

CRM 2015 – CORPORATE SALES CYCLE USER GUIDE





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ABOUT THIS DOCUMENT

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

NON-DISCLOSURE

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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:

<i>▲</i> 4 N	Microsoft Dynamics CRM ~ 🏫 WORKPLACE ~ Contacts ~							
+ 1	NEW 🛅 DELETE 💌 🗋 COPY A LINK 💌 🖚 E	MAIL A LINK 👻 🖹 RUN	REPORT - 🕅 EXPORT T	o excel 🕞 Import data 🛛 👻 🚥				
+	→ My Active Contacts							
\sim	Full Name 🛧	E-mail	Parent Customer	Business Phone				
	Amy Coote	C.Amy@g4.com	Beachwood School	0823461123				
	Andrew Duncan	andrew@green4solutions	Green 4 Solutions					
	Andy King	Kingy@g4.co.uk	Frampton College	073671240				
	Annabelle Lane	A.Lane@g4.com	Stanley Moore Secondary	8333412				
	Catherine Perryman	catherine.perryman@gree	Green 4 Solutions	084445553333				
	Charlotte Wright	R.Charlotte@g.4.com	Wright Consulting	789-563-2345				

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:

👍 Microsoft Dynamics CRM 🗸 👘 🕴 wo	DRKPLACE - Contacts	S	
+ NEW DELETE - D COPY A LINK - 4	🖘 Email a Link 🕞 🕲 Run	i report * 🛛 🛛 Export 1	to excel 🛛 🕞, import data 🖙 🚥
My Active Contacts ~ System Views Active Contacts	E-mail	Parent Customer	Business Prone
Active Contacts Subgrid View	C.Amy@g4.com	Seachwood School	0823461123
BenTest Contacts Being Followed	andrew@green4solutions	Green 4 Solutions	
Contacts I Follow	Kingy@g4.co.uk	Frampton College	073671240
Contacts: influenced Deals That We Won	ALane@p4.com	Stanley Moore Secondary	8335412
Contacts: No Campaign Activities in Last 3 Months Contacts: No Orders in Last 6 Months	catherine.perryman@gree	Green 4 Solutions	084445553333
Contacts: Responded to Campaigns in Last 6 Mo	R.Charlotte@g.4.com	Wright Consulting	789-563-2345
Inactive Contacts	chris.theodorson@green4s		
My Active Contacts	D.Drinks@p4.co.uk	Huntington Primary School	0833724563
My Connections On Hold Contacts	LAtherton@g4.com	Listers Secondary School	1458436
My Views Last Name	James.Wall@green4solutio	Green 4 Solutions	
Create Personal View	liverdy@G4.com	Littlebrooke School	05429942
Save Filters as New View Save Filters to Current View	Jenny Murphy@green4sol	Green 4 Solutions	
Joe Waker	joe.walker@green4solutio	Green 4 Solutions	



• 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 *P* 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.

Ŧ	My Active Contacts 🗸			
$\overline{\checkmark}$	Full Name 🛧	E-mail	Parent Customer	Business Phone
	Amy Coote	C.Amy@g4.com	Beachwood School	0823461123
	Andrew Duncan	and rew@green4solutions	Green 4 Solutions	
	Andy King	Kingy@g4.co.uk	Frampton College	073671240
	Annabelle Lane	A.Lane@g4.com	Stanley Moore Secondary	8333412



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 (Imere) 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	Serie	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. <u>Contacts</u> are used to represent individuals, whereas <u>Accounts</u> are used to represent the organisations and businesses that you interact with. Contacts and Accounts can be <u>linked together</u> 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.

Microsoft Dynamics	CRM 🥃 🏦 🕴 CORPORATE S/	ALES 👻 Sales Literature 😽
WORKPLACE	CORPORATE SALES	MARKETING

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

Microsoft Dynamics CRM	v ≜	CORPORATE SALE	s١	SalesLiterature 🗸		
Unknown0						
℃ LEADS		NITIES	AC	COUNTS	¥	¥

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

/ /	Microsoft Dynamics CRM 🗸 🏦 CORPORATE SALES 🗸 Contacts 🗸						
+ :	🕂 NEW 🛅 DELETE 🖙 🗋 COPY A LINK 🔽 🖘 EMAIL A LINK 🔽 🕑 RUN REPORT 🛪 🕼 EXPORT TO EXCEL 🝺 IMPORT DATA I						
+	→ My Active Contacts						
\sim	Full Name 🔨	E-mail	Parent Customer	Business Phone			
~	Amy Coote	C.Amy@g4.com	Beachwood School	0823461123			
	Andrew Duncan	and rew@green4 solutions	Green 4 Solutions				
	Andy King	Kingy@g4.co.uk	Frampton College	073671240			
	Annabelle Lane	A.Lane@g4.com	Stanley Moore Secondary	8333412			
	Ant Richards						
	Bob Bradley						
	Catherine Perryman	catherine.perryman@gree	Green 4 Solutions	084445553333			
	Charlotte Wright	R.Charlotte@g.4.com	Wright Consulting	789-563-2345			



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.

