



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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V1.0	15/10/2015	This is a new document	JW

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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.

Navigation Bar

Ribbon

Works Area

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	08444553333
Charlotte Wright	R.Charlotte@g4.com	Wright Consulting	789-563-2345
Chris Theodorson	chris.theodorson@green4s...		
Danny Drinkwater	D.Drinks@g4.co.uk	Huntington Primary School	0833724563
Elizabeth Atherton	L.Atherton@g4.com	Listers Secondary School	1458436

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:

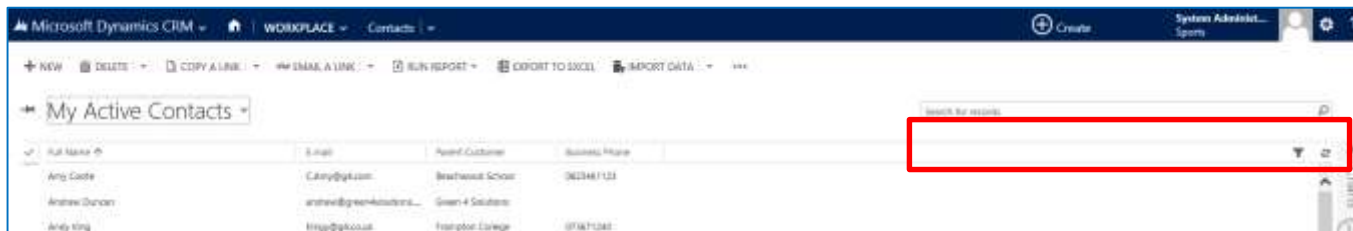
Microsoft Dynamics CRM WORKPLACE Contacts				
+ NEW DELETE COPY A LINK EMAIL A LINK RUN REPORT EXPORT TO EXCEL IMPORT DATA				
My Active Contacts				
Full Name ↑	E-mail	Parent Customer	Business Phone	
Amy Coote	C.Amy@g4.com	Beachwood School	0823461123	
Andrew Duncan	andrew@green4solutions...	Green 4 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	08445553333	
Charlotte Wright	R.Charlotte@g4.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 WORKPLACE Contacts				
+ NEW DELETE COPY A LINK EMAIL A LINK RUN REPORT EXPORT TO EXCEL IMPORT DATA				
My Active Contacts				
System Views Active Contacts Active Contacts Subgrid View BenTest Contacts Being Followed Contacts I Follow Contacts Influenced Deals That We Won Contacts: No Campaign Activities in Last 3 Months Contacts: No Orders in Last 6 Months Contacts: Responded to Campaigns in Last 6 Mo... Inactive Contacts My Active Contacts My Connections On Hold Contacts My Views Last Name Create Personal View Save Filters as New View Save Filters to Current View Joe Walker				
E-mail	Parent Customer	Business Phone		
C.Amy@g4.com	Beachwood School	0823461123		
andrew@green4solutions...	Green 4 Solutions			
Kingy@g4.co.uk	Frampton College	073671240		
A.Lane@g4.com	Stanley Moore Secondary...	8333412		
catherine.perryman@gree...	Green 4 Solutions	08445553333		
R.Charlotte@g4.com	Wright Consulting	789-563-2345		
chris.theodorson@green4s...				
D.Drinks@g4.co.uk	Huntington Primary School	0833724563		
L.Atherton@g4.com	Listers Secondary School	1458436		
James.Will@green4solutio...	Green 4 Solutions			
J.vandy@g4.com	Littlebrooke School	05429942		
Jenny.Murphy@green4sol...	Green 4 Solutions			
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 🔍 button.



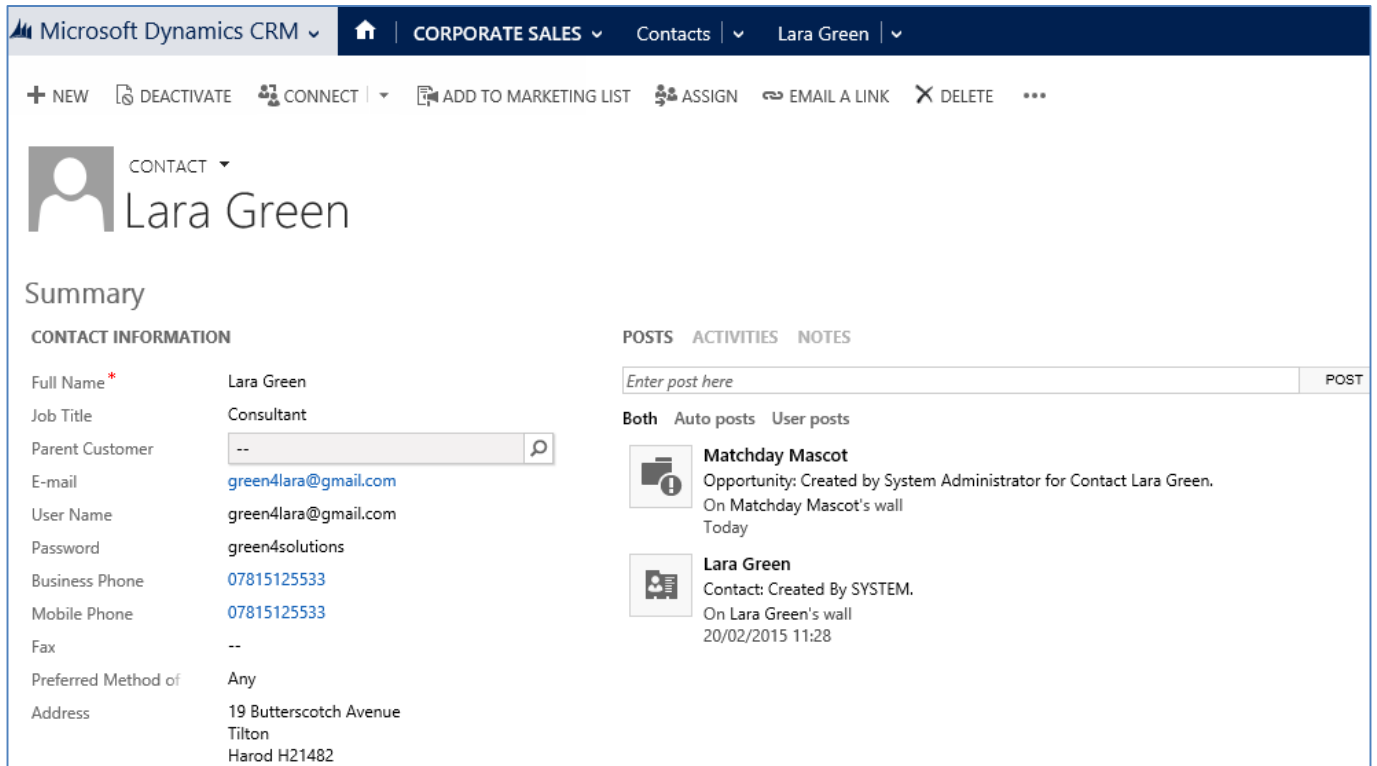
The list of records displayed will update to show only those records matching the keyword entered. If you are unsure of the exact search term, you can enter the wildcard character (*) before the search term. For example to search for all Accounts with "electrical" in their name, enter *electrical.

- **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.

My Active Contacts ▾				
✓ 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	


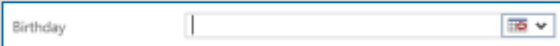

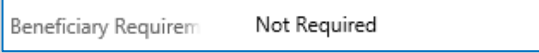
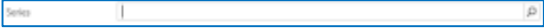
FORMS

Within CRM, information is collected using Forms (an example of which is shown below).



