BASICS OF CRM 2015

green4 SOLUTIONS

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

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DOCUMENT CONTROL

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CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited
16-17 Midland Court
Central Park
Lutterworth
Leicestershire
LE17 4PN
UK

Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com

1. INTRODUCTION

1.1. WHAT IS CRM?

Customer Relationship Management (CRM) is a model of managing a company or organisation's customer relationships.

- Microsoft Dynamics CRM is a business software application that allows companies of all sizes to track, manage and report on their customer interactions.

1.2. WHY CRM?

Moving to a CRM system brings with it a number of benefits:

- All customer data in a central repository
- Emails/phone calls recorded against contact as activities
- Targeted communications or email campaigns can be sent to customers
- Achieve a 360-degree view of the customer relationship
- Automate common business processes to reduce manual tasks
- Deliver a more consistent customer experience by streamlining customer interactions
- Enable executives to measure and report on key metrics related to their business so they can make better business decisions

2. USING CRM

CRM is a very powerful tool, and how we choose to use it can further benefit the productivity of users. Users can choose to access and navigate through CRM on different platforms. There are two ways of accessing CRM, through Internet Explorer and through Outlook. Which option to use is very much a business decision and the sections below aim to provide examples of scenarios where one particular user interface may be more suitable than the other.

2.1. OUTLOOK CLIENT VS INTERNET EXPLORER CLIENT

OUTLOOK CLIENT

Accessing CRM through the Outlook client (sometimes referred to as the Outlook plugin) enables users to view all their key customer data in one place. This is especially beneficial for users that already spend a considerable amount of time in Outlook in a typical working day. The table below describes the key benefits of using the Outlook client.

Function	Description
Email Tracking	Emails can be directly tracked from the Outlook client, and will be recorded against the contact or account in CRM
Tracking Appointments	Appointments can be tracked directly from the Outlook client and converted into an activity in CRM, allowing the user to effectively manage their appointments with clients.
Single Application User Interface	A key benefit of the Outlook client is that the user is provided with a single application user interface. This means that a user, who regularly utilises Outlook, can remain in this program without having to open multiple windows.
Conditional Formatting	Through the Outlook plugin – data can be further enhanced using the conditional formatting tool. This allows the user to help organise the data available to them.

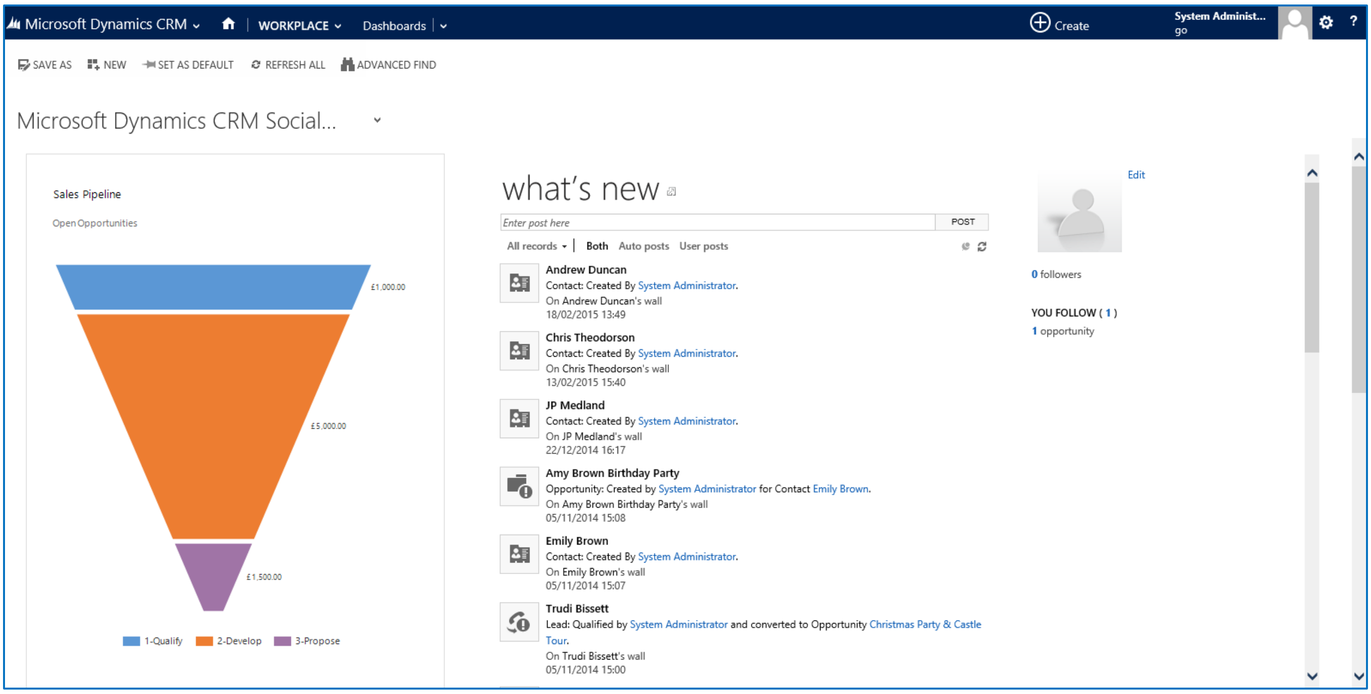
Scenario:

An example of a user, or department that would benefit most by using the CRM Outlook plugin would be Sales. Sales people tend to use Outlook regularly throughout their working day, and the single user interface would therefore be beneficial to them. The ability to synchronise activities, track emails and create new contacts and accounts whilst using Outlook, enables the user to streamline their processes when executing a sales process.

INTERNET EXPLORER CLIENT

Function	Description
Speed	General navigation of the CRM system is a lot quicker through the Internet Explorer client.
Syncing of Data	Data is synchronised more regularly, whereas accessing through the Outlook plugin means that data in the CRM is only intermittently synchronised.
All Green 4 Modules available	All Green 4 modules are available. For example – the Green 4 email marketing tool is only available through the Internet Explorer client.

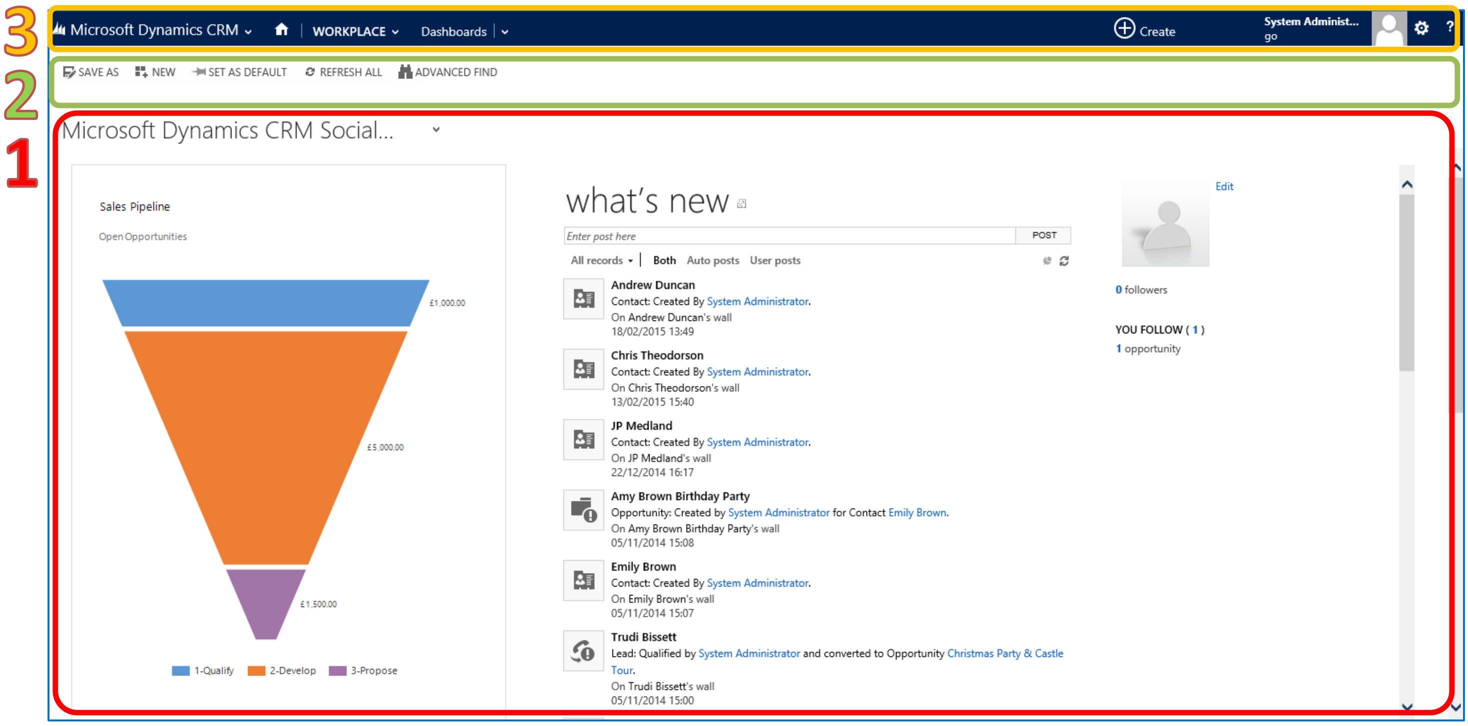
The screenshot below shows how CRM may appear when a user logs in through Internet Explorer:



2.2. CRM NAVIGATION

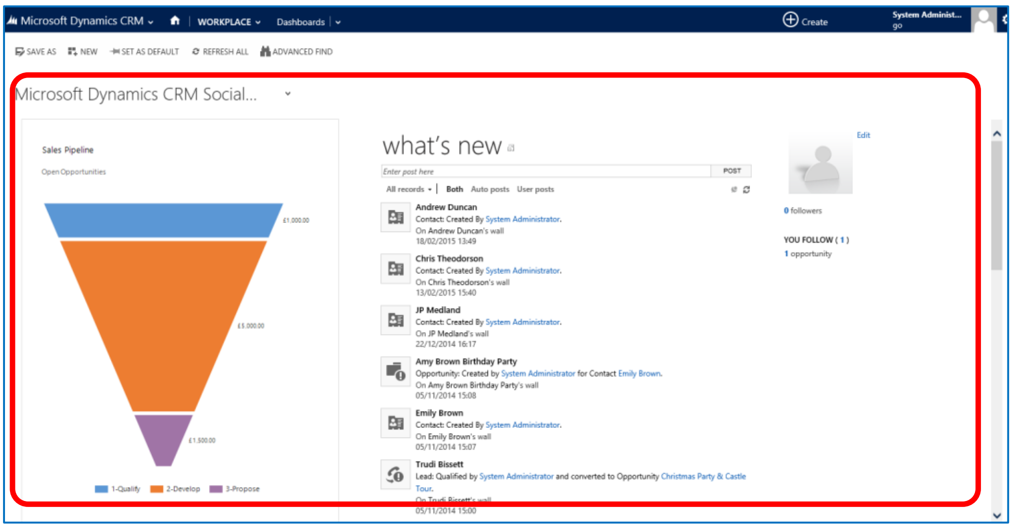
Microsoft Dynamics is designed to be used and react in a very similar way to other, maybe more familiar Microsoft software such as Word or Excel. CRM 2015 works with a drop down menu approach

The images below outlines the key areas of CRM 2015, a description of each area is provided below:



WORK AREA (1)

The work area displays information related to the menu option selected. The work area display will change depending on which area of CRM the user is working in. The information shown in the example below is of the Workplace area of CRM 2015. The Workplace page can be customised to a dashboard view relevant to the user.



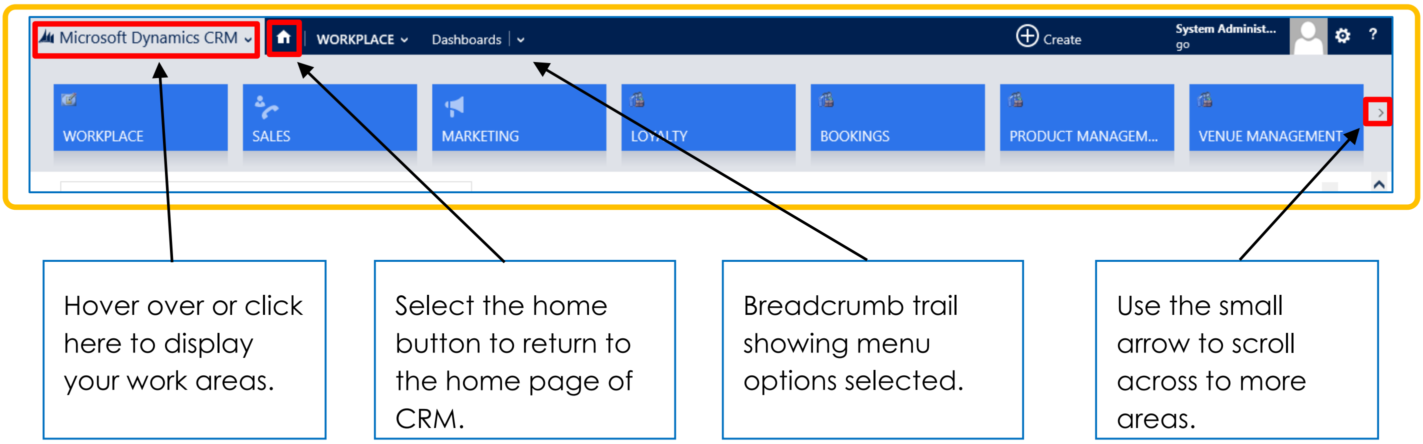
RIBBON (2)

A ribbon sits above every work area that is opened in CRM 2015. The ribbon will update based upon the area of CRM the user is in. For example, navigating to contacts will display different ribbon buttons and tabs than when you navigate to Marketing lists. The purpose of the ribbon bar is to display the most common activities to users in relation to where they are in the system. The New button in the ribbon often appears and is selected when creating a New form.

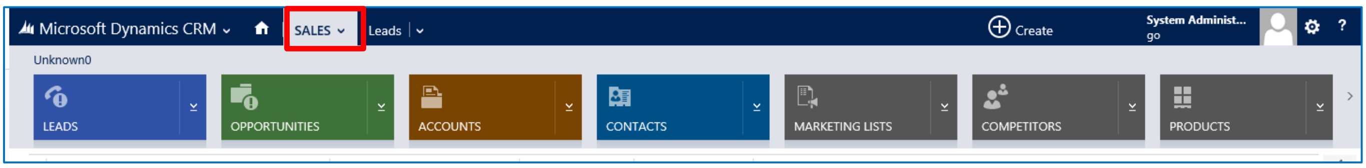
NAVIGATION BAR (3)

The navigation bar on the top of CRM 2015 allows users to select a relevant tab for an area to work in by either clicking or hovering over the Microsoft Dynamics CRM heading in the left hand corner. Hovering over this heading displays the list of entities available to work in i.e. Sales, Product Management, and Venue Management etc. By selecting the small arrow on the far right of the list, it is possible to scroll across the list of entities available.

As you select an entity, the Navigation Bar displays the selection or breadcrumb trail of what has been selected. In the example below, the selection shows Workplace and Dashboards. This enables easy navigation back to a previous area.

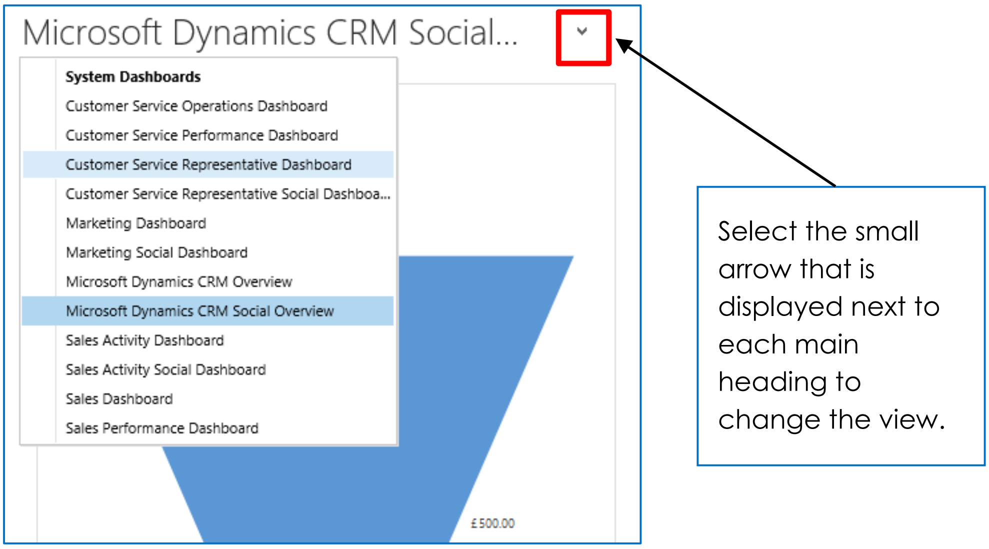


Upon selecting the area that you are going to work in from the Navigation Bar, items related to that area will be displayed. For example, as shown below, by hovering over or clicking on Sales, all related items to Sales are displayed such as Leads, Opportunities, Accounts, and Contacts etc.



