

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:

Microsoft Dynamics CRM 🗸 🏦 WORKPLACE 🗸 Contacts 🗸							
+ 1	NEW 🛅 DELETE 💌 🗋 COPY A LINK 🔍 🖘 🥲	Email a link 🖂 🖻 Run	REPORT - 🕅 EXPORT T	o excel 🔹 Import data 🕞 🚥			
Ŧ	➡ My Active Contacts ∽						
\checkmark	Full Name 🛧	E-mail	Parent Customer	Business Phone			
	Amy Coote	C.Amy@g4.com	Beachwood School	0823461123			
	Andrew Duncan	and rew@green 4 solutions	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:

NEW 🏛 DELETE 🝷 🗋 COPY A LINK 🝷	🖘 EMAIL A LINK 🔍 🖹 RUN	REPORT * 🔞 EXPORT T	TO EXCEL . MPORT DATA
My Active Contacts ~ System Views Active Contacts	E-mail	Parent Customer	Business Prione
Active Contacts Subgrid View BenTest	C.Amy@g4.com	Seachwood School Green 4 Solutions	0823461123
Contacts Being Followed Contacts 1 Follow	Kingy@g4.co.uk	Frampton College	073671240
Contacts: Influenced Deals That We Won Contacts: No Campaign Activities in Last 3 Months Contacts: No Orders in Last 6 Months	ALane@g4.com catherine.perryman@gree	Stanley Moore Secondary Green 4 Solutions	8333412 064445553333
Contacts: No Orders in Last 6 Months Contacts: Responded to Campaigns in Last 6 Mo Inactive Contacts	R.Charlotte@g.4.com chris.theodorson@green4s_	Wright Consulting	789-563-2345
My Active Contacts My Connections	D.Drinks@g4.co.uk	Huntington Primary School	0833724563
On Hold Contacts	LAtherton@g4.com	Listers Secondary School	1458436
My Views Last Name	James Wall@green4solutio	Green 4 Solutions	
Create Personal View Save Fitters as New View	liverdy@64.com	Littlebrooke School	05429542
have care and a men and a	Jenny Murphy@green4sol	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 î t	CORPORATE SALE	s۰	Sales Literature 🗸		
Unknown0						
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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 🛙								
➡ My Active Contacts ~								
✓ Full Name ↑	E-mail	Parent Customer	Business Phone					
Amy Coote	C.Amy@g4.com	Beachwood School	0823461123					
Andrew Duncan	and rew@green 4 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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- 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.

Micro:	soft Dynamics	CRM 🗸 🏠	WORKPLACE - Contac	ts 🗸 🛛 Andrew Duncan 🗸		
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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 CRM	1v 🏦	CORPORATE SALES	 Sales Litera 	iture 🗸	
Unknown0					
€ LEADS ≚		NITIES		×	¥

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

+ N	W DELETE - 🗋 COPY A LINE	C - 🖚 EMAIL A LONK - 🗇 RUN REPORT +	EXPORT TO EXCEL . MPORT DATA
۰,	Active Accounts ~		
¥	Account Name 🛧	Primary Contact	E-mail (Primary Contact)
	007	James Bond	james/bond@green/solutions.com
	Beachwood School	Amy Coote	CAmy@p4.com
	Chimbonda Ltd		
	Frampton College	Andy King	Kingy@g4.co.uk
	666 138		
	Greet 4 Solutions	Christoper Jeffreys	C.leffrey@greet4.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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Elizati -	The second secon	Tuest Intern	
-	citements beaution. New	had been in the	



- 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.

雄 Microsoft Dyr	namics CRM 🗸 🖬 🕴	WORKPLACE - Accourt	nts i 🗸 🛛 Bea	achwood School	v	
🕂 NEW 🕼 DEAC	CTIVATE CONNECT 🗸	ADD TO MARKETING LIST	뤜 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	CRM 🤟 🏫 🕴 CORPORATE S	ALES 👻 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.

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+ NEW B DELETE - D COPY A		RUN REPORT + 🗒 EXPORT	ID DICH 🔒 IMPORTDATA) - ····		
* My Active Contac	ts ~			Sindrift for revealed	
✓ full time ↑	5-mil	Perent Cultorter	Auren Pare		τ.
Any Coste	CAnydipAcon	deachwood School	0825461123		
Andy King	Kingy@g4.co.ux	Frampton College	073671240		
Arrandia Lanc	ALME®94.00M	Startley Moore Secondary.	8333412		

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.

