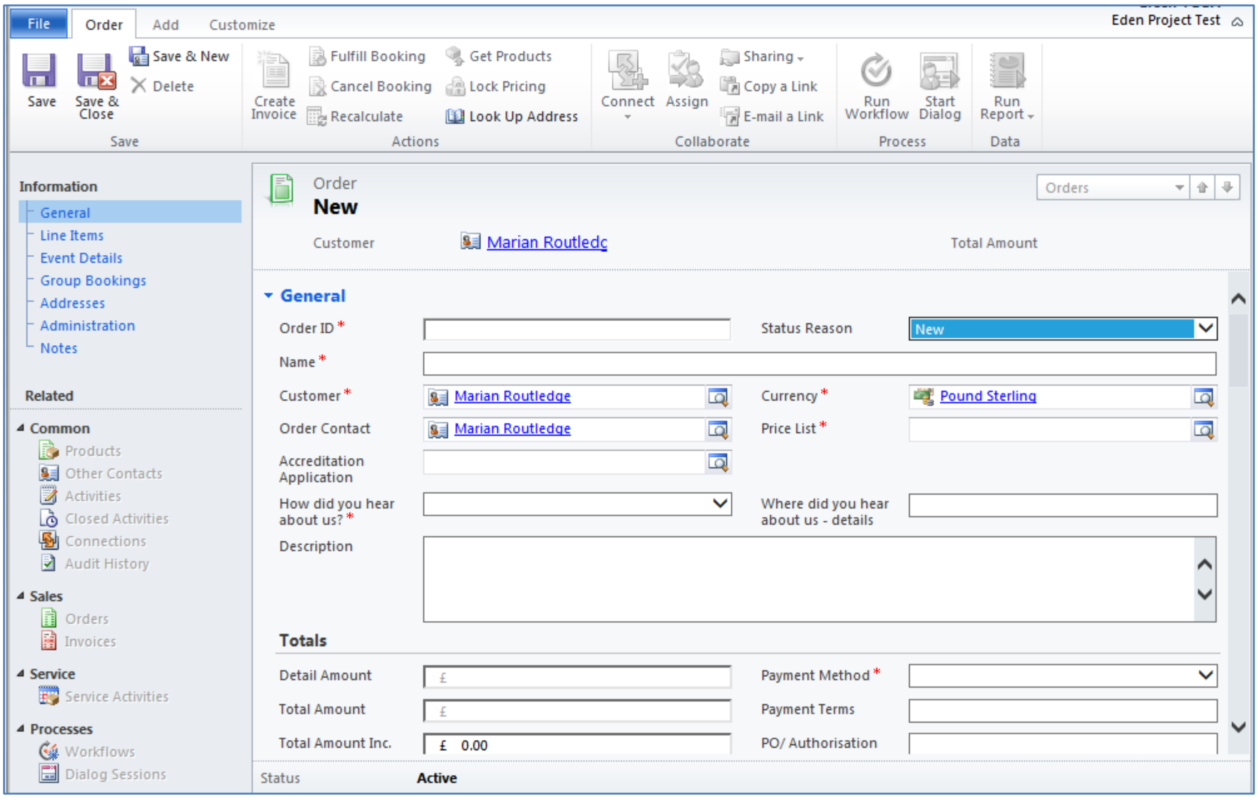
CREATING A STANDALONE ORDER

To create an order without an opportunity, carry out the following:

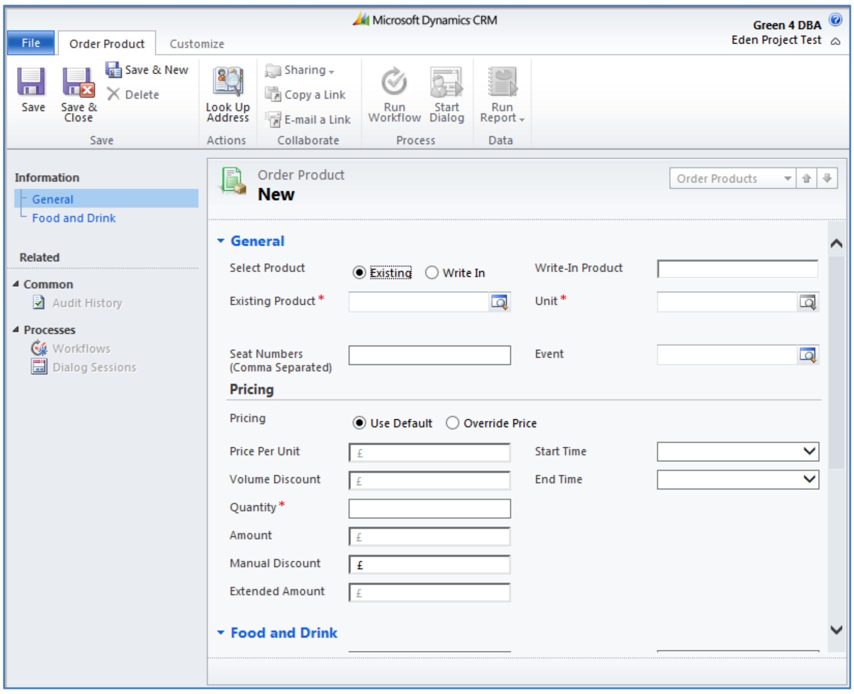
1. Select **Contacts** in the **Workplace > Customers** Navigation Panel. A list of contacts meeting the current view criteria will be displayed.
2. Double-click over the appropriate contact record. The details will be opened in the form view.
3. Select **Orders** under the **Sales** heading on the form navigation panel (highlighted below).



1. Select **Add New Order** on the ribbon.
2. A blank Order form will be displayed:



3. Complete the requested information ensuring all mandatory fields are completed.
4. Select **Save** on the ribbon to save the details entered but leave the order form open.
5. Select **Products** in the form navigation area.
6. Select **Add New Order Product** on the ribbon.
7. A blank Order Product form will be displayed:



8. Complete the following details:

- **Select Product.** Ensure the **Existing** option is selected. The **Write In** product should only be used if entering the details of an ad hoc product that is not in your product catalogue.
- **Existing Product.** Use the Look Up Records dialog to search for the product the customer is interested in.
- **Unit.** Use the Look Up Records dialog to select the default unit for the selected product.
- **Write-In Product.** Use to enter the name of an ad hoc product that does not exist in your catalogue.
- **Seat Numbers.** If seats are to allocated to the customer, enter the details in a comma separated list.
- **Event.** Use the Look Up Records dialog to search for the event that the product relates to. Use the New option on the Look Up Records dialog if the event does not already exist.
- **Quantity.** Enter the number of places the customer is requesting.
- **Start/End Time.** Enter the start and end times for the product (e.g. guided tour times).

