CRM 2015 – CORPORATE SALES CYCLE

USER GUIDE

THE QUEEN'S AWARDS FOR ENTERPRISE: 2014

CONTENTS

ABOUT THIS DOCUMENT

This document has been prepared as a User Guide for the CRM 2015 Corporate Sales Cycle.

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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
Butterworth
Leicestershire
LE17 4PN
UK

Phone: +44 (0) 845 508 8149

Email: support@green4solutions.com

Web: www.green4solutions.com

INTRODUCTION

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

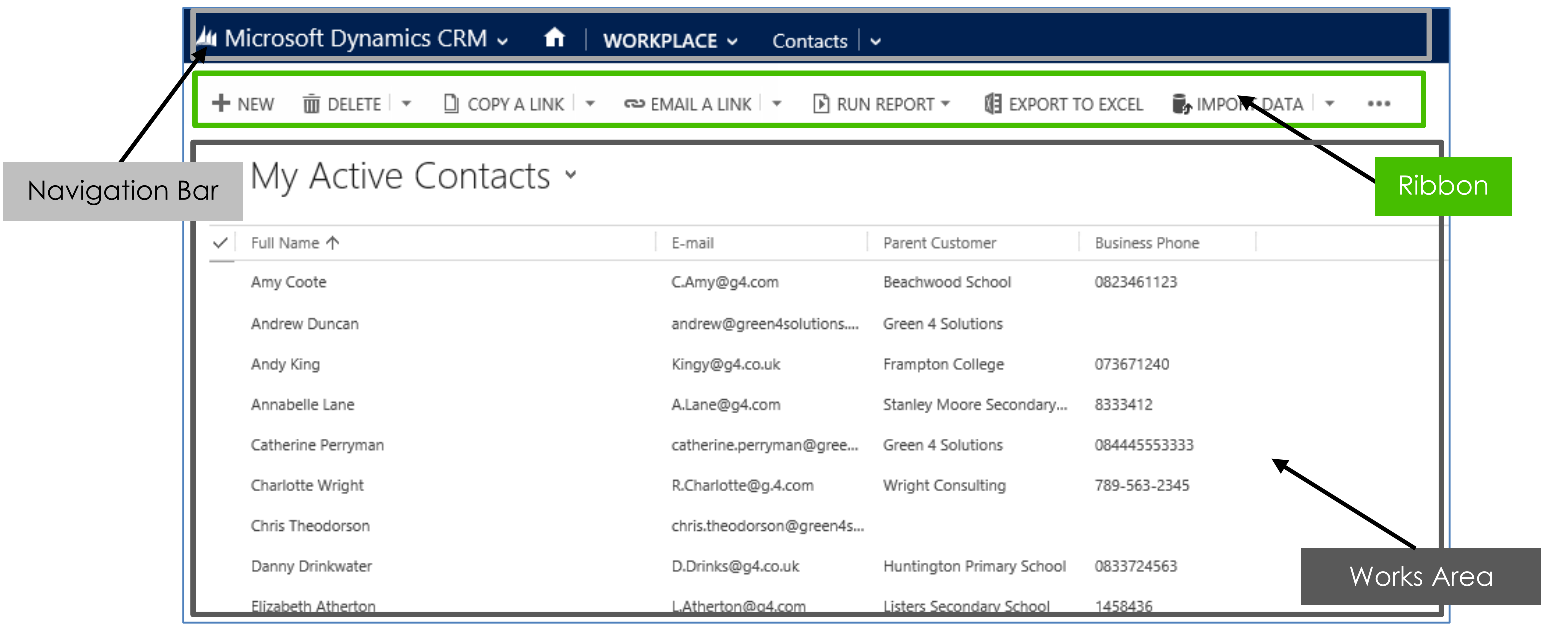
CORPORATE SALES CYCLE

APPLICATION LAYOUT

When working in 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.

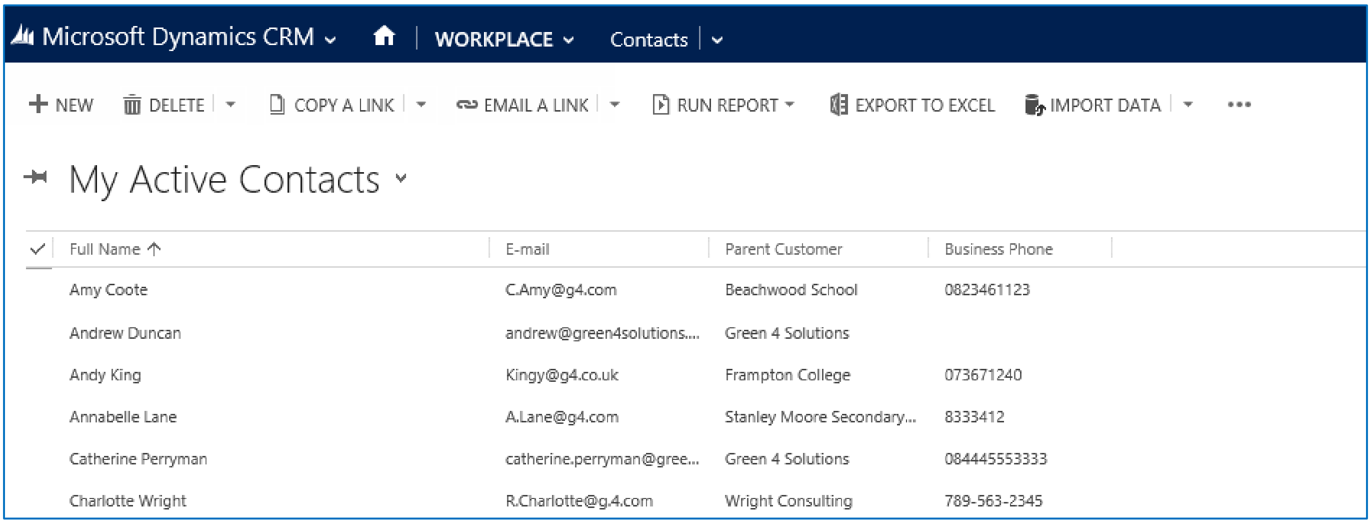
The key functional areas of the CRM window are:

- **Navigation Bar.** Used to select functional areas of the application. The functionality available via the navigation bar is spread across a number of folders, which can be accessed by selecting the appropriate tab in the navigation bar, 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 change as you move around the application.
- **Work Area.** The information held in CRM will be displayed in the work area of the window. The content displayed will change depending upon the option selected in the navigation bar and may include views, dashboards and calendars.



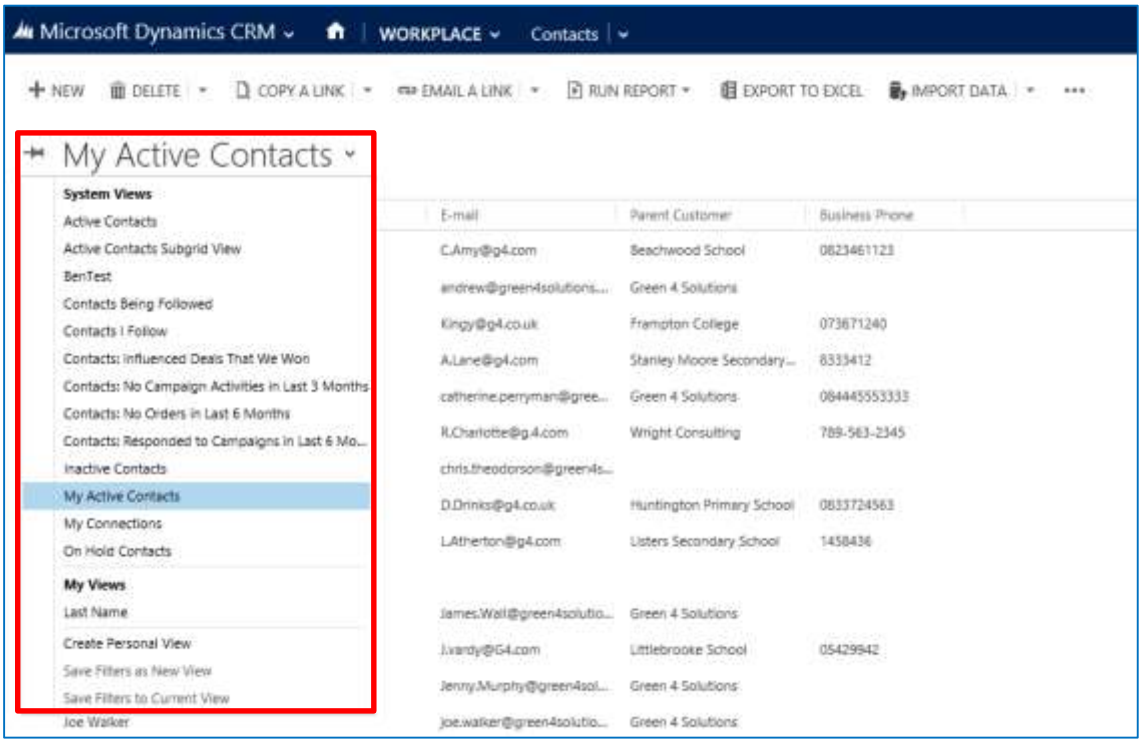
VIEWS

Within 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:

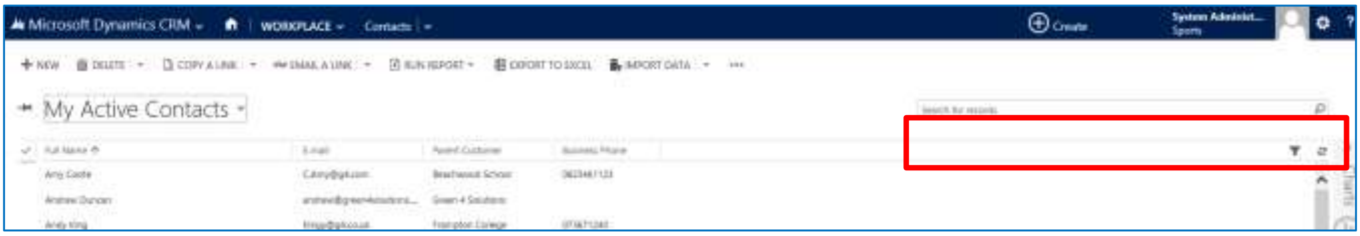


A number of actions are available to help you identify the information you are interested in within the view:

- **Change the View.** When you select an entity (for example Contacts) in the navigation panel, your default view will automatically be displayed. You can also choose alternative views by selecting the small arrow next to the name of the existing view. A selection of available views will be listed. To pick a different view click on the appropriate option in the list:

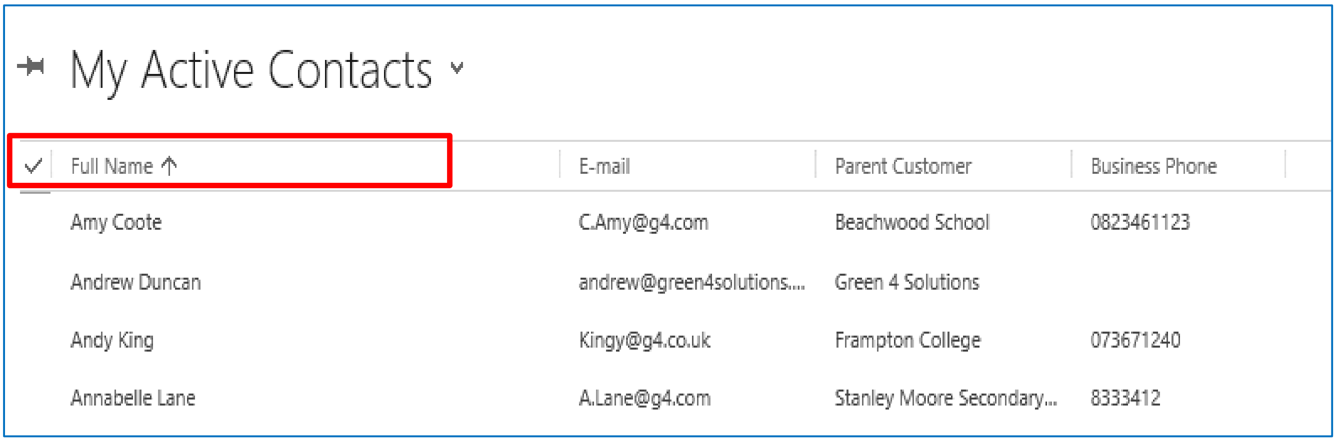


- **Search for a Record.** All views are searchable, for example a list of Contacts can be searched using the Contact's name, email or linked Account. To carry out a search, enter the search term into the text box at the top of the view and click the button.



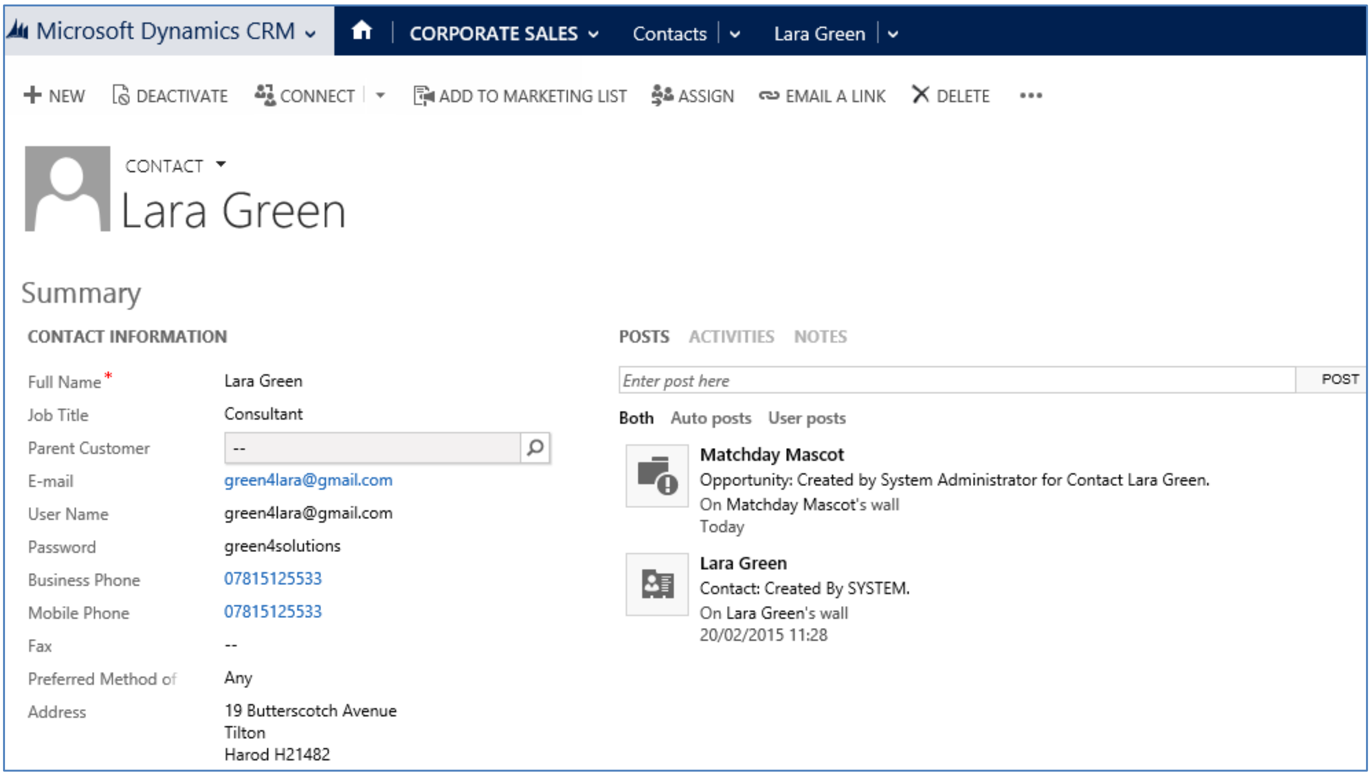
The list of records displayed will update to show only those records matching the keyword entered. If you are unsure of the exact search term, you can enter the wildcard character (*) before the search term. For example to search for all Accounts with "electrical" in their name, enter *electrical.