VIEWS

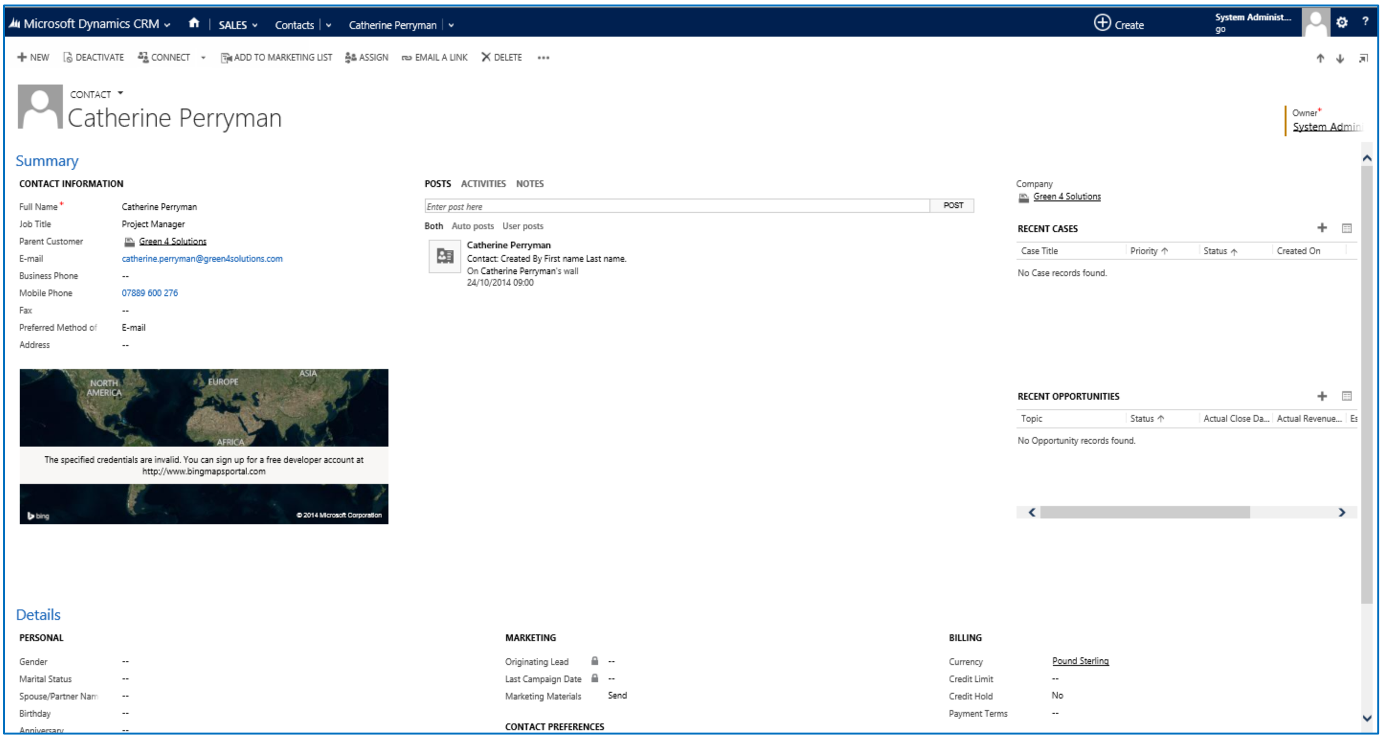
A view is a filter that can be applied to a list of records. Users can create and choose different views that contain all activities of a particular type. This allows users to change what data is displayed whilst working in different areas, this allows the user to quickly monitor information relevant to their role. The screen shot below provides an example of how different views can be selected:



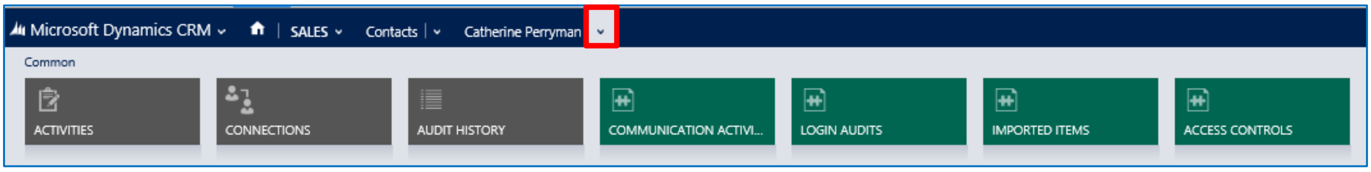
An example when the view may need to be changed is if you want to see any deactivated Products, Fixtures or Series etc. This allows any deactivated forms to be viewed and potentially reactivated.

FORMS

When a record is opened in CRM (i.e. a Contact, Account, Bookable Products) an additional 'Form' is opened with more detailed content regarding the entity selected. The form functions in a similar way to the basic CRM interface and includes the Navigation Bar and the Ribbon. A New form is displayed each time New is selected in the ribbon, for example to create a new Contact, Bookable Product, Series or Fixture a new form will be displayed for information to be entered into. Below is an example of a CRM form:

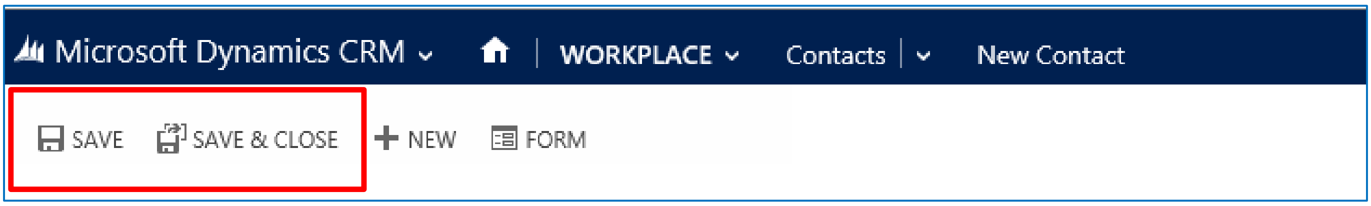


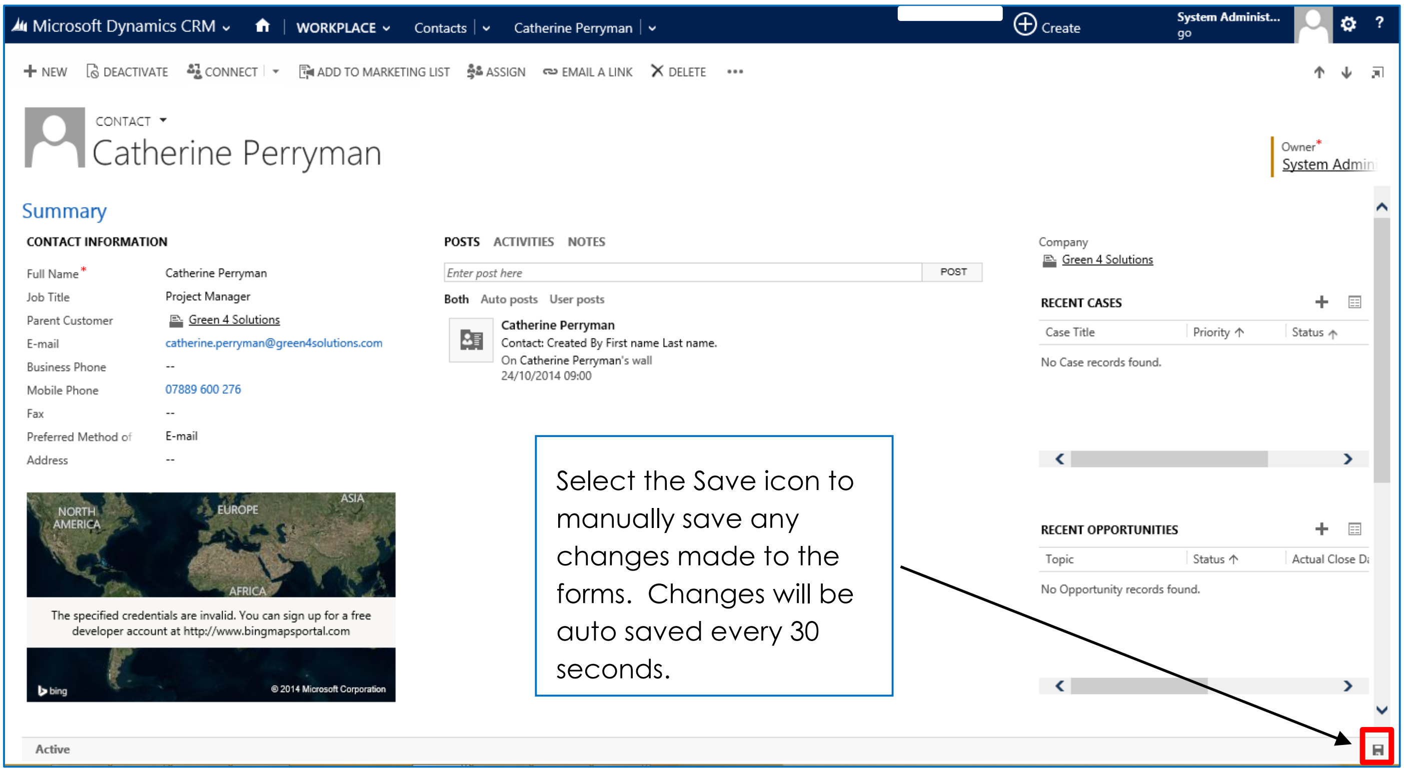
To select related areas to that form, click on or hover over the small arrow next to the name of the form in the Navigation Bar as shown below. The Common related areas will display.



SAVING IN CRM

When you create a new form, you will have to save the record for the first time manually using the **Save** or **Save & Close** options in the ribbon. Once the record has been saved, auto save will begin and any changes made to the record will be saved every 30 seconds after a field has been modified. However it is still always possible to save a form at any time by selecting the small save icon that is displayed in the bottom right hand corner of every form.





3. ACCOUNT AND CONTACT MANAGEMENT

3.1. WHAT IS A CONTACT?

The official Microsoft definition…

A person who represents a customer or potential customer, or an individual related to an account

Examples:

- An individual who has bought tickets from you
- An individual who has signed up for your club's e-newsletter
- The person you contact to discuss a local company sponsoring the team
- The school teacher you contact to discuss a school visit

Contacts as well as accounts are central to organisations and CRM and are used in conjunction with one another to create a 360 degree view of the customer. This data is vitally important to enable businesses to improve the quality and satisfaction of every customer interaction, maximising profitability of customer relationships.

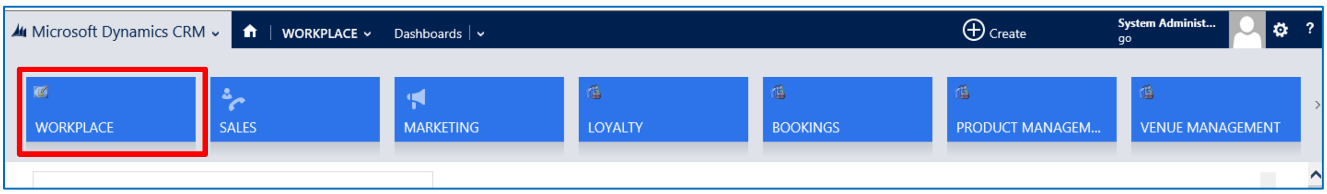
It is therefore vitally important that the contact form is kept as up to date as possible. Organisations should have clear processes in place that provide users with an understanding of what data is required and the reasons why. All interactions with a contact should be tracked against it using activities and notes, and any opportunity to enhance contact data should be taken.

Below are some examples highlighting the importance of contact data quality in different areas of an organisation:

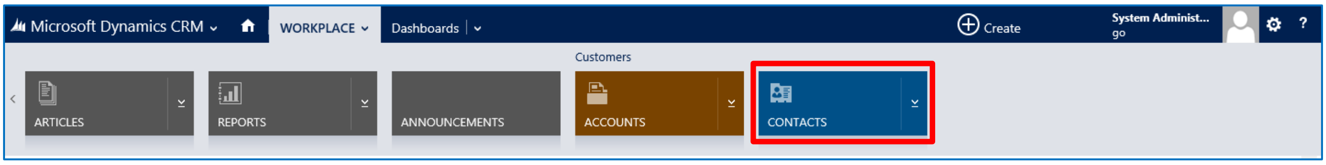
1) A salesperson needs to contact a prospective client for Match day hospitality. Prior to contact the user should check the contact form to review previous notes or closed activities. This is to ensure that any complaints or important information isn't overlooked; as well as helping the salesperson have a better chance of selling hospitality.
2) A marketing manager wants to communicate via email with all fans who have purchased a ticket for a game at the weekend. If at the time of the sale, the ticket office assistant only took minimal contact information (i.e. last name and postal address), the marketing manager would not be able to communicate with this fan by email, and the message, that may have been vital in retaining the fans support, will be lost.

Below is a step by step guide to creating a new contact:

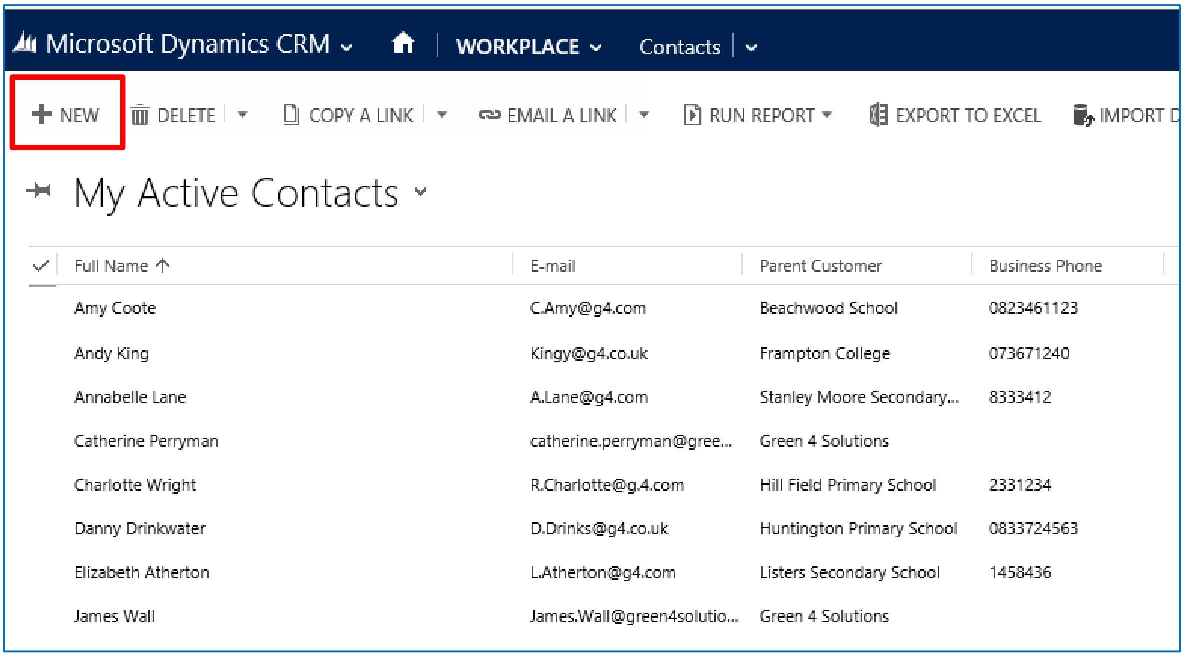
a) Select or hover over the Microsoft Dynamics CRM tab before clicking **Workplace** from the drop down list of the **Navigation Bar**.