The screenshot shows the Microsoft Dynamics CRM interface for a contact named Lara Green. The top navigation bar includes 'Microsoft Dynamics CRM', 'CORPORATE SALES', 'Contacts', and 'Lara Green'. Below the navigation bar is a toolbar with icons for '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', and a menu icon. The main content area is divided into two sections: 'CONTACT INFORMATION' and 'POSTS, ACTIVITIES, NOTES'. The 'CONTACT INFORMATION' section contains fields for Full Name, Job Title, Parent Customer, E-mail, User Name, Password, Business Phone, Mobile Phone, Fax, Preferred Method of, and Address. The 'POSTS, ACTIVITIES, NOTES' section shows a list of posts, including 'Matchday Mascot' and 'Lara Green'.

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

Field Name	Appearance	Description
Text		Enter the requested information directly into the box provided
Date		Enter the date directly into the box provided, or, click the calendar symbol (📅) alongside the field to open a calendar from which the date can be selected.
Selection		Click for the required answer.
Drop-Down		Select the required option from the list of values provided. To access the list of values click within the field.
Look Up		Select the required value from those displayed after selecting the magnifying glass. If the value is not displayed, select Look Up More Records or to create a new value select +New

1. CONTACT AND ACCOUNT MANAGEMENT

Contacts and Accounts are key records within CRM. [Contacts](#) are used to represent individuals, whereas [Accounts](#) are used to represent the organisations and businesses that you interact with. Contacts and Accounts can be [linked together](#) within CRM.

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

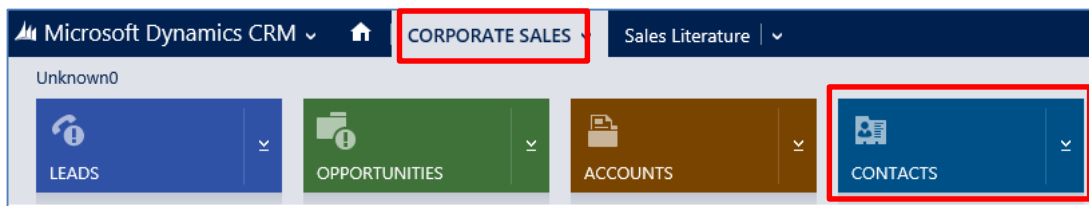
1.1. CREATE A CONTACT

To create a Contact complete the following instructions:

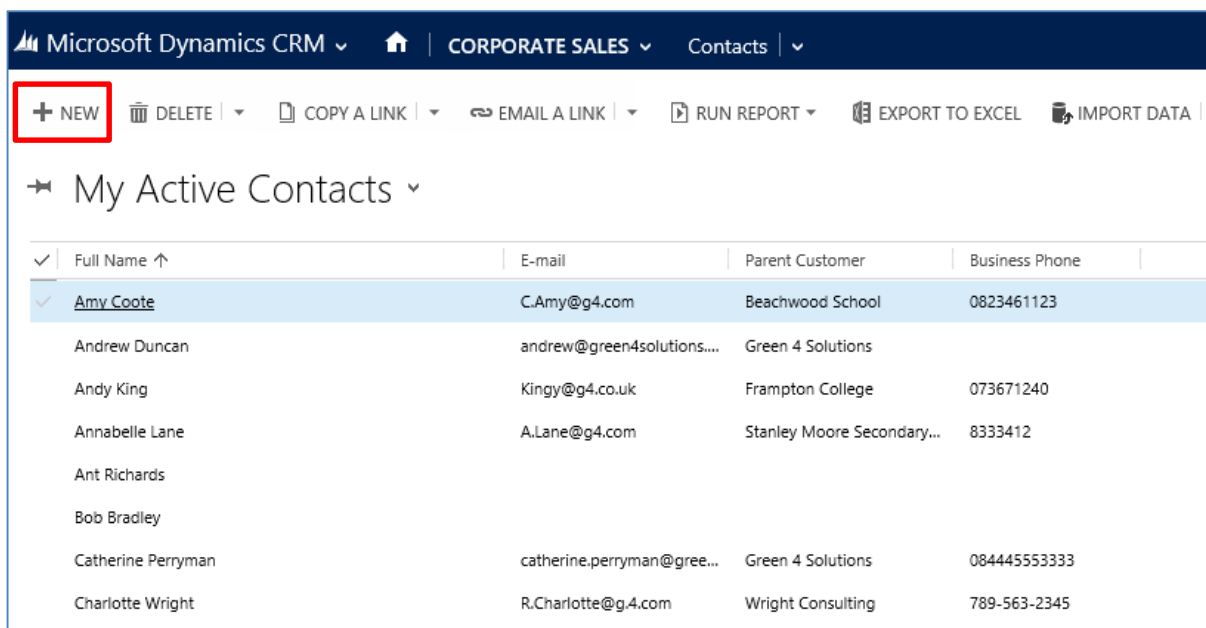
- Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.



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



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



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

- e) Click **Save and Close** on the ribbon. The new contact is now saved in **CRM**.
- f) A Contact can be edited at any point by reopening the relevant Contact form, making the changes and selecting the save icon in the bottom right hand corner of the form.
- g) If a Contact is no longer active, their record in CRM can be deactivated from the database. When a record is deactivated the details remain in the system but are hidden from the majority of views. To deactivate a Contact open up the relevant Contact record in form view before selecting Deactivate on the ribbon.



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

1.2. CREATE AN ACCOUNT

To create an Account complete the following instructions:

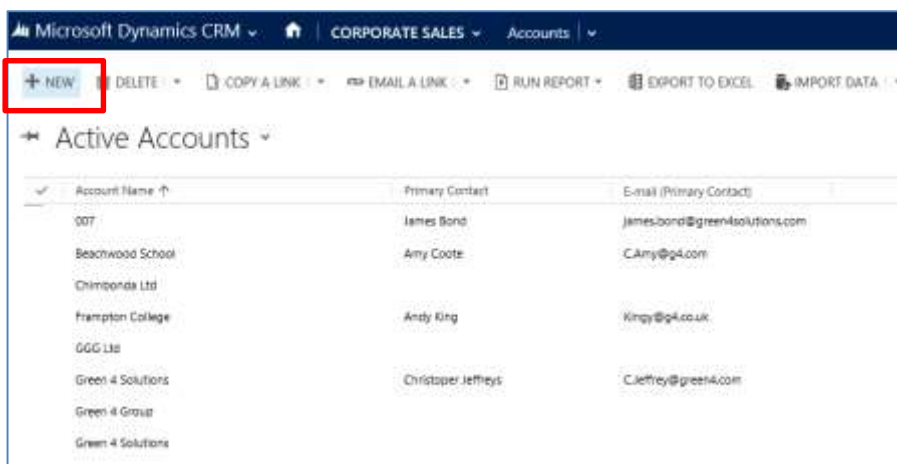
- a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.



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



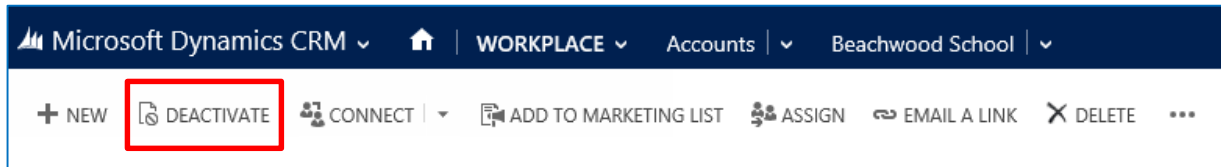
- c) The Account View will be displayed. Select **New** on the ribbon.