- **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 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	E-mail --	Enter the requested information directly into the box provided
Date	Birthday	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	Available Offline No	Click for the required answer.
Drop-Down	Beneficiary Requirem Not Required	Select the required option from the list of values provided. To access the list of values click within the field.
Look Up		Select the required value from those displayed after selecting the magnifying glass. If the value is not displayed, select Look Up More Records or to create a new value select +New

1. CONTACT AND ACCOUNT MANAGEMENT

Contacts and Accounts are key records within 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 together within CRM.

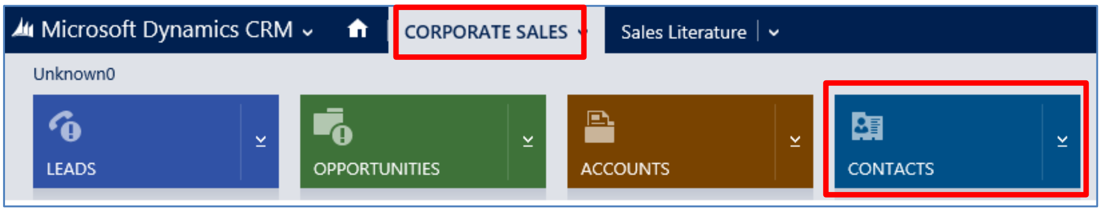
The following sections describe how to work with Contacts and Accounts in CRM.

1.1. CREATE A CONTACT

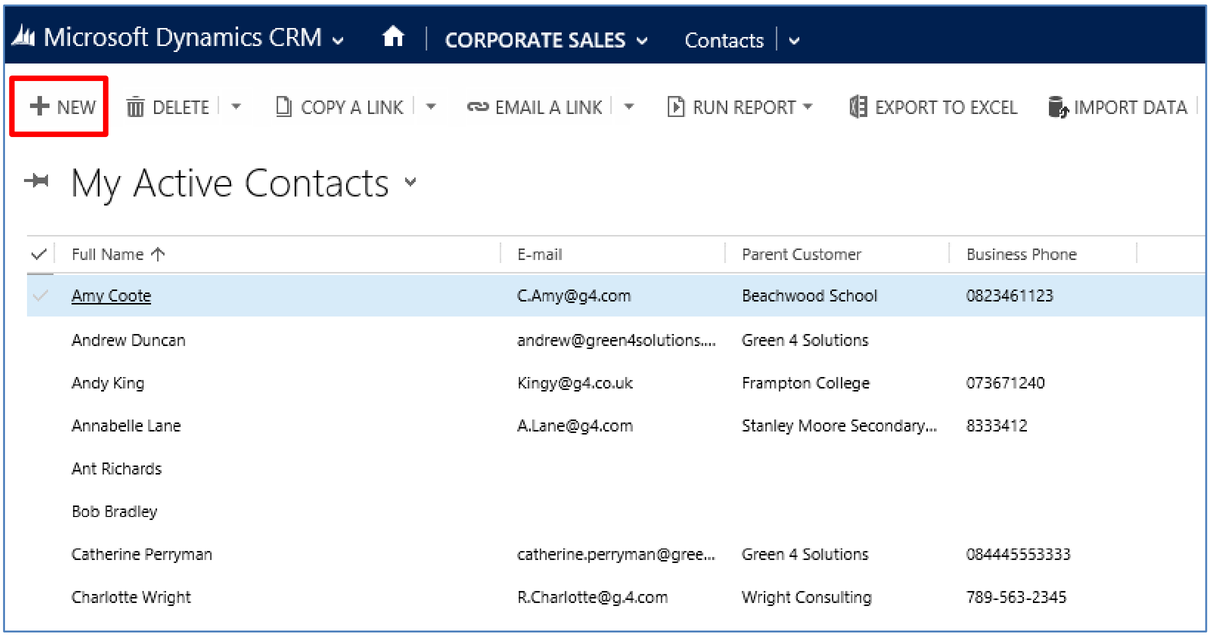
To create a Contact complete the following instructions:

a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.

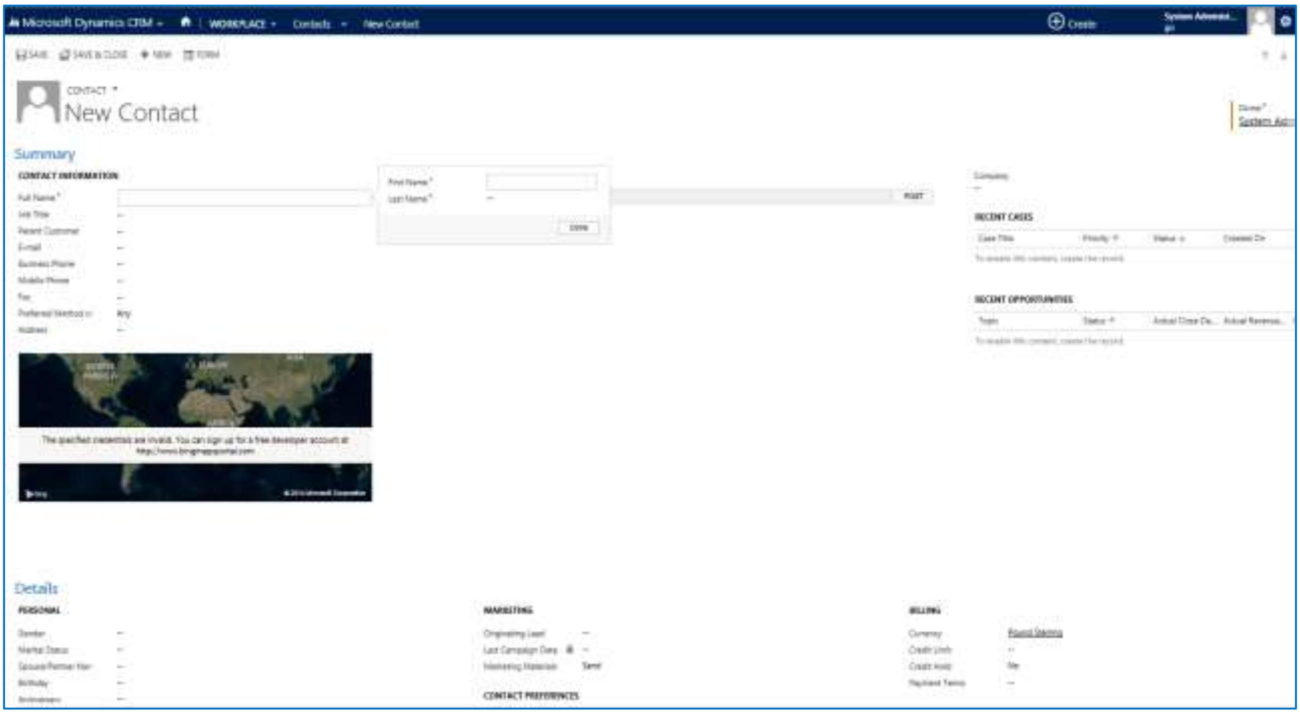
b) Hover over the **Corporate Sales** tab and from the drop down select **Contacts**.



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



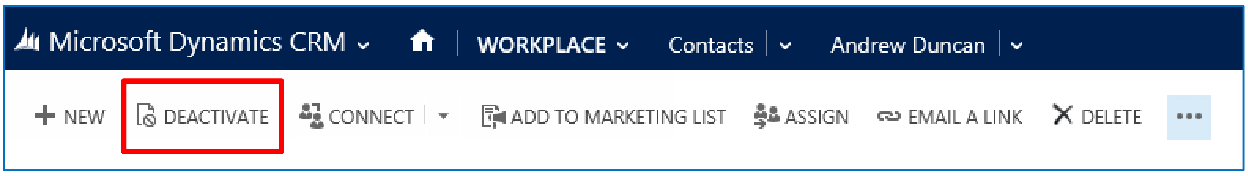
d) A blank **Contact Form** will be displayed. You must enter all of the mandatory fields (all fields with a red asterisk) and any fields marked with a blue cross are recommended fields but do not have to be completed. As the field is selected, an outline to the field will appear.



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

f) A Contact can be edited at any point by reopening the relevant Contact form, making the changes and selecting the save icon in the bottom right hand corner of the form.

g) If a Contact is no longer active, their record in CRM can be deactivated 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 open up the relevant Contact record in form view before selecting Deactivate on the ribbon.



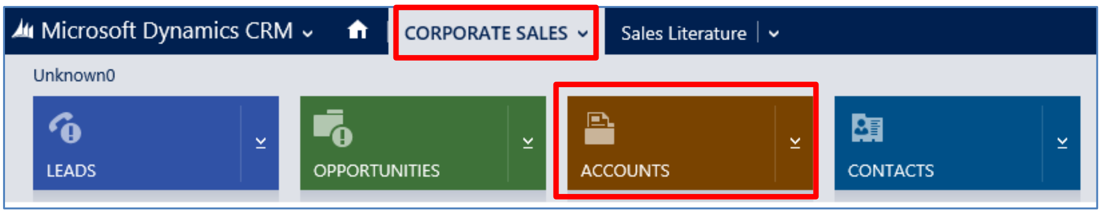
Note. You can use the **Parent Customer** field to link the Contact to an Account record (for example the company the contact represents). When you select the icon alongside the field a list of existing account records will be displayed, select the appropriate record from those listed. If an appropriate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

1.2. CREATE AN ACCOUNT

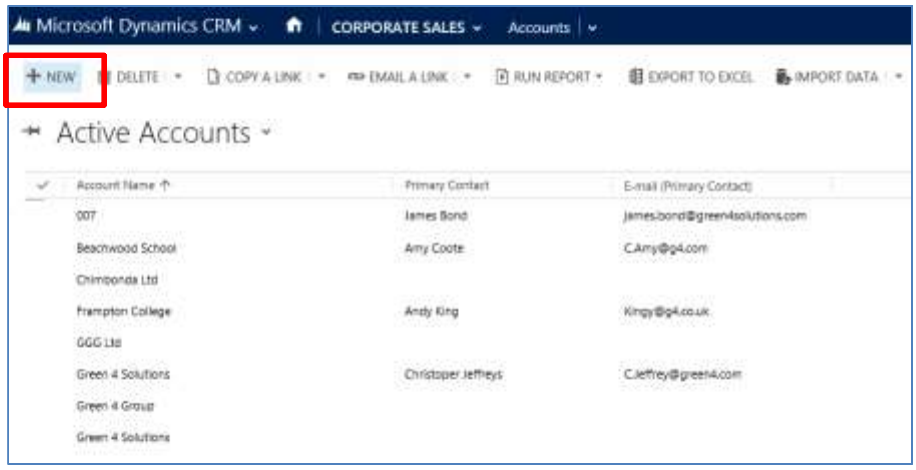
To create an Account complete the following instructions:

a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.

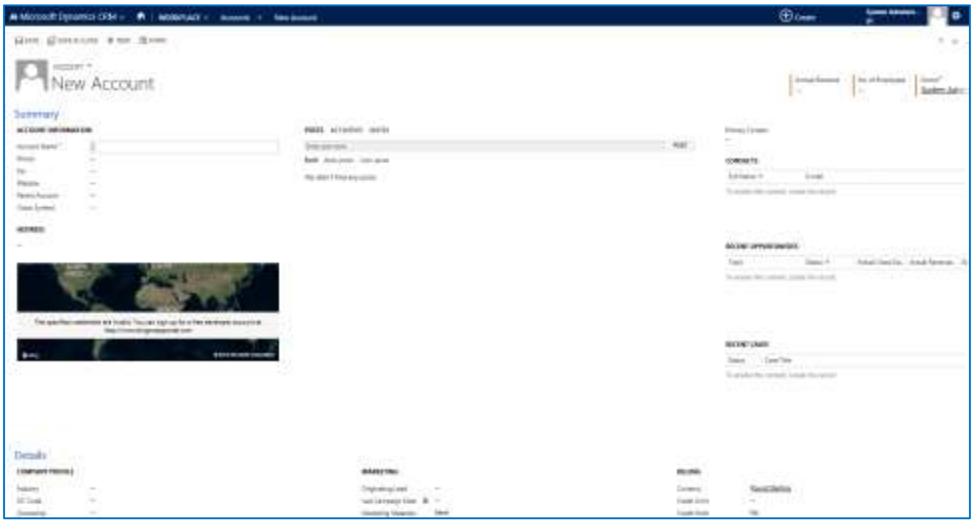
b) Hover over the **Corporate Sales** tab and from the drop down select **Account**.



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



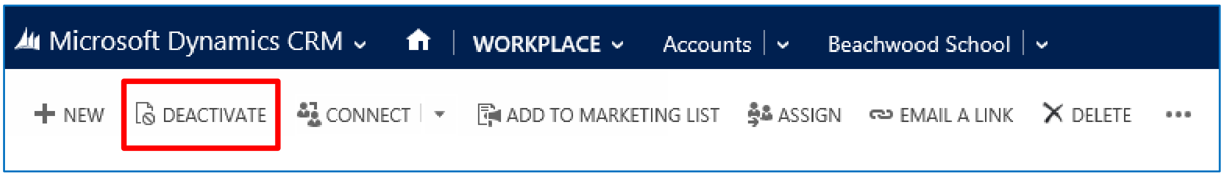
d) An **Account Form** will be displayed. Again, you must enter all of the mandatory fields (all fields with a red asterisk) and any fields marked with a blue cross are recommended fields but do not have to be completed. As the field is selected, an outline to the field will appear.



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

f) An Account can be edited at any point by reopening the relevant Account form, making the changes and selecting the save icon in the bottom right hand corner of the form.

g) If an Account is no longer active, their record in CRM can be deactivated 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, open up the relevant Account record in form view before selecting **Deactivate** in 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.

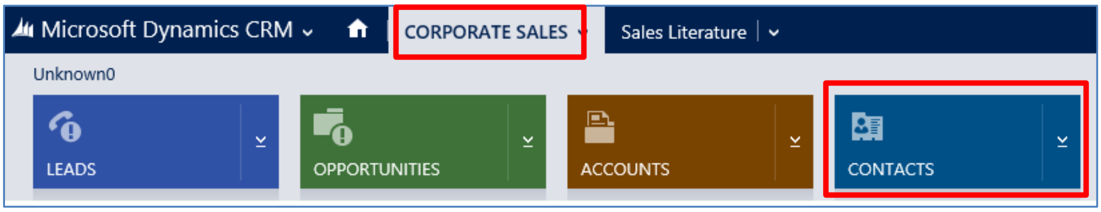
1.3. BUILDING RELATIONSHIPS BETWEEN A CONTACT AND ACCOUNT

CREATING A LINK BETWEEN A CONTACT AND AN ACCOUNT

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

a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.

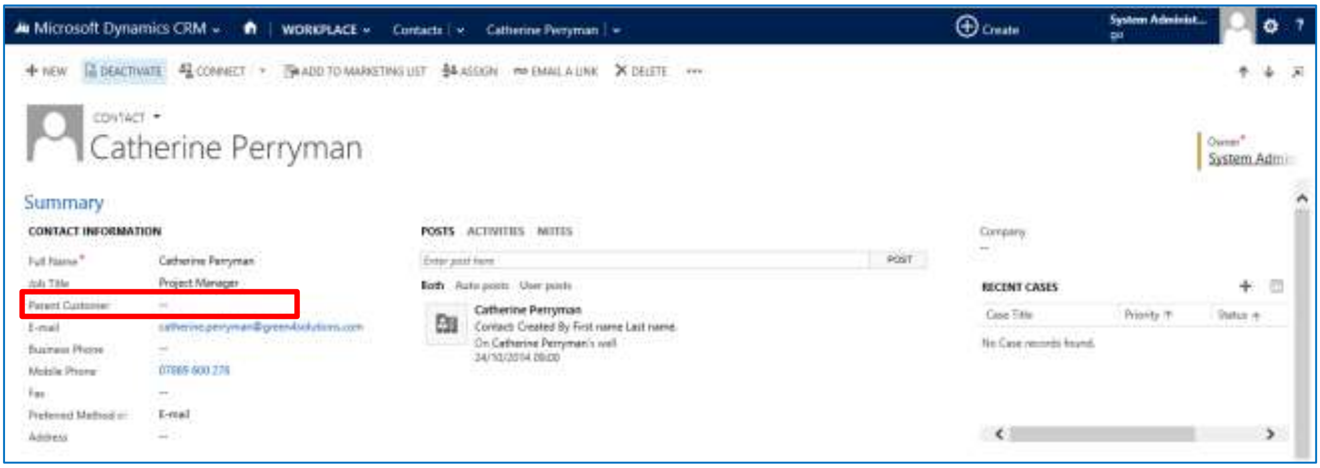
b) Hover over the **Corporate Sales** tab and from the drop down select **Contacts**.



c) 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.