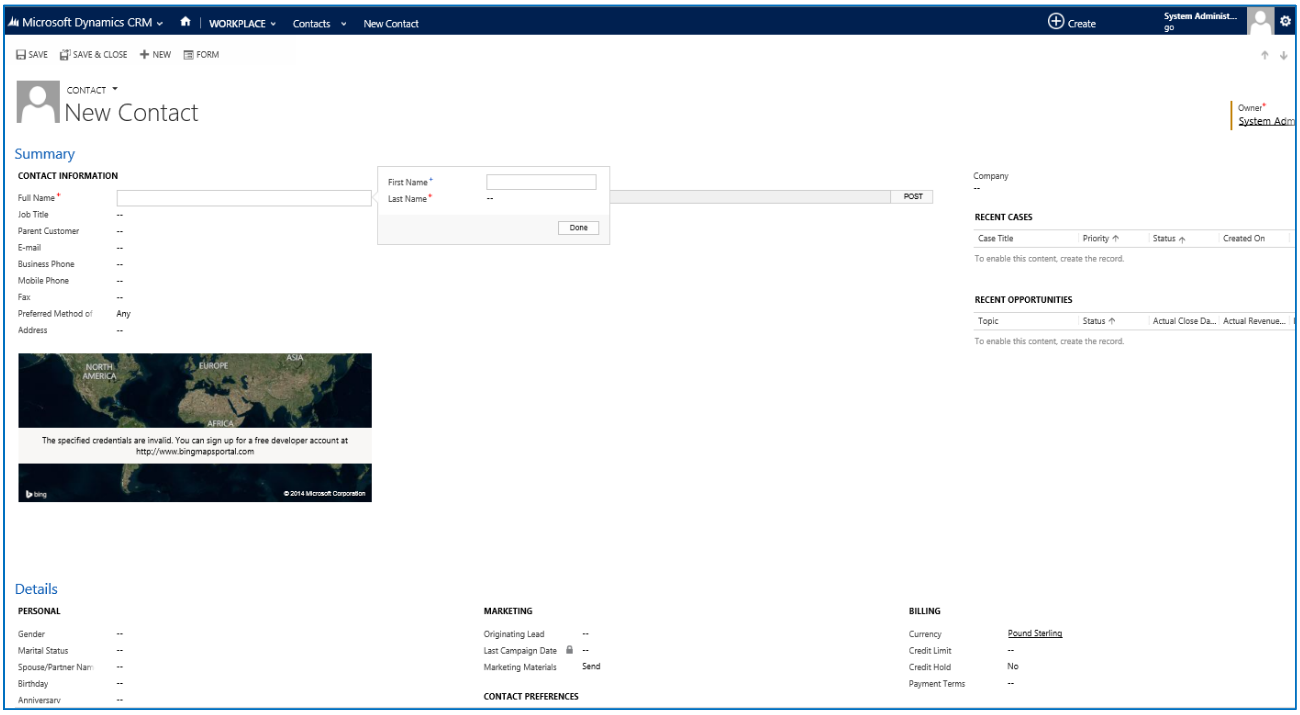
b) Hover over the **Workplace** tab to display the related entities. Scroll across the drop down row of related areas and select **Contacts**.



c) The **Contact View** with the list of My Active Contacts will be displayed. Select **New** in the ribbon.



d) A blank **Contact Form** will be displayed. You must enter all of the mandatory fields (all fields with a red asterisk) and any fields marked with a blue cross are recommended fields but do not have to be completed. As the field is selected, an outline to the field will appear.



e) Click **Save and Close** on the ribbon. The new contact is now saved in **CRM**.

3.2. WHAT IS AN ACCOUNT?

The official Microsoft definition…

> *Organisation or business to which the salesperson tries to sell a product or service. The company billed in business transactions.*

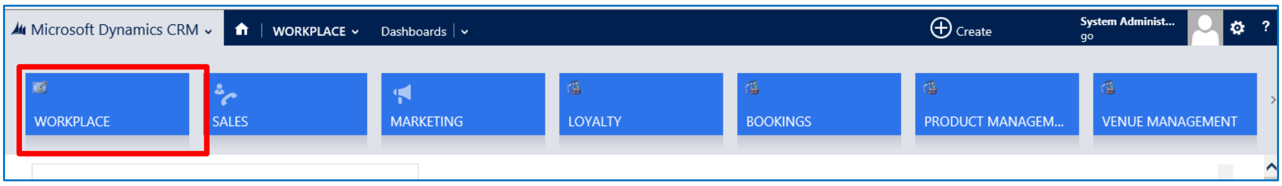
Examples:

- The school who has provided team mascots
- The Company who have hired a hospitality suite for a match day
- The charity who you are supporting through community projects

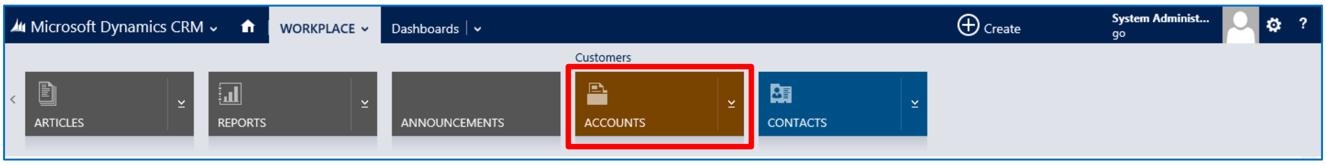
In much the same way as contacts, gathering as much accurate information relating to an account is vital to ensuring an efficient and well informed approach to future interactions and again maximising the profitability of the relationship with an organisation.

Below is a step by step guide to creating a new account:

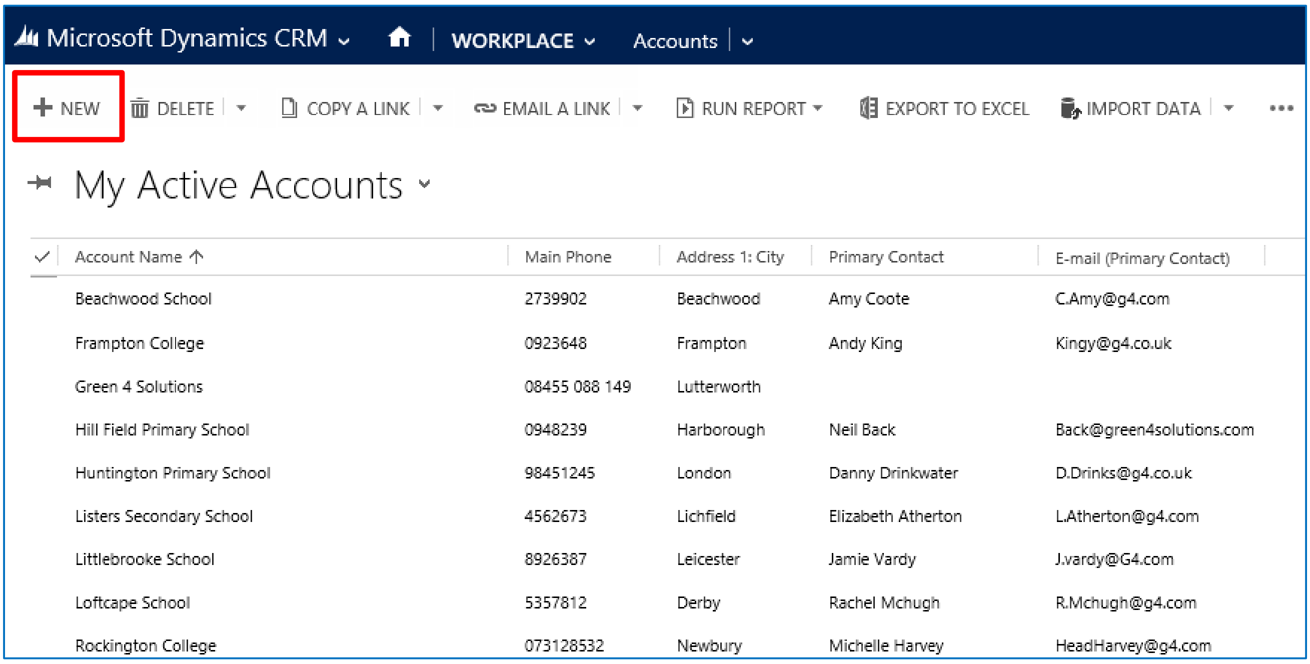
a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Workplace** from the drop down list of the **Navigation Bar**.



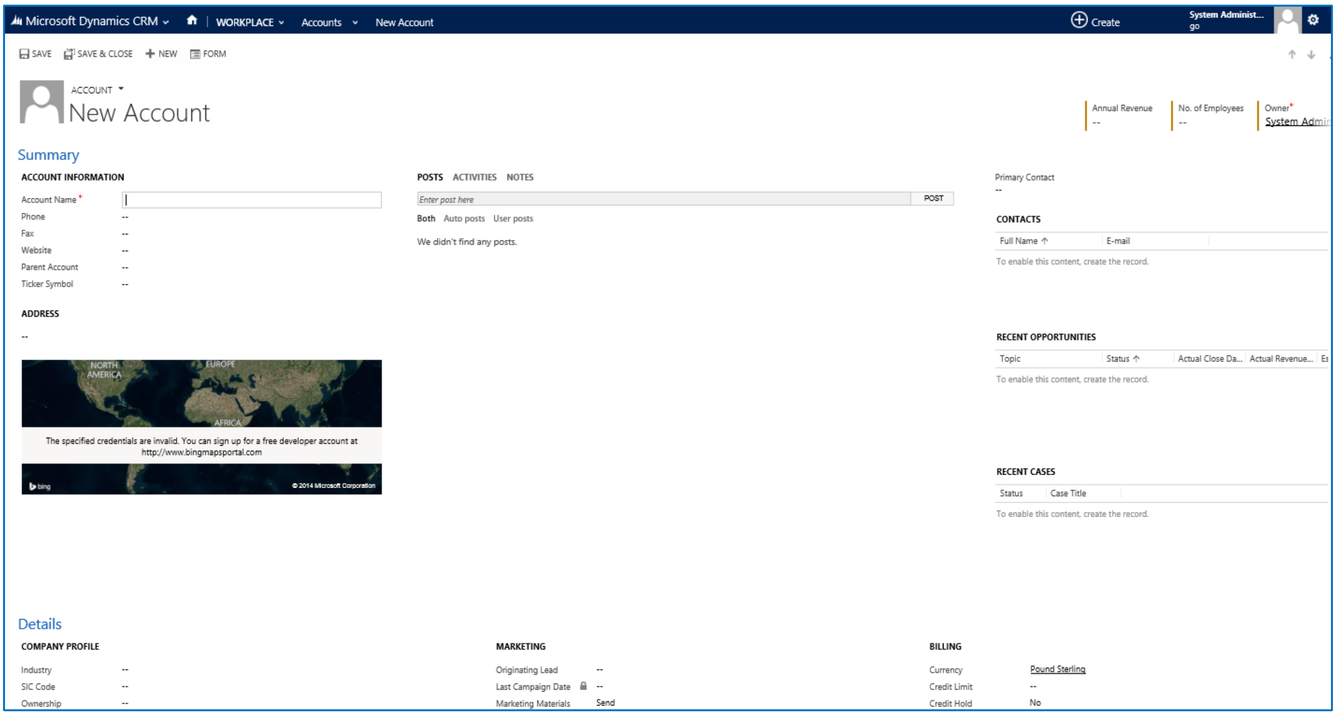
b) In the **Workplace** area of Microsoft CRM, select the **Workplace** tab in the Navigation Bar, scroll across the drop down row of related areas before selecting **Accounts.**



c) The **Account View** will be displayed. Select **New** on the ribbon.



d) An **Account Form** will be displayed. Again, you must enter all of the mandatory fields (all fields with a red asterisk) and any fields marked with a blue cross are recommended fields but do not have to be completed. As the field is selected, an outline to the field will appear.



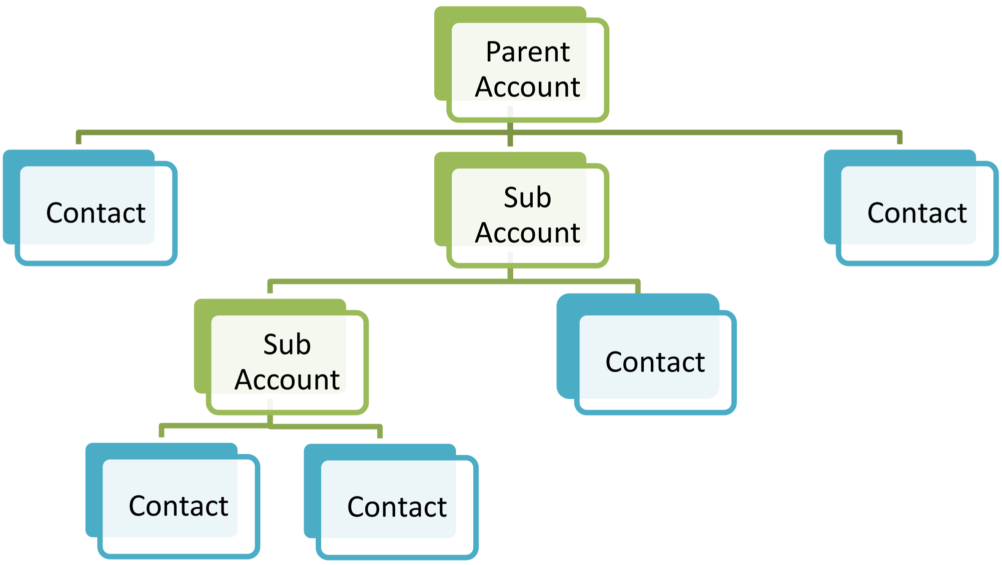
e) Click **Save and Close** on the ribbon. The new account is now saved in **CRM**.

3.3. BUILDING RELATIONSHIPS

Not every company or organisation is the same, and understanding the relationships and connections within an organisation can benefit sales and customer service. CRM allows users to build relationships between accounts and contacts, therefore allowing you to reflect the real-life relationships your organisation may encounter.

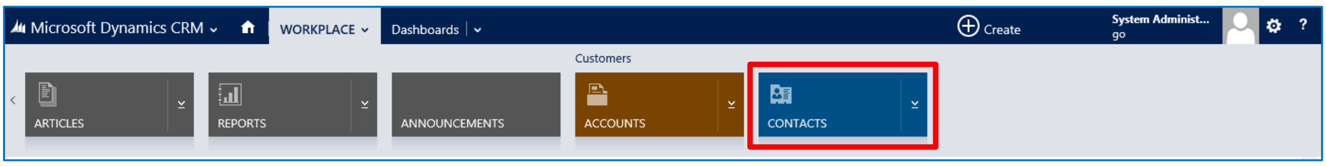
Linking contacts with accounts is vital for effective communication with contacts. For example, a **Primary Contact** for an account is likely to be the person who will make the decision regarding a sale, or the person to contact regarding a particular issue. By linking this contact to the account, the end user has all the information in one place and doesn't have to go searching through the system. When opening the **Primary Contact**, their role is easily visible – allowing the user to understand whether or not the contact is an appropriate recipient for your message.

Below is an example of how contacts may be linked to accounts:

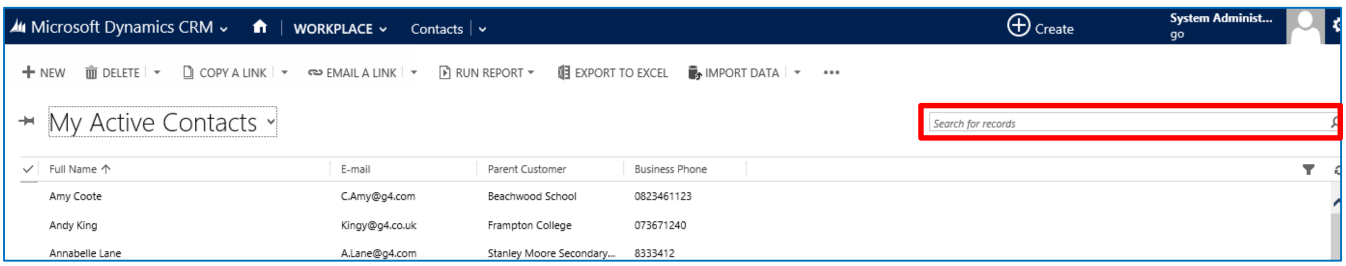


Below is a step by step guide to creating a link between a **Contact** and an **Account**:

a) In the **Workplace** area of Microsoft CRM, select the **Workplace** tab in the Navigation Bar, scroll across the drop down row of related areas before selecting **Contacts.**

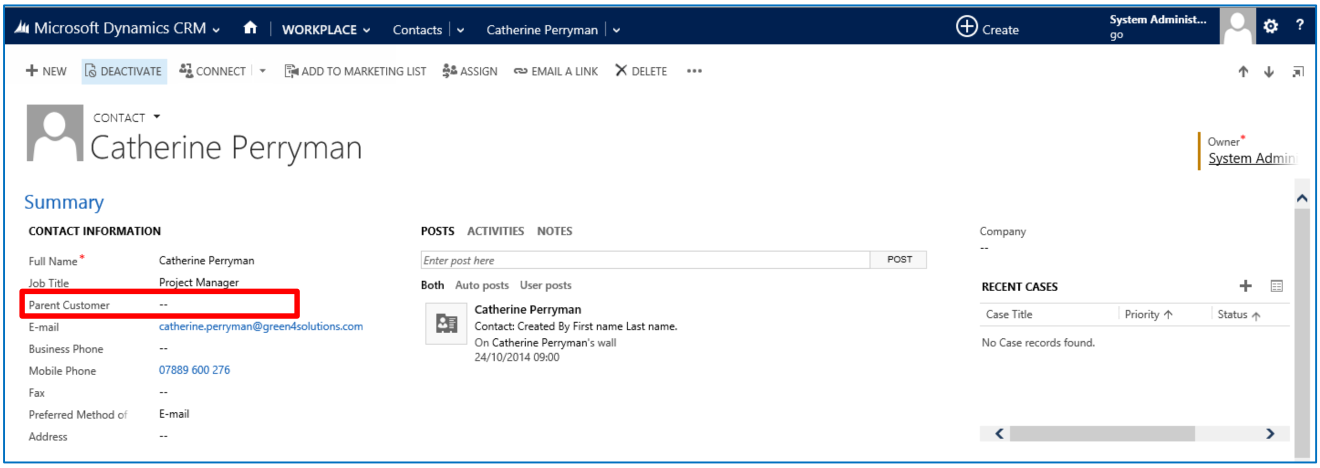


b) Select the view **Active Contacts** and search for the relevant contact using the search bar in the top right hand corner of the contact view.