9. Select **Save** on the ribbon to save the details entered but leave the form open.
10. The Pricing information will automatically update using the prices held within the system for the selected product. If required you can manually change the price charged as follows:

    - **Manual Discount.** To offer a manual discount on the total price charged, enter the amount into the Manual Discount field. For example to discount the price by £100 enter 100.
    - **Override Price.** To discount each individual place, for example to charge £80 pounds instead of £100 per place booked, select the **Override Price** option. When this option is selected you will be able to manually enter a **price per unit.**

    To see the effects of the changes made to the prices, select **Save** on the ribbon. The form will remain open but the pricing details will be updated to reflect the changes made.
11. Once the details are complete select **Save & Close** on the ribbon.
12. The Booking form will be re-displayed. The newly added product will be listed in the Line Items grid.

Multiple products can be added to the order using the method described above. The products added do not have to relate to the same fixture, series or event.

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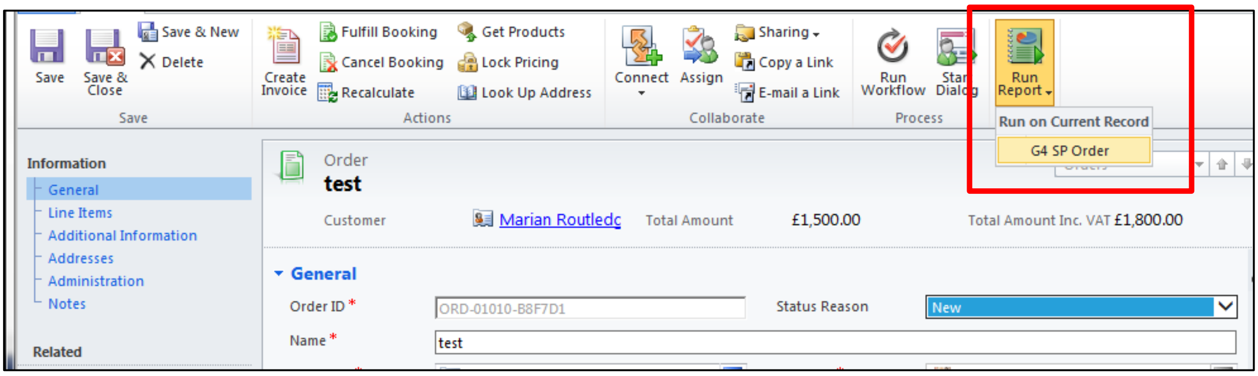
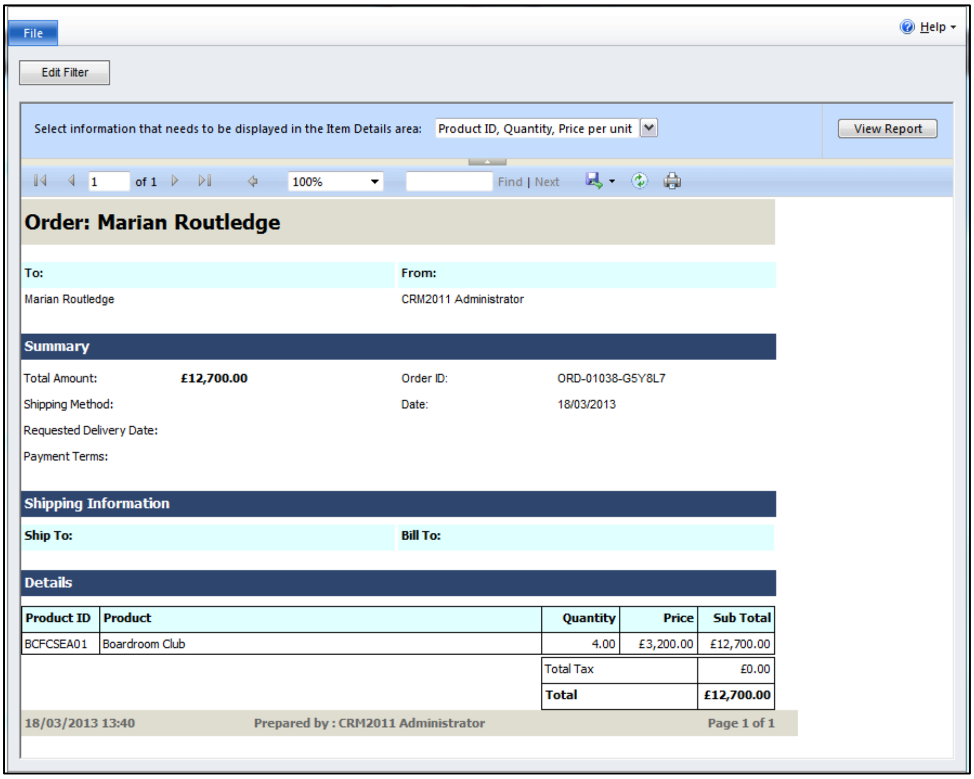
13. Select **Recalculate** on the ribbon to update the order pricing information (note it may be necessary to select the **Order** tab (highlighted in the image below) at the top of the form). Note, to update the Price Including VAT price select **Recalculate** a second time.
14. To review a copy of the order, select **Run Report** followed by **<report name>** from the ribbon.



15. The order details will open in the Report Viewer:



16. From the Report Viewer you can carry out the following actions:

    - **Export the Report.** Select the **Export** button ( ) to export the report. A drop-down list will be displayed allowing you to select the format used to save the report (e.g. CSV, PDF).
    - **Print the Report.** Select the **Print** button ( ) to print the report to an appropriate printer connected to the computer.

17. To close the report select **Close** from the **File** menu.

UPDATING A ORDER

Once an order has been created within Microsoft CRM it is possible to continue to update the record whilst it remains active, for example you can enter the details of when the order has been fully paid and when tickets have been distributed.

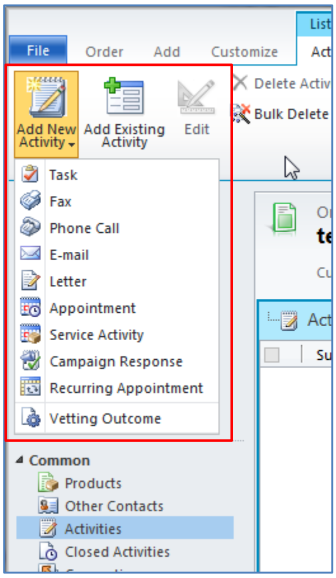
To edit an order:

1. Select **Orders** in the **Sales** Navigation Panel. A list of orders meeting the current view criteria will be displayed.
2. Carry out a search for the order.
3. Double-click over the appropriate order to open the details in the form view.
4. Edit the details as required before selecting **Save and Close** on the ribbon.

ADDING ACTIVITIES TO ORDERS

To create an activity related to an order:

1. Open the appropriate order record in the form view.
2. Select **Activities** in the form navigation panel. A list of activities linked to the opportunity will be displayed.
3. Select **Add New Activity** from the ribbon. A list of available activities will be displayed:



4. Once the activity type has been selected, the appropriate form will be displayed. Complete the requested information including:
    - **Subject**. Enter a descriptive name for the activity.
    - **Regarding**. Use to link the activity to another record, for example event or person.
    - **Owner**. Your Microsoft CRM username will be automatically entered.
    - **Duration.** Enter the duration of the activity.
    - **Due**. Enter when the activity is due to be completed.
5. Once the information is complete select **Save & Close** on the ribbon.