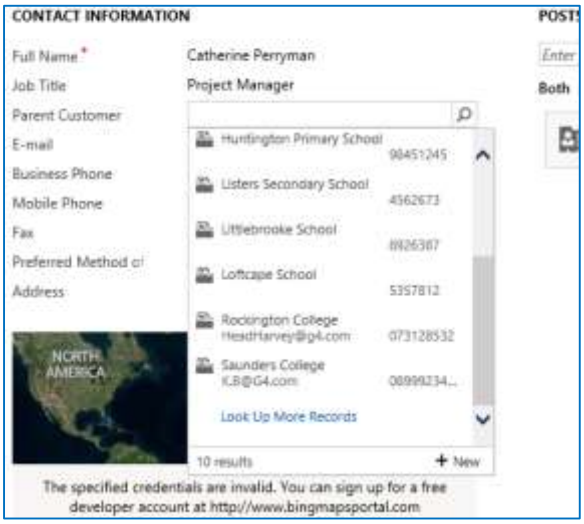
d) Double click on the Contact and the **Contact form** should appear.

e) On the **Contact form** there is a field called **Parent Customer**, click the **look up** button.

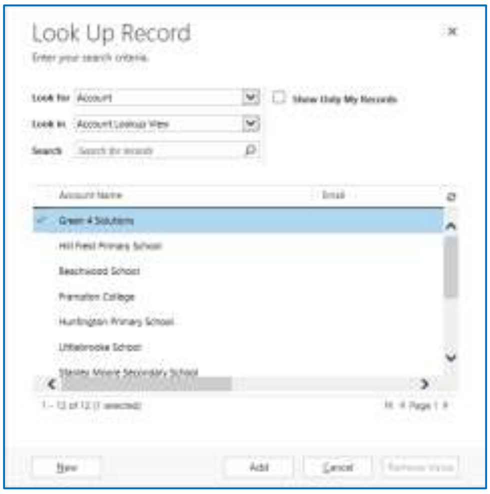


f) This will display a list of 10 Accounts. If the Account that you would like the Contact to be related to is displayed, select it. If not, select the **Look Up More Records** option, this will allow you to search for the relevant Account you wish to associate the Contact with.

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



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



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

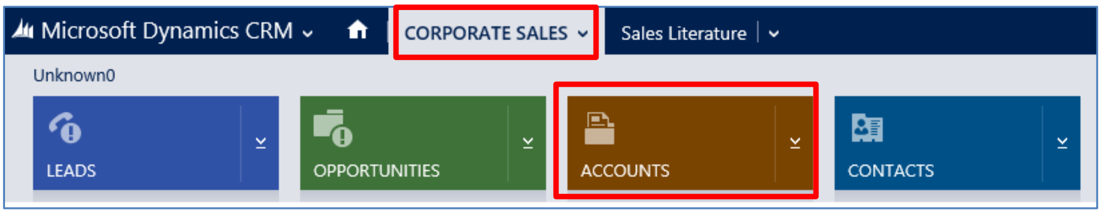
j) Click **Save.**

CREATING A LINK BETWEEN AN ACCOUNT AND A PRIMARY CONTACT

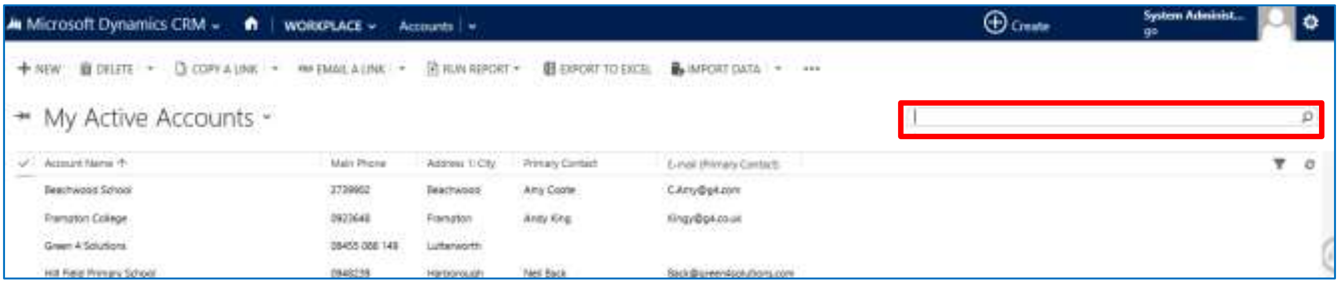
Below is a step by step guide to creating a link between an **Account** and a **Primary Contact:**

a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.

b) Hover over the **Corporate Sales** tab and from the drop down select **Account**.

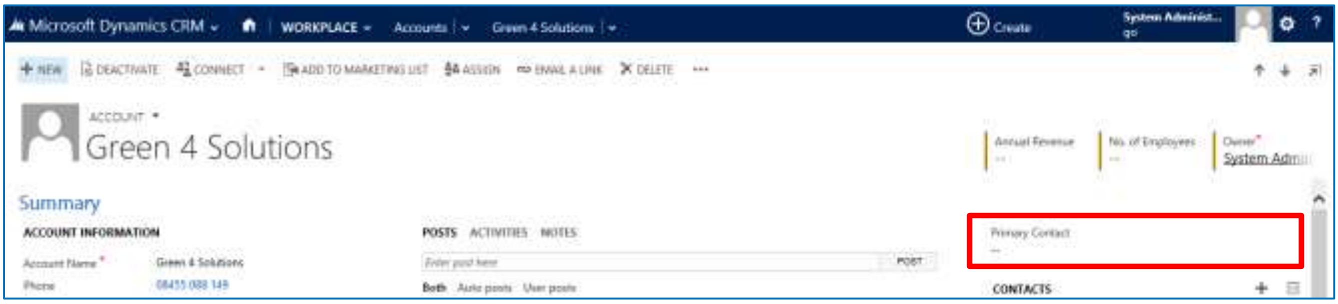


c) Select the view **Active Accounts** and search for the relevant contact using the search bar in the top right hand corner of the contact view.

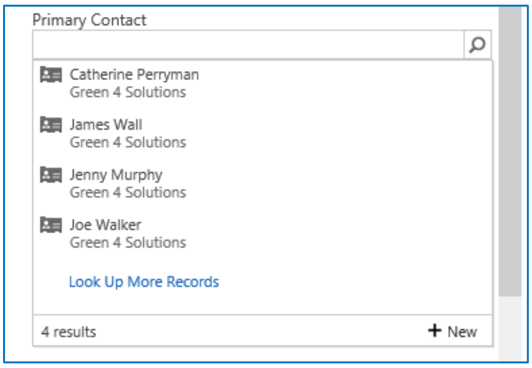


d) Double click on the Account and the **Account form** should appear.

e) 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**.

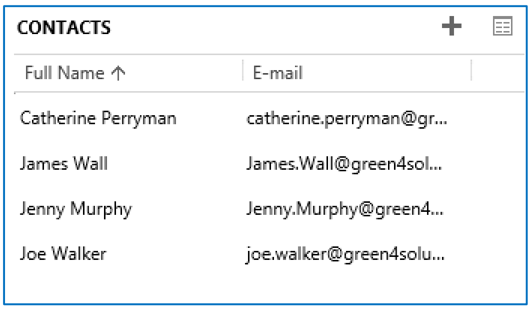
g) You will automatically be returned to the **Account form**, and the Primary Contact field should now have the appropriate contact occupied.

h) Click **Save.**

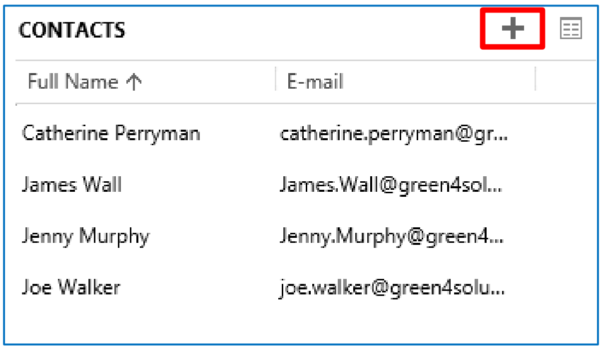
ADDING A CONTACT THAT IS NOT THE PRIMARY CONTACT

To add a Contact that isn't the Primary Contact complete the following instructions:

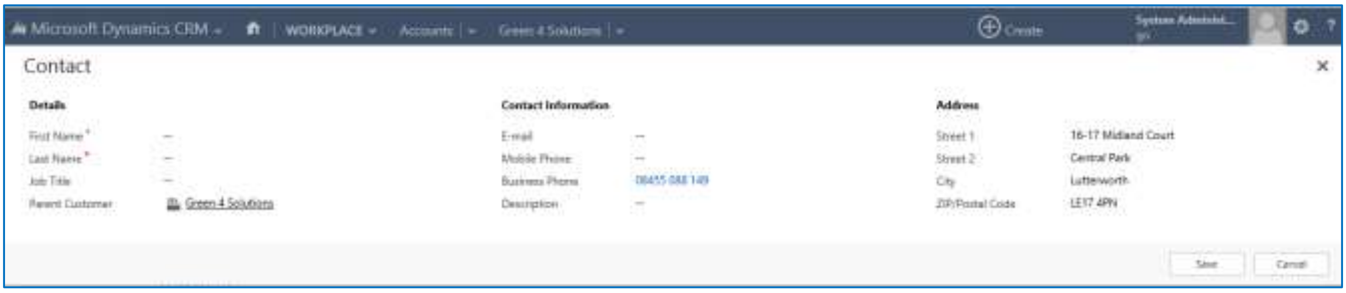
a) With the **Account Form** open, find the **Contacts** field which has a small table beneath it. If any contacts have already been related to this Account, the names of these will be displayed in the table.



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.

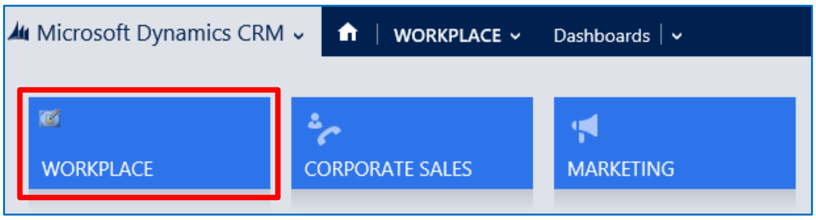
2. ACTIVITIES

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 allows you to build up a history of the interactions you have had with each of your customers.

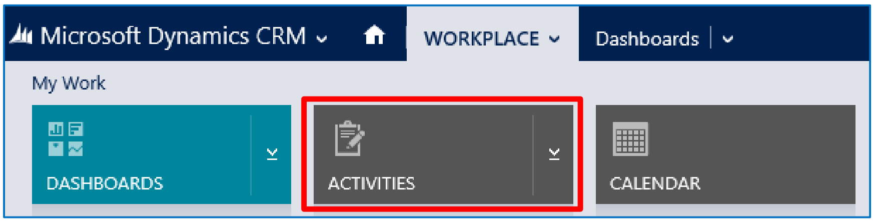
2.1. VIEWING YOUR ACTIVITIES

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

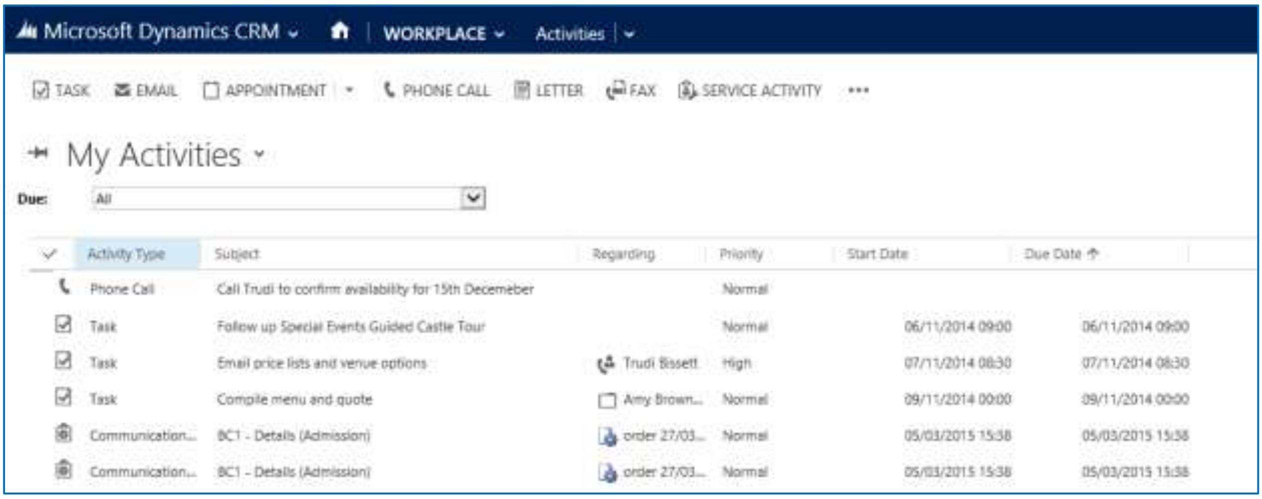
a) Hover over or select the **Microsoft Dynamics CRM** tab in the navigation bar, from the drop down choose **Workplace.**



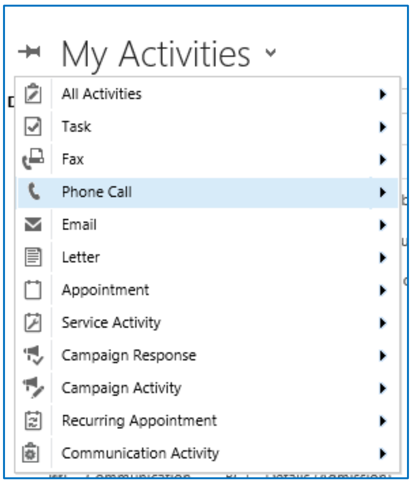
b) In the navigation bar select the **Workplace** tab before choosing **Activities** from the drop down.



c) The My Activities view will be displayed showing all Activities that have been assigned to you. To open up a specific Activity, double click on it.



It is possible to change the view to particular type of Activity only, this can be done by selecting the small arrow next to the **My Activity**. A drop down will appear with all of the Activity types. Depending on which Activity is to be viewed, select the appropriate tab.

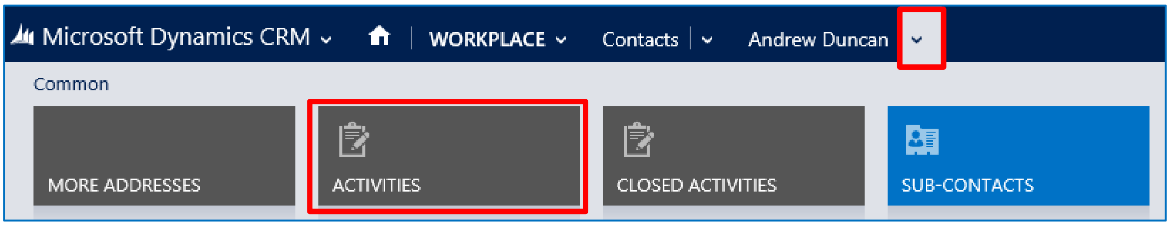


2.2. VIEWING OPEN ACTIVITIES LINKED TO A CONTACT OR AN ACCOUNT

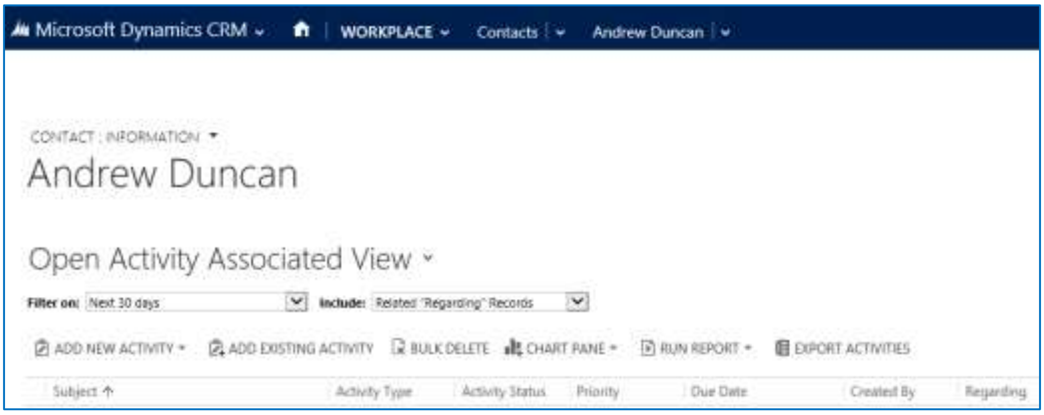
To view the Activities related to a Contact or an Account, complete the following instructions:

a) Open the appropriate Contact or Account record in the form view.

b) Within the Contact or Account form select the small arrow next to the name of the Contact or Account in the navigation bar, from the drop down select **Activities.**



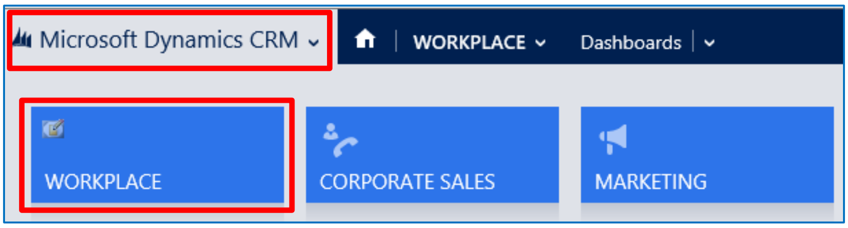
c) The Open Activity Associated View will be show, displaying a list of open Activities linked to the Contact or Account.