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



- e) Click **Save and Close** on the ribbon. The new account is now saved in **CRM**.
- f) An Account can be edited at any point by reopening the relevant Account form, making the changes and selecting the save icon in the bottom right hand corner of the form.
- g) If an Account is no longer active, their record in CRM can be deactivated from the database. When a record is deactivated the details remain in the system but are hidden from the majority of views. To deactivate an Account, open up the relevant Account record in form view before selecting **Deactivate** in the ribbon.



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

1.3. BUILDING RELATIONSHIPS BETWEEN A CONTACT AND ACCOUNT

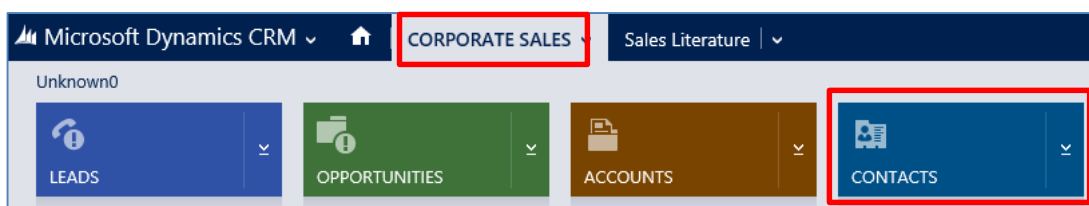
CREATING A LINK BETWEEN A CONTACT AND AN ACCOUNT

Below is a step by step guide to creating a link between a [Contact](#) and an [Account](#):

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



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



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



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

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

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

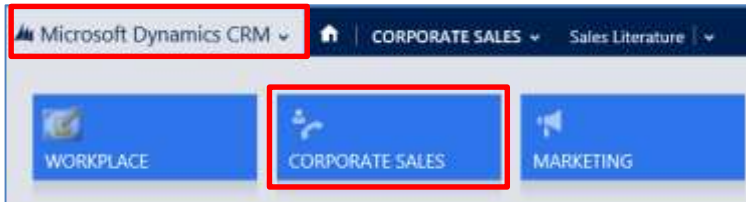
- h) Once the account you wish to associate with this Contact is found or added, select it and click **Add**.

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

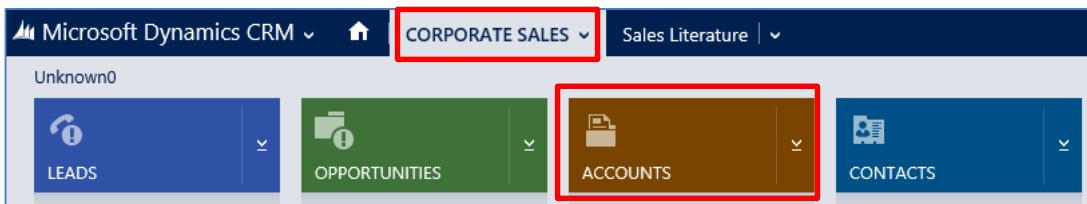
CREATING A LINK BETWEEN AN ACCOUNT AND A PRIMARY CONTACT

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

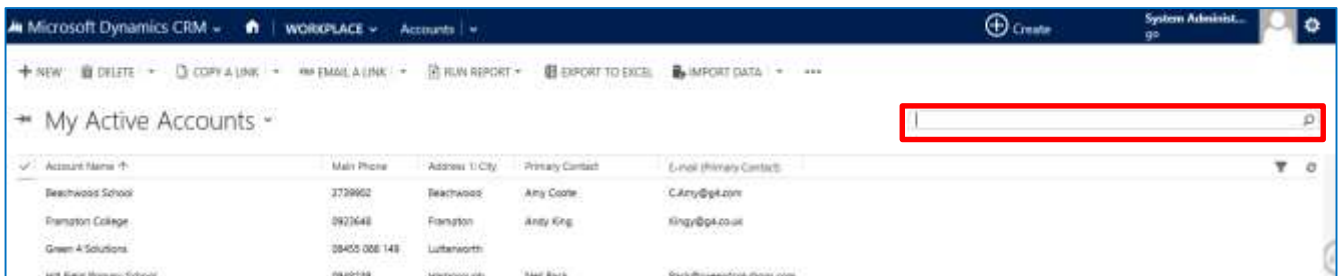
- a) Select or hover over the **Microsoft Dynamics CRM** tab before clicking **Corporate Sales** from the drop down list of the navigation bar.



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



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



- d) Double click on the Account and the **Account form** should appear.
- e) On the **Account form** there will be a field called **Primary Contact**, click the **look up** button.



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

Primary Contact

Catherine Perryman
Green 4 Solutions

James Wall
Green 4 Solutions

Jenny Murphy
Green 4 Solutions

Joe Walker
Green 4 Solutions

[Look Up More Records](#)

4 results + New

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

Look Up Record

Enter your search criteria.

Look for: Contact Show Only My Records

Look in: Active Contacts Filter by related Parent Customer

Search: Search for records

Full Name ↑	E-mail
Amy Cote	ACote@g4.com
Andy King	AKing@g4.co.uk
Annabelle Lane	ALane@g4.com
Catherine Perryman	catherine.perryman@gre...
Charlotte Wright	Charlotte@g4.com
Danny Drinkwater	DDrink@g4.co.uk
Elizabeth Atterton	Laterton@g4.com

1 - 22 of 22 (1 selected) 11 Page 1

New Add Cancel Remove Values

- 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 ↑	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**.

Microsoft Dynamics CRM - WORKPLACE - Accounts - Green 4 Solutions - Create

System Administrator

Close

Contact

Details

First Name *

Last Name *

Job Title

Parent Customer: Green 4 Solutions

Contact Information

E-mail

Mobile Phone

Business Phone: 08455 088 149

Description

Address

Street 1: 16-17 Midland Court

Street 2: Central Park

City: Lutterworth

ZIP/Postal Code: LE17 4PH

Save Cancel

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

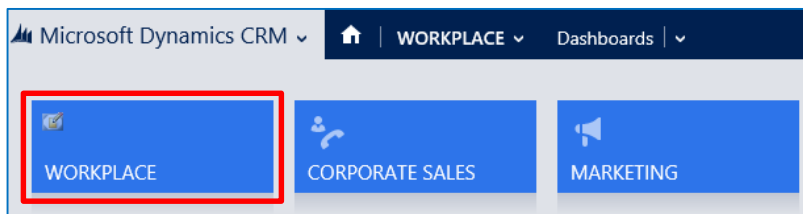
2. ACTIVITIES

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.