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Summary					
CONTACT INFORMAT	now	POSTS ACTIVITIES MITTES		Company	
Full Name*	Catherine Panyman	Enter your faces	POST	(m)	
tols Title	Project Manager	Both Autopoots Voerpainte		RECENT CASES	+ 0
Parant Customer	÷.	Catherine Petryman		Case Title	Priority IT Parties et
I-mail	samming persynan Byrendudydam.com	Contact: Created By First name Last name			
Buarness Process	This second	On Catherine Perrymen's well 34/10/2014 28:00		No Case records have	4
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Fee	(224)				
Preferred Mathod or	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 CRM	• n corporate s	ALES + Sales Literature +
WORKPLACE	CORPORATE SALES	MARKETING

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.

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→ My Active Accounts -					1	م
🖉 Account Name 🛧	Main Phone	Address 1 City	Printally Cartain	E-nel (himery Centect)		T 0
Beachwood School	3739962	Teachwood	Amy Coste	CArty@pkzon		
Framation College	0923648	Formation	Anty King	King/Bp4.co.ut		
Green A Solutions	08455 008 148	Luiterworth				
Hit Field Primary School	0948239	Hartsonoustr	Mell Back	Stok @ureen4polutions.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	iamics CRM 🗸 📫 🕴 WORKPLA	CE + Accounts + Green 4 Solutions +		🕀 Create	System Administ QC	- 0	0	7
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Summary							_	0
ACCOUNT INFORM		POSTS ACTIVITIES MOTES		Pringry Contact				
Account Name*	Green & Solutions	Friter part here	Point					
Phone	06435 088 149	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	4
× 40	ry Coote		CAmyBg4.com	
An	dy King		Engy@g4.to.ik	
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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.

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

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



CONTACTS	+ 🗉
Full Name 个	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.

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			Address		
	E-mail			16-17 Midland Court	
	Mobile Phone:		Street 2	Central Park	
	Business Phone	10.455 641 149	City	Lutterworth-	
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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 🖌	
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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**.

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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

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🗹 TAS	sk 💌 email	APPOINTMENT -	🕻 PHONE CALL	E LETTER	ر 🗳 FAX	SERVICE ACTIVITY	•••	
-H N	/ly 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	S CRM 🗸 🍙 WORKPLA	CE - Contacts	- Andr	ew Duncan 🛛 🛩		
CONTACT : INFORMATION	•					
Andrew D	uncan					
Open Activity	Associated View	2				
			12221			
Filter on: Next 50 days	include: Relater	1 "Regarding" Records	Y			
ADD NEW ACTIVITY -	🛱 ADD EXISTING ACTIVITY 🛛 🛱	BULK DELETE 🔒 CHA	RT PANE *	🖹 RUN REPORT *	EXPORT ACTIVITIES	
Subject 个	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.

ilter on: Next 30 days	M Include: Re	lated "Regarding" R	ecords 💌			
ADD NEW ACTIVITY - QLA	DO EXISTING ACTIVITY	🕼 BULK DELETE	📲 CHART PA	NE *	🕑 RUN REPORT *	B EXPORT ACTIVITIES
🖓 Task	Activity 1	Type Activi	ty Status P	riority	Due Date	Created 8
La Fax	e*					
C Phone Call						
🖀 Email						
Etter						
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 CRM	/l → 📄 🕴 WORKPLACE →	Dashboards 🗸
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.**