Service activities can be created to book resources using this method.

SETTING AN ORDER TO FULFILLED

Once an order has been fulfilled, i.e. all of the fixtures, series and events linked to the order have been completed, the order can be deactivated. Deactivated orders will remain within Microsoft CRM, but will not appear in the majority of views. To fulfil an order:

1. With the order open in the form view, select **Fulfil Order** on the ribbon.
2. The Fulfil Order dialog will be displayed.
3. Update the details as required before selecting **OK** to continue.

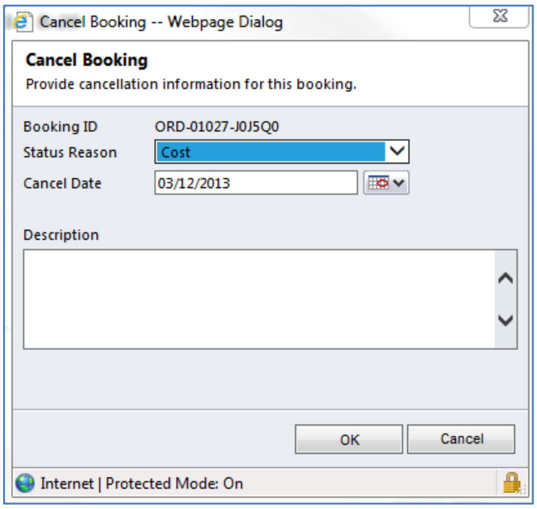
You will be unable to edit fulfilled orders.

SETTING AN ORDER TO CANCELLED

If an order is cancelled, it is best to deactivate the order record. Deactivated orders remain within Microsoft CRM, but are not displayed in most views. Deactivated records can be re-activated if necessary, please contact your system administrator for assistance.

To deactivate an order in Microsoft CRM:

1. Open the order record in the form view.
2. Select **Cancel Booking** from the ribbon.
3. The **Cancel Booking** dialog will be displayed.
4. The **Status** will be automatically set to **Cancelled**. Use the drop-down list to select the **Status Reason**.



5. Once the details are complete, select **OK** to continue.

PRODUCTS

The Corporate Sales module uses standard CRM products and price lists to populate opportunities and orders. Setting up products in Microsoft CRM is a three stage process:

1. Create your price lists
2. Add your products
3. Link your products to your price lists

STEP 1: CREATE YOUR PRICE LISTS

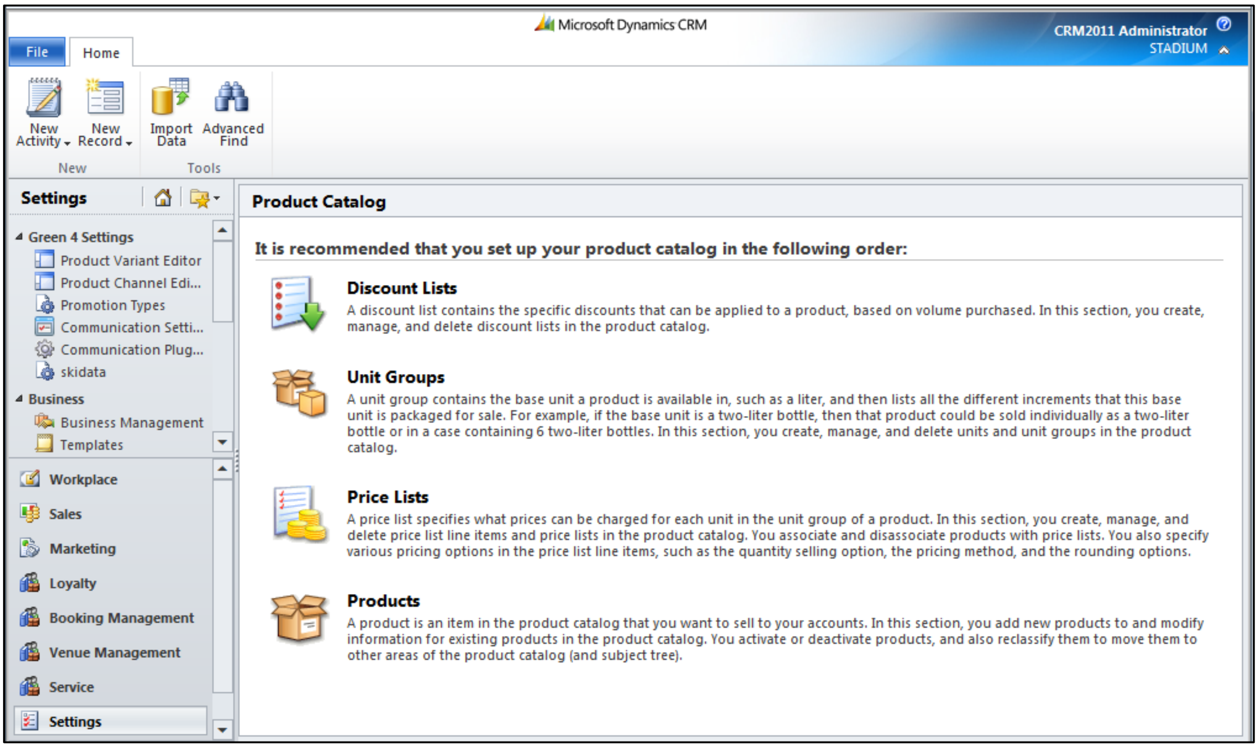
Within Microsoft CRM you should create a price list of each set of products you sell. For example the following would be a common example for a sports club:

Price List	Usage
A Games	Used for pricing products sold for A fixtures (i.e. your premium fixtures).
B Games	Used for pricing products sold for B fixtures (i.e. your second tier fixtures).
C Games	Used for pricing products sold for C fixtures (i.e. your lowest tier fixtures).
Season	Used for season-long products.
Event	Used for special events, e.g. golf days

The above table is only an example, and using Microsoft CRM it is possible to create price lists to meet the needs of your organisation.

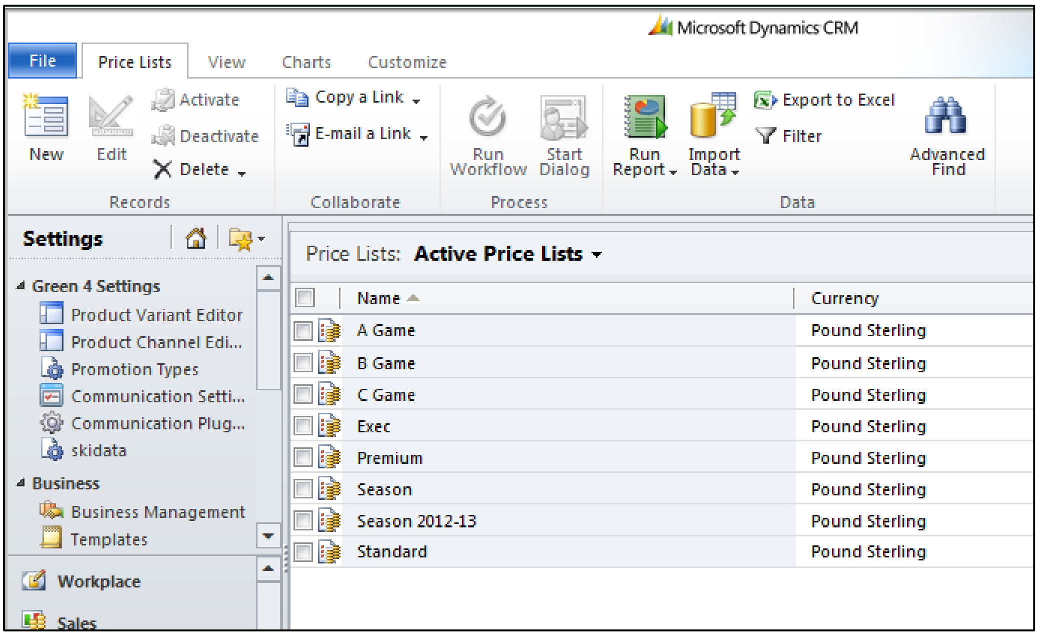
To create a price list:

1. Select **Product Catalog** in the **Settings** Navigation Panel. The Product Catlog Work Area will be displayed:



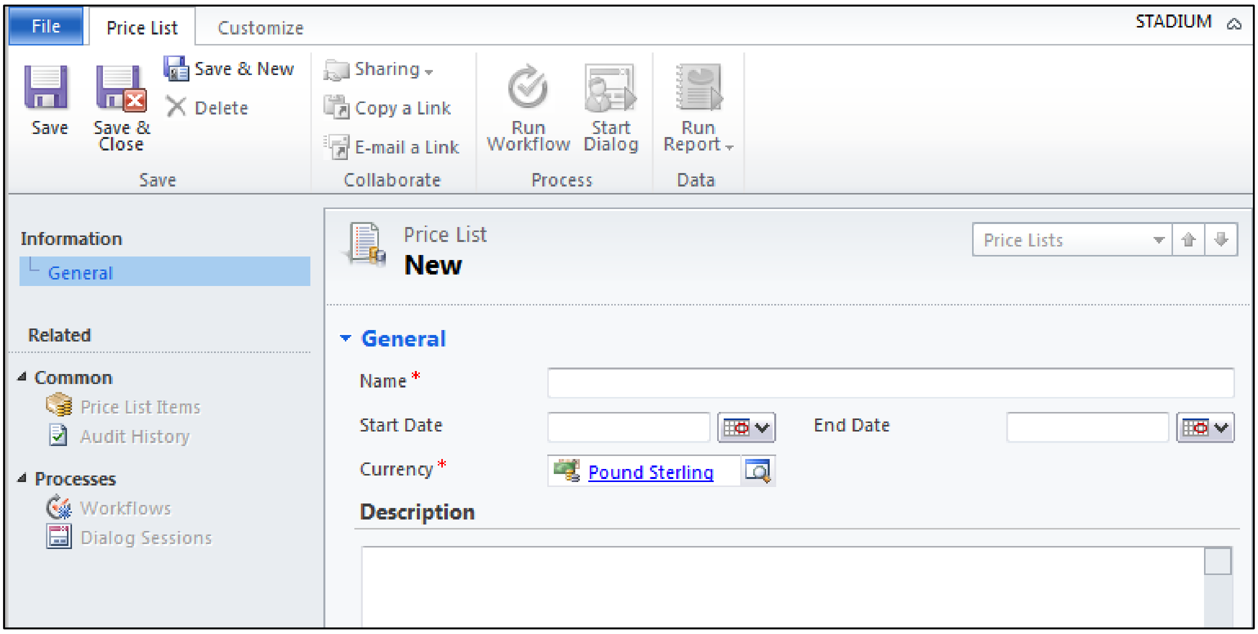
2. Select **Price Lists** in the work area.

3. A list of price lists meeting the current view criteria will be displayed:



4. To create a new Price List, select **New** on the ribbon.

5. A blank Price List form will be displayed:



6. Complete the following details:

- **Name.** Enter a name for the price list. The name will be used by others to identify the purpose of the price list and should therefore be relevant.

- **Start Date.** Enter a date when the price list comes into use. Leave blank if the price list will be available immediately.

- **End Date.** Enter the date when the price list will cease to be available. Leave blank if the price list is to be available indefinitely.

- **Currency.** Your organisation's default currency will be automatically displayed. Leave unchanged.

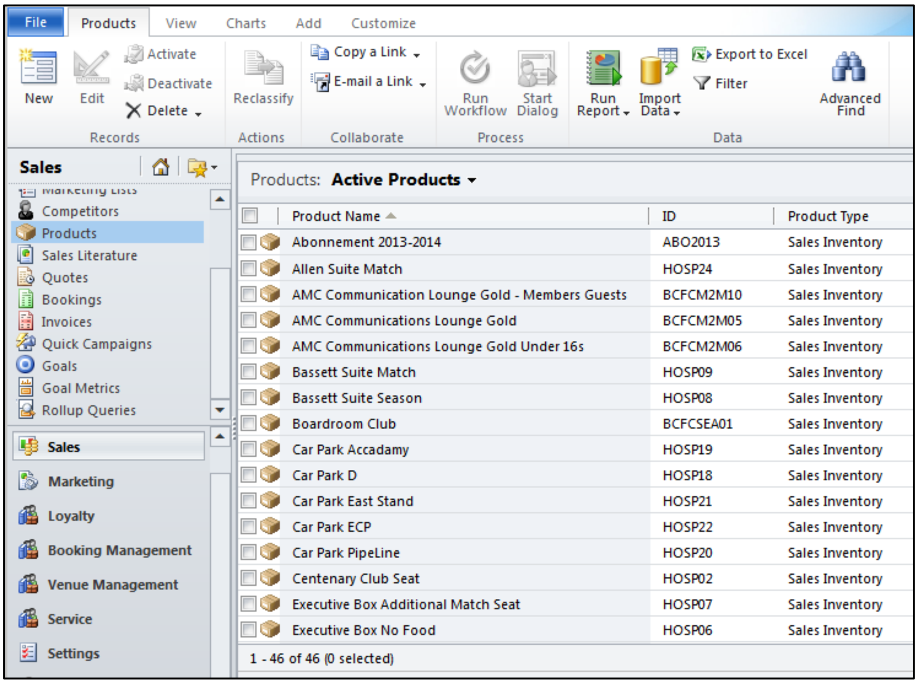
- **Description.** Enter a description of the price list.