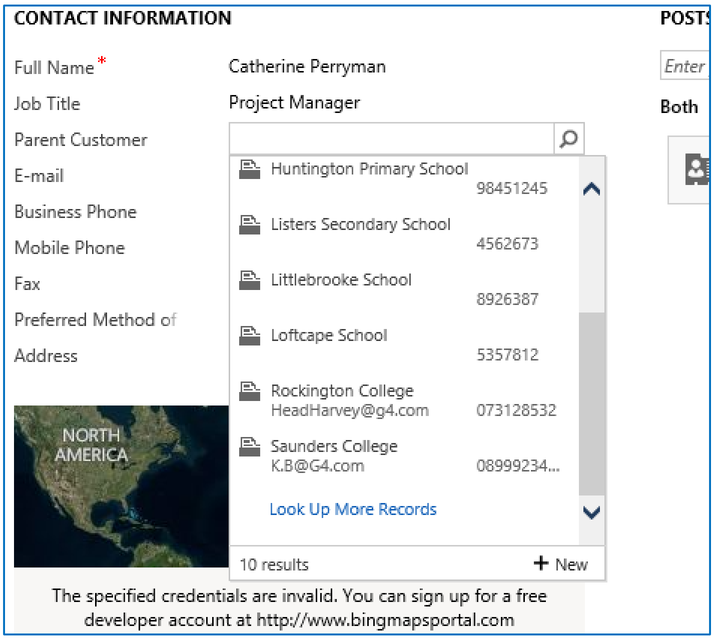
c) Double click on the contact and the **Contact form** should appear.

d) On the **Contact form** there will be a field called **Parent Customer**, click the **look up** button.

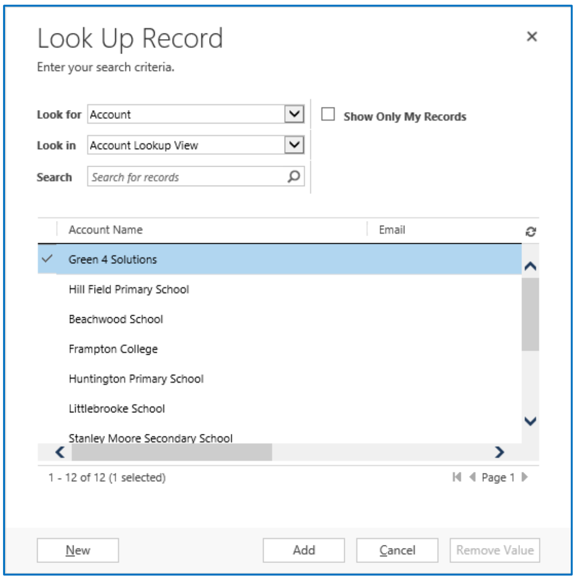


e) This will display a list of 10 Accounts. If the account that you would like the contact to be related to is displayed in this list select it. If not, select the **Look Up More Records** option, this will allow you to search for the relevant account you wish to associate the contact with.

f) If the Account does not exist, select the **+ New** icon and capture the Account details.



g) Once the account you wish to associate with this contact is found or added, select it and click **Add**.

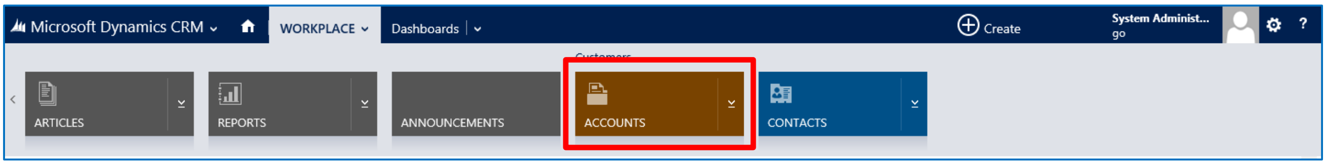


h) You will be automatically returned to the **Contact form**, and the **Parent Account** field should now have the appropriate account occupied.

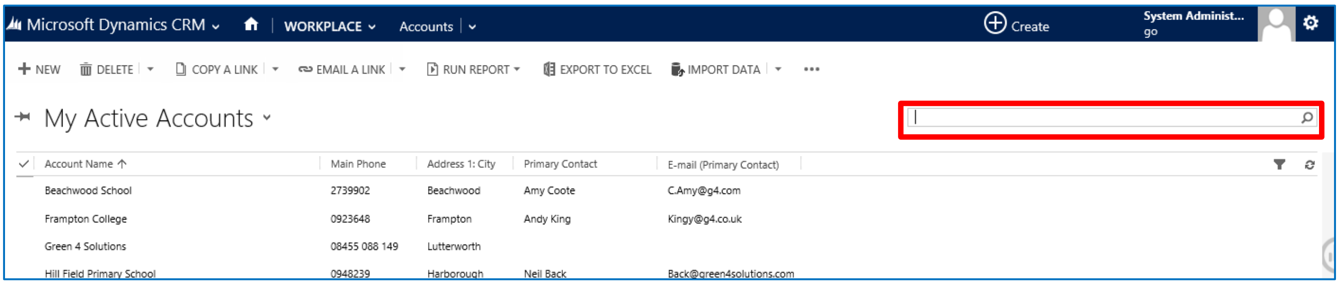
i) Click **Save.**

Below is a step by step guide to creating a link between an **Account** and a **Primary Contact:**

a) In the **Workplace** area of Microsoft CRM, select the **Workplace** tab in the Navigation Bar, scroll across the drop down row of related areas before selecting **Accounts.**

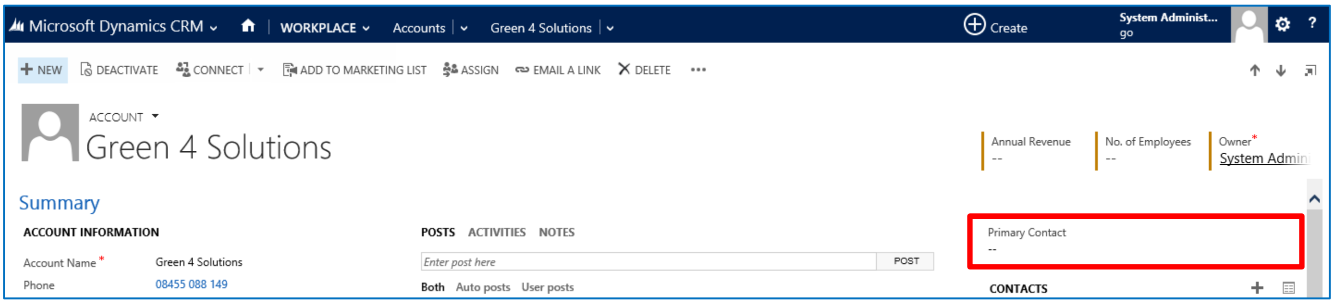


b) Select the view **Active Accounts** and search for the relevant contact using the search bar in the top right hand corner of the contact view.

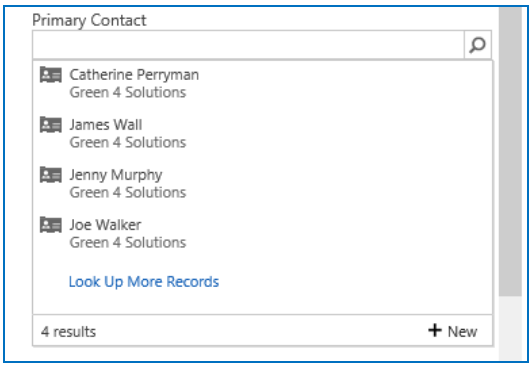


c) Double click on the Account and the **Account form** should appear.

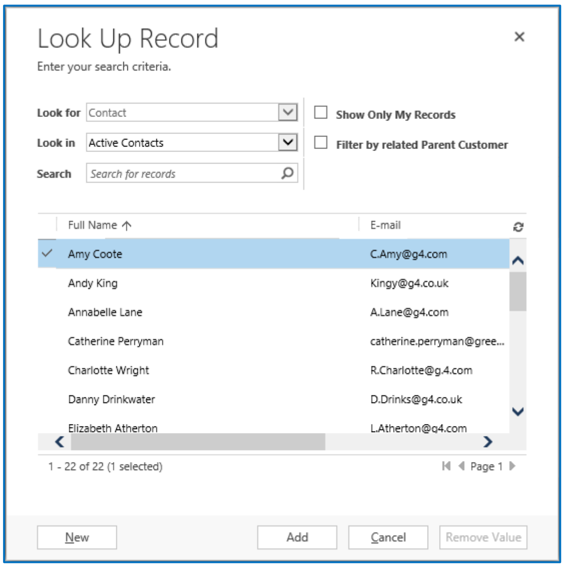
d) On the **Account form** there will be a field called **Primary Contact**, click the **look up** button.



e) This will display a list of active Contacts. If the account that you would like the contact to be related to is displayed in this list select it, if not, choose the **Look Up More Records** option. This will allow you to search for the relevant account you wish to associate the contact with.



f) Search for the Contact you wish to associate with this Account, select it and click **Add**.

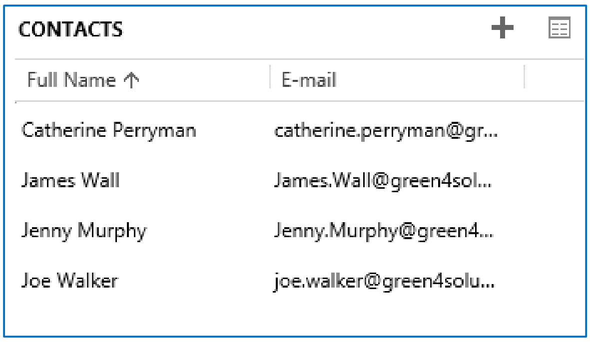


g) You will be automatically returned to the **Account form**, and the Primary Contact field should now have the appropriate contact occupied.

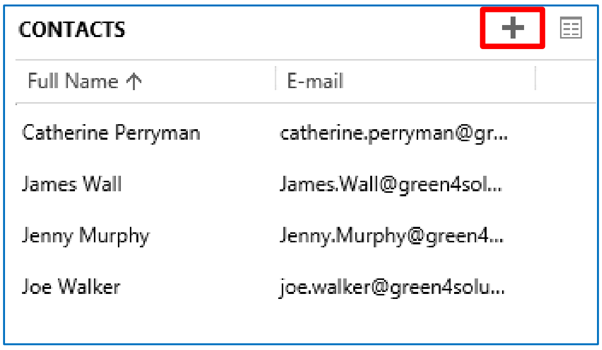
h) Click **Save.**

To add a contact that isn't the Primary Contact:

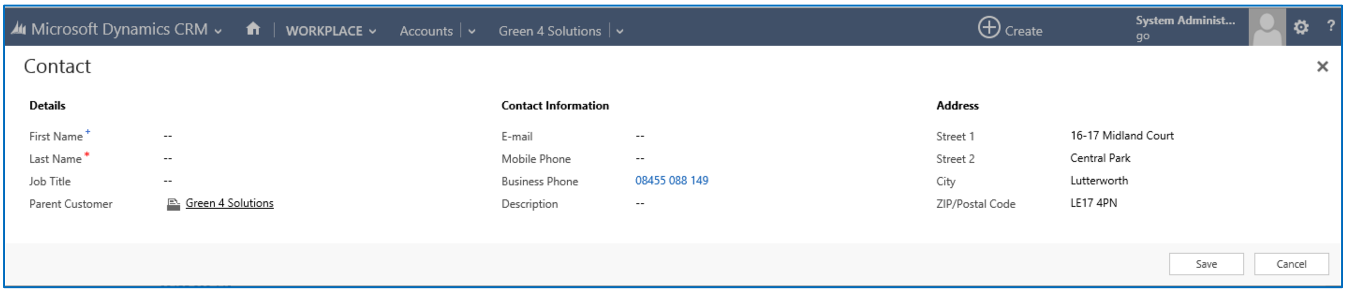
a) With the **Account Form** open, find the **Contacts** field which has a small table beneath it. If any contacts have already been related to this Account, the names of these will be displayed in the table.



b) To add a new Contact to the Account select the Plus symbol.



c) A smaller Contact form will drop down, complete the relevant details before selecting **Save.**



d) A new Contact has been created and this new contact is now assigned to the Account.

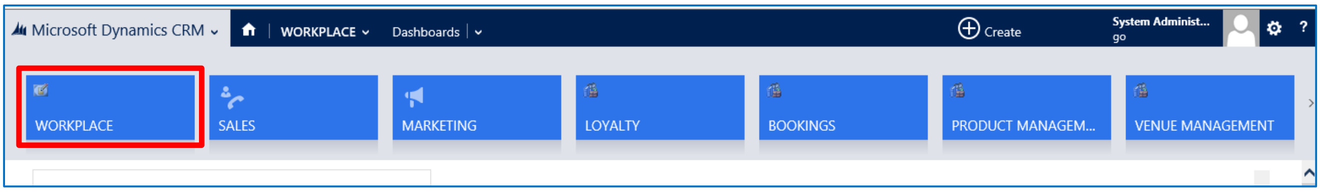
4. ACTIVITIES

Businesses and organisations interact with their customers through different channels using different techniques. Phone calls, emails, and general tasks are a part of everyday business processes. A key benefit of a CRM system is that everyday interactions can be recorded and tracked against the relevant contact or account. This is done through the Activity Management functionality in CRM. Activities allow users to record and schedule everyday interactions with their clients. These activities can be used to remind a user of a certain task, or to assign an activity to another user. Logging interactions with customers through the activity management tool also allows other users to see the most recent activities assigned to an account or contact, benefitting the user who may be contacting the customer.

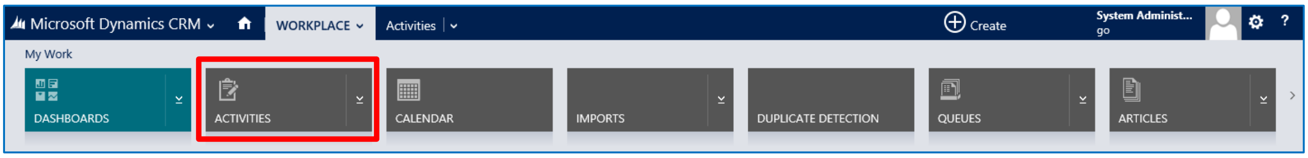
4.1. MY ACTIVITIES

My activities is the area where a user can find all of the activities assigned to them. My activities will automatically open as soon as Activities is selected from the workplace area of CRM.
Below is a step by step guide to creating a new activity:

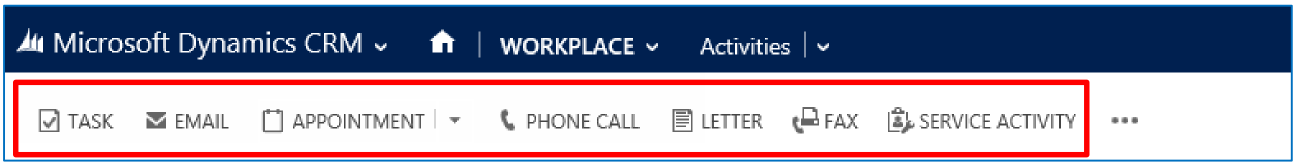
a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Workplace** from the drop down list of the **Navigation Bar**.