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Summary					
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an only		CONTACT PREPRINTES	Payment Yamp		

- 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.

Ju Micros	oft Dynamics	CRM 🗸 🖬	WORKPLACE ~ Contact	ts 🗸 🛛 Andrew Duncan 🗸		
+ NEW	🗟 DEACTIVATE	CONNECT 🗸	ADD TO MARKETING LIST	త్తి ASSIGN ణు EMAIL A LINK	X DELETE	•••



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.

Microsoft Dynamics CRI	vlv n t∣	CORPORATE SALES	Sales Literat	ture 🗸	
Unknown0		r			
€ LEADS ≚		INITIES		×	×

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

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+ NE	W П DELETE - 🗋 СОРУАЦИК - 🖘 В	MAIL A LINK * 🕑 RUN REPORT *	EXPORT TO EXCEL . MPORT DATA
+,	Active Accounts -		
v	Account Name 🛧	Primary Contact	E-mail (Primary Contact)
	007	lames Bond	james/bond@green/solutions.com
	Beachwood School	Amy Coote	CAmy@g4.com
	Chimbonda Ltd		
	Frampton College	Andy King	Kingy@g4.co.uk
	666 138		
	Green 4 Solutions	Christoper Jeffreys	C.leftrey@green4.com
	Green 4 Group		
	Green 4 Solutions		

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.

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	Internation -	Invest Rescalation
	tatiarpaptie B -	from loss
Annual and a second sec	constanting Meanmain. Mean	lushing in



- 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.

Micros	soft Dynamics	: CRM 🗸 🖬	WORKPLACE ~ Acc	counts 🗸 🛛 Be	achwood School	~	
╋ NEW	🗟 DEACTIVATE	🖧 CONNECT 🗌 🔻	🛱 ADD TO MARKETING I	LIST 😤 ASSIGN	⇔ EMAIL A LINK	X DELETE	•••



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 <u>Contact</u> and an <u>Account</u>:

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

Microsoft Dynamics C	RM 🗸 🏦 🕴 CORPORATE SA	NLES 👻 Sales Literature 🛛 🛩
WORKPLACE	CORPORATE SALES	MARKETING

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.

AL N	ticrosoft Dynamics CRM 🗸 👘 🕴	WORKPLACE - Contac	ts i v		① Create	System Administ
+	нам 👜 редата (- 🗍 соружинас -	- IMARALINE - D	RUN REPORT + 🛚 🗮 EXPORT	ID DCH 🔒 IMPORTDATA) - +++		
+	My Active Contacts ~				Sector for records	3
ų,	ful Nene 1	E-mail	Parent Duttorter	Norren Plene		Ŧ
	Any Coste	CAmy@gik.com	Beachwood School	0825461123		
	Andy King	Ongy@g4cous	Frampton College	075671240		
	Arrandia Lane	Alane@g4.com	Stamey Moore Secondary.	8333472		

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.

Microsoft Dyna	mics CRM + 🕐 WORKPLACE +	Contacts (v Catherine Pwryman) v		() Create	System Administ. 🍳 🔿 7
+ NEW REDEACTION	4 CONNECT (> BADD TO MARKET	NG ULT 🕸 ALEXEN 🖚 EMAL A UNK 🗙 DELETE 🚥			* + *
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Summary					
CONTACT INFORMAT	now	POSTS ACTIVITIES MITTES		Company	
Full Name*	Cathorine Panyman	Enter part time	POST	100	
tols Title	Project Manager	Both Autoposts User pants		RECENT CASES	+ 0
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Fee.	(22.1)				
Preferred Mathod in	E-mail				
Address				<	>

- 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.