7. Once the details are complete, select **Save & Close** on the ribbon.

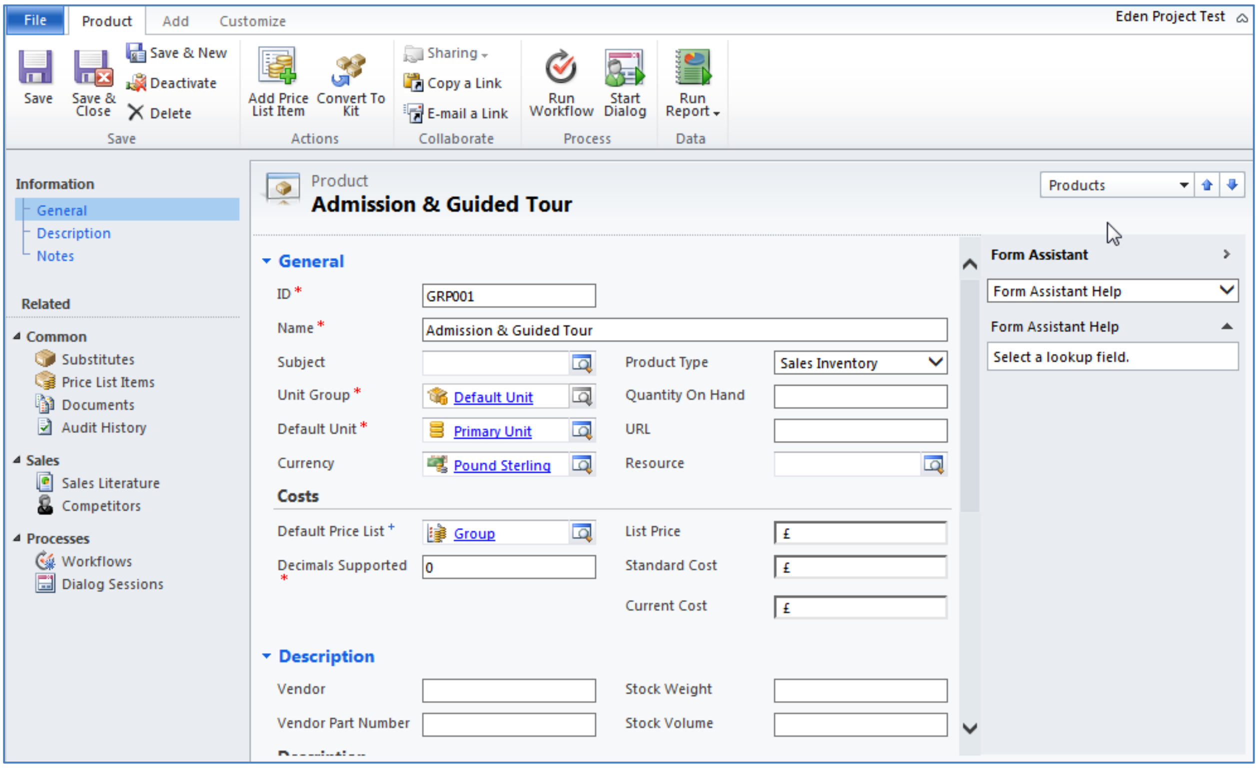
STEP 2: ADD YOUR PRODUCTS

To add a product to the product catalogue:

1. Select **Products** in the **Sales** Navigation Panel.
2. A list of products meeting the current view criteria will be displayed:



3. To create a new Product, select **New** on the ribbon.
4. A blank Product form will be displayed:



5. Complete the following details:
   - **ID.** Enter a unique ID for the product.
   - **Name.** Enter a name for the product. The name will be used by others to identify the product and should therefore be relevant.
   - **Resource.** Use the Look Up Records dialog to select the resource the product uses. For example the room you are selling hospitality for.
   - **Unit Group.** Use the Look Up Records dialog to select the default unit group.
   - **Default Unit.** Use the Look Up Records dialog to select the default unit.
   - **Currency.** The currency field will be automatically set to your organisation's default currency.
   - **Decimals Supported.** Enter 0.

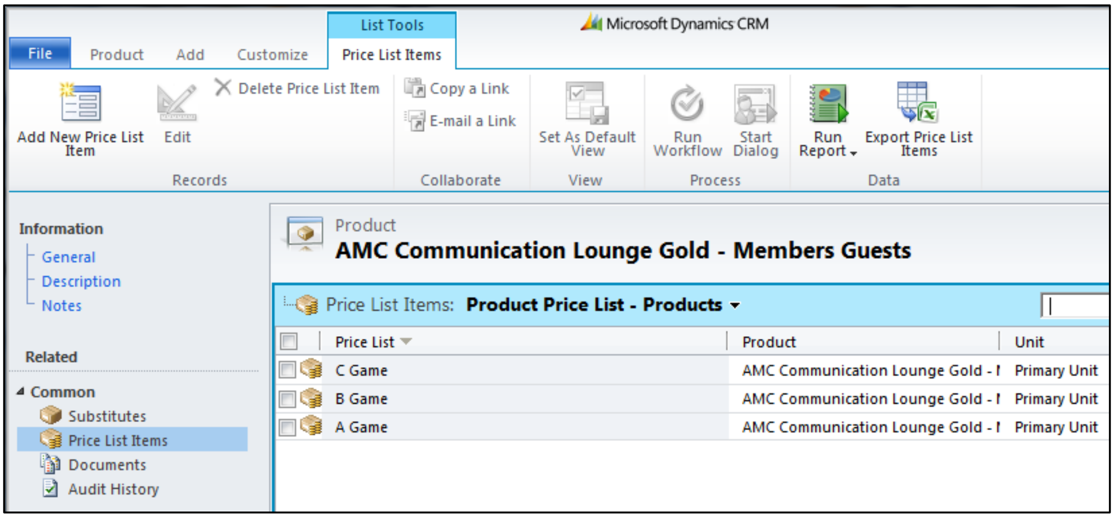
   Leave all other fields unchanged.
6. Once the details are complete, select **Save** on the ribbon to save the details but leave the form open.

STEP 3: LINK PRODUCTS TO PRICE LISTS

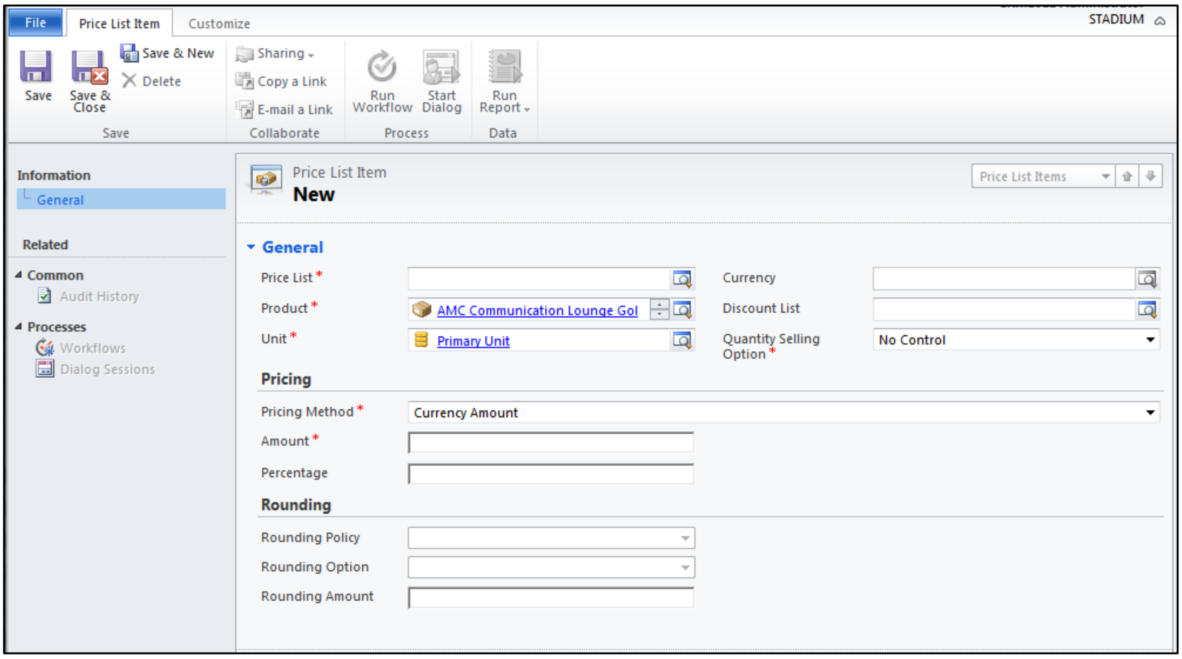
The prices charged for products are determined by price list item records, which link the product to the price list. A product may have a number of linked price list items, which allows you to charge different prices for the same product depending upon the price list selected.