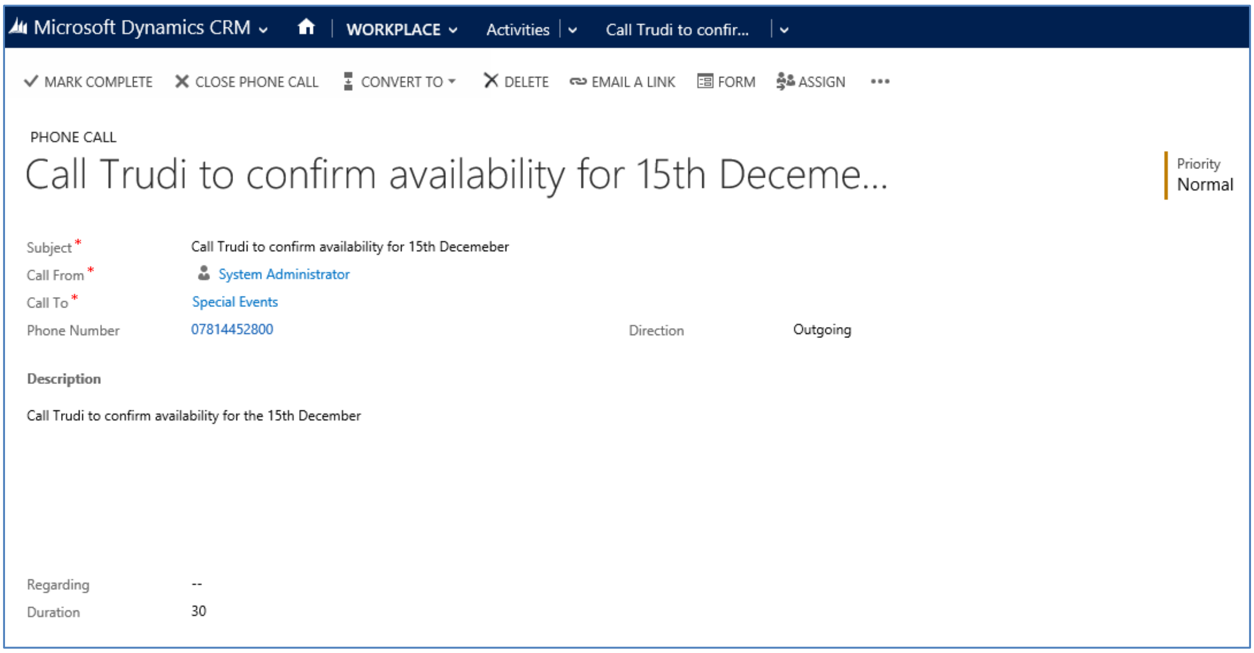
b) In the **Workplace** area of Microsoft CRM, select the **Workplace** tab in the Navigation Bar, from the drop down list of related areas select **Activities**.



c) The **Activities View** will be displayed. On the ribbon will be a number of activity options (Task, email, phone call etc.) Click in the activity you wish to create.

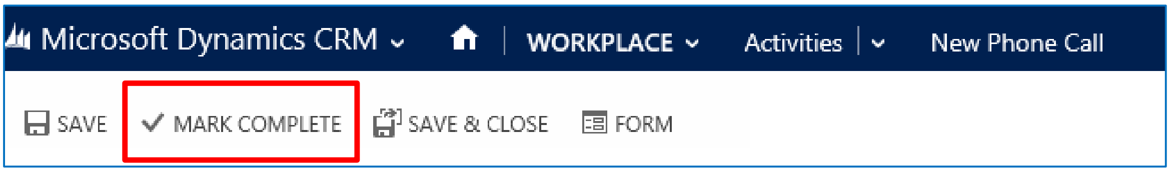


d) An Activity Form relating to your activity type will be displayed. Enter as much information as possible. The below example shows the activity type form of Phone Call.

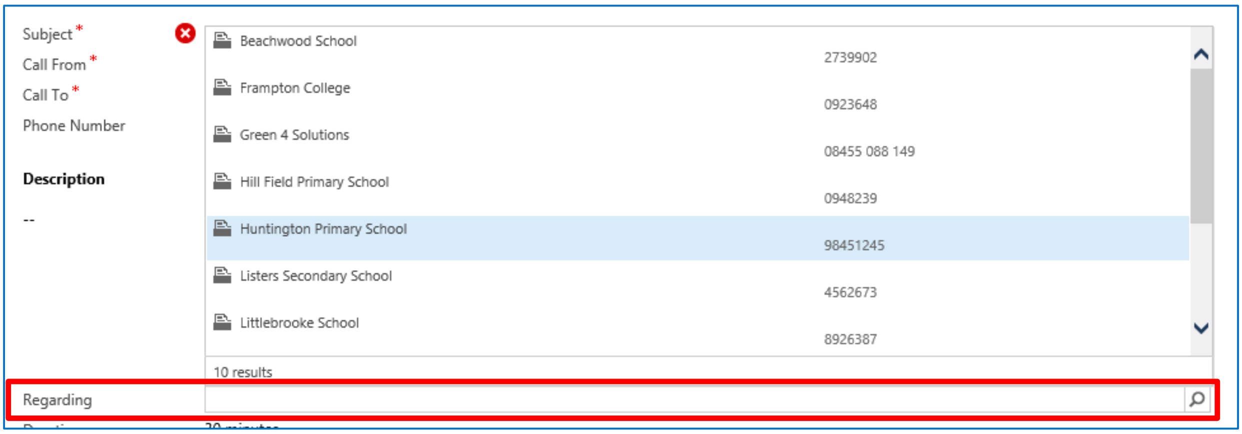


e) Click **Save and Close** on the ribbon. The new activity is now saved in CRM.

f) To close an activity as complete, on the **ribbon**, select **Mark Complete** on the ribbon. This will identify the activity as Closed (requiring no further action).



g) To link the activity to a particular contact or account, select the lookup on the **Regarding** field.



h) Search for the record you wish to assign the task to from either the list of records that automatically display or select **Look Up More Records** from the drop down list. Select the record and click **OK.**

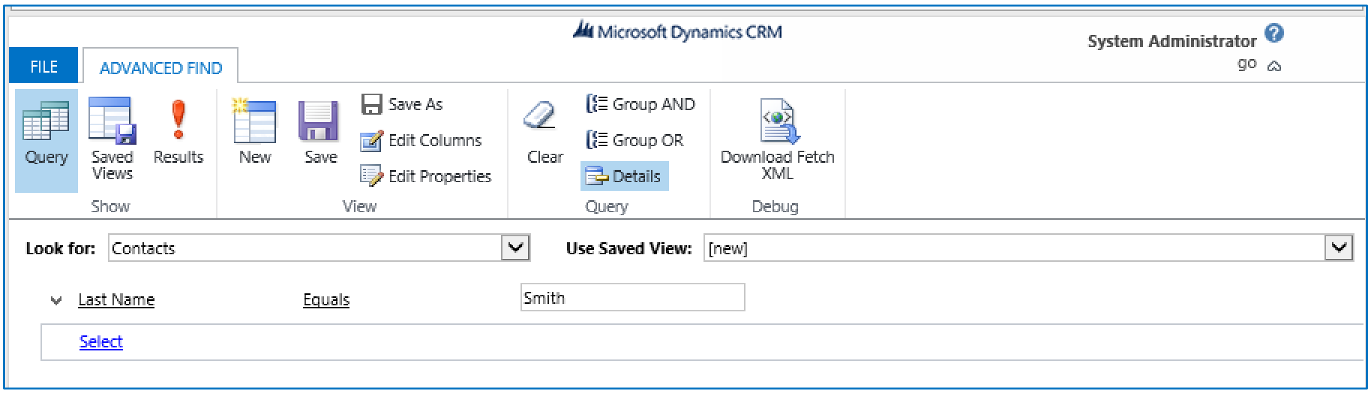
i) This will return you to the **Activity Form**, where you can **Save.**

In much the same way as contacts and accounts, it is important to be as detailed as possible when completing an activity. The activity may be opened by another user who may be communicating with the contact or account that the activity is related to.

5. ADVANCED FIND

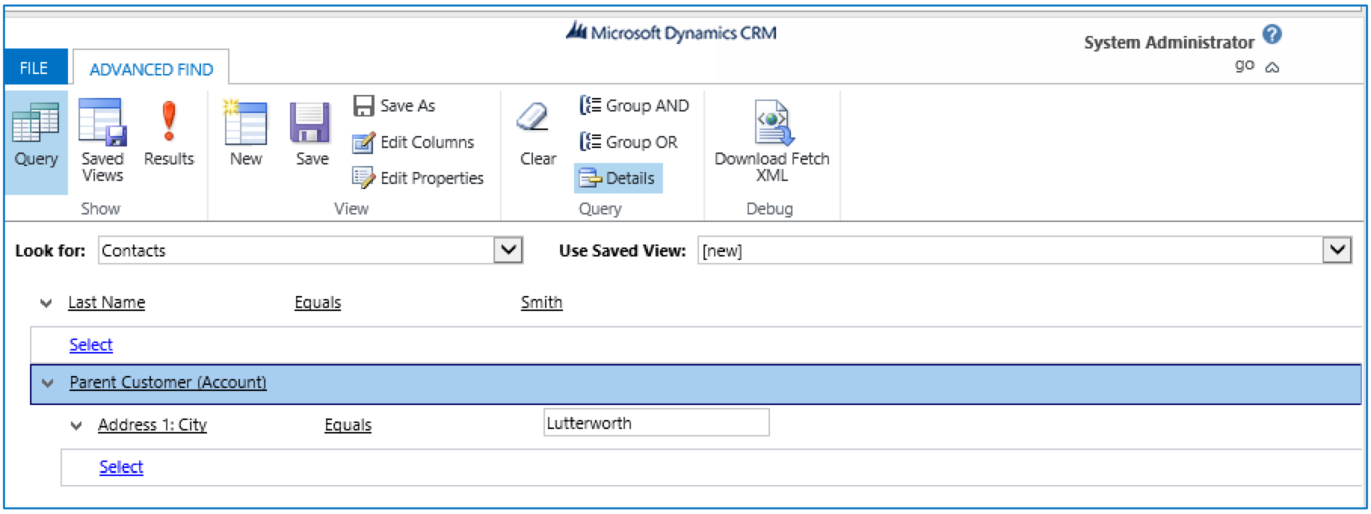
Advanced find is a tool in Microsoft Dynamics allows users to look up data based criteria important to them. The tool allows you to search on multiple fields in the primary record type, as well as multiple fields within a related record.

For example, if a user wanted to search for a contact that had the last name 'Smith', they would look for contacts that had the last name 'Smith' and the query would look like this:



This query would return all contacts that had the last name 'Smith'.

By adding a **related** field, the user can search the content of a related record form. For example, if a user wanted to find out if any of the contacts were associated with an account where the City field on the account was 'Lutterworth', a related field would need to be added to the query:



By doing this, the advanced find will return all the contacts with last name 'Smith' and by adding the related field – the advanced find will then search on the Account form to return the contacts associated with an account that has a City of 'Lutterworth'. This is possible when the relationship between the two contacts already exists.

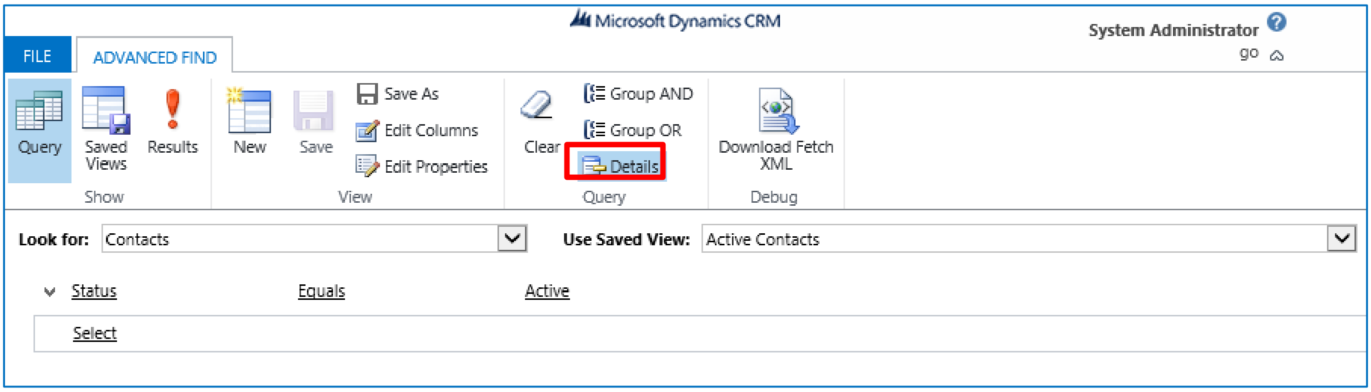
5.1. RUNNING AN ADVANCED FIND

To run an Advanced Find in Microsoft CRM:

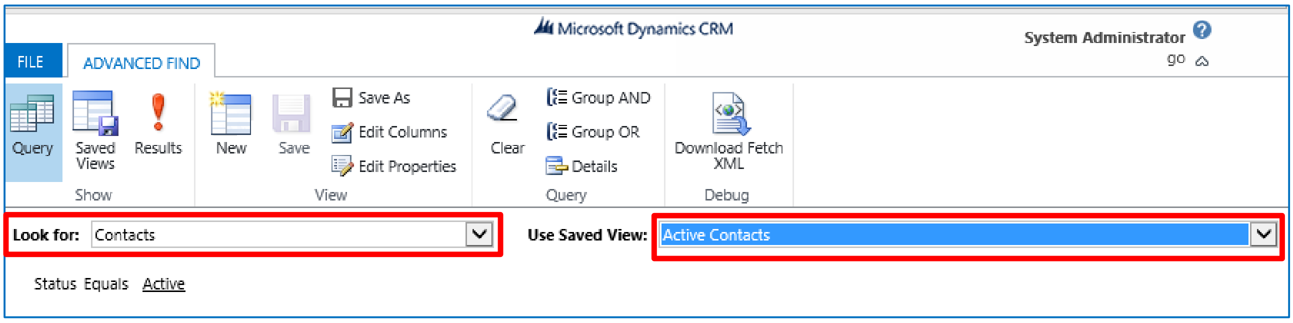
a) In order to run an advanced find, go to the entity you want to search on (In this example we will search for contacts, therefore select **Contacts** from the **Navigation Bar**).

b) Select the **Advanced Find** button on the ribbon. This is found by clicking on the more commands symbol as demonstrated below.

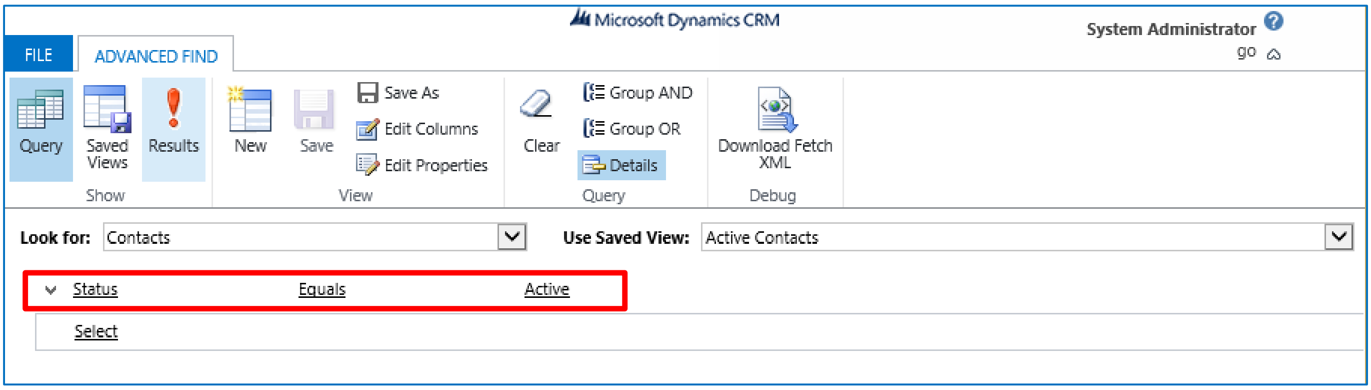
c) The **Advanced Find** form will be displayed. Select the **Details** menu option.