Microsoft Dynamics CRN	1 🗸 🏚 🕴 CORPORATE SA	LES 👻 Sales Literature 🖡 🗸
WORKPLACE	CORPORATE SALES	

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

Microsoft Dynamics CRM	~ 🟦	CORPORATE SALE	s v	Sales Literature	,	
Unknown0						
℃ LEADS		NITIES	AC	COUNTS	¥	¥

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.

🛦 Microsoft Dynamics CRM 🚽 🔒 🕴		e I atranta			() Create	System Administ 阿 🗘
+ NEW IN DELETE + 13 COPY & LONG +	we EPYOF Y FLAK	HUN REPORT	 Before to excel 	🔒 IMPORT (MATA) + 🛛		
✤ My Active Accounts -					0	و
🖉 - Account Name 🛧	Main Phone	Address 11 City	Printary Cantach	E-mail (Himary Cantact)		τ σ
Beachwood School	3739962	Teachwood	Amy Coote	CArry@git.zom		
Premation College	0923648	Franction	Antly King	King/@p4.co.uk		
Green A Solutions	08455 008 148	Lutterworth				
Hit Fale Primary School	0948239	Hartsonoush	Nel Back	Seck@ureen4solutions.com		

- 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.

A Microsoft Dyn	amics CRM 🖌 📫 📋 WORKPLA	CE + Accounts + Green + Solutions +		🕀 Create	System Administ Q ^{ci}	- 0	0
+ NEW 13 DEAC	twate 42 connect - 154 add to	MARKETING LIET \$4 ASSESS I III IIII IIII IIIII X DELETE				÷	+ 3
P Gre	een 4 Solutions			Annual Ference	No. of Engloyees	Owner" System	Admin
Summary							1
ACCOUNT INFORM	ATION	POSTS ACTIVITIES MOTES		Printery Contact			
Account Name*	Green & Solutions	Enter part here	POST	**			
Phone	08455 (888 149	Both Auto posts User posts		CONTACTS		+	8



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.

Look for	Cottact	*	🗌 Show Only My Records	
Look In	Active Contacts	V	🗌 Filter by related Parent Costs	me
Search	Search for records	p		
ħ2	Патіе ф		E-mail	-
× 40	ry Coote		CAmyBg4.com	
An	dy King		Engy@g4.to.ik	
.An	nabelle Lane		Alure@g4.com	
Ca	therine Penymen		catherine.persynian@gr	w.,
O	oriotte Wright		R.Charlotte@g.4.com	
De	my Drinkwater		D.Drinks@g4.co.uk	
< ^B	alieti Atietoi		LAtherton@o4.com	>
1.22	of 22 (1 selected)		16.6 Pa	et k

- 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.

+
E-mail
catherine.perryman@gr
James.Wall@green4sol
Jenny.Murphy@green4
joe.walker@green4solu

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



CONTACTS	+ 🗉
Full Name ↑	E-mail
Catherine Perryman	catherine.perryman@gr
James Wall	James.Wall@green4sol
Jenny Murphy	Jenny.Murphy@green4
Joe Walker	joe.walker@green4solu

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

nics CRM - n workplace - A:	counte - Green & Solutions		() Create	Syntaxe Administra 197	- 0 7
					×
	Contact Information	1 5	Address		
	E-mail		Street 1	16-17 Midland Court	
	Mobile Phone:	-	Street 2	Central Park	
	Business Phone	00455 088 149	City	Lutterworth-	
🏨 Gren 4.5oh/fora	Description	1	20P/Postal Code	LEN7 APPA	
				Size	Genel
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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**.

Microsoft Dynamics CRN		Dashboards 🗸
C WORKPLACE	CORPORATE SALES	Marketing

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

Microsoft Dynamics CRM	1~ 🟦	WORKPLACE ~	Dashboards 🗸
My Work			
© ⊒ ■ 2 DASHBOARDS	اڭ ACTIVITIE	s	CALENDAR

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.

⊨	My Activities 🖌	
Ź	All Activities	•
	Task	•
e₽.	Fax	•
C.	Phone Call	► k
$\mathbf{\nabla}$	Email	F
	Letter	۰ľ
Ü	Appointment	•
Ë	Service Activity	•
₩,	Campaign Response	•
1	Campaign Activity	•
12	Recurring Appointment	•
¢	Communication Activity	۲

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**.

Microsoft Dynamics CRM	I 🗸 🏦 WORKPLACE 🗸	Contacts 🗸 🗸 Andrew Dunca	n 🗸
Common			
	Ê	Ŝ	2
MORE ADDRESSES	ACTIVITIES	CLOSED ACTIVITIES	SUB-CONTACTS

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.