To create a price list item:

1. With the product open in the form view, select Price List Items in the form navigation panel.
2. A list of price list items that have been previously added to the product will be shown:



3. To create a new price list item, select **Add New Price List Item** on the ribbon.
4. A blank Price List Item form will be displayed:



5. Complete the following details:
    - **Price List.** Use the Look Up Records dialog to select the price list the price list item relates to.
    - **Product.** The product will be automatically entered.
    - **Unit.** The unit will be automatically entered.
    - **Currency.** Use the Look Up Records dialog to select your organisation's default currency.
    - **Discount List.** Use the Look Up Records dialog to select the discount list that applies to the product.
    - **Pricing Method.** Ensure **Currency Amount** is selected.
    - **Amount.** Enter the cost of the product.

    Leave all other fields unchanged.
6. Once the details are complete select **Save & Close** on the ribbon

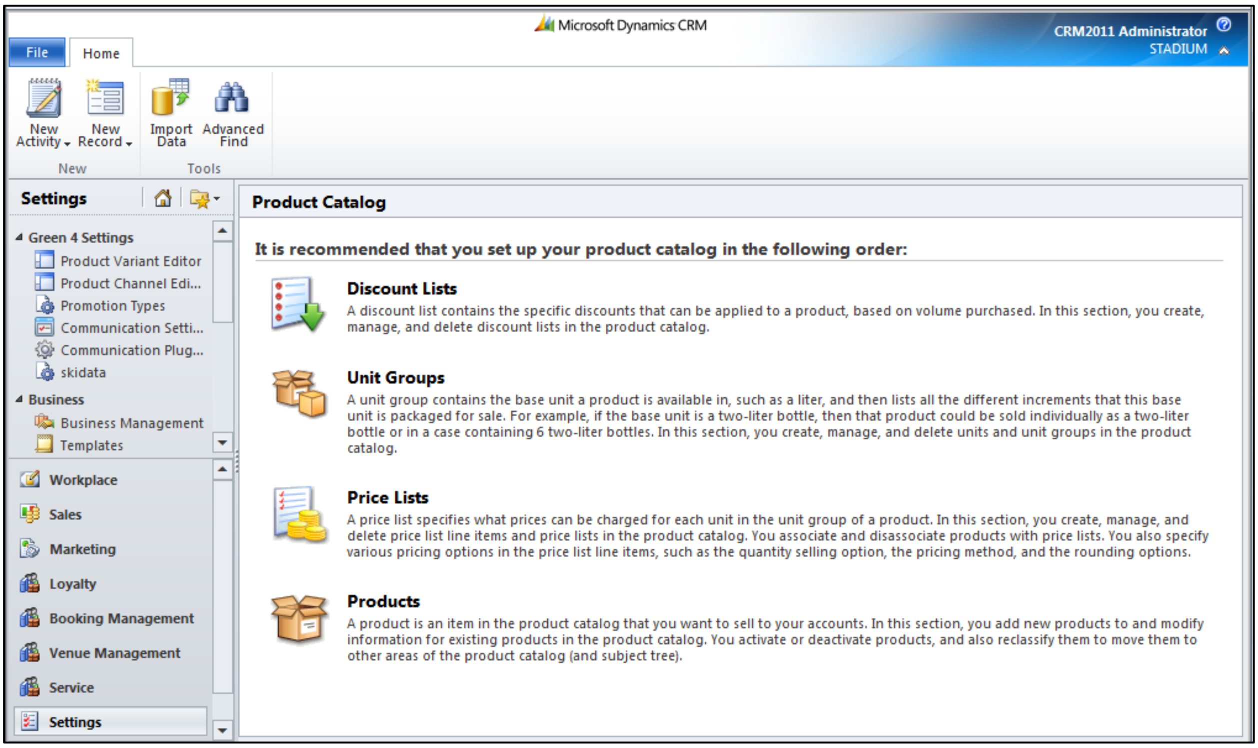
7. Repeat the above process to link the product to each relevant price list. For example a hospitality product could be linked to your A Game, B Game, C Game and Season price lists, with a different price charged for each. Whereas your golf day would only be linked to the Events price list.

8. Once the price list items are complete, select **Save & Close** on the ribbon to save the product details.

DISCOUNT LISTS

Discount lists are used to provide volume related savings on products. To create a discount list:

1. Select **Product Catalog** in the **Settings** Navigation Panel. The Product Catlog Work Area will be displayed:



2. Select Discount Lists in the work area.

3. A list of price lists meeting the current view criteria will be displayed.

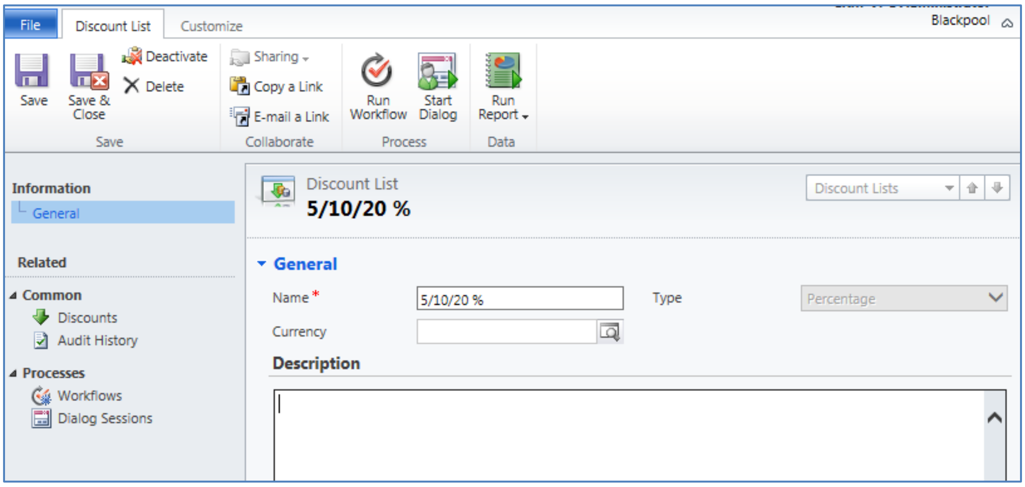
4. Select **New** on the ribbon.