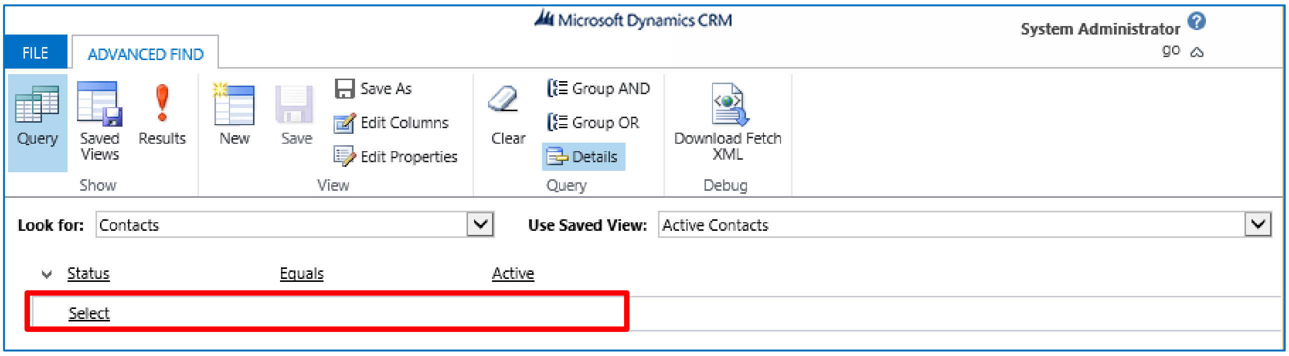
d) Next, in the **Look For** drop down menu choose what the Advanced Find is to search for before choosing in the **Use Saved View** drop down an appropriate view. In this example as we are searching for contacts select Look For - Contacts and Use Saved View - Active Contacts.



e) The Advanced Find dialog will be updated as shown below. The search parameters to the view will be automatically added but may differ depending on what you are searching for. In this instance one parameter is automatically listed: **Status Equals Active**. This means that if the Results button was selected now, all active contacts would be searched for and found.



f) To add additional parameters, to narrow the search click Select (highlighted in the below image)

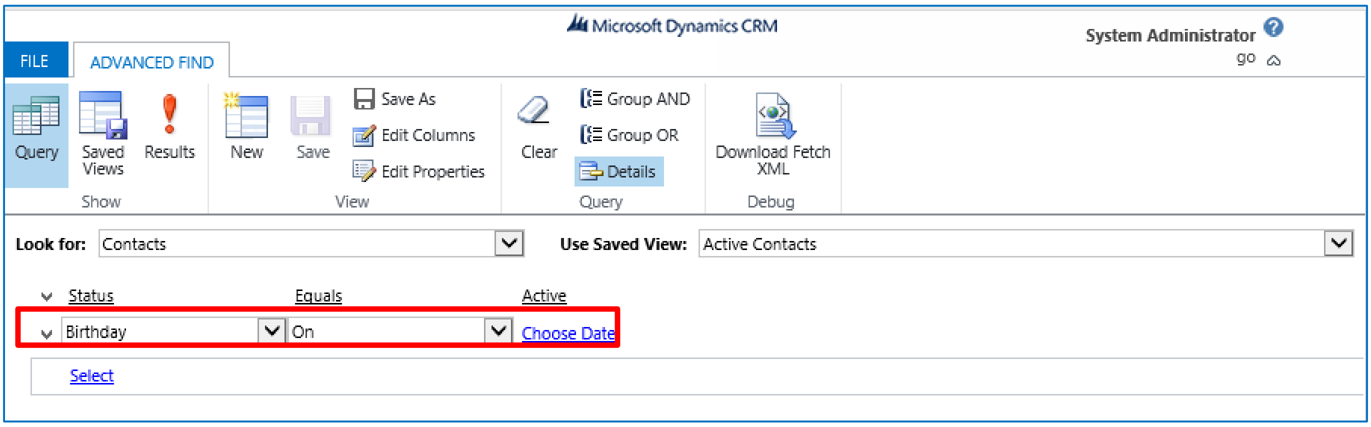


g) A list of fields you can search for will be displayed. The list is divided into two section:

- **Fields.** The top section of the list shows the fields that are part of the record type you are currently searching on. In this example we can see all the fields that form part of a contacts record.
- **Related.** The bottom section of the list shows all of the entities that are related to the current record type. So in this example we see a list of all record types that are related to a contact.

To use a **Field name** from the list:

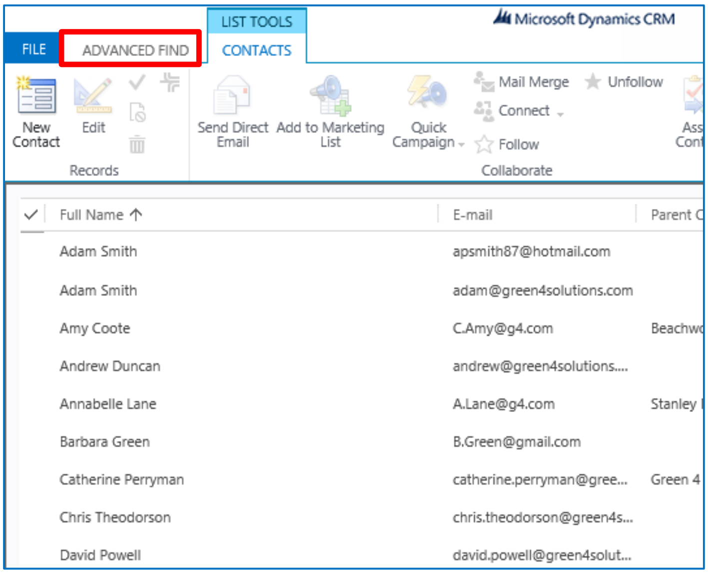
h) Select the appropriate field name from the list. A new row will be added to the Advanced Find as is shown below. In this example I have chosen birthday. In the middle drop down I am able to select what the Advanced Find should search for in relation to the birthday, various options can be chosen. Depending on what field has been chosen, different options will be displayed to search for.



i) Any further fields can be searched for by again choosing **Select** and the above process can be repeated to narrow down your Advanced Find.

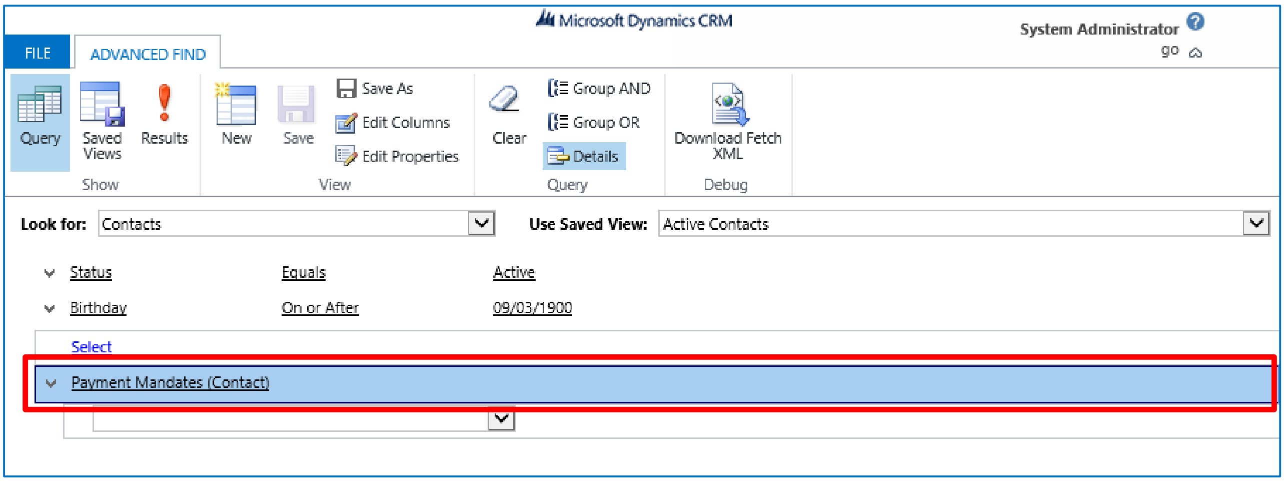
j) Once all of your search criteria has been selected, click **Results** in the ribbon. A list of records meeting the conditions entered will be displayed.

k) To return to the search terms, select the **Advanced Find** tab heading (highlighted below). The search item previously entered will be redisplayed allowing you to modify the details.



To use a **Related field** from the list.

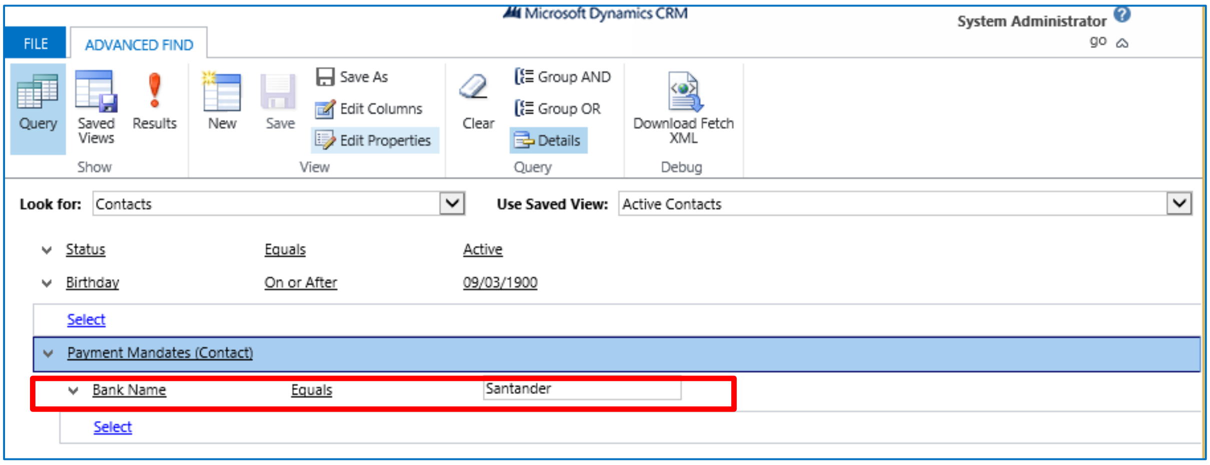
l) Select the appropriate record type from the related section of the list. A new row will be added to the Advanced Find as shown below. This row will be coloured blue to indicate that it is a related record type. In this example, the related field of **Payment Mandate** has been chosen.



m) To set a search term based on the related entity, click **Select** below the blue related row. A list of fields will be displayed and as before the list will be divided into two section.

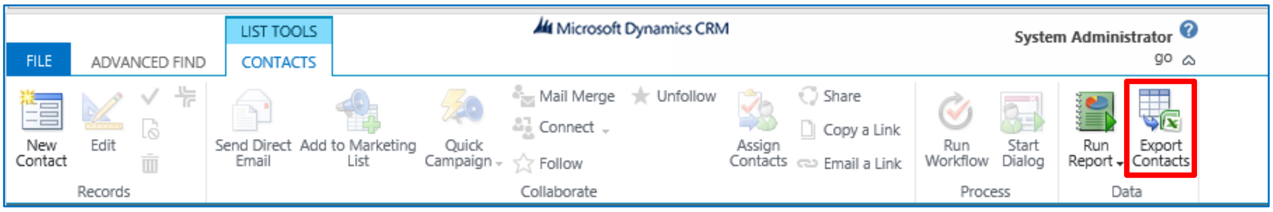
- **Fields.** The fields section will list all of the fields from the related record
- **Related.** The related section will list all of the record types that are related to the current record type.

n) Select the appropriate field or related item from the list. A new row will be added to the Advanced Find dialog. Complete the details of the new row as required, this will differ depending on what has been selected. As can be seen below Bank Name has been chosen from the list of Fields in this example.



o) To view the results of your search, click **Results** on the ribbon. A list of records meeting the conditions will be displayed. Therefore in this example, the results will show all contacts whose birthdays are on or after 09/03/1900 and have a Payment Mandate created with a Bank Name of Santander.

p) It is possible to export the contacts that have been gained from your Advanced Find results by exporting them to Excel via the **Export to Excel** button on the ribbon.



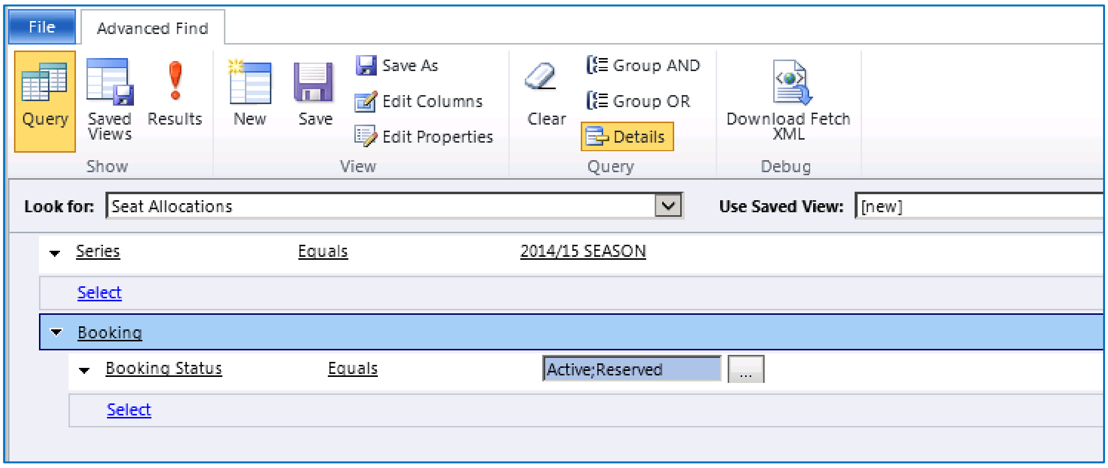
5.2. EXAMPLES OF ADVANCED FIND SEARCHES

There are many different ways that Advanced Finds can be used to find important data related to your needs. Below demonstrates a number of Advanced Finds that are commonly used:

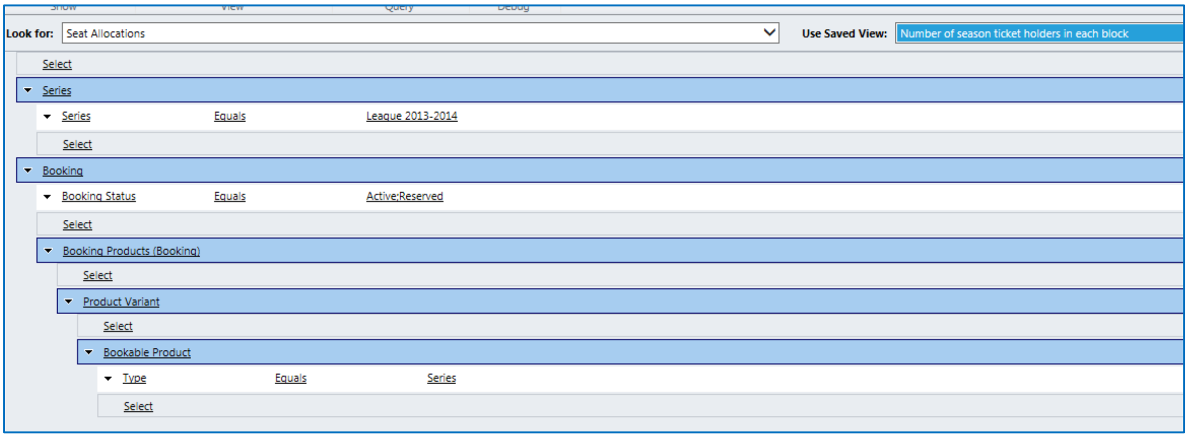
Note. The examples shown below are all dependant on how the setup of the system has been completed and therefore may differ between setups.

---

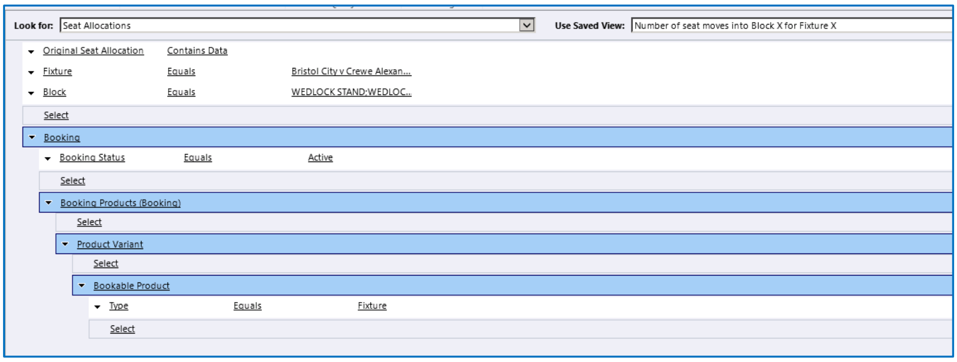
a) **All Active Season Ticket Holders.** This advanced find enables you to find all contact information related to every Active Season Ticket Holder on your system.



b) **The Number of Season Ticket Holders in each block.**



c) **Number of seat moves into a particular block for a certain fixture.**

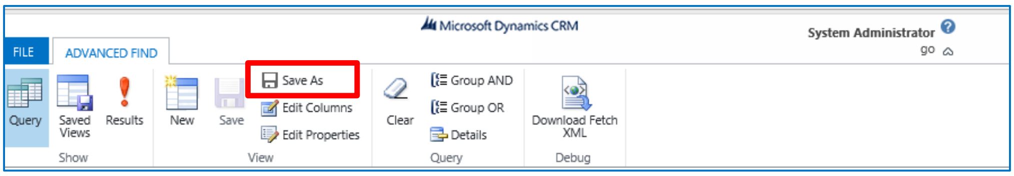


5.3. SAVING AND SHARING AN ADVANCED FIND

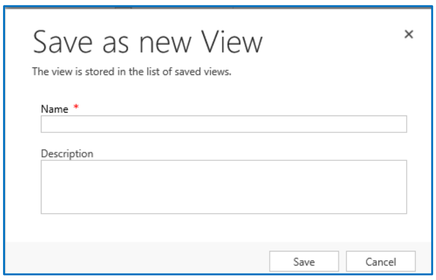
Once you have created an Advanced Find you can save the criteria for future use. For example if you create an Advanced Find to identify bookings for a particular fixture, you can save the search details, and then when you need to report on the next fixture, you can re-use the search once you have adjusted the fixture name.