Microsoft Dynamics CR	vi v 👖	WORKPLACE ~	Activities 🗸
My Work			
DASHBOARDS ≚		s	CALENDAR

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

🌆 Mic	rosoft Dyna	mics CRM 🗸 🖬	WORKPLACE ~	Activities	s ~			
🗹 TAS	sk 💌 email	APPOINTMENT -	🕻 PHONE CALL	E LETTER	ر 🗳 FAX	SERVICE ACTIVITY	•••	
-H N	∕lv Activ	ities ~						
Due:	All		~					

- 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 <u>Contact</u> or <u>Account</u> 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**.

Microsoft Dynamics CRM	🗸 🏫 WORKPLACE 🗸	Contacts 🛛 🗸 🛛 Andrew Duncar	1 🗸
Common			
MORE ADDRESSES	Lactivities		SUB-CONTACTS

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

Microsoft Dynamic	CRM 🗸 🏫 WORKPLA	ACE - Contacts	- Andr	ew Duncan 🛛 🛩		
CONTACT : INFORMATION	*					
Andrew D	uncan					
Open Activity	Associated View					
Filter on: Next 30 days	include: Relate	d "Regarding" Records	Y			
ADD NEW ACTIVITY +	ADD EXISTING ACTIVITY	вицк delete 📲 сна	RT PANE *	🕑 RUN REPORT *	EXPORT ACTIVITIES	
Subject 🛧	Activity Type	Activity Status	Priority	Due Date	Created By	Regarding

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

itter on: Next 30 days	¥	Include:	Related "Regardin	g" Records	Y		
ADD NEW ACTIVITY -	ADD EXISTING	ACTIVITY	🕼 BULK DELE	TE 📲 CHA	RT PANE *	🕑 RUN REPORT *	EXPORT ACTIVITIES
😡 Task		Activity	Type A	tivity Status	Priority	Due Date	Created 8
Fax Fax							
C Phone Call							
🖀 Email							
🕅 Letter							
Appointment							
Service Activity							
🐮 Campaign Response							
Recurring Appointment							
Communication 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**.

Microsoft Dynamics CR		Dashboards \mid 🗸
C WORKPLACE	CORPORATE SALES	

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

Microsoft Dynamics CRM	/v n	WORKPLACE ~	Activities 🗸
My Work			
© ■ ■ ■ DASHBOARDS		5	CALENDAR

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.**

4 4 N	∕licı	osoft Dynami	ics CRM 🗸 🏦 WORKPLACE 🗸 Activit	ies 🗸			
¥ ⊠	tas N	κ ⊠email (Λν Δctiviti		E 🖓 FAX 🔹 S	SERVICE ACTIVITY	Campaign Response To cut a data initia	
Due:						Contractivities Contr	
~	C	Activity Type Phone Call	Subject Call Trudi to confirm availability for 15th Decemeber	Regarding	Normal	✓ Mark Complete ★ Cancel	
	2	Task	Follow up Special Events Guided Castle Tour		Normal	🖫 Set Regarding	5/11/201
	2	Task	Email price lists and venue options	🗳 Trudi Bissett	High	🚔 Assign	7/11/2014
	2	Task	Compile menu and quote	Amy Brown	Normal	🗋 Copy a Link 🔹 🕨	€/11/201
	4	Communication	BC1 - Details (Admission)	🍓 order 27/03	Normal	ာ Email a Link	5/03/201
	4	Communication	BC1 - Details (Admission)	🍓 order 27/03	Normal	🖳 Add to Queue	5/03/201
	4	Communication	BC1 - Details (Admission)	👌 order 27/03	Normal	🔹 Run Workflow	5/03/201

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.

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		a
	ecord 1 Activity will	ecord 1 Activity will be in regard to.

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**.

Microsoft Dynamics CRM	🗸 💼 WORKPLACE 🗸	Dashboards \mid 🗸
C.	*c	A
WORKPLACE	CORPORATE SALES	MARKETING



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

Microsoft Dynamics CRN	/√ 🕇	WORKPLACE ~	Activities 🗸
My Work			
III III III IIII DASHBOARDS ≚		5	CALENDAR

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.