🌆 Mic	rosoft Dynam	ics CRM 🗸 🏦 WORKPLACE - Act	tivities 🗸				
☑ TAS	sk 🛛 Email (🗋 APPOINTMENT 🔽 🕻 PHONE CALL 📳 LET	TER 🕞 FAX 違 SI	ERVICE ACTIVITY	••• Campaign Response		
→ N	/ly Activit	ies ×			Dither Activities	Þ	
Due:	All	\checkmark			🖋 Edit		
~	Activity Type	Subject	Regarding	Priority	 m Delete ✓ Mark Complete 		`
~ C	Phone Call	Call Trudi to confirm availability for 15th Decemeber		Normal	× Cancel		
	Task	Follow up Special Events Guided Castle Tour		Normal	💵 Set Regarding		5/11/2014
	Task	Email price lists and venue options	🗳 Trudi Bissett	High	🗳 Assign	-	7/11/2014
	Task	Compile menu and quote	Amy Brown	Normal	Copy a Link	•	9/11/2014
\$	Communication	BC1 - Details (Admission)	ゐ order 27/03	Normal	ප Email a Link	•	5/03/201
¢.	Communication	BC1 - Details (Admission)	🍓 order 27/03	Normal	🖳 Add to Queue		5/03/201
\$	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 🗸
۲.	*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 IIIIIIIIIIIIIIIIIIIIIIIIII		s – – – – – – – – – – – – – – – – – – –	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 4 N	vic	osoft Dynami	ics CRM 🗸 🏦 WORKPLACE 🗸 Activi	ities 🗸			
Ø	TAS	K 🛛 EMAIL (🗋 APPOINTMENT 🖂 📞 PHONE CALL 🗎 LETTE	R 🕻 🛱 FAX 🗟 S	ERVICE ACTIVITY	••••	
+	Ν	ly Activit	ies ×			Other Activities	
Due:		All	V			🖋 Edit	
-	/	Activity Type	Subject	Regarding	Priority	☐ Delete	、 、
~	¢	Phone Call	Call Trudi to confirm availability for 15th Decemeber		Normal	✓ Mark Complete ★ Cancel	
17	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
	\$	Communication	BC1 - Details (Admission)	ò order 27/03	Normal	⇔ Email a Link →	5/03/201
	â	Communication	BC1 - Details (Admission)	ゐ order 27/03	Normal	🖳 Add to Queue	5/03/201
	¢.	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 Dyn	amics CRM 🗸 📫 WORKPLACE 🗸 🖉	Activities 🗸	
🗹 TASK 🛛 EMAII	. 📋 APPOINTMENT 🔽 🕻 PHONE CALL 📄 I	LETTER 🛛 🛱 FAX 🖆 SERVICE ACTIVITY	
≁ My Acti	vities ~		
Due: All	V		
 Activity Type 	Subject	Regarding Priority	Start Date 🔿 Due Date 🛧
🗸 📞 Phone Call	Call 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.**

🚧 Mie	crosoft Dynam	ics CRM 🗸 🏦 WORKPLACE 🗸 Activ	vities 🗸				
🗹 ТА	SK 🖿 EMAIL	🗂 APPOINTMENT 🖂 📞 PHONE CALL 📄 LETTE	ER 🕻 FAX 🖾 SI	ERVICE ACTIVITY	•••		
	A A				🔩 Campaign Response		
_ →	My Activit	ies 👻			Dther Activities	Þ	
Due:	All	\checkmark			🖋 Edit		
					🔟 Delete	•	
_	Activity Type	Subject	Regarding	Priority	✓ Mark Complete		
~ <	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
	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)	ゐ order 27/03	Normal	🕶 Email a Link	•	5/03/201
4	Communication	BC1 - Details (Admission)	ゐ order 27/03	Normal	E. Add to Queue		5/03/201
4	Communication	BC1 - Details (Admission)	ゐ order 27/03	Normal	🔅 Run Workflow		\$/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**.

	rm Deactivation t 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 Car	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.

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	LEADS	OPPORTU	MITTES	ACCOUNTS	CONTACTS	MARKETING USTS	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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nit Group*		Standard Cost
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PRICE LIST IT	EMS	
NAME UNIT	EMS	



- **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**.

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	PRODUCT CHANNEL EDIT_	RESOLINCE LANES		SKIDATA	BUGINESS MANAGEMENT	TEMPLATES	PRODUCT CATALOG



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

A Micro	soft Dynamics CRM + 🏠 settings + Product Catalog	() Cosato	System Administra 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.	raciust could be said individually as a	ve-iter bedae or = 4 (ave contains	ng Kitvo-iter
	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 catelog. You appointed as a device the submit winage, and avere price lab line items and price lab in the product catelog. You appointed as a device the submit winage, and avere price lab line items and price lab in the product catelog. You appointed as a device the submit winage, and avere price lab line items and price lab in the product catelog. You appointed as a device the submit winage.	racconste products with price (etc. %	u alto loecify variaus priorig opto	m 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.	It products, and also replacely them to	mule then to other areas of the p	enskult (Atakag

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

An http://goowne.comportune	ice List: New Price List - Microsoft Dynamics CRM - Intern Law 2011 Sports management (2018anage Sites Science)	
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	Data Activ	

- 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.