To save and share an Advance Find view complete the following:

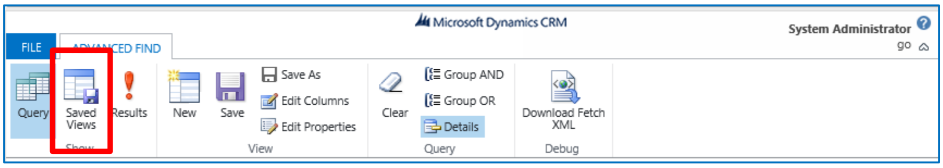
a) On the **Advanced Find** tab with the search terms visible, select **Save As** from the ribbon.



b) Choose an appropriate name and click **Save.** The view will be saved and can be accessed from the dropdown below the ribbon on the Advanced Find dialog.



c) To Share your view with other users, select **Saved Views** from the ribbon of the **Advanced Find** Form.



d) Select the view you wish to share, and select **Share** from the ribbon.

e) A new window will open; select **Add user/team** from the navigational panel on the left of the form.

f) Add the user(s) you wish to share with and click **OK.**

g) Select the relevant permissions you wish the user to have, and click **OK**

6. MARKETING LISTS

The Marketing List option allows you to create either a **static** or **dynamic** list of contacts, accounts or leads.

A **dynamic** Marketing List will update whenever the data in CRM does. For example, if a dynamic Marketing List is set up with all contacts with an email addresses added, if there was an import of 5,000 additional contacts with email addresses – they would automatically be added to the Marketing List.

Static Marketing Lists work in the opposite way to dynamic lists. Once the group has been created, they will not update, regardless of the data in CRM.

Marketing Lists utilise the Advanced Find functionality within CRM:

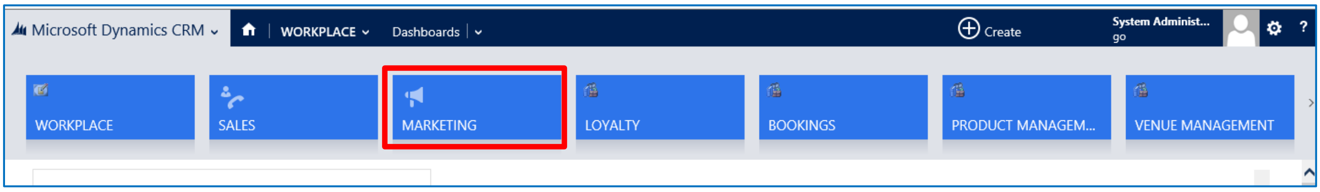
- Advanced queries can be executed to extract a certain segment of members
- Queries (views) can be saved and shared with other users
- Lookups can be used to add particular members
- Advanced find can be used to remove and evaluate members in the list

A group of contacts in a marketing list can be used in campaigns. For example, a Marketing List may be created with the end goal of targeting these particular contacts with a telesales campaign. The marketing list can be assigned to this campaign and a list of phone calls generated against the contacts. Marketing lists can also be added to email marketing audiences in order to distribute email campaigns. Members captured by the Marketing List can also be exported to Excel, which may be important if the data requires cleansing.

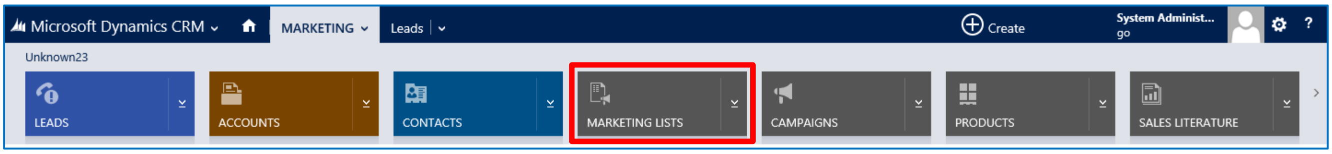
6.1. CREATING A MARKETING LIST

To create a Marketing List:

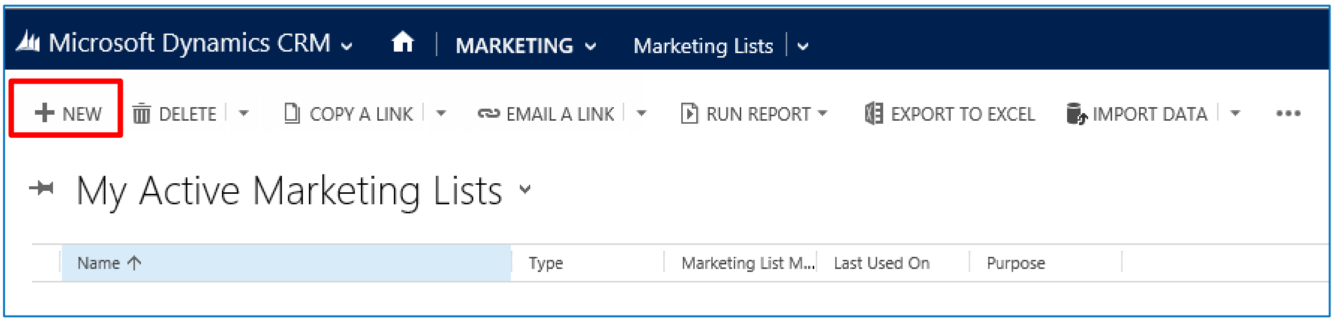
a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Marketing** from the drop down list of the **Navigation Bar**.



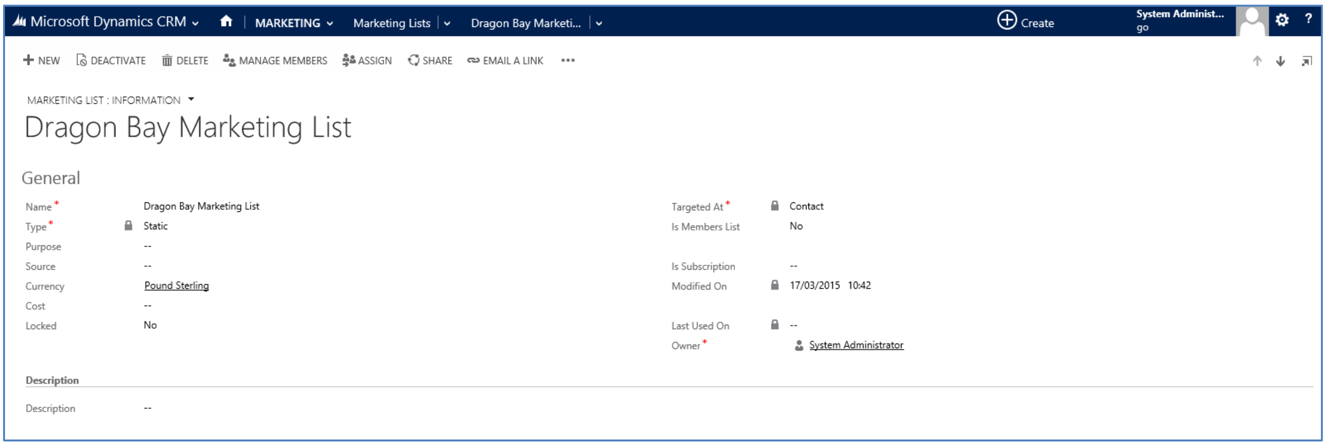
b) In the **Marketing** area of Microsoft CRM, select the **Marketing List** tab in the Navigation Bar, from the drop down list of related areas select **Marketing Lists.**



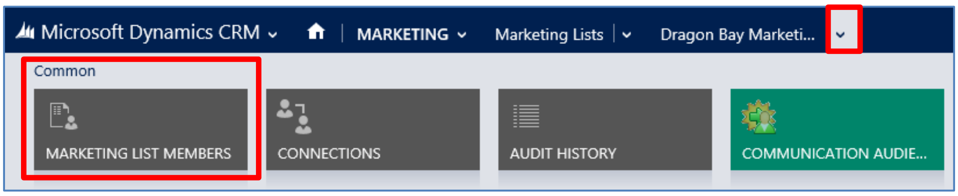
c) The Marketing Lists View will be displayed. Select **New** on the ribbon.



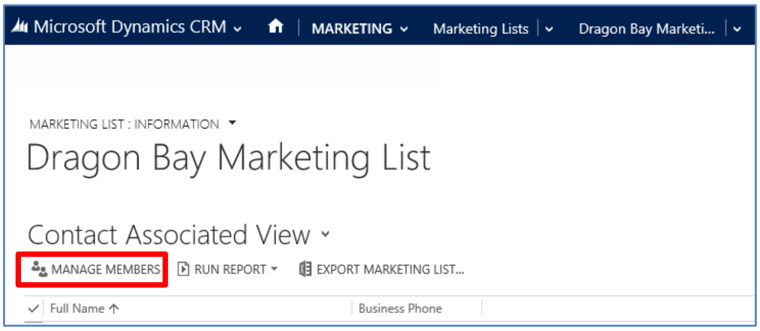
d) The Marketing Lists Form will be displayed. Enter a **Name** for the list before selecting the **Member Type, Type** of Marketing List and who the marketing list is to be **Targeted At**. Select **Save** on the ribbon.



e) Select the small arrow next to the marketing list's name in the Navigation Bar. This will display the Marketing List's common related areas. Select **Marketing List Members**. This will allow you to control who is to be a part of the Marketing List.



f) Select **Manage Members** on the ribbon.

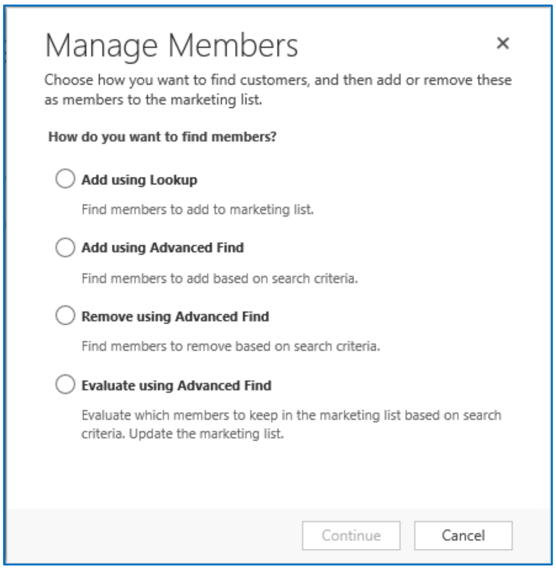


g) Use the **Manage Members** dialog to add members to the list. There are a number of ways to add members, it is possible to:

- **Add using Lookup.** Select if you would like to simply add contacts to the Marketing List.
- **Add Using Advanced Find**. Select if you would like to add contacts to the Marketing List based on a certain search criteria.

The Manage Members dialogue also allows members to be removed from the Marketing List:

- **Removing using Advanced Find.** Select if you would like to remove contacts from the Marketing List based on a certain search criteria.
- **Evaluate using Advanced Find.** Select if you would like to evaluate which contacts to keep in the Marketing List based on a certain search criteria. This can be used to update the Marketing List.



h) Once the list is complete, select **Save.**

7. REPORTING

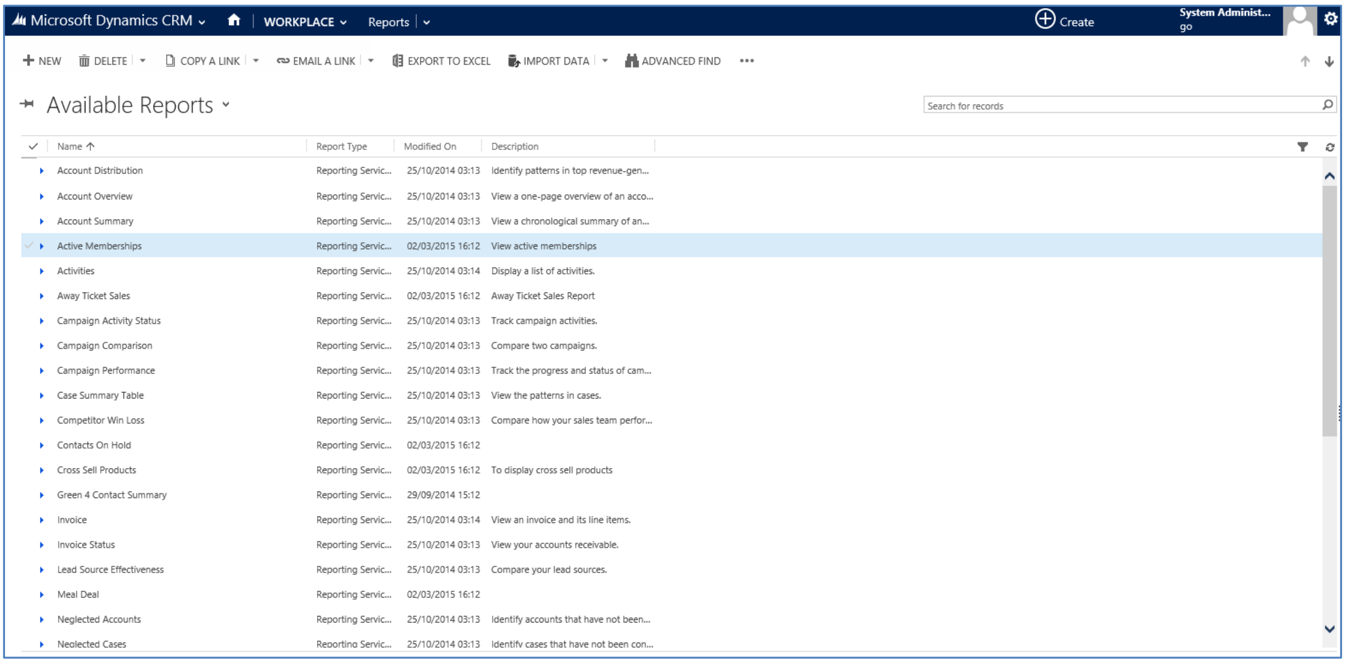
There are a number of built in reports within CRM that allow users and organisations to build detailed analysis on general performance. Example reports include reporting on the effectiveness of a communication, measuring sales performance, evaluating the quality of contact or account data, etc. Reporting is vitally important for organisations and provides the ability to feedback on areas such as profitability and ROI. Line managers may also wish to run reports to measure performance of their staff. In addition to the standard CRM reports, reports can be modified and built through the reports wizard.

7.1. ACCESSING REPORTS

a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Workplace** from the drop down list of the **Navigation Bar**.

b) In the **Workplace** area of Microsoft CRM, select the **Workplace** tab in the Navigation Bar. From the drop down list of related areas select **Reports.**

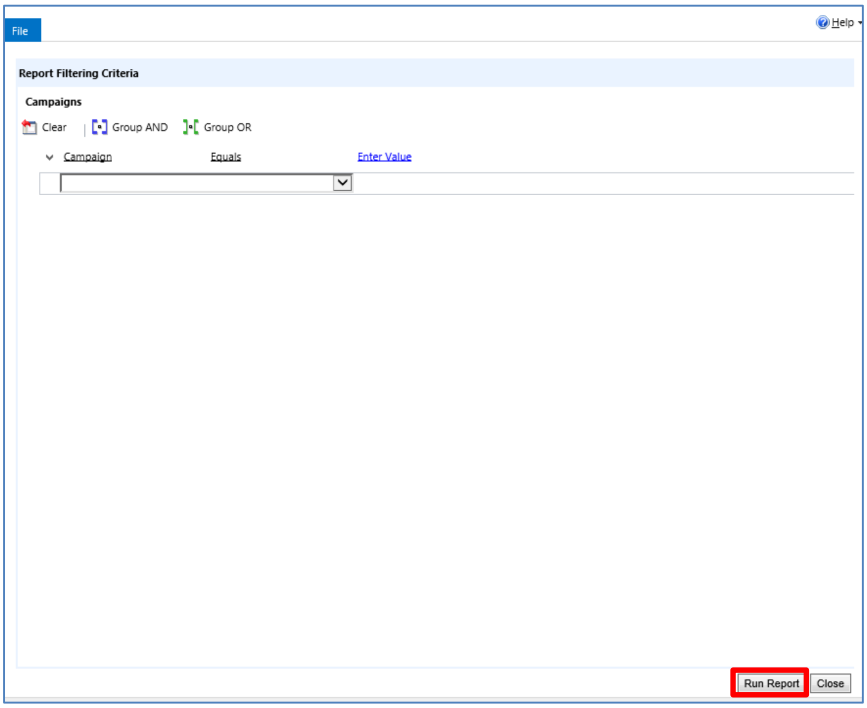
c) A list of Available Reports will be shown:

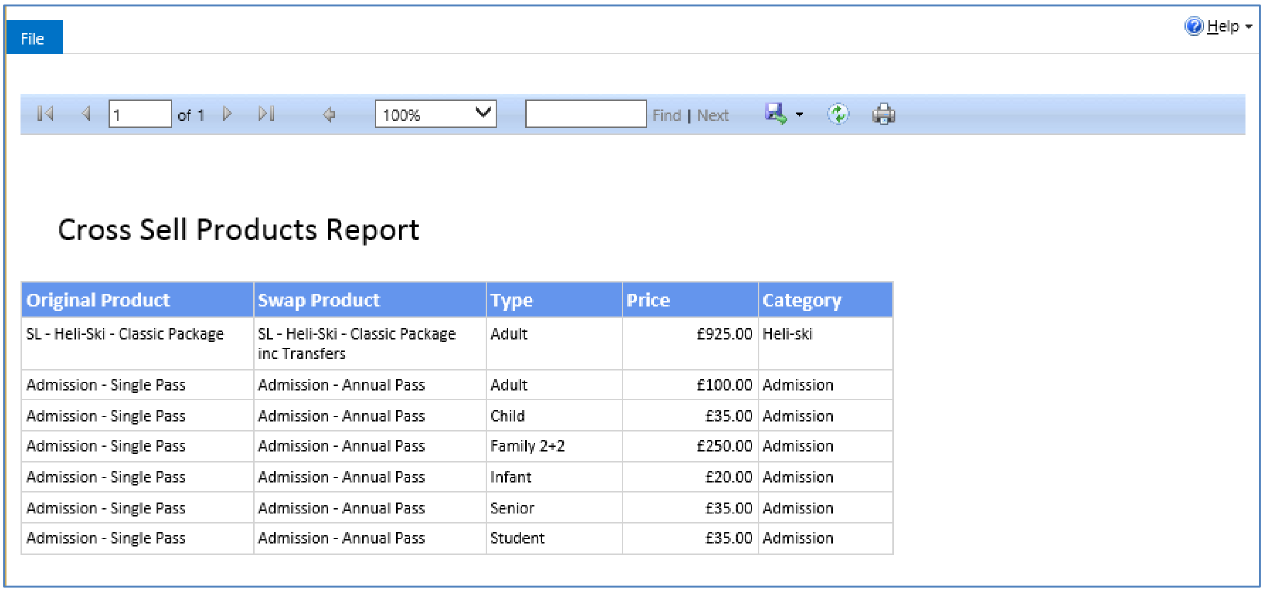


d) To run a report, double click on the relevant report.

e) The report will open.