4	I Mici	osoft Dynam	ics CRM 🗸 🔺 WORKPLACE 🗸 Ac	tivities 🗸			
	🗹 TAS	K 🛛 EMAIL	🗂 APPOINTMENT 🗁 📞 PHONE CALL 🗐 LET	rter 🍋 fax 違 se	RVICE ACTIVITY	•••	
•	H N	1y Activit	ies ×			Dether Activities	
Dı	ie:	All	\checkmark			🖋 Edit	
	~	Activity Type	Subject	Regarding	Priority	m Delete	· .
	~ C	Phone Call	Call Trudi to confirm availability for 15th Decemeber		Normal	X Cancel	
	2	Task	Follow up Special Events Guided Castle Tour		Normal	L Set Regarding	5/11/201
	2	Task	Email price lists and venue options	🗳 Trudi Bissett	High	📲 Assign	7/11/201
	2	Task	Compile menu and quote	Amy Brown	Normal	🗋 Copy a Link	9/11/201
	4	Communication	BC1 - Details (Admission)	👌 order 27/03	Normal	🕶 Email a Link	5/03/201
	â	Communication	BC1 - Details (Admission)	👌 order 27/03	Normal	🖳 Add to Queue	5/03/201
	4	Communication	BC1 - Details (Admission)	👌 order 27/03	Normal	🔅 Run Workflow	5/03/201

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.

Microsoft Dynamics CRN	1⊽ 🟦	WORKPLACE ~	Activities 🗸
My Work			
III III IIIIIIIIIIIIIIIIIIIIIIIIIIIIII		5	CALENDAR

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.

Microsoft Dynamics	CRM 🗸 🏦 WORKPLACE 🗸 Activ	ities 🗸	
🗹 TASK 🔤 EMAIL 📋 /	APPOINTMENT 🔽 🕻 PHONE CALL 📄 LETTE	R 🖓 FAX 🗟 SERVICE ACTIVITY	
→ My Activitie	S *		
Due: All	V		
✓ Activity Type Su	ıbject	Regarding Priority	Start Date 🕇 Due Date 🛧
🗸 📞 Phone Call 🦳 Ca	all Trudi to confirm availability for 15th Decemeber	Normal	

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

🌆 Mic	rosoft Dynam	ics CRM 🗸 🔺 WORKPLACE 🗸 Activit	ties 🗸				
🗹 ТА	SK 🛛 EMAIL	🗂 APPOINTMENT 🖂 📞 PHONE CALL 🛛 🗐 LETTER	t 🖓 FAX 🔹 S	ERVICE ACTIVITY	•••		
-	My Activit	ies ×		_	Campaign Response	×	
Due:	All	\checkmark			🖋 Edit		
					面 Delete	- I - F	
	Activity Type	Subject	Regarding	Priority	✓ Mark Complete		1
$\sim c$	Phone Call	Call Trudi to confirm availability for 15th Decemeber		Normal	X Cancel		
	Task	Follow up Special Events Guided Castle Tour		Normal	L Set Regarding		5/11/2014
	Task	Email price lists and venue options	🗳 Trudi Bissett	High	Sa Assian		7/11/201
	Task	Compile menu and quote	Amy Brown	Normal	Copy a Link	•	€/11/201
\$	Communication	BC1 - Details (Admission)	🍓 order 27/03	Normal	🖘 Email a Link	•	5/03/201
\$	Communication	BC1 - Details (Admission)	👌 order 27/03	Normal	L. Add to Queue		5/03/201
\$	Communication	BC1 - Details (Admission)	👌 order 27/03	Normal	🔅 Run Workflow		5/03/201



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**.

Confir Do you wan	TM Deactivation at to deactivate the selected 1 Phone Call? You can reactivate it later, if you wish.	×
Select the st	atus of the closing Phone Call.	
Status:	Made	~
	Close Ca	ncel

2.8. BREAKING CONTACT AND ACCOUNT RELATIONSHIPS

When you create an <u>Activity</u> record against a <u>Contact</u> that is linked to an <u>Account</u>, 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.

4	Microsoft Dynamics CRM	× 6	CORPORATE SAL	ES 👻 Leads 🔍			e	D Create	System / Speats
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	LEADS	OPPORTU	NITES .	ACCOUNTS	CONTACTS	MARKETING USTI	COMPETITORS	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.

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PRODUCT		
New Pro	oduct	
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D *		Default Price List "
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auntity On Hand	17)	Decinals Supported *
Init Group *		Standard Cost
hefwalt Unit*	≜ +3	Gument Cost
	EMS	
RICE LIST ITE		
PRICE LIST ITE		



- **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 **<u>Products</u>** 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**.