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Audit History	Start Date Currency* Pound Sterling Description	Dece
	Status Active	A, 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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Add New Price List	Weite Price List Rem	😭 Follow 🔛 Copy e Link 🖈 Unfollow 📟 Email a Link	Set As Default View	Nun Star Workfow Disk		VEN of Price List items
Records		Calleborate	View	Process	Det	
Price List: Information L. General	Roo	ust m Hire			Price Lists	4
Related	- Price 1	List Items Product Price L	ist - Price List	¥	Search for recor	es p
Common	V Pieduct	ń.		40HT		Ψ 0
Price List Items	Hospital	ty - 2006 Lounge	Primary Unit			
(3) reade control	- Hospital	ty - Greet Room	Primary Unit			
	Hospitali	ty - Six Geoff Hund Suite		Primary Linit		
	Hospital	ty - The Boardroom		Primary Unit		
	Hospital/	ty - The Centre Circle Suite		Primary Unit		
	Hospitali	ty - The Millennium Suite		Primary Unit		
	Hespital	ty - The Premier Lounge		Primary Unit		
	Knights o	If the Round Table School Event		Primary Unit		
	Sir Lance	tot Venue Hire		Primary Unit		

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

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Pricing									
Pricing Method *		Currency Amount							
Amount *									
Percentage									
Rounding									
Rounding Policy									
Rounding Option									

- **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 ∨ S	ponsorship 🗸
10	÷	(<i>1</i> 4
WORKPLACE	CORPORATE SALES	MARKETING	LOYALTY

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

Microsoft Dynamics	CRM	~ f t	CORPORATE	SALES	 Opportunit 	ties 🗸
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C LEADS	¥		NITIES	¥		×

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

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company."							



- 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)) A De
Existing Contact?	click to enter	Estimated Bu
Existing Account?	click to enter	Purchase Pro
Purchase Timeframe	click to enter	Identify Decis
Topic * Name * Job Title Business Phone Mobile Phone	Hospitality Box Hire Fred Perry Consultant 0843564267 07842563	
Email COMPANY	f.perry@green4.com	
Company ⁺	Greeen 4 Soluutions	
Website	http://www.green4solutions.com/	
Address	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.

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.

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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.

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Price List Room Hire								
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Product Name	Properties	Unit	Price Per-Unit	Quantity	Decourt	Extended Amount	Suggestions	
🗰 🗟 Hospitality - The Premier L		Primary Unit	<i>≣ £1,000.00</i>	1	10.00	₩ £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				
Nama 🛧	Status	Tutal Amount	Created On	
te records found.				

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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		Pro-Prolight Amount - M		\$1.00510	
		2+1 Evolution Amount			
		1+) Total Tax B		MCB.	
		Dotal Associati B		41.000.0E	

- 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.

RODU										S.,	1
	Product Name	Properties	(del)	P	rice Per Unit	Quantity	Decount	Extended Amount	Suggestion	5	
₩.i	ili Hospital <i>it</i> y -		Primary Unit		£1,000.00	1.00000	£0.00	ä £1,000.00			
	_	10.000	Amount B							£100	
		(-) Divo	count (%)							£100 (10	
		(-) Divo	ount (%) Discount							(10	1.00
		(-) Dive (-) Pre-Freight	ount (%) Discount Amount 📓								00.0
		(-) Divo (-) Pro-Freight (+) Freight	ount (%) Discount Amount 📓							(10 £90	1.00



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	⊕ Create Ent	ter Search
QUOTE *	ete ≣LOOKUPADDHESS ₿/ ality Box Hire	ACTIVATE QUOTE I PRINT QUOTE FOR CUSTO	kflow 前£90	
Summary		(E) Bun Repo	ort a Ran on Current Record	
Quote ID*	QUO-01033-5850H9	PRODUCTS	tivities + G4 SP Quote	
Revision ID *	₽ 0	Product Name Properties Unit Price Per Unit Quanti Tomm Edd	Quote Quote	
Name*	Hospitality Box Hire	Hospitality Primary Unit # £1,000.00 1.00000 ED	00.000	

f) The Quote will be generated:

		1	/, Trice per unit			10.00
11 1 1	ett > 21 - 0	100%	itime 100 +	(* #		
fec.			From:			
Greeen 4 Sol	uutions		System	Atministrator		
tő - 17 Midlar	nd Court					
Central Park						
utterworth						
Locestenstin	I, LE19 JLW					
Summary						
Total Amount	£900.00	Quote ID.	QUO-01033-	885049		
Japping Hed	had:	Date:	24/06/2015			
lequested De		Effective From				
Payment Terr	ne	Effective To				
Due By:						
shipping I	Information					
Ship Tat			Bill Te	Ē		
Details					-	
Product ID	Freduct		Quantity	Price	Sub Total	
G1006	Hospitality - The Premier Lounge		1.00	61,098.00	61,000.00	
					Quate Discourt (%)	10.00 %
					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	rospect 🗸		
🕂 NEW 🛅 DELETE 🔛 LOOK UP ADDRESS	ACTIVATE QUOTE	PRINT QUOTE FOR CUSTO	🤹 GET PRODUCTS	聲 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.

🎍 Microsoft Dynamics CRM 🗸 👘		RATE SALES 🗸	Quotes 🗸	Good Prospect	~	
🕂 NEW 🗴 DELETE 🛅 CREATE BOOKI	NG 🔒 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.**

	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**.

Microsoft Dyn	amics CRM + 📫 🕴 CORP	ORATE SALES + Orders + Hospitality Box Ho	el+.		.0	Greate	Enter Sean	n-tiem 👂 👔	System Admin Sports	the Plan
	в 🕃 опателного 🔍 прав	и вооения 🛱 сансти воокина 📓 несалсныте	E LOOK UP 400HEBE	*** E						
CROER *										
Hospita	lity Box Hire					- 1	Total Amount #£900.00	Batur" Active	Status Research New	Owner"
Summary										
Ottar D*	A ORD-01013-D9W502	PRODUCTS				16	. +	SALES INFORMATION		
Name -	Hospitality Box Hire	Product Netre Properties Linit	President Char	etty Decount	Extended Amount	Supportion		Opportunity	Householdy Ros H	-
Corrence	Frund Sterling	E Houristy Primary Unit	B £1.000.01 1	10.03	# £1000.00			Quete	Househall by Oce H	
Pret Life*	Ranet How							Potential Contorner*	E Dreien 4 Sale	Adams
Prices Looked *	A Ves									
SHIPPING DATES								DEICRIPTION		
Fegurated Delivery	(m)									
Data Fulfilled	8 -									
SHIPPING INFORMA	THOM									
SApping Method	-									
Payment Terros	-	Detail Assessed					61.000.00			
Energy of Terms		() Discount (%)					1 10.00 (
ADDRESSES		1.1 Discourt					12			
ADDIESSES		Pro-Enright Associati B					1990.00			
FIT To Address		(+) Eveloptic Account					100			
ShipTo	Address	(-) Total Tax II					60.00			
Ship To Address	-	Total Amount					1900.00			

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 CR	.M 🗸 📫 CORPORATE SALES 🗸 C	Orders 🗸 🛛 Good Prospect 🗸
🕂 NEW 💼 DELETE 🛱 CREA	ATE INVOICE BOOKING	EL BOOKING 🖩 RECALCULATE 🔛 LOOK UP ADDRESS 🛛 🚥

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	OOKING 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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North Adoleses		10000	Total Inc. B						10:00			

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.

Exter Patter							
Select infor	mation that needs to be di	splayed in the item Or	tails area: Product ID, C	Santity Price per unit	-		
a a [9 (1, 2, 3)	9 1076	¥ [Telline id	÷ 4		
Invoice	e: Sports						
Toi				From			
Orevent 4 Sel	kadions			Bysters	Administrator		
16-17 Midla							
Central Park							
Lutterworth:							
Leicestershin	6, LE19 3LW						
Summary						4	
Total Amount	t: £900.00		Invoice ID	MV-01006-S	BC4KB		
Shipping Het	had:		Date	2400/2015			
Payment Ten	anci						
Shipping 1	Information						
Ship To:				Bill To	6		
Details							
Product ID	Product			Quantity	Price	Sub Total	
G1005	Houstality - The Premier	Lourge		£.00	£1,000.00	\$1,000.00	
						Invoice Discount (%)	10.00 %
						Total Tax	\$9.00



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 ~	
🕂 NEW 💼 DELETE 🛍 LOOK UP AD	DRESS 🕃 INVOICE PAID	CANCEL INVOICE	RECALCULATE	VSE 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 *