Some reports will not require any criteria to be selected and will instantly generate. For other reports the Report Filtering Criteria view will be displayed. This allows specific criteria to be shown on the report which can be selected from the drop down. Upon filtering the criteria or if no criteria needs to be changed, select the **Run Report** button.





Cross Sell Products Report

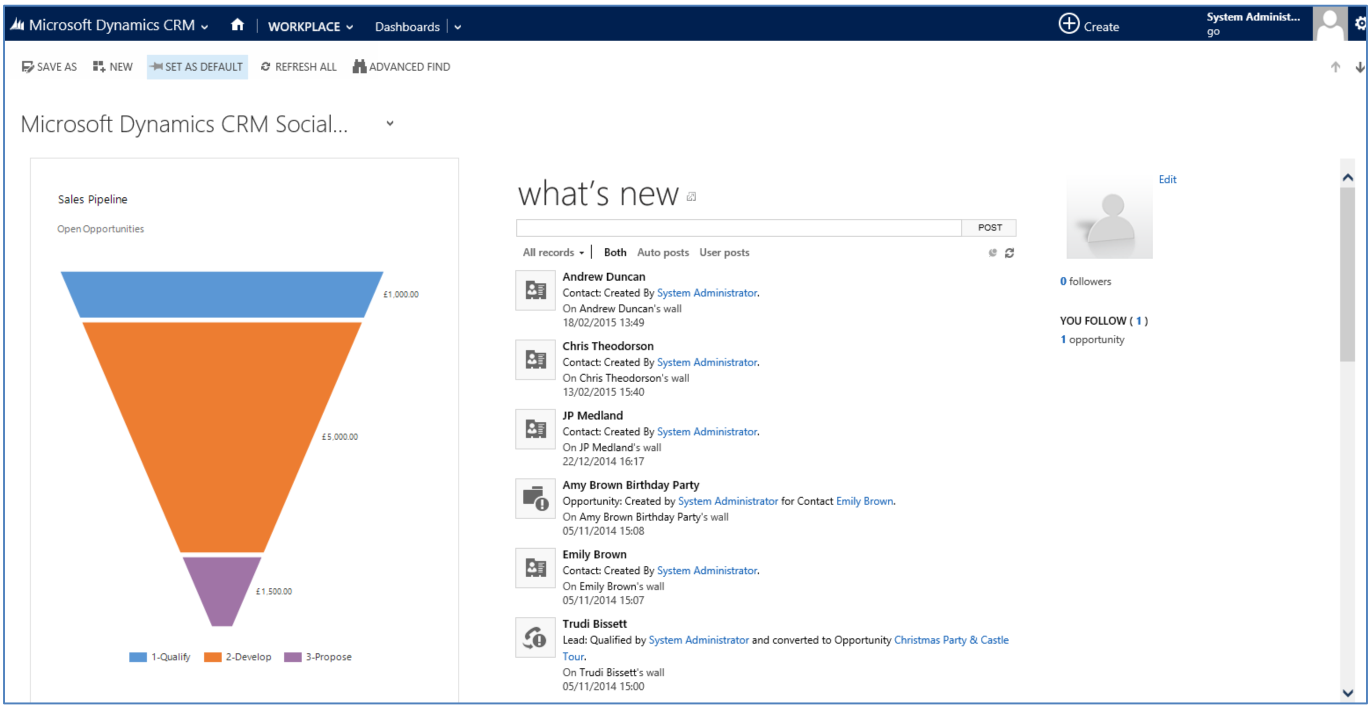
Original Product	Swap Product	Type	Price	Category
SL - Heli-Ski - Classic Package	SL - Heli-Ski - Classic Package inc Transfers	Adult	£925.00	Heli-ski
Admission - Single Pass	Admission - Annual Pass	Adult	£100.00	Admission
Admission - Single Pass	Admission - Annual Pass	Child	£35.00	Admission
Admission - Single Pass	Admission - Annual Pass	Family 2+2	£250.00	Admission
Admission - Single Pass	Admission - Annual Pass	Infant	£20.00	Admission
Admission - Single Pass	Admission - Annual Pass	Senior	£35.00	Admission
Admission - Single Pass	Admission - Annual Pass	Student	£35.00	Admission

8. DASHBOARDS

To quickly access data, dashboards can be used to allow easy and quick reference to relevant data. From the dashboard, users can quickly identify and access data relevant to their job role, for example, if you were a sales manager you may wish to have a view that details all open leads, a view that lists all open activities and a chart with estimated revenue.

Dashboards will be displayed immediately after a user logs in to CRM when using the Internet Explorer client, and acts as a type of 'homepage'. It streamlines processes and prevents a user having to search through the CRM system to obtain a list of data that can be displayed in the dashboard. It is suggested that users review their dashboard periodically in order to keep track of any activities that may require their attention.

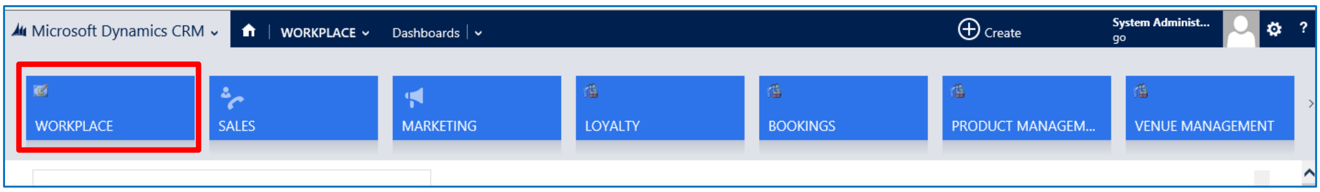
Views can be created to access certain segments or subsets of data from CRM. These views can then be shared with other users.



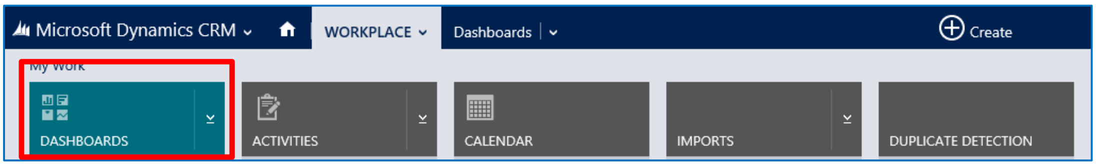
8.1. CREATING A NEW DASHBOARD

To create a new dashboard in Microsoft CRM:

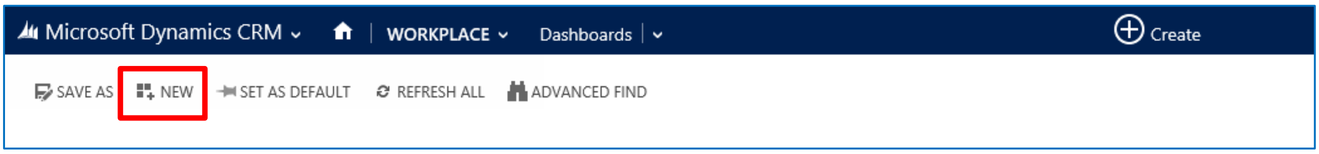
a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Workplace** from the drop down list of the **Navigation Bar**.



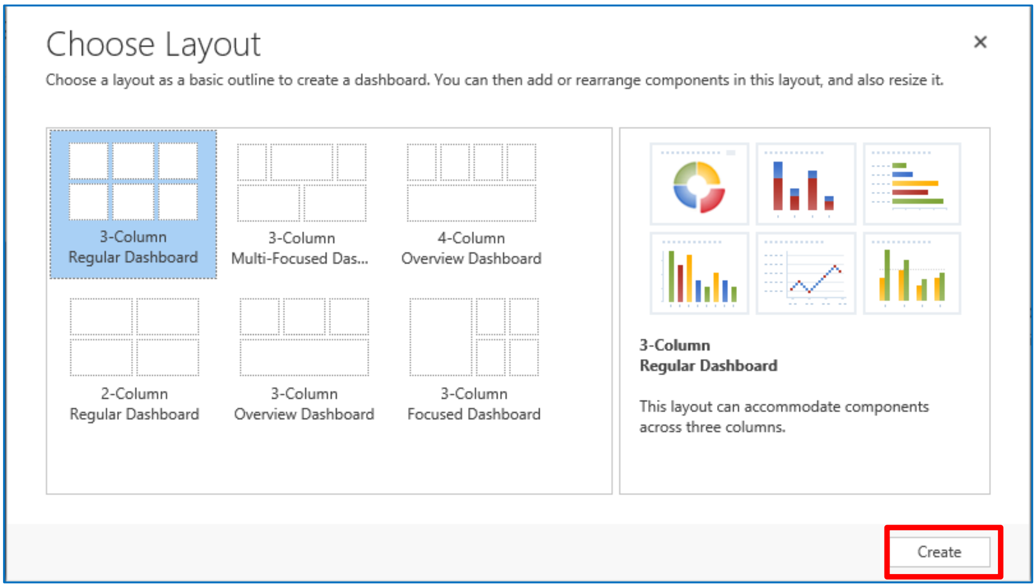
b) In the **Workplace** area of Microsoft CRM, select the **Workplace** tab in the Navigation Bar, from the drop down list of related areas select **Dashboards.**



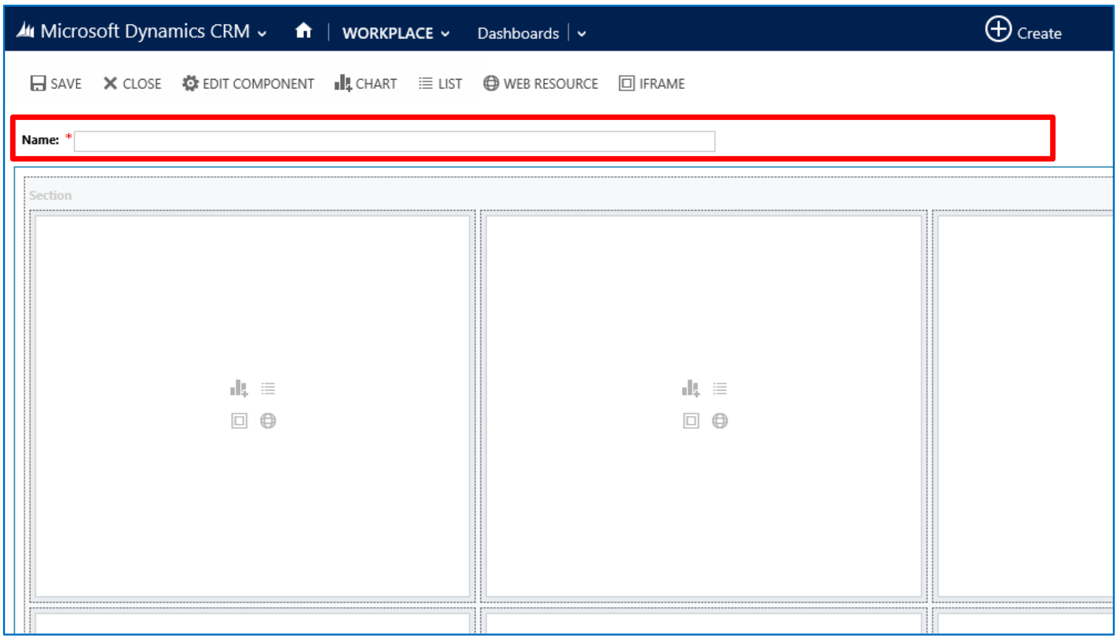
c) The Dashboards view will be displayed, with the default dashboard. Select **New** on the ribbon.



d) The **Dashboard** form will be displayed prompting you to select a layout. Select a suitable layout and click **Create.**



e) Enter a suitable name for the dashboard and click **Save.**



f) You are now able to modify each section of the dashboard, creating custom views for each section.

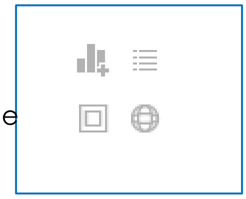
g) To do this click one of the 4 icons in each section

I. Chart

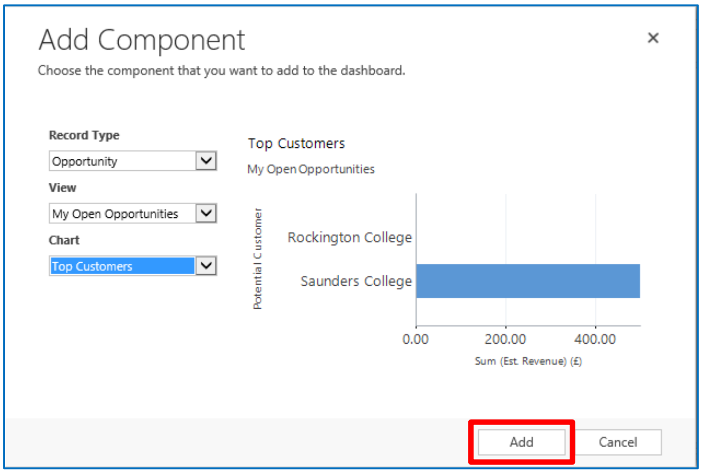
II. List

III. Web resource

IV. iFrame

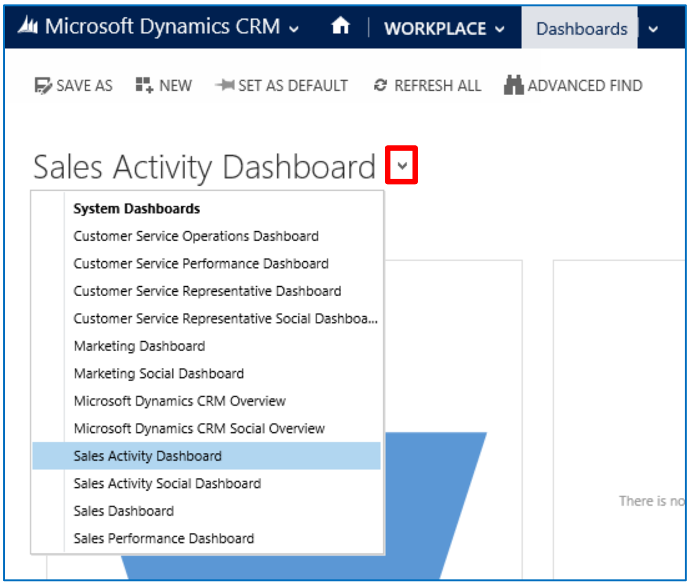


h) This will open a new window prompting the user to select the relevant data and format.



i) Once all relevant data is selected, click **Add** to add it to the dashboard, this will return the user to the dashboard form, where the dashboard can be saved and closed.

j) Below the ribbon is a small arrow, highlighted below. To access the dashboard in the **Dashboard View** select this arrow and choose your dashboard.



k) To set a dashboard to default, when in the **Dashboard view**. Select **Set As Default** from the ribbon. The dashboard will be automatically selected.

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