4	Microsoft Dynamics CRM	SETTINGS	~ C	ommunication Set.			e
					Business		
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	PRODUCT CHANNEL EDIT_	RESOLINCE LANES		SCDATA	BUSINESS MANAGEMENT	TEMPLATES	PRODUCT CATALOG



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

A Micro	soft Dynamics CRM 👻 🏠 SETTINGS 🔟 Product Catalog	() Create	System Administration Sports	0
Produc	t Catalog			
It is recor	nmended that you set up your product catalog in the following order:			
	Discount Lists A descurt list contains the specific discount that can be applied to a product, based on volume purchased, in this section, you metric hange, and delete abcount lists in the product calalog.			
8	Unit Groups A unit providents the case unit a product is available in, such as a title, and best loss at the oriformal incomments that this takes unit is proceased for while. For example, if the base unit is a two-lifer methor, then that be to that we find a section, you create manage, and cases unit and unit groups in the product catalog.	restort could be used individually as a	wo-iter bodie or = 4 cave contains	ng K two-ther
	Price Lists A price for labother what prices call be charged for each with in the wint group of a product. In this laboh, you center, manage, and avere price lab line items and price lab in the product catego, You appointed as a price left in the parallel category. You appointed as a price left in the averting set of the parallel category. You appointed as a price left in the averting set of the parallel category.	isacconsta products with price (etc. No	u also specify variaties pricing optio	at in the poly
ť	Products A product is an iden in the product rating that was work to set to new accounts. In this sectors, you and here products to and multiple internation the secting products in the product catery. You will very directive used subject trees.	fe products, and also replacely them to	o make them to other weak of the p	enstud (Alakag

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

PLAT PRICE LIST QUETO		
Same Same & Carlos A Mar Same Same & Carlos Carlos	v Coharta Choke Congrains + Universe Charta Line + Universe Calaporter Packet Dang Line - Chart Calaporter Packet Dang Chart	
Processor A literature Related Constant Analytic list threes Analytic threes	Proce List * General tare* Lise Correcy* Description	Provinti
	Data Active	

- 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.

HLI HLC2 LIST CLISTON Image: Solid State Image: Solid State Image: Solid State Solid State Image: Solid State Image: Solid State Cross Image: Solid State Image: Solid State	Stating- Criston Copy a Line + Unitation Brank a Line Workford Dialog Report.	
Price Lat. Internation L. General Related	Price List Room Hire	Prior Links 🔶 🔶 🔶
oge ynsk Lot herre :	Start Date Currancy * C Pound Sterling C	Dete
	Statua Active	# 100% ·

g) Each <u>Product</u> 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.

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PRICE UST CUSTOMU	LIST TOO PRICE LIST	neos ampor etc.= 1022000807493= 1 IS TEMS	ar, gna i ype sa	d luce senere s	shimet vebia	200312-001	nortz.	
Add New Price List	tte Price List Rem	C follow D Copy a Link & Unitation C Email a Link	Set As Default View	Bun Sta Workfow Die	rt Report.	HIN Export Price L Items	ar	
Records		Callaborate	View	Process		Deta		
Price Lat: Information	Price	List			Price Lists	- 1	4	
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Related	- Price 1	ist Items Product Price Li	st - Price List	w l	Search for	econds	ρ	
Common	V Product	ń.	4HT		Ŧ	0		
Audit History	Hospital	ty - 2006 Lounge		Primary Unit				
(3) report to the	mospital	ty - Green Room		Primary Unit				
	Hospitali	ty - Sir Geoff Hund Suite		Primary Linit				
	Hospitali	ty - The Boardroom		Primary Unit				
	Hospital/	ly - The Centre Circle Suite		Primary Unit				
	Hospitali	ty - The Millennium Suite		Primary Unit				
	Hospitali	ty - The Premier Lounge		Primary Unit				
	Xinights o	If the Round Table School Event		Primary Unit				
	Sir Lance		Primary Unit					

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

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General				7					
Price List *		Room Hire	Q	Currency		Pound Sterling			
Product *				Discount List					
Unit *				Quantity Selling Opti	*	No Control			
Pricing									-
Pricing Method *		Currency Amount							
Amount *									
Percentage									
Rounding									
Rounding Policy									
Rounding Option									
Rounding Amount									5

- **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 <u>Product</u> 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**.