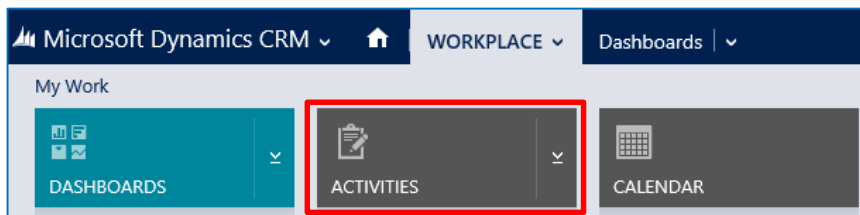
2.1. VIEWING YOUR ACTIVITIES

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

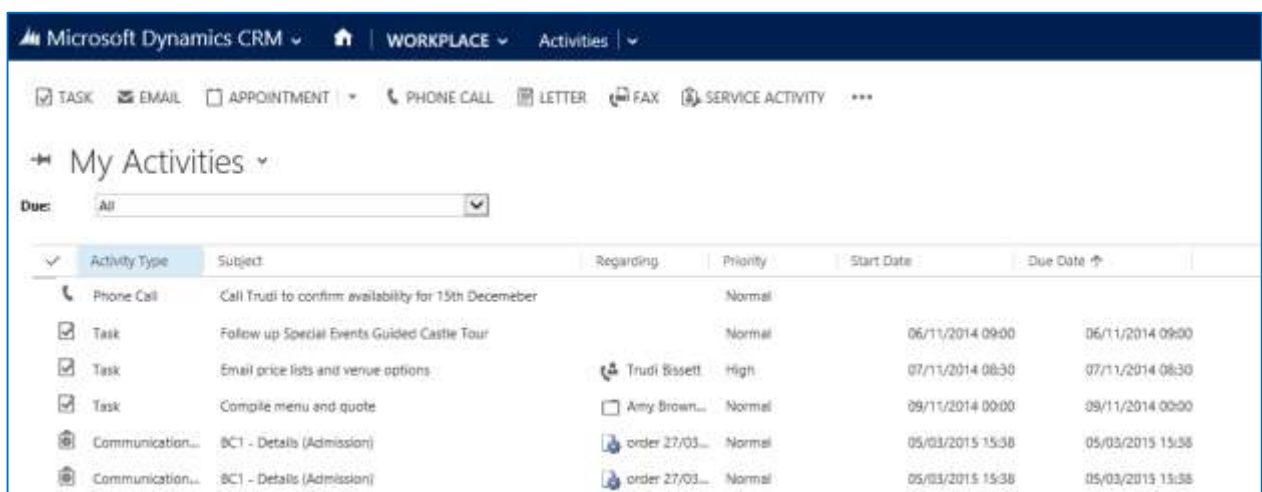
- Hover over or select the **Microsoft Dynamics CRM** tab in the navigation bar, from the drop down choose **Workplace**.



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

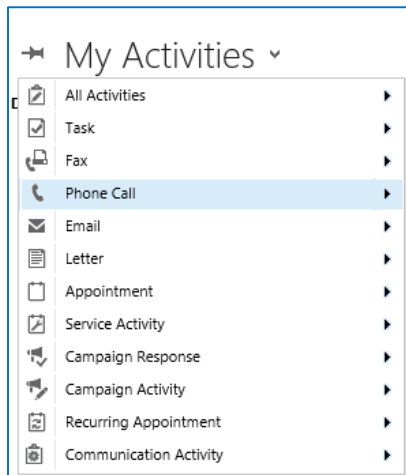


- The My Activities view will be displayed showing all Activities that have been assigned to you. To open up a specific Activity, double click on it.





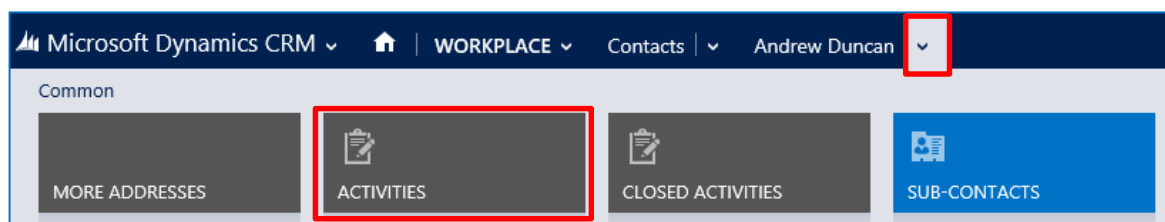
It is possible to change the view to particular type of Activity only, this can be done by selecting the small arrow next to the **My Activity**. A drop down will appear with all of the Activity types. Depending on which Activity is to be viewed, select the appropriate tab.



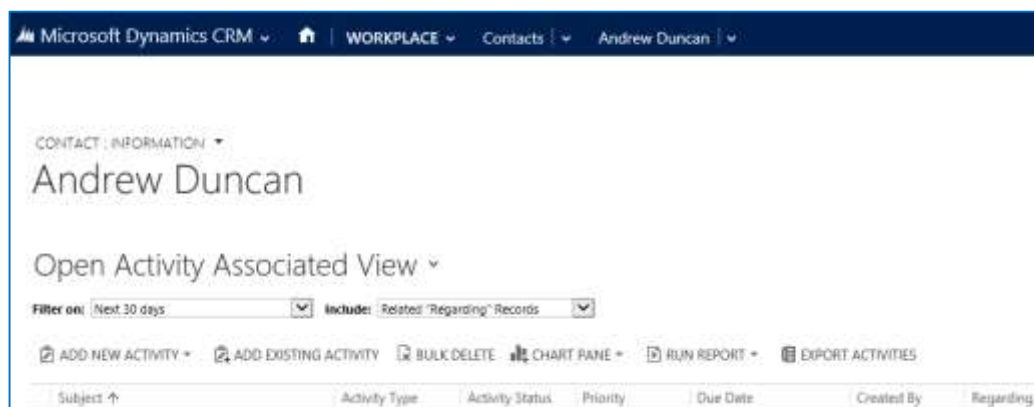
2.2. VIEWING OPEN ACTIVITIES LINKED TO A CONTACT OR AN ACCOUNT

To view the Activities related to a [Contact](#) or an [Account](#), complete the following instructions:

- Open the appropriate Contact or Account record in the form view.
- 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**.



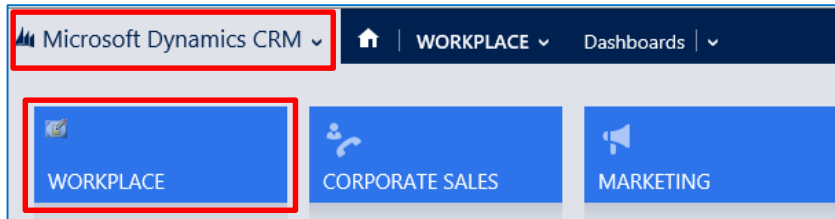
- The Open Activity Associated View will be show, displaying a list of open Activities linked to the Contact or Account.



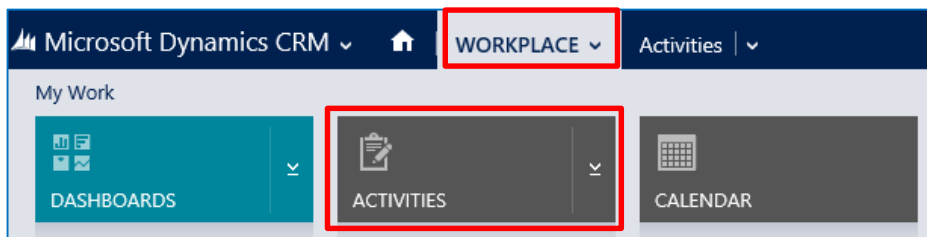
2.3. CREATING AN ACTIVITY

To create a new Activity complete the following instructions:

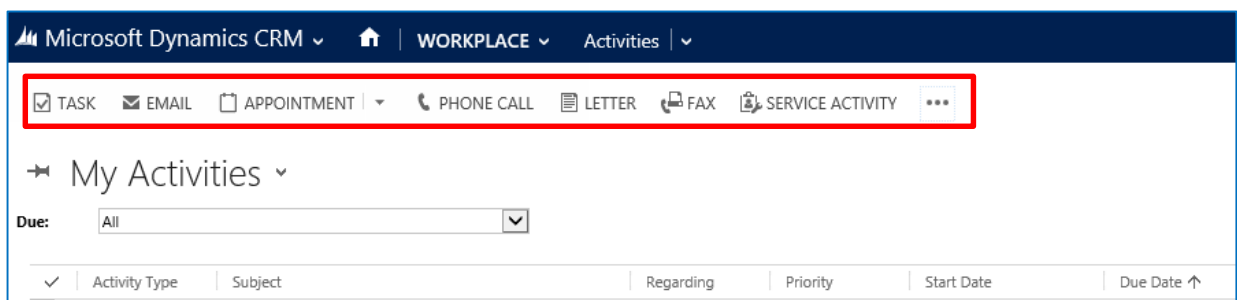
- a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace**.