5. The Create Discount List dialog will be displayed. Complete the following:

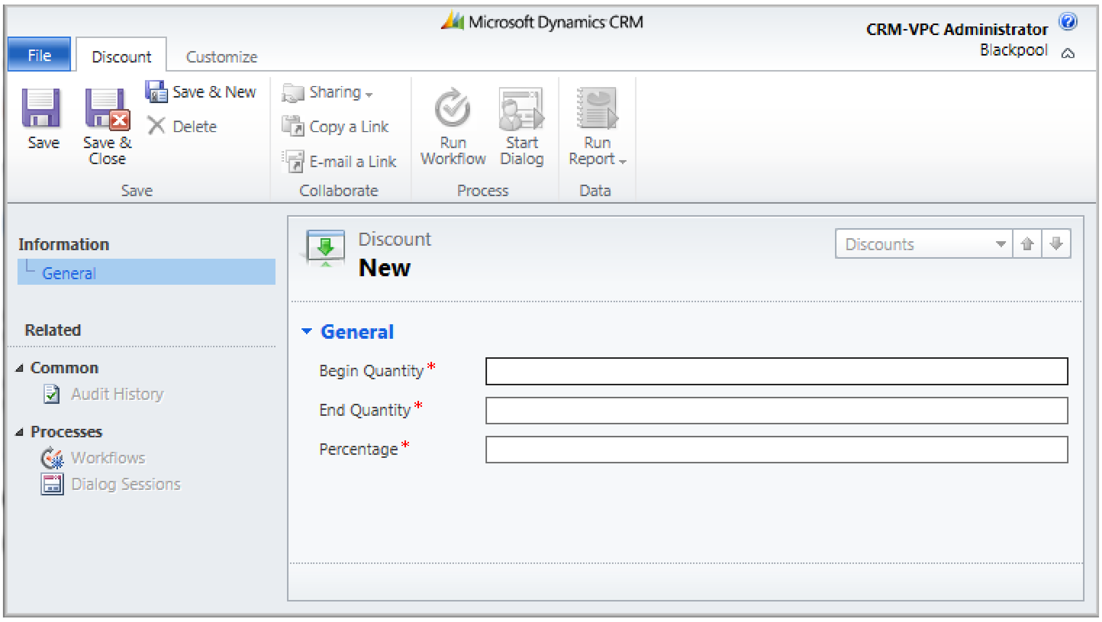
   - **Name**. Enter a name for the discount list.
   - **Type**. Select either Percentage (if you are going to offer a percentage discount) or Amount (if you are going to offer a monetary discount).

6. Once the details are complete select **OK** to continue.

7. The Discount List form will be displayed.



8. Select **Discounts** in the form navigation area.
9. A list of discounts that have been linked to the discount list will be displayed. Select **Add New Discount** on the ribbon.
10. A blank discount form will be displayed. Complete the following details:
    - **Begin Quantity.** Enter the number of items the purchaser has to add to their order before the discount will be applied.
    - **End Quantity.** Enter the number above which the discount will no longer apply.
    - **Percentage / Amount.** Enter the discount to be applied either as a percentage or amount.

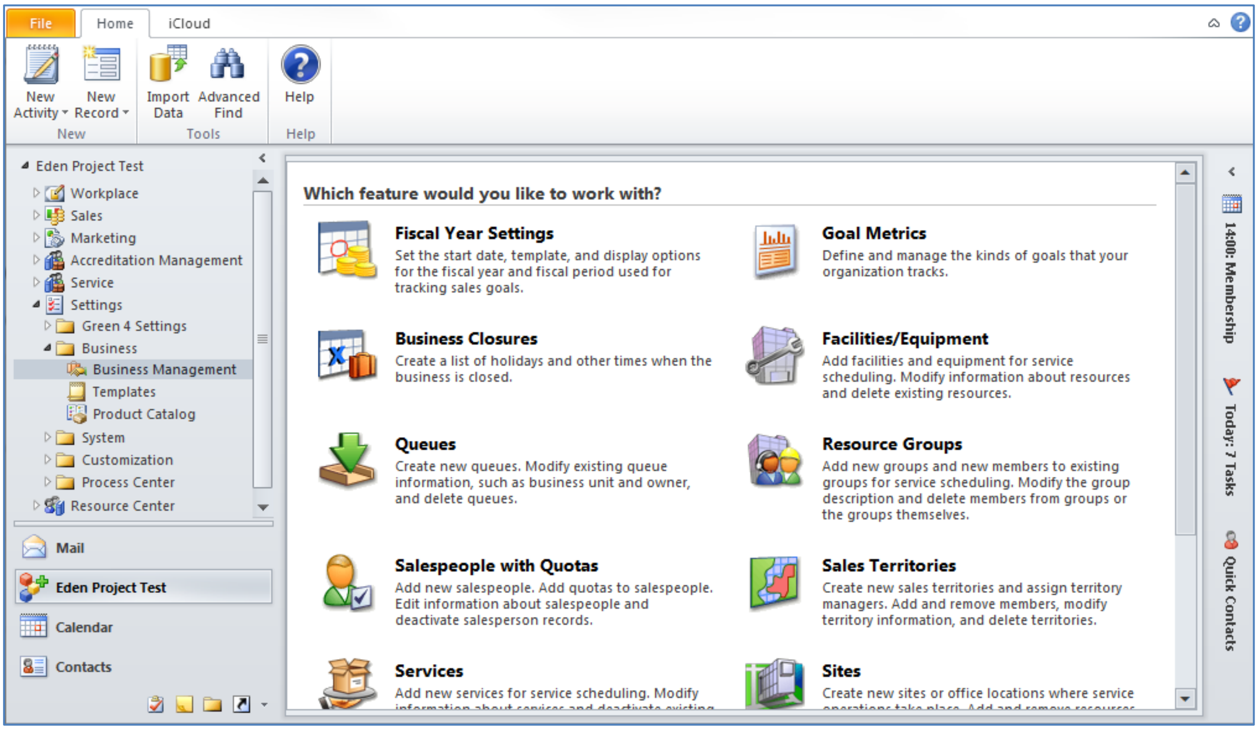


11. Once the details are complete, select **Save & Close** to return to the discount list. Repeat the above process for all price breaks.