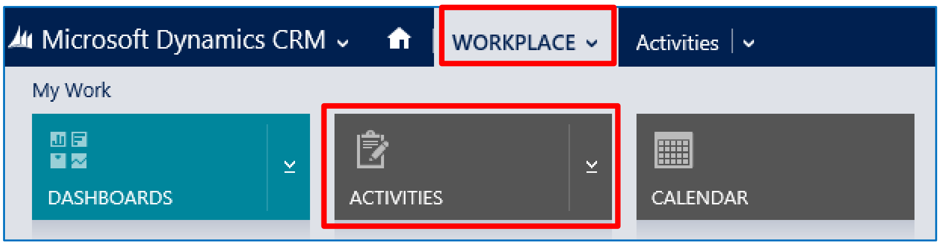
2.3. CREATING AN ACTIVITY

To create a new Activity complete the following instructions:

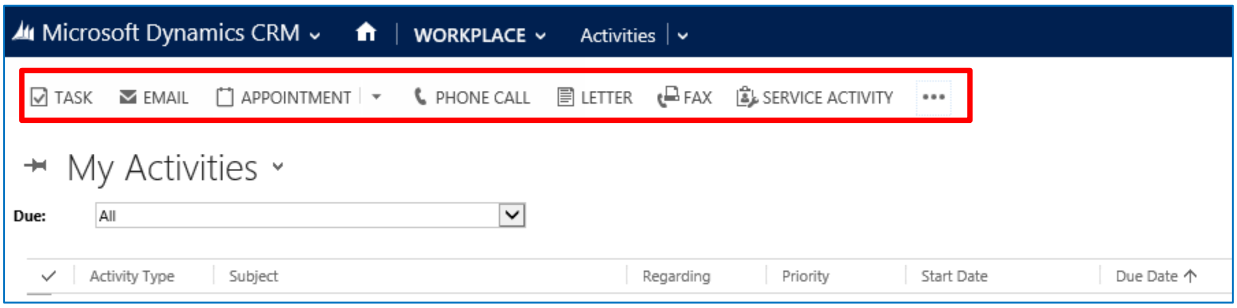
a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace.**



b) In the navigation bar choose **Workplace** and from the drop down, select **Activities.**



c) The My Activities view will be displayed. On the ribbon select the Activity type that you wish to create. It is possible to choose from; **Task**, **Email**, **Appointment**, **Phone Call**, **Letter**, **Fax** and **Service** Activity



d) 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 an Account or Contact.
- **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.

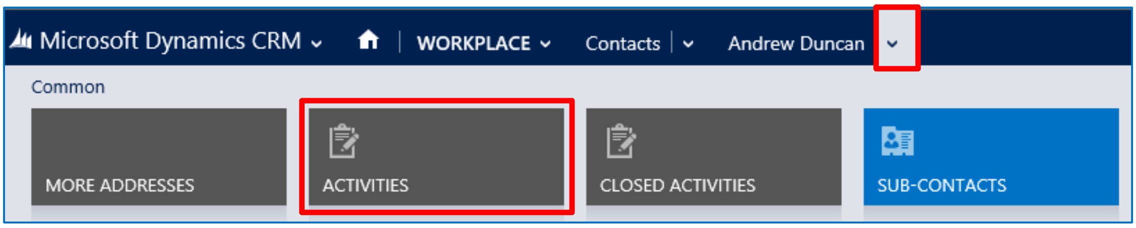
e) Once the information is complete select **Save and Close** on the ribbon.

2.4. CREATING AN ACTIVITY FROM A CONTACT OR ACCOUNT

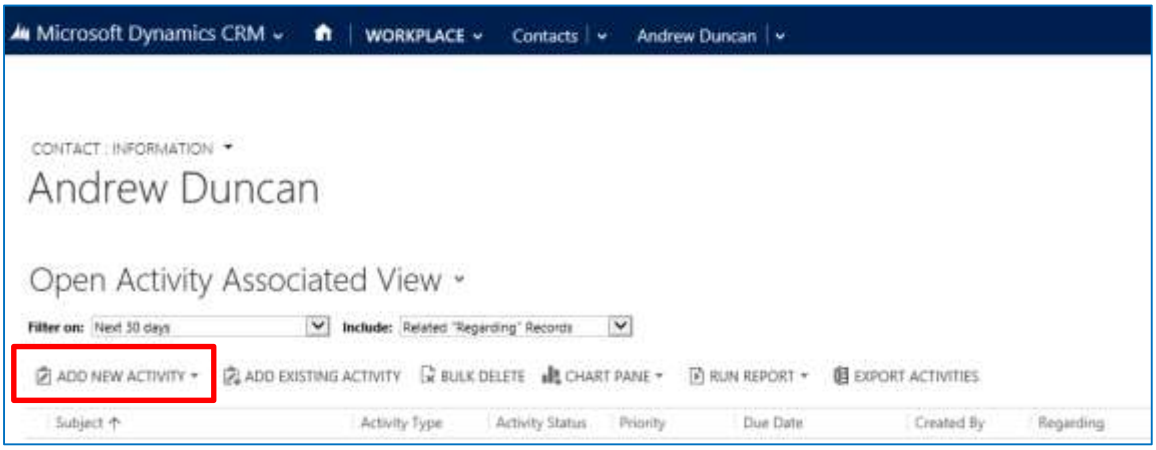
To create an Activity related to a Contact or Account the following instructions must be completed:

a) Open the appropriate Contact or Account record in the form view.

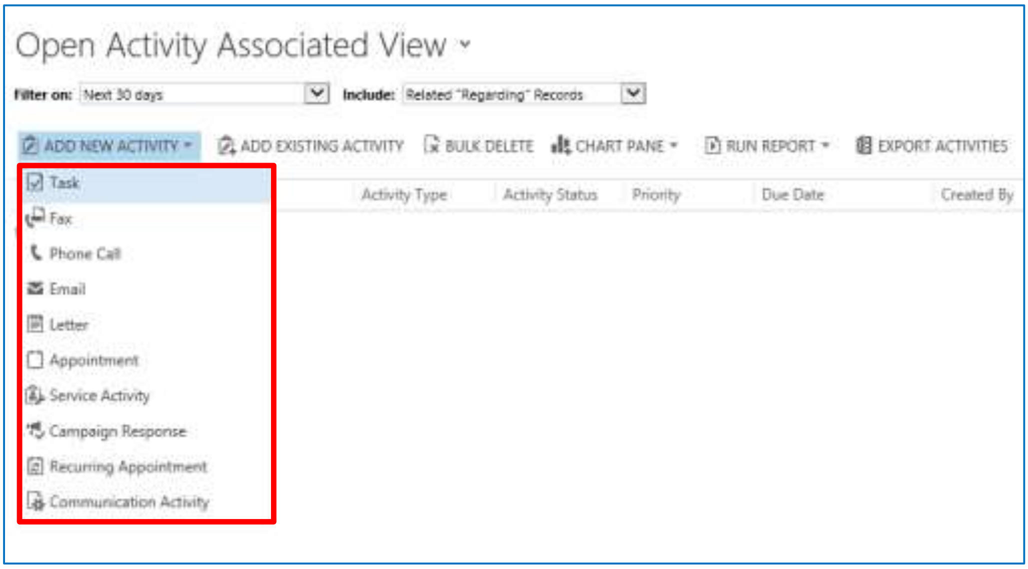
b) In the Contact or Record form, select the small arrow next to the name of the Contact or Account on the navigation bar. From the drop down select **Activities.**



c) The Open Activity Associated View will be show, in the ribbon select **Add New Activity**.



d) A drop down will appear displaying all Activities that can be created. Select the relevant Activity.



e) 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.

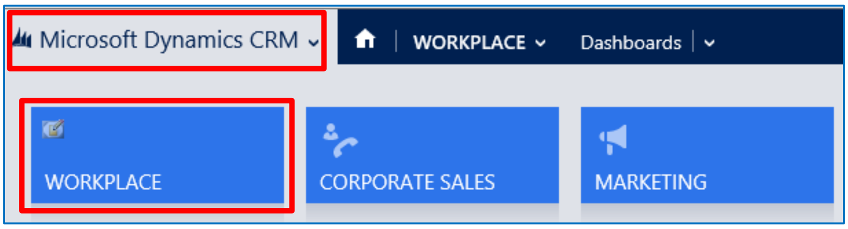
f) Once the information is complete select **Save and Close** on the ribbon.

2.5. SET REGARDING FOR AN ACTIVITY

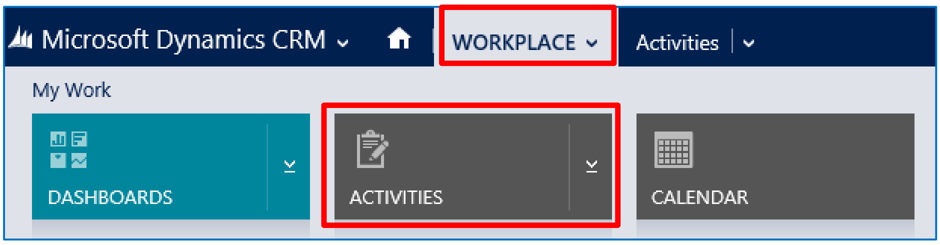
The Regarding field enables you to attach an Activity to an additional record within CRM, such as an Order, Opportunity or Case. By associating the Activity with an additional record, you can then see the Activity from any of those records. For example if the regarding field is set to an Opportunity, 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

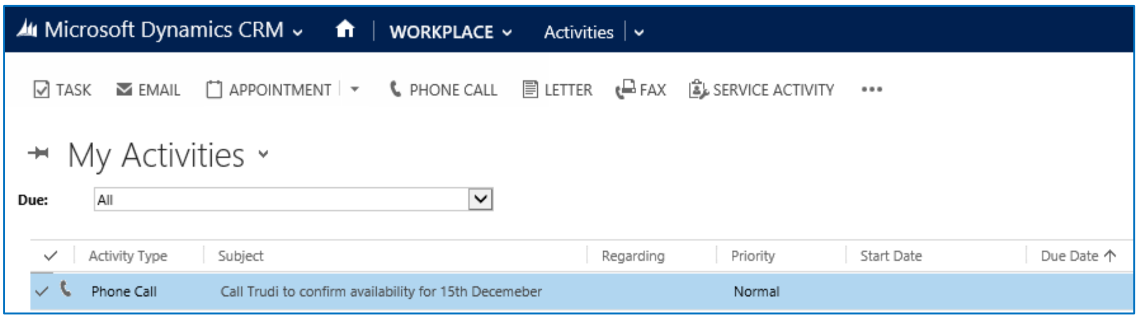
a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace.**



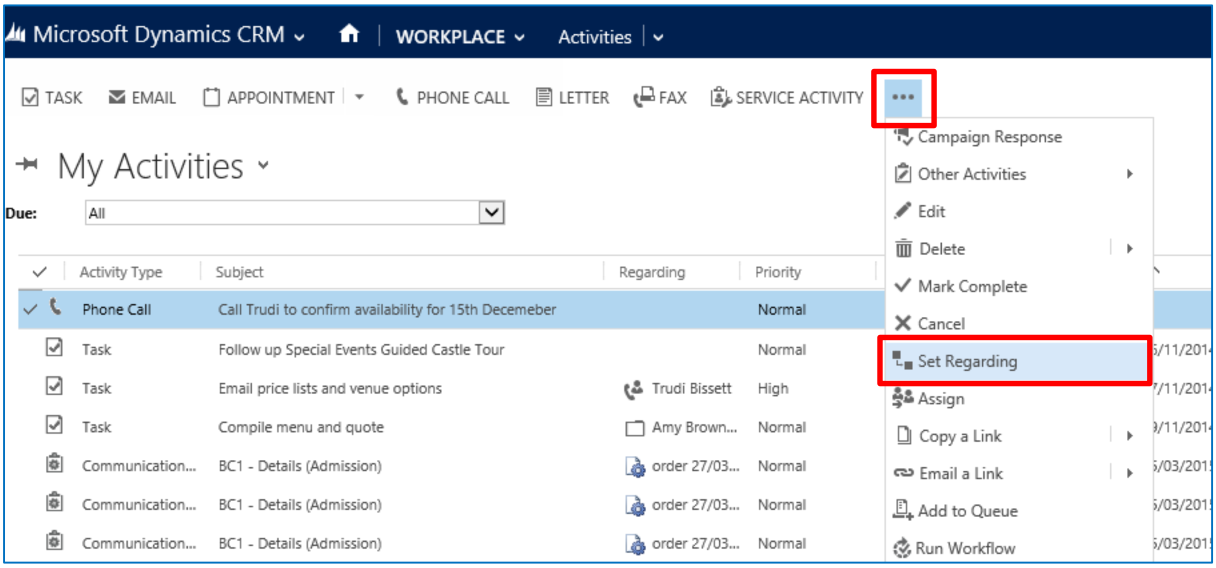
b) In the navigation bar choose **Workplace** and from the drop down, select **Activities.**



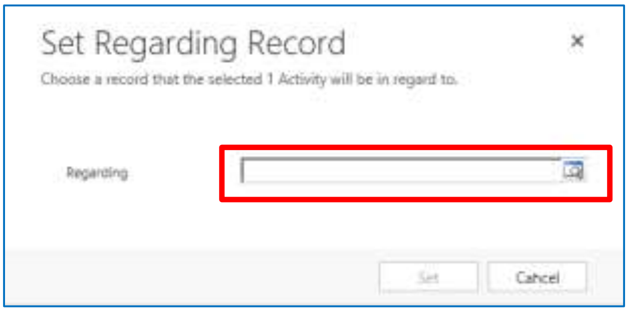
c) The My Activities view will be displayed. Highlight and place a tick in the Activities that you wish to set the regarding for.



d) In the ribbon, select the icon that replicates 3 dots and from the drop down choose **Set Regarding.**



e) The Set Regarding dialog will be displayed. Click the magnifying glass 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.

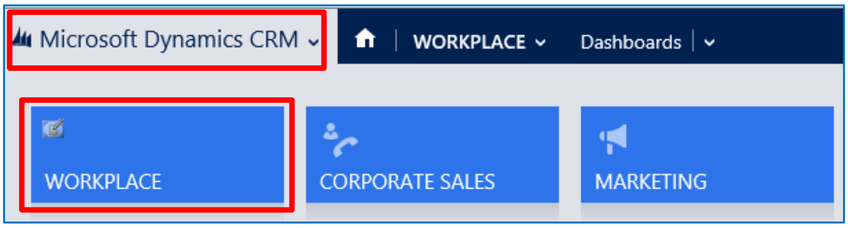


f) Upon adding the appropriate record, select **Set** on the Set Regarding Record dialog.