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



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

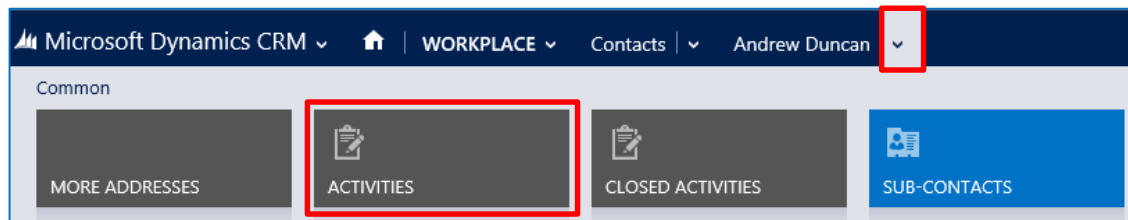


- d) Once the Activity type has been selected, the appropriate form will be displayed. Complete the requested information including:
- **Subject.** Enter a descriptive name for the Activity.
 - **Regarding.** Use to link the Activity to another record, for example an Account or Contact.
 - **Owner.** Your Microsoft CRM username will be automatically entered.
 - **Duration.** Enter the duration of the Activity.
 - **Due.** Enter when the Activity is due to be completed.
- e) Once the information is complete select **Save and Close** on the ribbon.

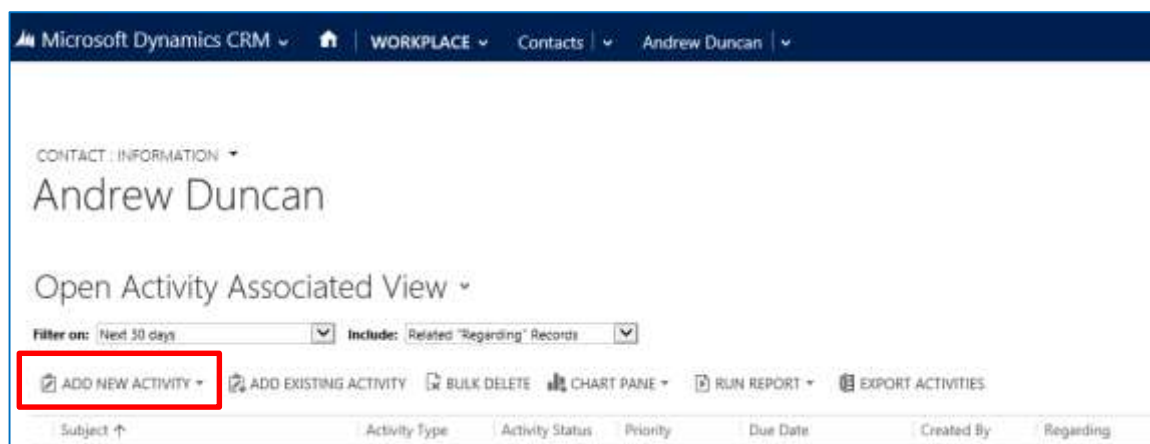
2.4. CREATING AN ACTIVITY FROM A CONTACT OR ACCOUNT

To create an Activity related to a [Contact](#) or [Account](#) the following instructions must be completed:

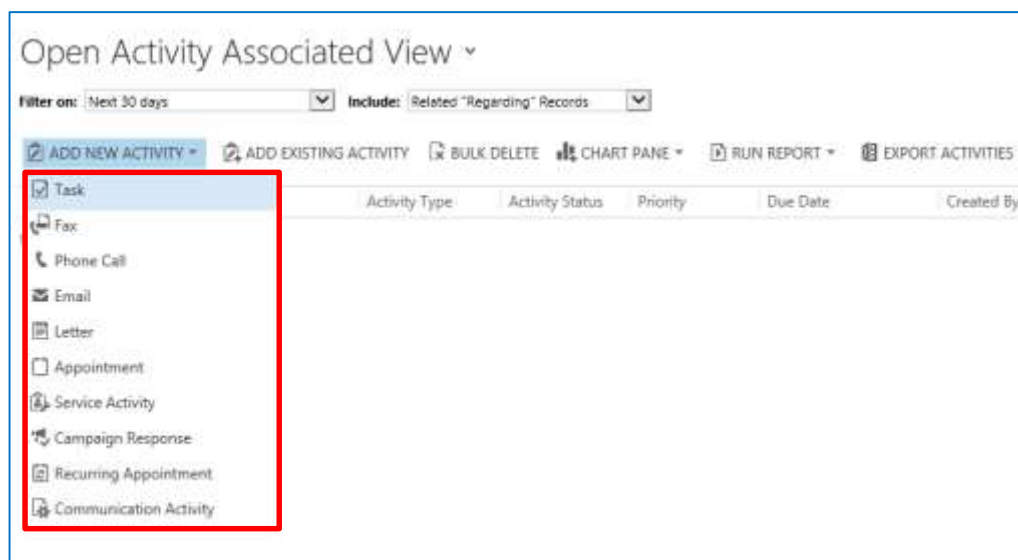
- Open the appropriate Contact or Account record in the form view.
- In the Contact or Record form, select the small arrow next to the name of the Contact or Account on the navigation bar. From the drop down select **Activities**.



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



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



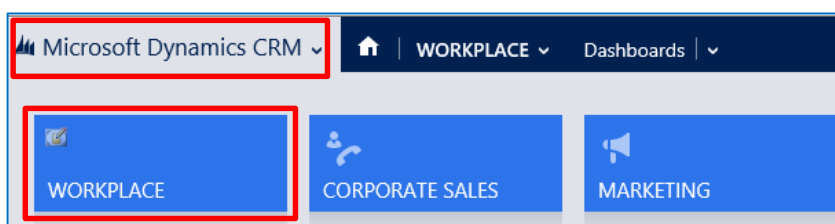
- e) Once the Activity type has been selected, the appropriate form will be displayed. Complete the requested information including:
- **Subject.** Enter a descriptive name for the Activity.
 - **Regarding.** Use to link the Activity to another record, for example event or person.
 - **Owner.** Your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

2.5. SET REGARDING FOR AN ACTIVITY

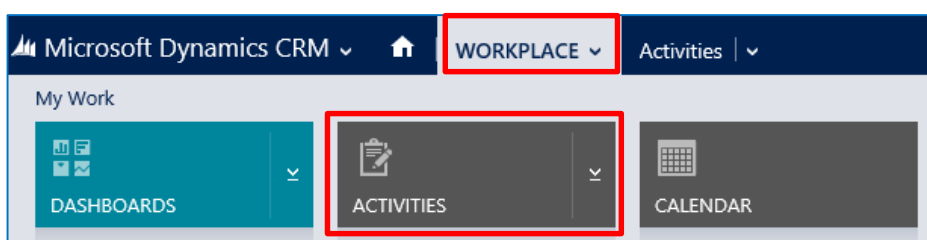
The Regarding field enables you to attach an Activity to an additional record within CRM, such as an Order, Opportunity or Case. By associating the Activity with an additional record, you can then see the Activity from any of those records. For example if the regarding field is set to an Opportunity,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

To set the regarding record for an Activity

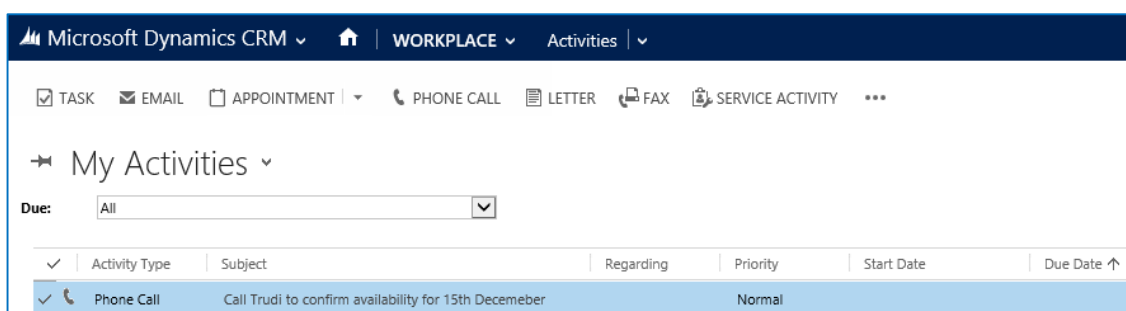
- a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace**.