FACILITIES

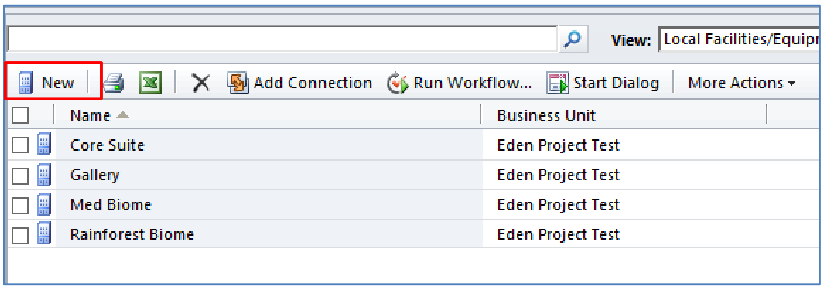
Within the Green 4 Corporate Sales Process module, the standard facilities entity is used by products. To create a facility record, carry out the following:

1. Select **Business Management** in the **Settings > Business** Navigation Panel. The Business Management Work Area will be displayed:



2. Select **Facilities/Equipment** in the work area.

3. Click **New** on the toolbar above the list of existing facilities:

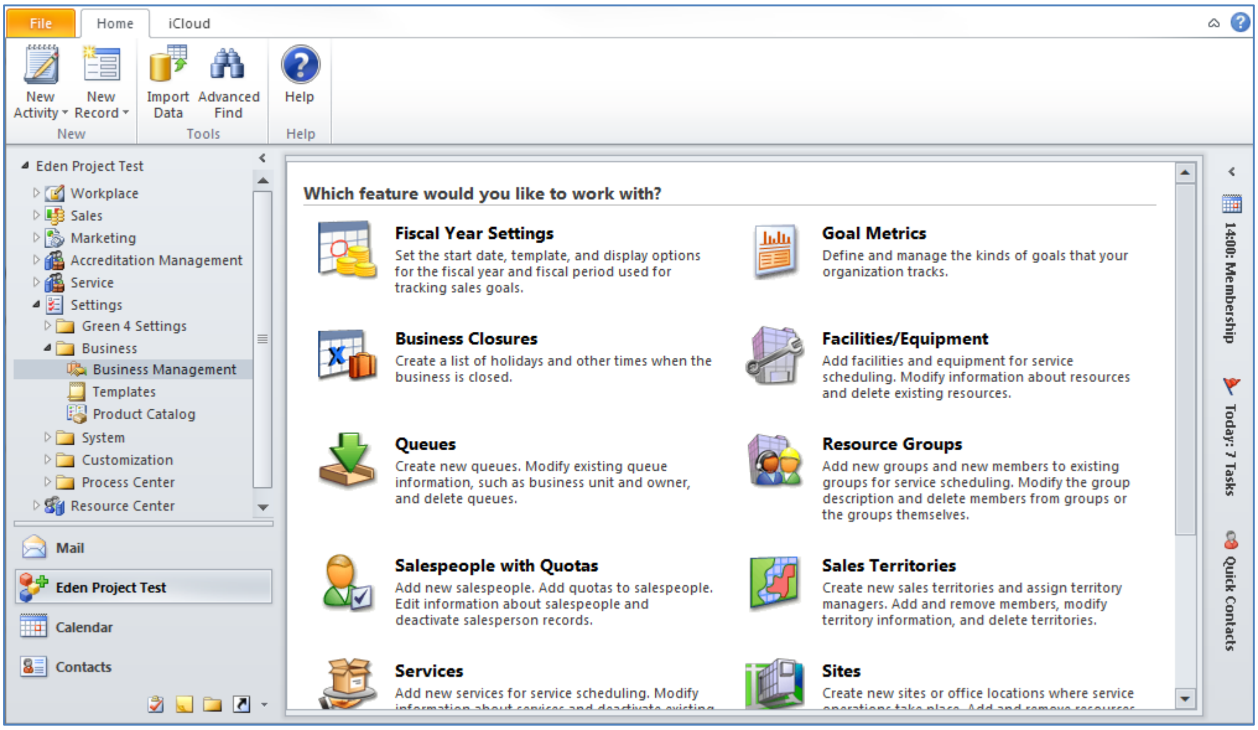


4. Complete the requested details before selecting **Save & Close** on the ribbon.

SERVICES

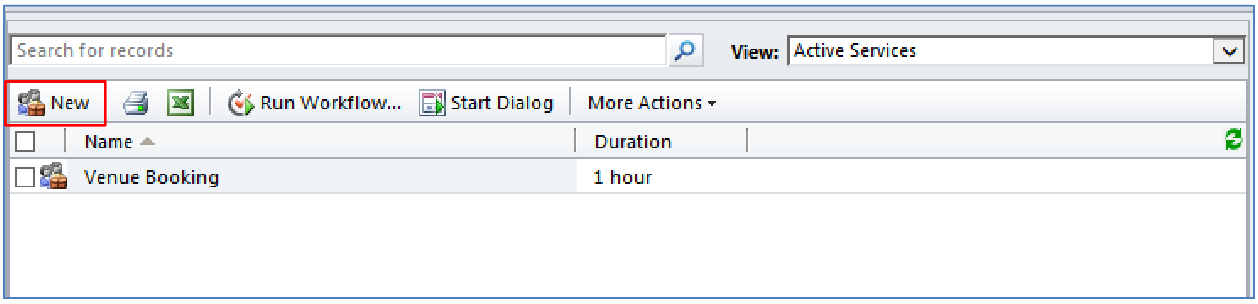
To set up a service that can be called from the service calendar carry out the following:

1. Select **Business Management** in the **Settings > Business** Navigation Panel. The Business Management Work Area will be displayed:



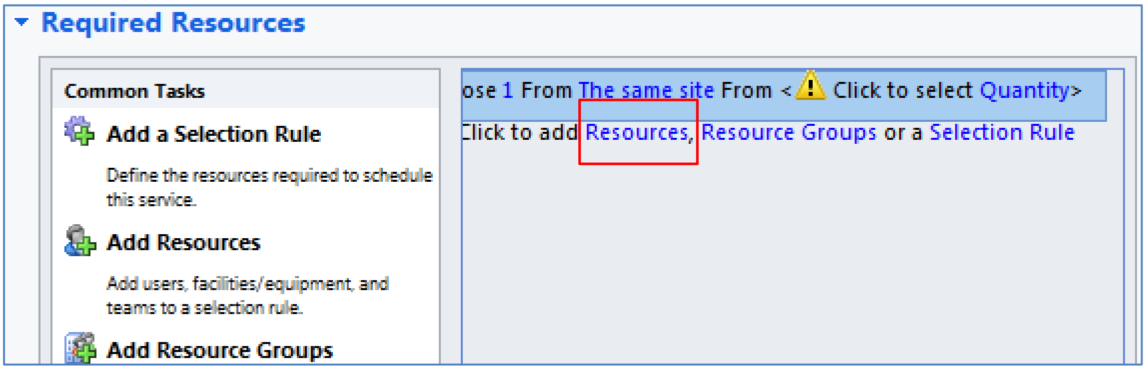
2. Select **Services** in the work area.

3. Click **New** on the toolbar above the list of existing services:



4. Complete the following details:

   - Name. Enter the name for the service.
   - Scheduling. Complete the default scheduling information.
   - Required Resources. Click on **Resources** in the dialog that is shown:



The Look Up Records dialog will be displayed. Select the resources that can be used for the service you are defining. For example select the rooms that can be hired. Click **OK** to continue.

5. Select **Save & Close** on the ribbon.