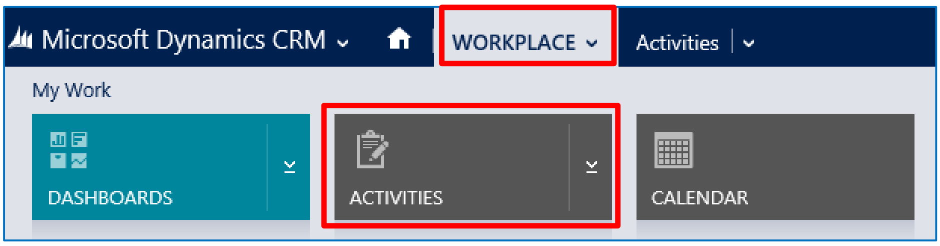
2.6. ASSIGNING AN ACTIVITY TO ANOTHER USER

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

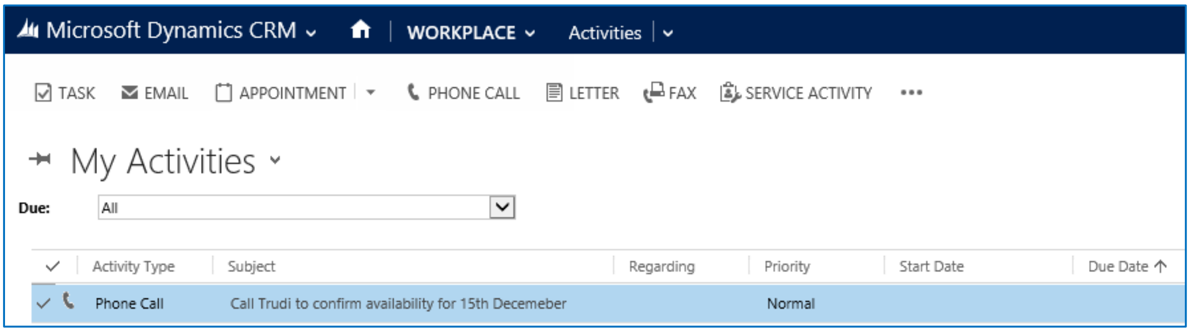
a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace.**



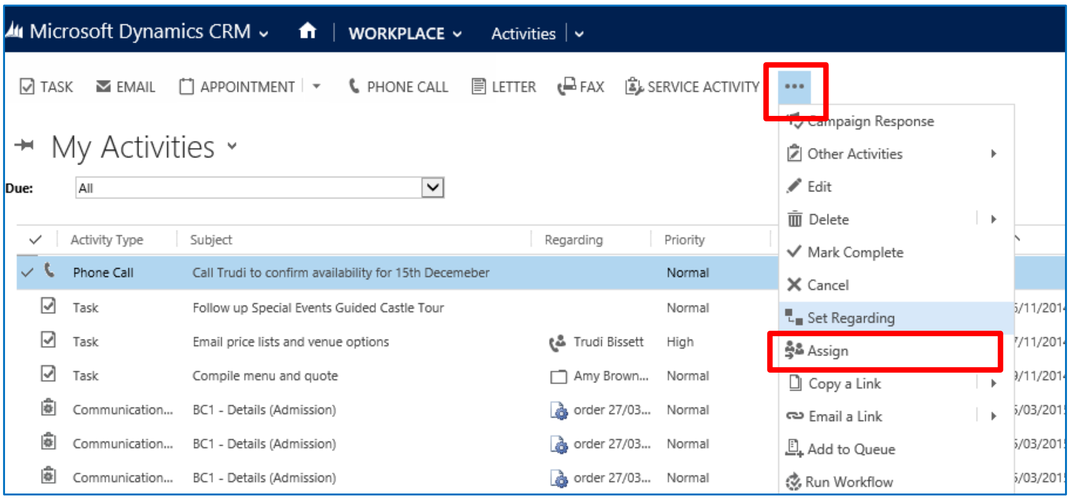
b) In the navigation bar choose **Workplace** and from the drop down, select **Activities.**



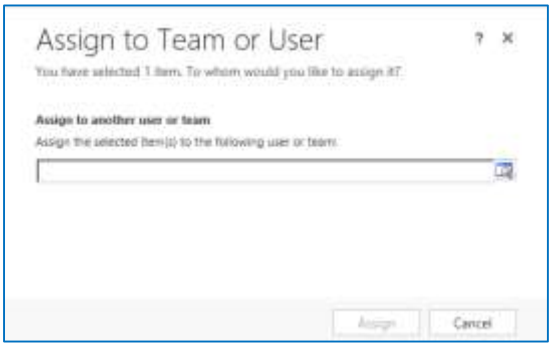
c) The My Activities view will be displayed. Highlight and place a tick in the Activities that you wish to assign to another user.



d) In the ribbon, select the icon that replicates 3 dots and from the drop down choose **Assign.**



g) The Assign to Team or User dialog will be displayed. Use the magnifying glass 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.

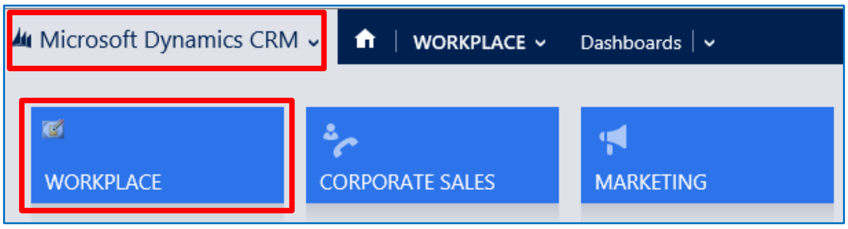


d) Upon adding the appropriate record, select **Assign** on the Assign to Team or User dialog.

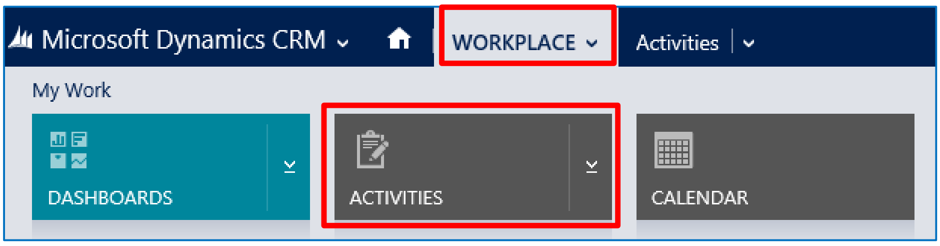
2.7. COMPLETING AN ACTIVITY

Once an Activity has been completed, it is necessary to set the record to complete. To do this complete the following instructions:

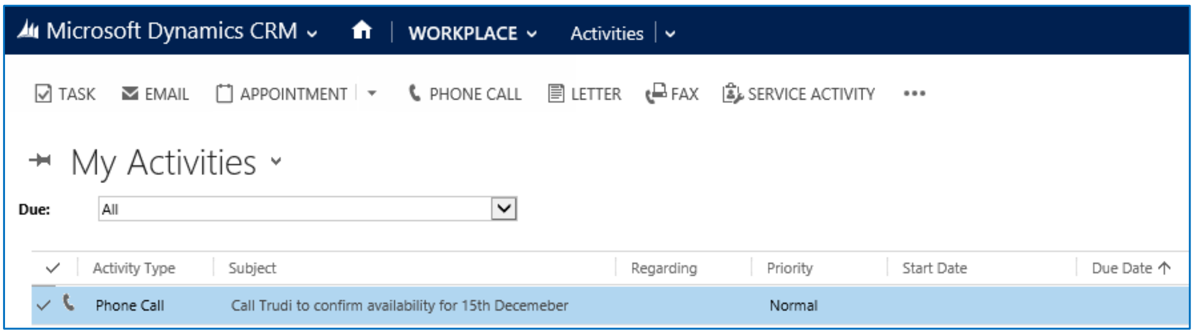
a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace.**



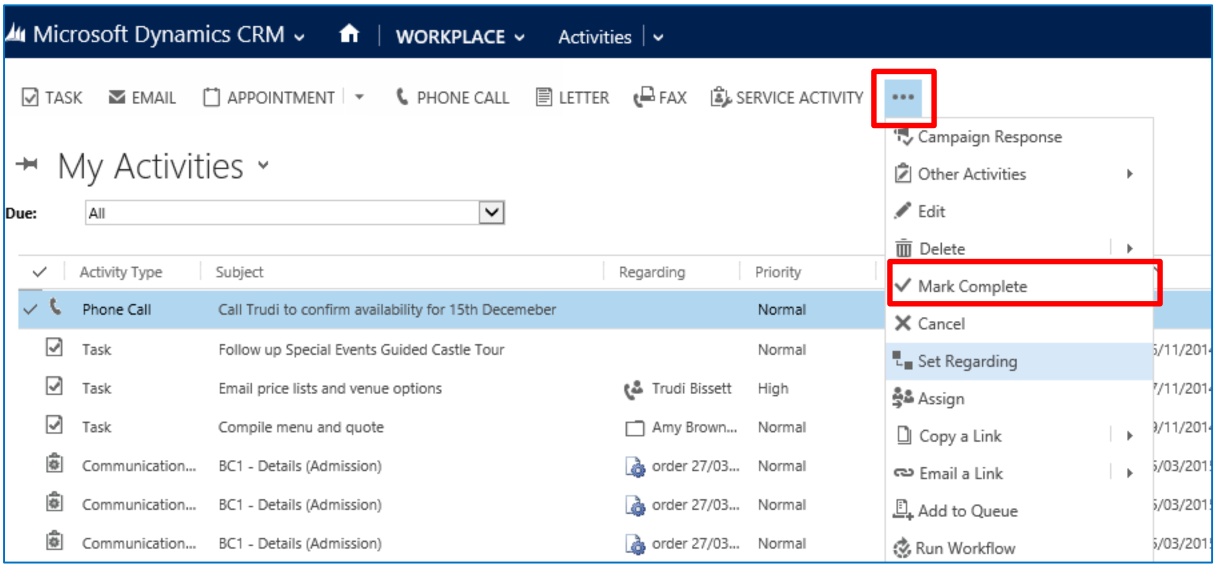
b) In the navigation bar choose **Workplace** and from the drop down, select **Activities.**



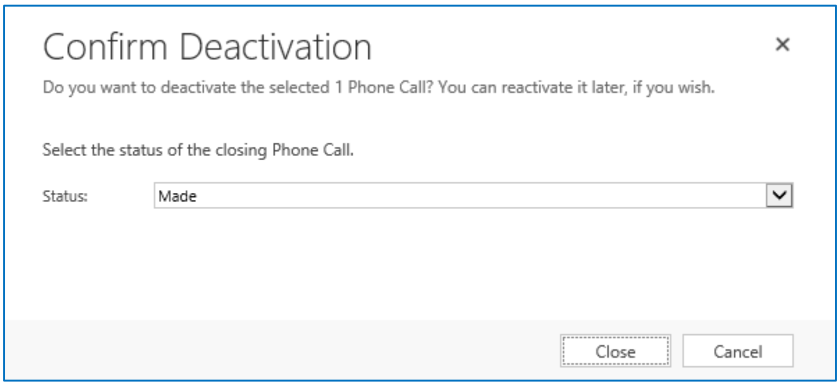
c) The My Activities view will be displayed. Tick and highlight the Activities that you wish to mark as complete. It is only possible to mark the same type of Activities as complete in one attempt.



e) In the ribbon, select the icon that replicates 3 dots and from the drop down choose **Mark Complete.**



d) The **Confirm Deactivation** dialog will be displayed, depending on the Activity Type selected the values given in the Status drop down within the Confirm Deactivation dialog will differ. Select the appropriate Status before selecting **Close.**



2.8. BREAKING CONTACT AND ACCOUNT RELATIONSHIPS

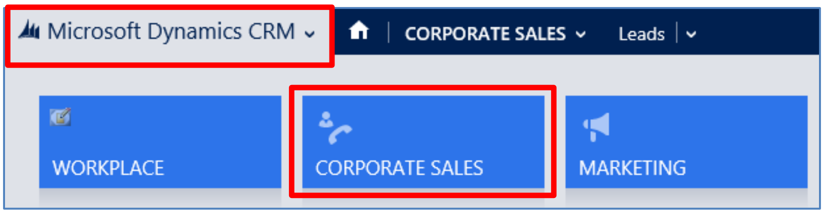
When you create an Activity record against a Contact that is linked to an Account, a copy of the Activity will be automatically saved against the Account record. Consequently if the Contact – Account link is broken (because the employee leaves for example), a record of the Activity will always remain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

3. CREATING PRODUCTS

For every Product that is to be sold in the Corporate Sales Process a Product should be created. S such as the individual hospitality areas that are available or the sponsorship packages.

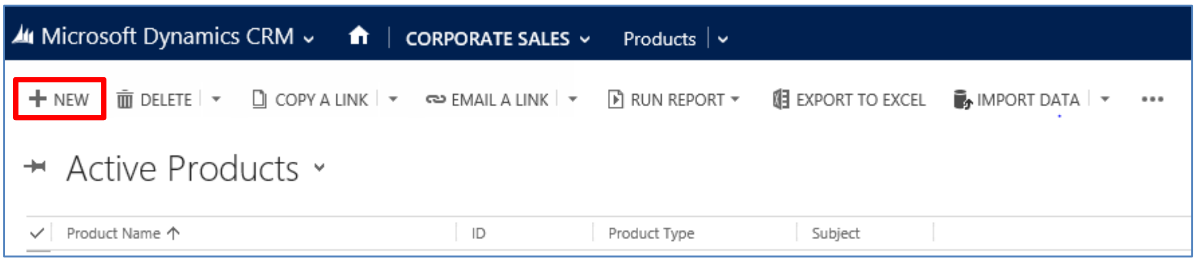
To create a Product, complete the following instructions:

a) Select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down select **Corporate Sales.**

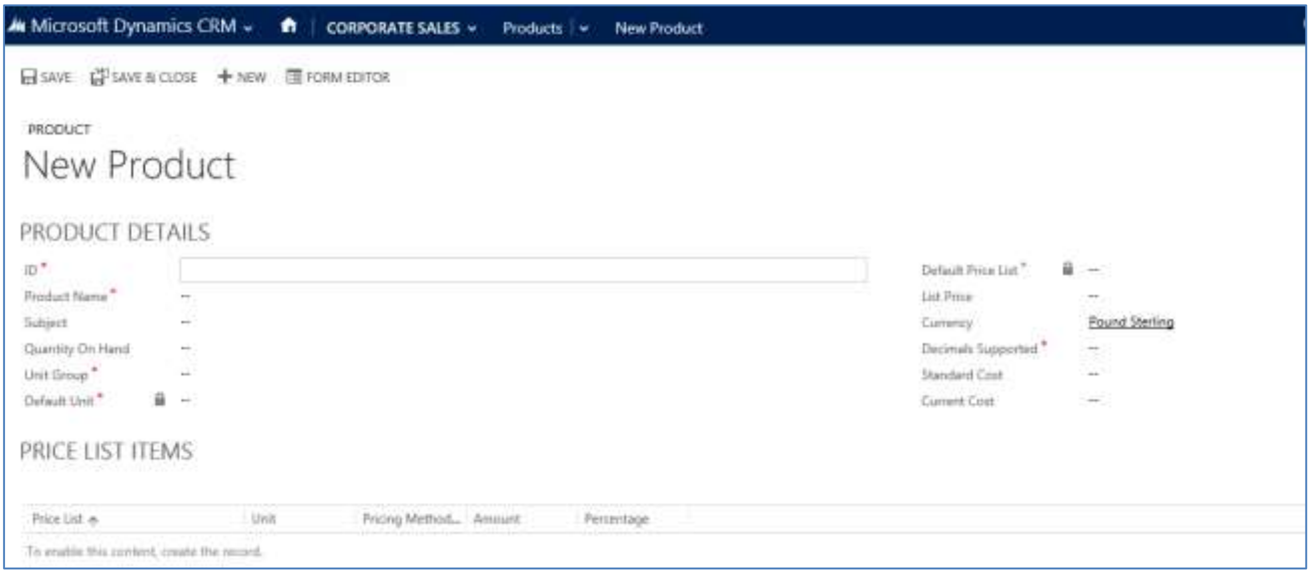


b) Choose **Corporate Sales** in the navigation bar and from the drop down select **Products.**

c) The Active Products view will be displayed, select **New** in the ribbon.



d) A New Product form will open, complete the following details.