Microsoft Dynamics CRN	1 ↓ 🔒 🔒 CORPORATE SALE	S ∽ Opportunities ∽	Sponsorship 🗸
C	20	4	í li B
WORKPLACE	CORPORATE SALES	MARKETING	LOYALTY

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

Microsoft Dynamics C	CRM	~ f	CORPORATE	SALES	5 >	Opportunities 🗸	
Unknown81	_						
Co LEADS	¥		NITIES	¥	AC		¥

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

Microsoft Dyn	amics CRM 🤟 👘 🕴 co	RPORATE SALES	- Leads 👻 New Lead		() Create	System Ade Sports	eet 🍳 🗘
∃save ∯save	a close + NOW / LOT R	NDCESS I FORM	tornoe.				÷ ÷
Ne	w Lead			Land Source.	Rating: Warm	Status New	Owner* System Admir
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routbey/							



- 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.

New	Lead	
Qualify (Active)		De
Existing Contact? Existing Account? Purchase Timeframe	click to enter click to enter click to enter	Estimated Bud Purchase Prod Identify Decis
Summary contact		
Topic * Name * Job Title Business Phone	Hospitality Box Hire Fred Perry Consultant 0843564267	
Email	f.perry@green4.com	
Company * Website Address	Greeen 4 Soluutions http://www.green4solutions.com/ 16 - 17 Midland Court Central Park Lutterworth Leicestershire LE19 3LW UK	

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.

Ju Micros	soft Dynar	nics CRM 🗸		RATE SALES 🗸	Leads 🗸
+ NEW	<u> </u> DELETE	💙 QUALIFY	🛇 DISQUALIFY 🔻	ADD TO MARK	ETING LIST



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

Microsoft Dynam	NEX CRM - 💼 CONFORM	COLUMN CONSTAN	ine (= Hospitality Boot		() Course	Enter Secondaria - P	S System Adealer	······································
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- c) Within the Opportunity form, the **Potential Customer** field will automatically be completed as this has been taken from the details entered into the <u>Lead</u>. 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.

Forecast Information			
Revenue	User Provided		
Est. Revenue	£5,000.00	Probability (%)	
Est. Close Date	31/08/2015	Rating	Warm
Currency *	Pound Sterling		

e) Next, the Line Items which include the <u>Price List</u> that is to be used and <u>Products</u> 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.

Line Items		_						
Price List Room Him								
								÷ + +
Product Name	Properties	Unit	Price Per Unit	Quertity	Discount	Extended Amount	Suggestions	
🗰 🗟 Hospitality - The Premier I	2	Primery Unit	<i>€1,000.00</i>	1	00.03	iii £1,000.00		

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.

Quotes				
Name 🛧	Status	Tintal Amount	Created Chi	
No Quote recordi feunal.				

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**.

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		(1+) Freight Amount			
		Let Total Tax. W		10.00	
		Total Assessed B		41,000.00	

- 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.

RODUCTS							+	Ψ.	4
Product Name	Properties	\$Joil	Price Per Unit	Quantity	Decount	Extended Amount	Suggestion	6	
🗮 🗟 Hospitality -		Primery, Unit	₩ £1,000.00	1.00000	£0.00	<u>₽</u> £1,000.00			
_	Detail /	Amosait B						£10	000
	Detail /	Amount B unt (%)						£10	0.0
	Detail / (-) Diveo	Amount B sunt (%) Hiscount						£10	0.0
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	Detail / (-) Divco (-) D Pro-Froight / (+) Froight / (+) To	Amount B sunt (%) Hecount Amount B Amount otal Tax B						£10 (1 ¥9	0.0 0.0 60



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.

Microsoft Dy	mamics CRM 🗸 🛛 🏠 🕴 co	RPORATE SALES - Quotes - Hospitality Box Hire	0	Create Enter Search
+ NEW 10 DEL QUOTE • HOSpita	ete ⊞lookupadoness № ality Box Hire	ACTIVATE QUOTE ERINT QUOTE FOR CUSTO State GET PRODUCTS 44 ASSIGN C Share Pro Empli a Link @ Run Workflow E Start Dialog		Total Amount ₩£900.00
Summary		🕑 Bun Report	a Rom	on Carrent Record
Quote ID*	QUO-01033-5850H9	PRODUCTS Chief Activities		G4 SP Quote
Revision ID*	₽ 0	Product Name Properties Unit Price Per Unit Quanti Torm Editor		Quate
Name*	Hospitality Box Hire	B Hospitality / Primary Unit @ £1,000.00 1.00000 £0.00 @ £1	00.000	

f) The Quote will be generated:

Select information that I	weds to be cliptay	ed in the litery Details are	Product ID, Quart	Ny, Price per unit	*		
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fec.				From:			
Sreeen 4 Sokutions				System	Administrator		
6 - 17 Midland Court							
Sentral Park							
utterworth							
.cicestenshire, LE15 3LW							
Summary							
Total Amount:	\$900.00		Quete ID:	000-01033-	885049		
hipping Hethod:			Date	24/06/2015			
lequested Delivery Date:			Effective From				
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Due By:							
shipping Informati	m					3	
Ship Tat				Ball To	Ē.		
Details							
Product ID Product				Quantity	Price	Sub Total	
G1006 Hospitality	The Premier Louis	508		1.00	£1,098.00	61,000.00	
						Quote Discourt (%)	10.00 5
						Total Tax	£0.0

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.

🍐 Microsoft Dynamics CRM 🗸 👘 🛛	CORPORATE SALES	5 🗸 Quotes 🛛 🗸 Good Pr	ospect 🗸		
🕂 NEW 🚊 DELETE 🔛 LOOK UP ADDRESS	ACTIVATE QUOTE	PRINT QUOTE FOR CUSTO	🤹 GET PRODUCTS	📲 ASSIGN	

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.

🌆 Micro	soft Dynar	nics CRM 🗸 🖬 🔒		ATE SALES 🗸 Que	otes 🗸	Good Prospect	~	
+ NEW	DELETE	🛅 CREATE BOOKING	🔒 REVISE	🖺 PRINT QUOTE FOR	CUSTO	🐴 CLOSE QUOTE	🗳 ASSIGN	•••



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

Create	e Booking e to create an order.
Status Reasor Date Won	Won 20/08/2015
Description	
Close	Enquiry
Actu	al revenue is: O
	Calculated from quotes
O Don't	t update Enquiry
	OK Cancel

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**.

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+ ww ≇ outr occar ∙ Hospita	i Borantawara & aun lity Box Hire	LIBOORNE DECANCELECCENCE 🗑 RECALCULATE	団 LOOK UP 40018	W				Total BE	Amount 900.00	Pastar* Active	Salas Tasanti New	Owner*
Summary							2					
Ottar D	& ORD-01013-D6W502	PRODUCTS					u .		+	SALES INFORMATION		
Name "	Hoopitality Box Hire	Product Nene: Properties Linit	Prese Per Link	Guetty	Decourt	Extended Amount	Support	ire i		Opportunity	Householdy like Here	
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801 To Address)	-	(+) Eveloptet Account										
ShipTe	Address	(-) Total Tax II							60.00			
Ship To Address	-	Total Account 👹						13	630,00			

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.

🊈 Microsoft Dynamics CRM 🗸				5 🗸 Orders 🗸	Good Prospect	Ŭ	
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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.

Fulfill BC Provide fulfillmen	Oking nt information for this booking.
Status Reason	Complete 🗸
Date Fulfilled	21/08/2015
Description	
	Fulfill Cancel

- 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.

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Days To Makhers	8.000	1+1	Total Tax. B						10.00		
		Teste	i ferment ik						900.00		

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.

Edd Piller							
Select infor	mation that needs to be dis	played in the item De	tails area Product ID, C	wantity. Price per unit	*		
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Invoice	e: Sports						
Toi				From			
Sect 4 So	kadions.			Bystern	Administrator		
16-17 Mida	nd Coult						
Central Park							
Lutieruorth:							
Leicestershik	6, LE19-3LW						
Summary							
Total Amount	t: £905.00		Invoice ID	NV-01006-S	BC4KB		
Shipping Het	had:		Date:	24/00/2015			
Payment Tes	and:						
Shipping	Information						
Ship Tat				Bill To	i.		
Details							
Product ID	Product			Quantity	Price	Sub Total	
G1005	Houstally - The Premier	Louige		£.00	\$1,000.00	\$1,000.00	
		19756		10 100		Invoice Discount (%)	10.00 %
						Total Tax	\$3.0



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.

Microsoft Dynamics CRM -	CORPORATE S	ALES - Invoices	 Good Prospe 	ct v	
🕂 NEW 💼 DELETE 🛍 LOOK UP AD	DRESS 🕃 INVOICE PAID	CANCEL INVOICE	RECALCULATE	💝 USE CURRENT PRICING	•••

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 *