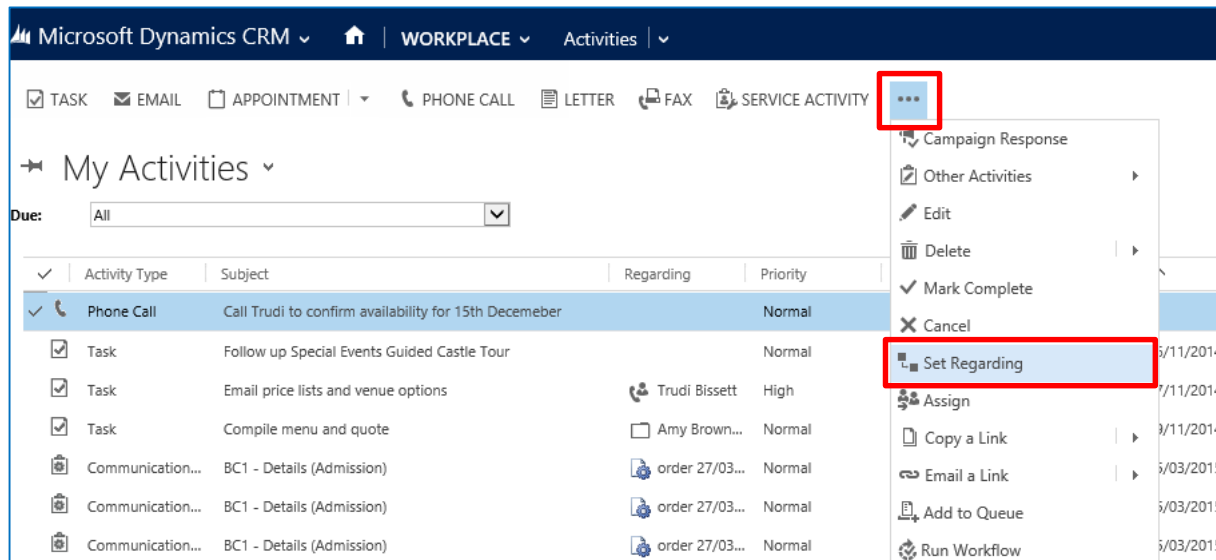
- b) In the navigation bar choose **Workplace** and from the drop down, select **Activities**.



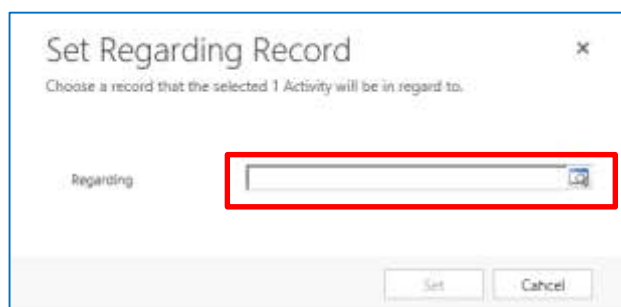
- c) The My Activities view will be displayed. Highlight and place a tick in the Activities that you wish to set the regarding for.



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



- e) The Set Regarding dialog will be displayed. Click the magnifying glass to open the Look Up Dialog and select the appropriate record. When using the Look Up Dialog, ensure the **Look For** field is set to the correct record type.

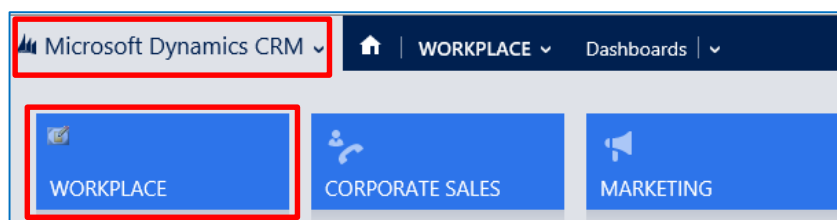


- f) Upon adding the appropriate record, select **Set** on the Set Regarding Record dialog.

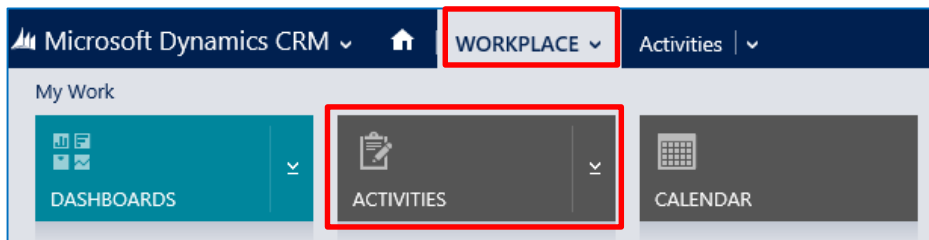
2.6. ASSIGNING AN ACTIVITY TO ANOTHER USER

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

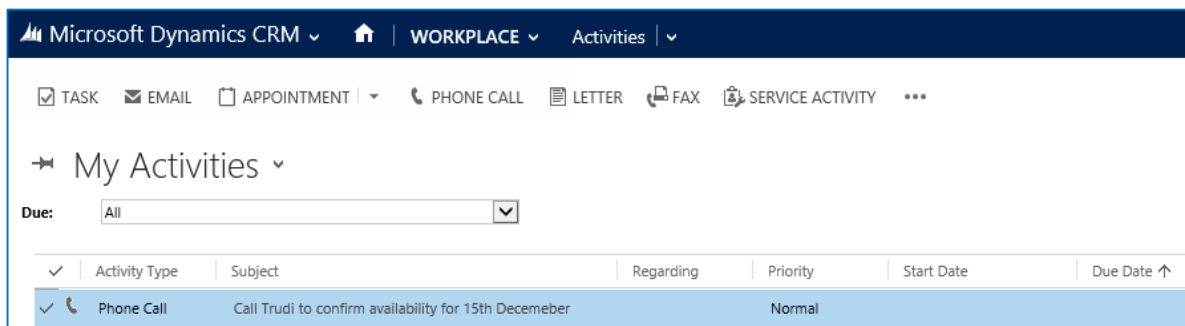
- a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace**.