- **ID.** Enter a unique ID for the product.
- **Product Name.** Enter a name for the product. The name will be used by others to identify the product and should therefore be relevant.
- **Quantity On Hand.** If applicable enter the quantity of the product that is available.
- **Unit Group.** Use the Look Up Records dialog to select the applicable Unit Group.
- **Default Unit.** Use the Look Up Records dialog to select the applicable Default Unit.
- **List Price.** If applicable enter the price at which the product will be sold for.
- **Currency.** The currency field will be automatically set to your organisation's default currency.
- **Decimals Supported.** Enter the amount of decimals that the system will be supporting.

Leave all other fields unchanged.

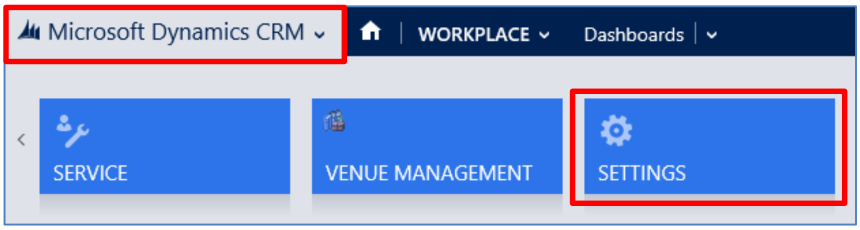
e) When the details are complete, select **Save** on the ribbon. A warning will appear showing that a default price list has not been set. Until all the applicable Products have been created, the Default Price List does not need to be entered. Repeat the above steps until all of the Products have been created.

4. CREATING PRICE LISTS

A Price List must be created to hold a number of Products that are available at a specific price.

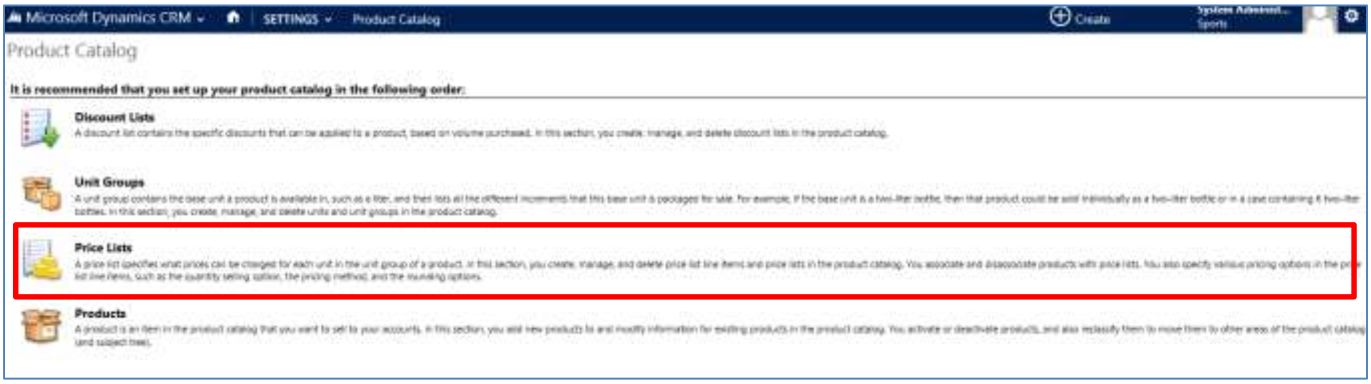
To create a Price List, complete the following instructions:

a) Select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down select **Settings.**

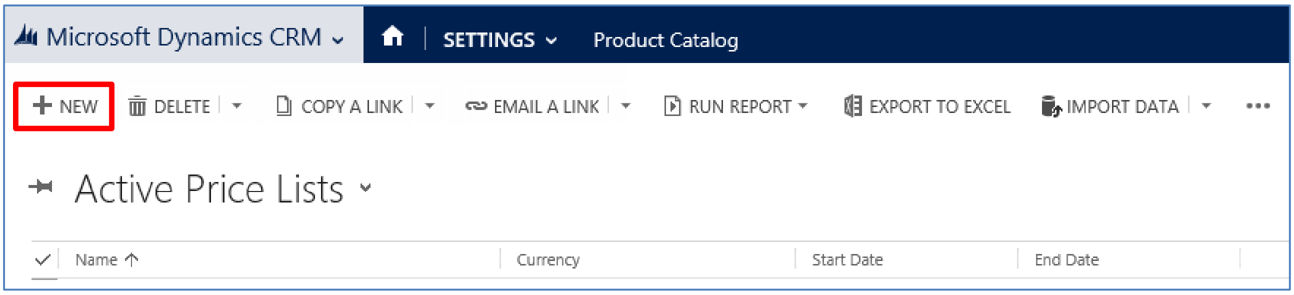


b) Choose **Settings** in the navigation bar and from the drop down scroll across and select **Product Catalog**.

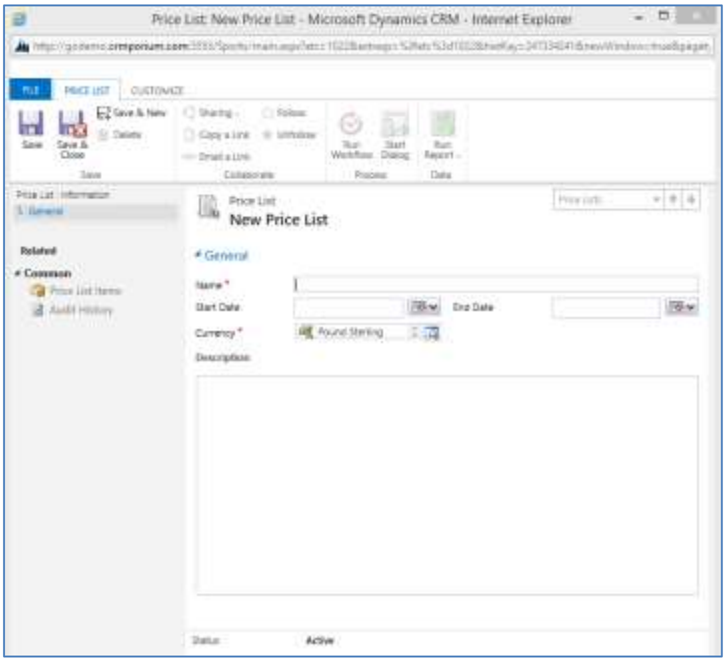
c) The Product Catalog view will be displayed, select **Price Lists.**



d) The Active Price Lists view will be displayed, select **New** in the ribbon.

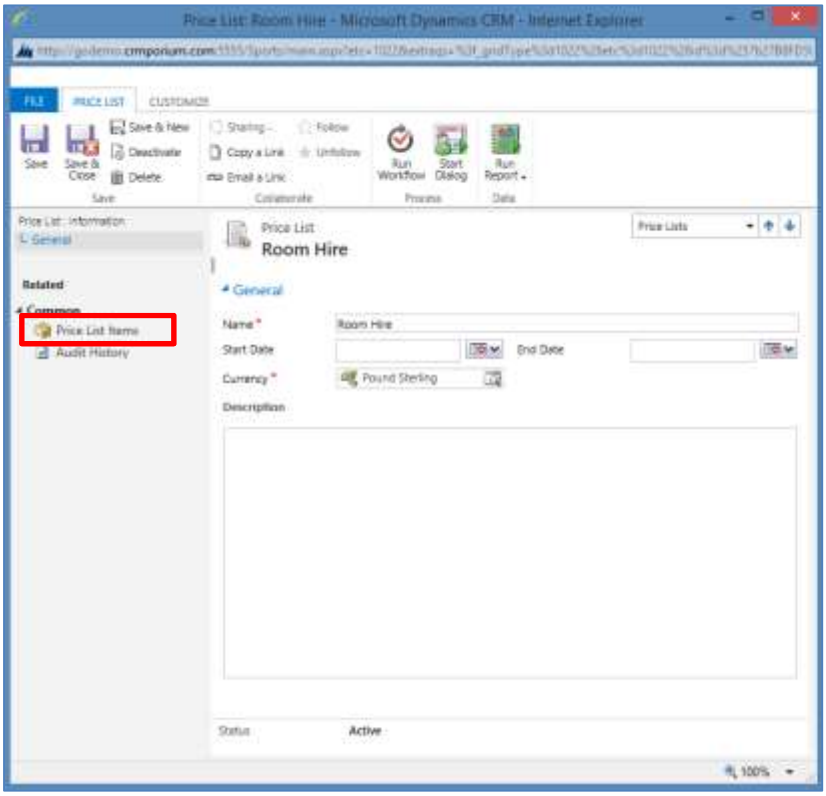


e) A new Price List form will be displayed, complete the following details

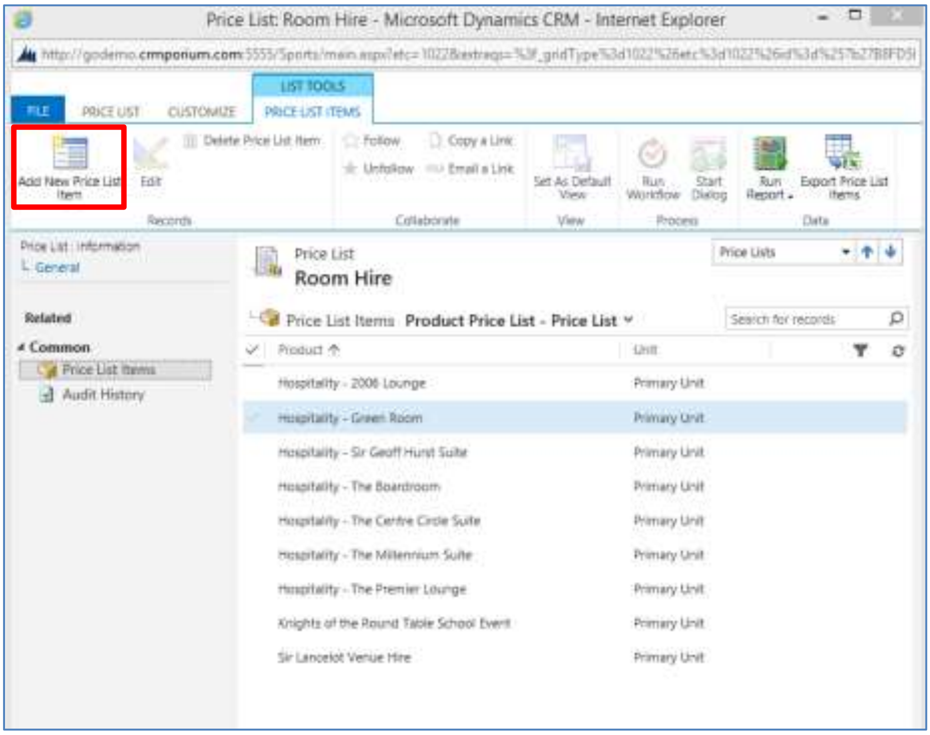


- **Name.** Enter the name of the Price List.
- **Start Date**. Enter the start date of the Price List.
- **End Date.** Enter the end date of the Price List
- **Currency.** The default currency will be automatically completed.
- **Description.** Enter a description of the Price List if this applicable.

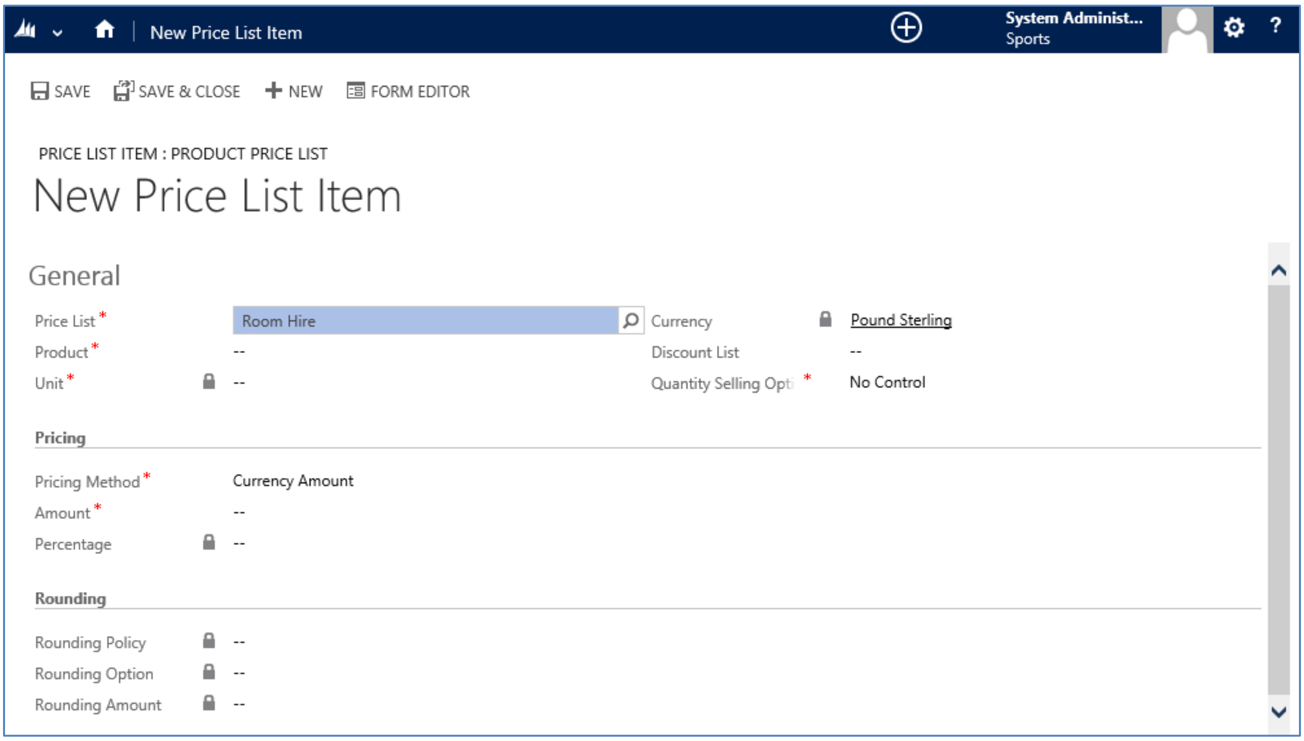
f) Upon completing the above information, select **Save** in the ribbon. With the Price List form still open, select **Price List Items** in the related entities area.



g) Each [Product](#) that is to be related to this Price List can now be added to it, this can be done by selecting **Add New Price List** Item in the ribbon. When a Product is added to a Price List, it becomes a Price List Item.



h) A Price List Item form will open in a new window. The following details must be completed:



- **Price List.** The Price List field will automatically be completed with the Price List you have currently selected.
- **Product.** Use the magnifying glass to look up and select the relevant Product that was previously created that is to be linked to the chosen Price List.
- **Unit.** Select the applicable Unit for how the Product is to be sold.
- **Currency.** The default currency in the system will automatically be entered.
- **Discount List.** If applicable use the magnifying glass to look up and select a Discount List for the Price List Item.
- **Quantity Selling Options.** From the drop down, select the applicable Quantity Selling Option.
- **Pricing Method.** From the drop down, select the applicable Pricing Method, this usually being Currency Amount.
- **Amount.** Enter the amount that the Product is to be sold for.

i) Select **Save and Close** on the ribbon to create the Price List Item. The Product will be added to the Price List. Repeat the above steps to create any further Price Lists and add the Products as Price List Items to the applicable Price Lists.

5. CORPORATE SALES CYCLE: LEAD> QUOTE> WON OPPORTUNITY> INVOICE

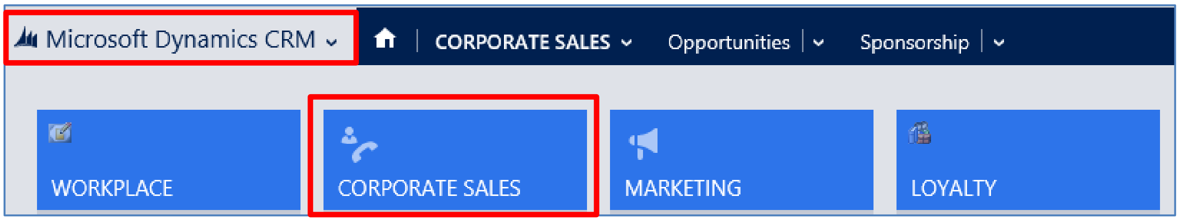
The Corporate Sales cycle describes the steps that are to be followed to turn a potential sale (A Lead) into a fulfilled order and invoice within CRM 2015. As each step is undertaken the form view will change, from a Lead, Opportunity, Quote, Order and finally to Invoice. The Corporate Sales module also offers the opportunity for Order Confirmations and Invoices to be created within CRM so they can be sent to the client when the appropriate stage is reached.