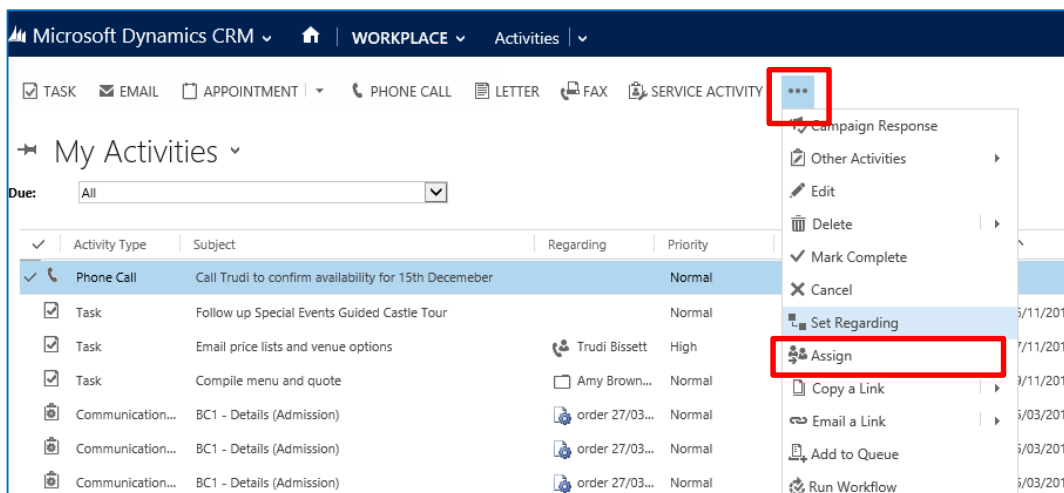
- b) In the navigation bar choose **Workplace** and from the drop down, select **Activities**.



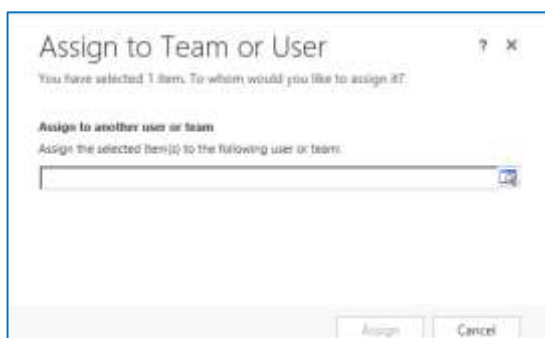
- c) The My Activities view will be displayed. Highlight and place a tick in the Activities that you wish to assign to another user.



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



- g) The Assign to Team or User dialog will be displayed. Use the magnifying glass to open the Look Up Dialog and select the appropriate record. When using the Look Up Dialog, ensure the **Look For** field is set to the correct record type.

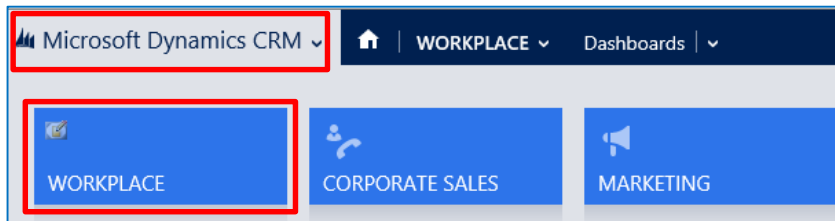


- d) Upon adding the appropriate record, select **Assign** on the Assign to Team or User dialog.

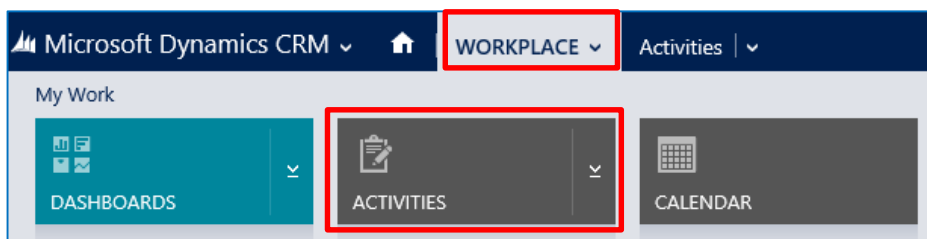
2.7. COMPLETING AN ACTIVITY

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

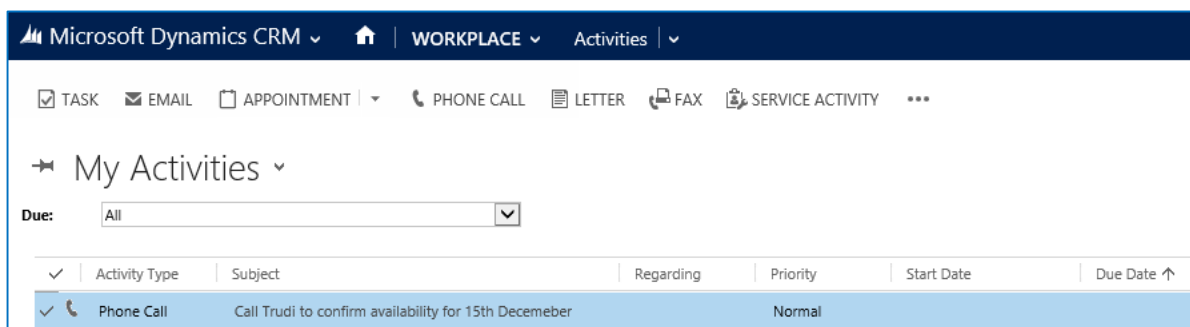
- a) Hover over or select the **Microsoft Dynamics CRM** tab on the navigation bar and from the drop down select **Workplace**.



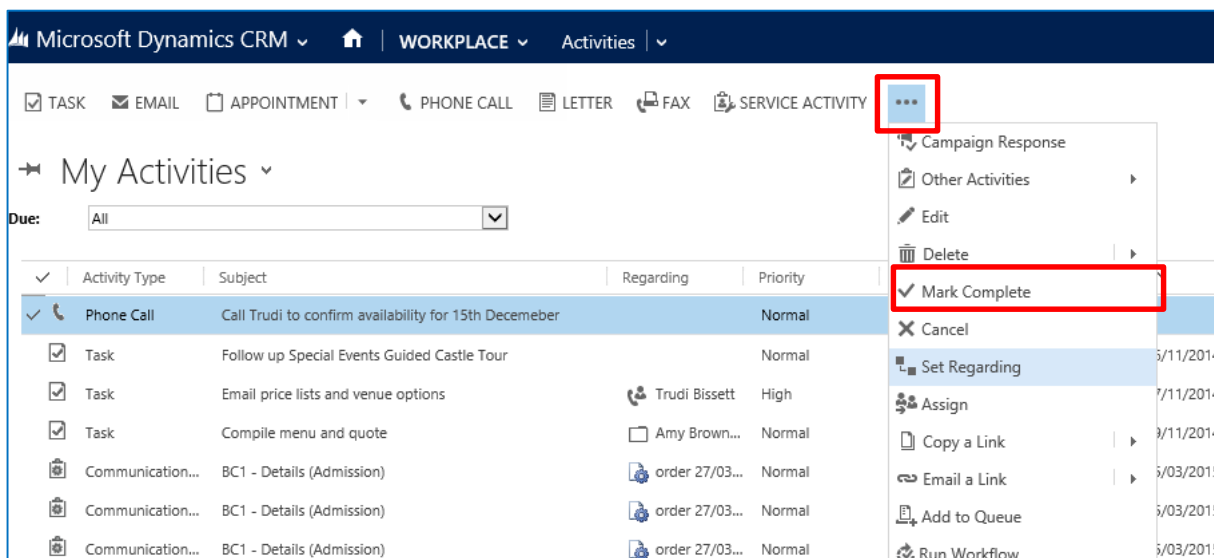
- b) In the navigation bar choose **Workplace** and from the drop down, select **Activities**.