STEP 1. CREATE A LEAD

A Lead represents a potential sales contact and should be created to begin the Corporate Sales Cycle process.

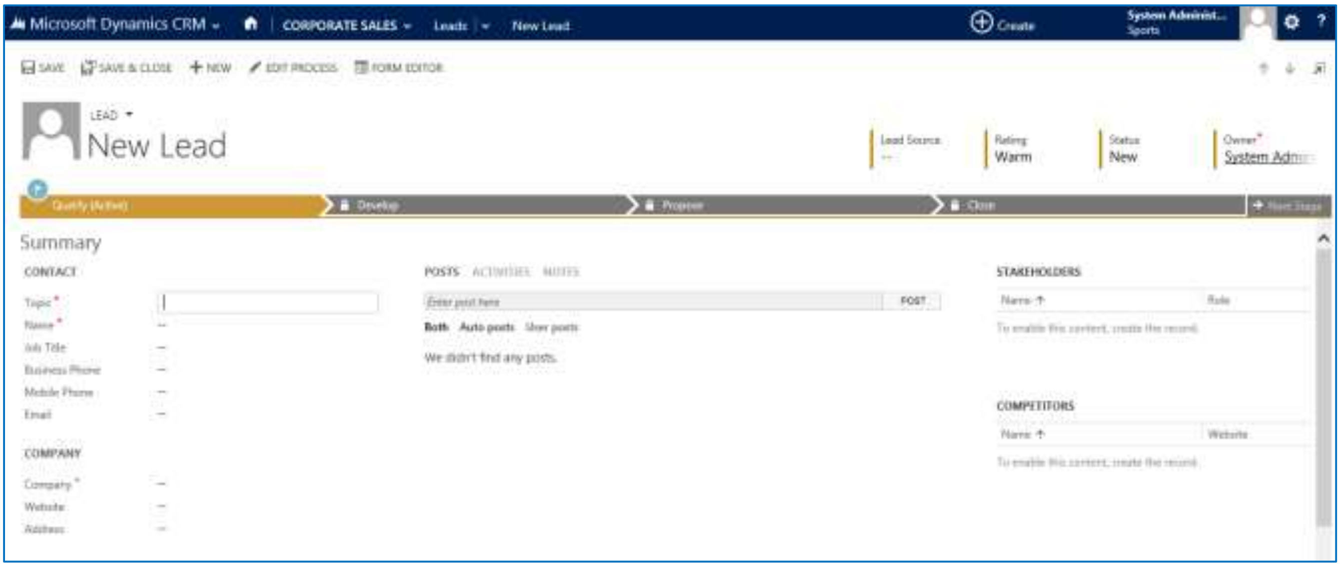
To create a Lead within CRM, complete the following process:

a) Select the **Microsoft Dynamic CRM** tab in the navigation bar and from the drop down, choose **Corporate Sales**.



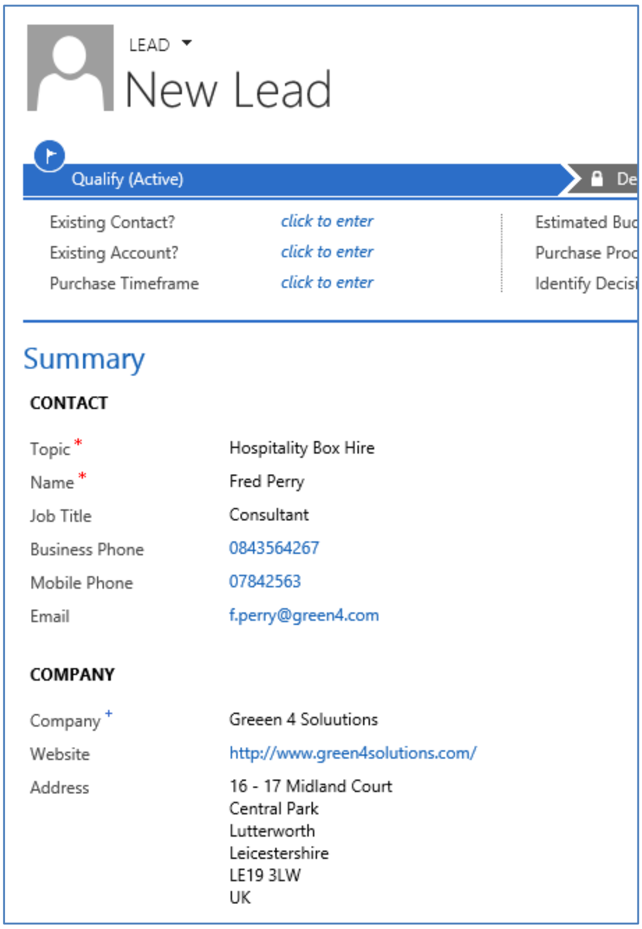
b) In the navigation bar select **Corporate Sales** and from the drop down choose **Leads.**

c) The New Leads view will be displayed, select **New** on the ribbon. A New Lead form will open.



d) The progress bar at the top of the Leads form will allow the user to see which stage they are at in the sales process

e) Complete the **Contact** area of the Lead form and if applicable enter the **Company** details.



f) Upon completing the details, select **Save** in the ribbon.

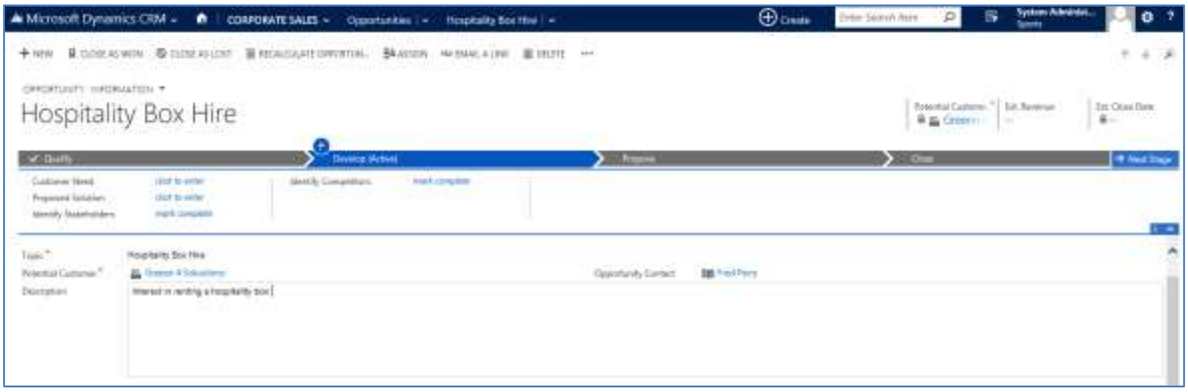
STEP 2. QUALIFY THE LEAD AND CREATE THE OPPORTUNITY

Upon saving the Lead form it will now be possible to Qualify the Lead and move onto the next stage of the progress bar; this being the stage where the Opportunity is created and therefore moving from business development to sales.

To Qualify the Lead and create the Opportunity, complete the following:

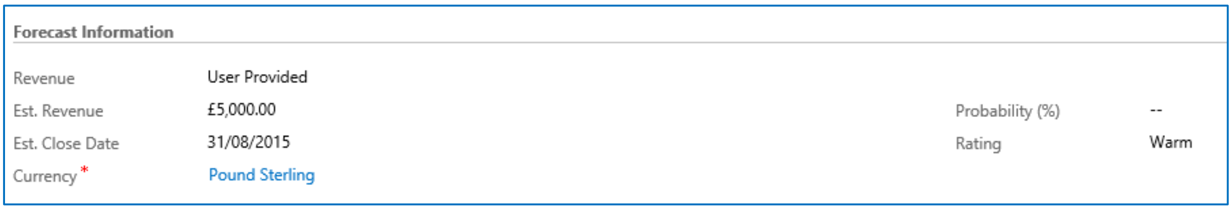
a) With the Lead form open, select **Qualify** in the ribbon.

b) The Contact added to the lead will become a [Contact](#) within CRM and the user will move into the next stage of the progress bar, this being the area where an Opportunity is created.



c) Within the Opportunity form, the **Potential Customer** field will automatically be completed as this has been taken from the details entered into the [Lead](#). Additionally an **Opportunity Contact** can be added to the form as well as a **Description** of the Opportunity.

d) Forecast Information such as the **Estimated Revenue** and **Close Date** of the Opportunity can also be entered.



e) Next, the Line Items which include the **[Price List](#)** that is to be used and **[Products](#)** should be added. This is done by scrolling down the page to the Line Items section, entering either a **New** or **Existing Price List** before selecting the plus sign in the table below and entering the applicable Products. When the product has been added to this table the **Price Per Unit** and **Quantity** as well as any **Discount** can be added.

f) Further reductions can be made to the Opportunity below the Line Items product box if applicable.

Note. It is possible to recalculate an Opportunity (For example if discounts have been applied) by selecting the **Recalculate Opportunities** tab in the ribbon.

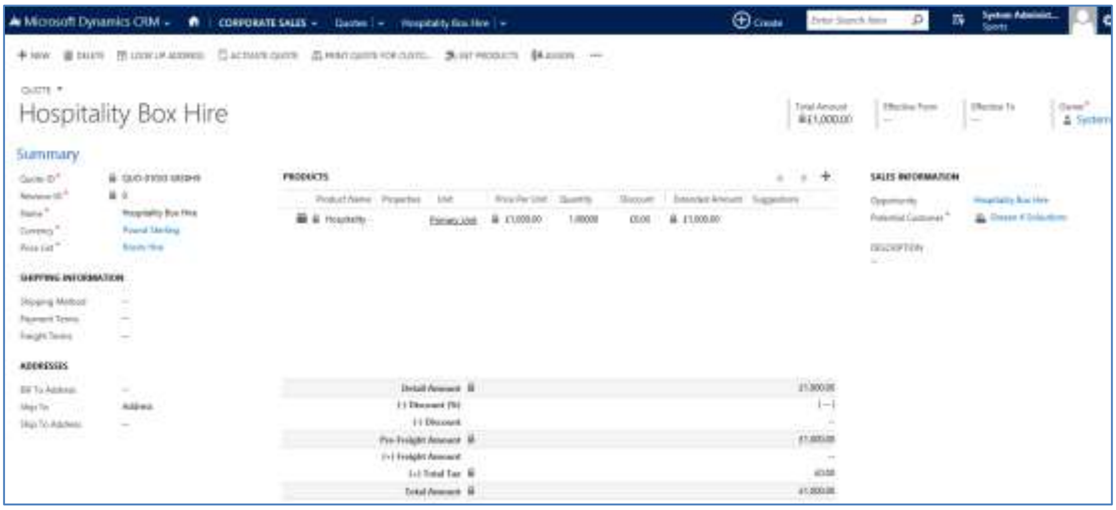
g) Select the **Save** icon in the bottom right hand corner to save the Opportunity at any time.

STEP 3. CREATING A QUOTE FROM AN OPPORTUNITY

Quotes are created from an Opportunity, to create a Quote complete the instructions listed below.

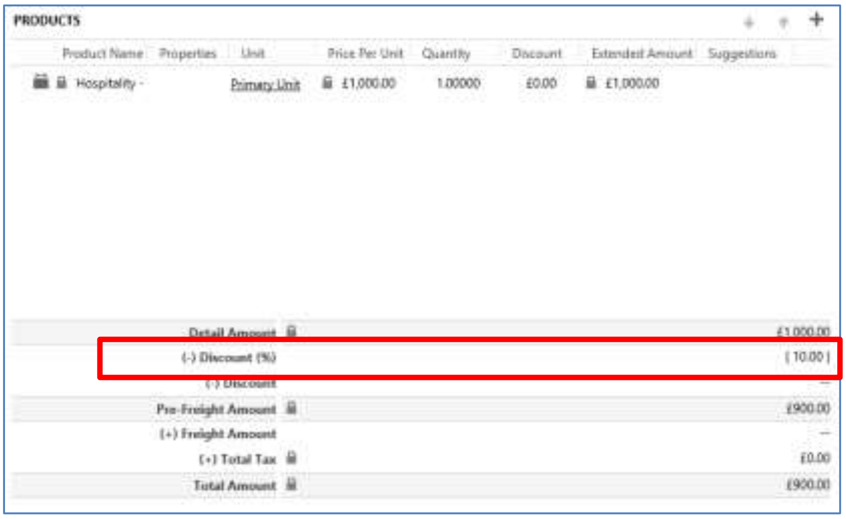
a) With the applicable Opportunity form open, scroll down to the **Quotes** section of the form.

b) Simply select the **plus icon** at the edge of the Quotes table. A Quote form will open taking the information that was entered into the Opportunity form such as the list of products that were added. Additionally the system will create a unique **Quote ID number**.

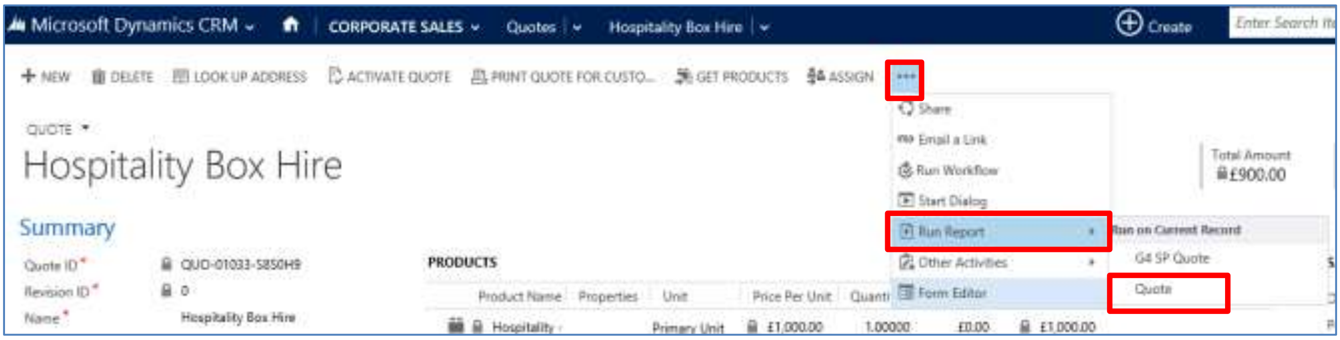


c) If applicable additional information such as shipping information can also be added to the quote form.

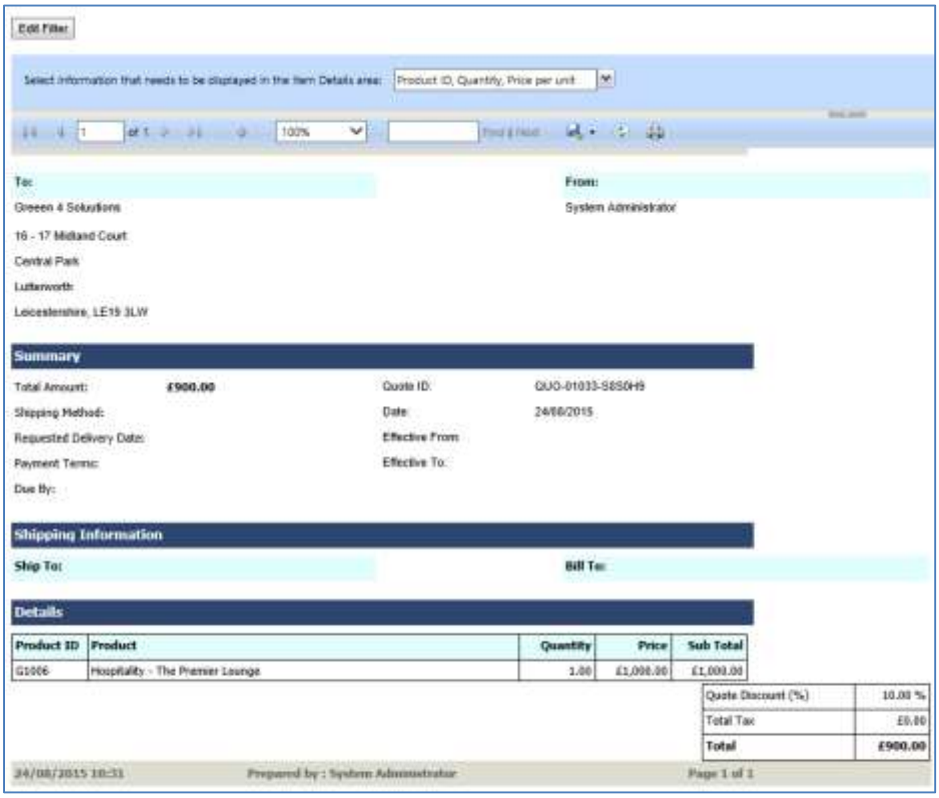
d) Within the Product table of the Quote form further discounts can be added easily by entering the amount as highlighted below. After entering any discounts, refresh the Quote form by selecting the save icon in the bottom right hand corner of the form.



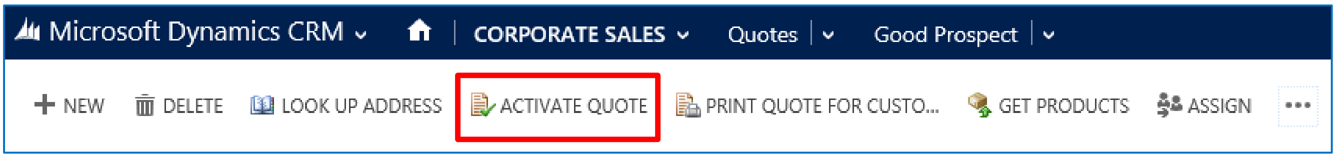
e) The Quote can be printed out and sent to the customer by selecting the **dot icon** in the ribbon and from the drop down choosing run reports before selecting Quote.



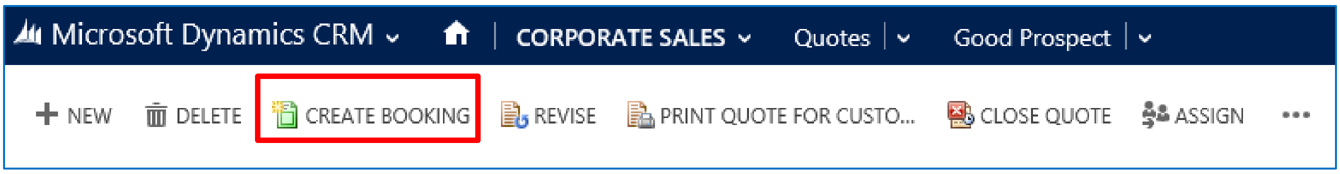
f) The Quote will be generated:



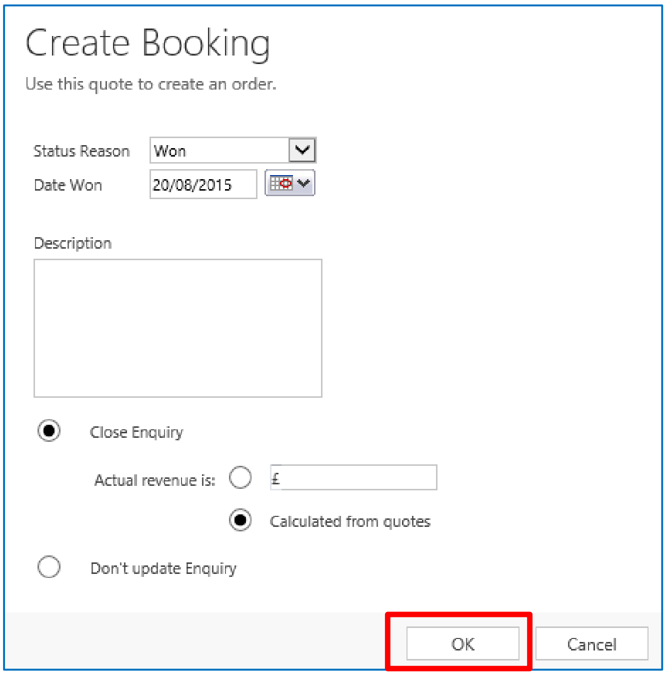
g) When the Quote has been generated, it is possible to activate the Quote so that it becomes locked down and no additional changes can be made to it. To do this return to the Quote in form view and select **Activate Quote** on the ribbon.



h) Next the Opportunity can be closed. This should be done if it is confirmed that the Opportunity has been won. To do this simply select **Create Booking** within the Quote forms ribbon.

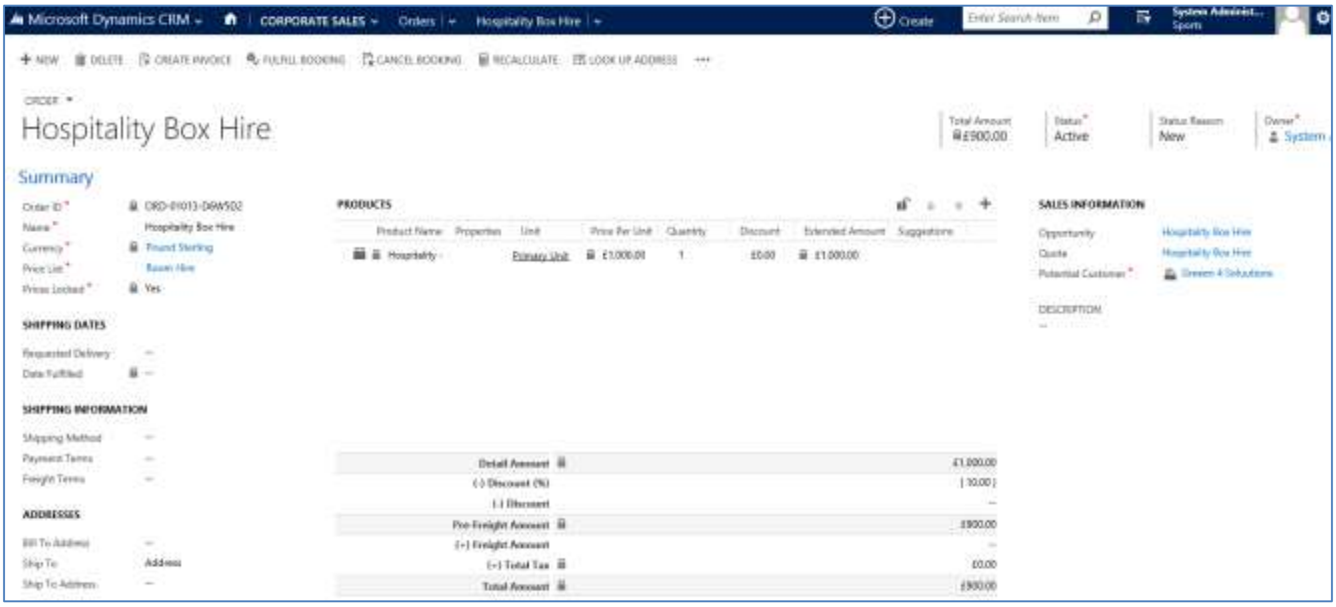


i) A new window will open asking you to confirm the booking and the date the booking was won. Select **Ok.**



j) This will automatically close the related Opportunity, closing and winning the Quote at the same time as closing the Opportunity. The Quote form will update into an Order form giving details of the Opportunity and Quote that is related to it as well as a unique **Order ID** number.

Additional information can be added to the order form such as **Shipping Information** if this is applicable, as well as a **Bill To Address.**



k) Select the **Save** icon in the bottom right hand corner of the Order form.

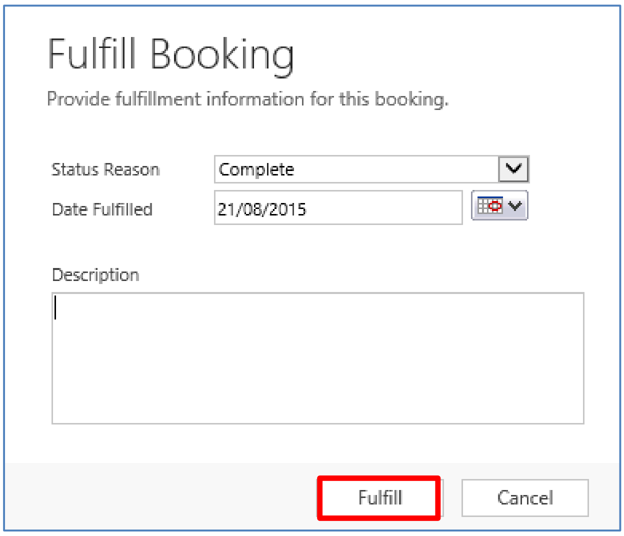
STEP 4. FULFILLING AN ORDER AND CREATING AN INVOICE FROM AN ORDER

When an Order has been confirmed, it must be fulfilled, this will complete the order and from here an Invoice can be created from the Order form.

To fulfil an order and create an Invoice, complete the following instructions:

a) With the order form open, select **Fulfil Booking** on the ribbon.

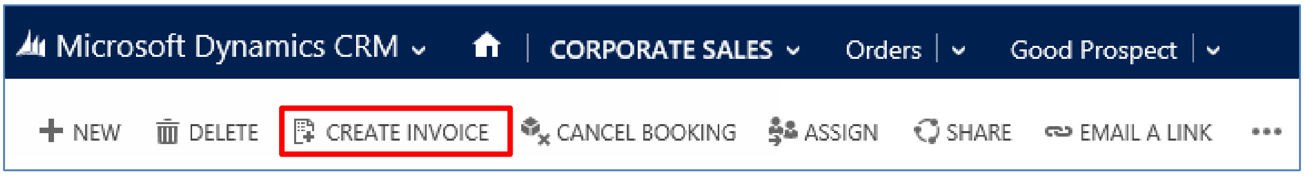
b) A **Fulfil Booking** window will open, select the **Status Reason** to **Complete** and the **Date** that the order has been fulfilled. If applicable, add a Description to the **Fulfil Order** window.



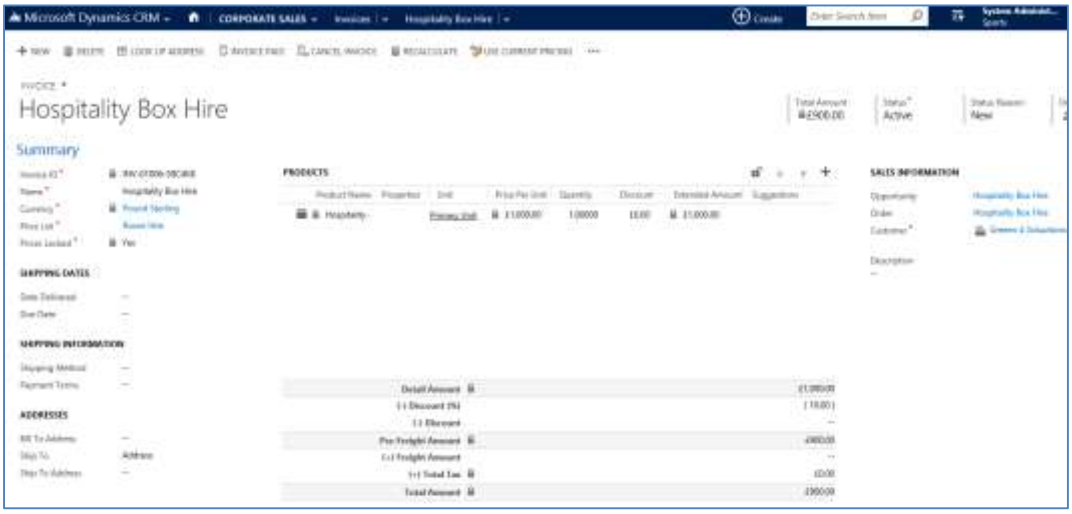
c) Upon completing the Fulfil Booking window, select **Fulfil**.

d) The booking will be fulfilled, from here it is possible to create an Invoice.

e) An Invoice can be created from the fulfilled order by simply selecting **Create Invoice** in the ribbon.

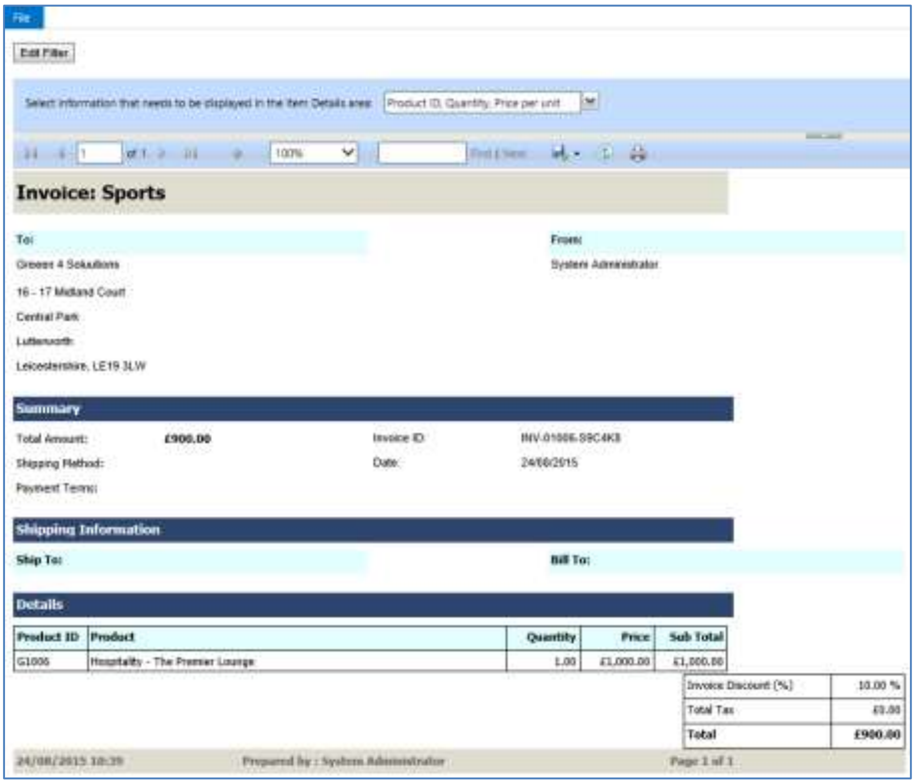


f) The Order form will update and change to an Invoice form.

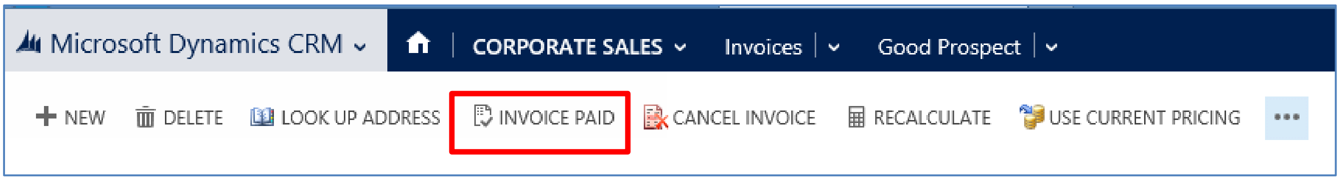


g) To create an invoice that can be sent to the customer select the **dots icon** in the ribbon and from the drop down select **Run Report** before choosing **Invoice**.

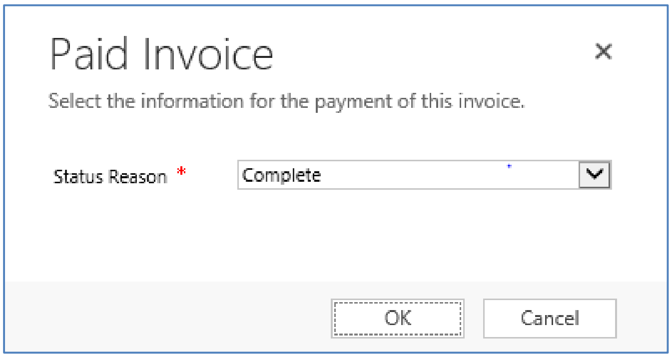
h) A new window will open displaying the invoice which can then be printed and sent to the customer.



i) Once the Invoice has been paid, the Invoice form can be reopened within CRM and within the Invoice form select **Invoice Paid** on the ribbon.



j) A new Paid Invoice window will open where it is possible to select a Status Reason of **Complete** before choosing **Ok.**



k) The Invoice form will update to a Paid status and the sale will be complete, the page can no longer be edited.

***End of Document ***