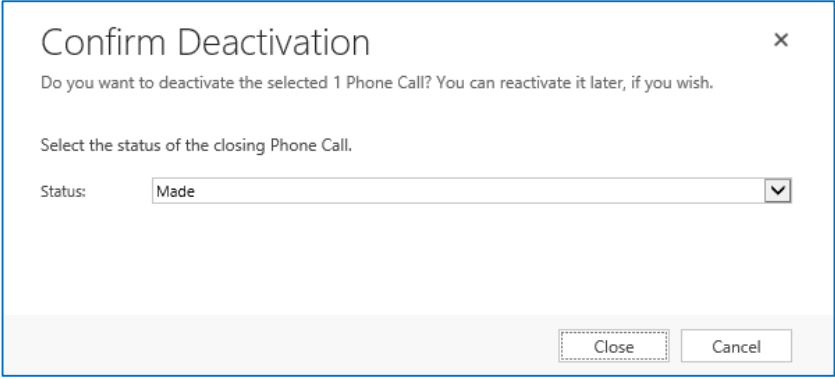
- c) The My Activities view will be displayed. Tick and highlight the Activities that you wish to mark as complete. It is only possible to mark the same type of Activities as complete in one attempt.



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



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



Confirm Deactivation [X]

Do you want to deactivate the selected 1 Phone Call? You can reactivate it later, if you wish.

Select the status of the closing Phone Call.

Status: Made [v]

[Close] [Cancel]

2.8. BREAKING CONTACT AND ACCOUNT RELATIONSHIPS

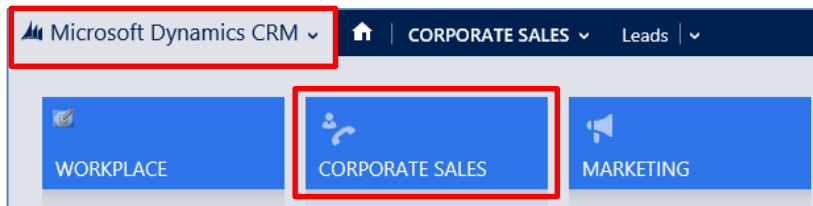
When you create an [Activity](#) record against a [Contact](#) that is linked to an [Account](#), a copy of the Activity will be automatically saved against the Account record. Consequently if the Contact – Account link is broken (because the employee leaves for example), a record of the Activity will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

3. CREATING PRODUCTS

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

To create a Product, complete the following instructions:

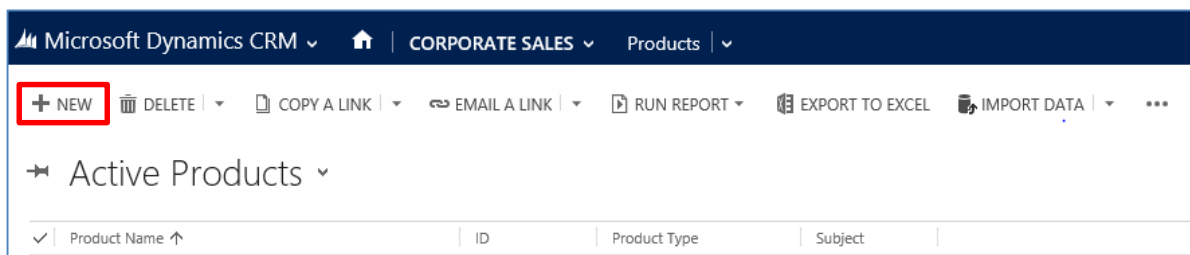
- a) Select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down select **Corporate Sales**.



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



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



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

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

Leave all other fields unchanged.

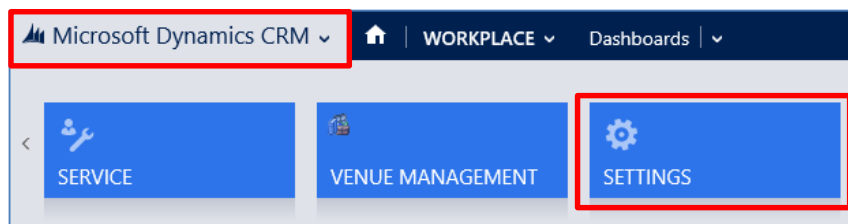
- When the details are complete, select **Save** on the ribbon. A warning will appear showing that a default price list has not been set. Until all the applicable Products have been created, the Default Price List does not need to be entered. Repeat the above steps until all of the Products have been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

4. CREATING PRICE LISTS

A Price List must be created to hold a number of [Products](#) that are available at a specific price.

To create a Price List, complete the following instructions:

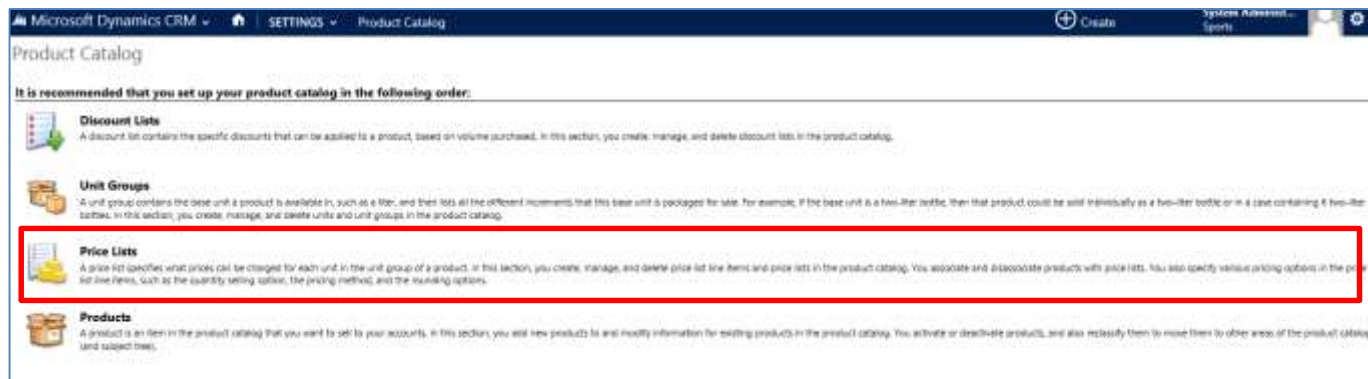
- Select or hover over the **Microsoft Dynamics CRM** tab in the navigation bar and from the drop down select **Settings**.



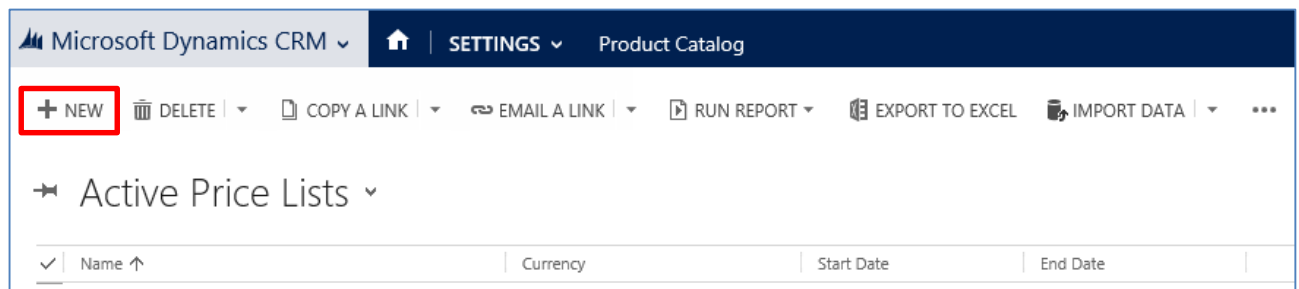
- Choose **Settings** in the navigation bar and from the drop down scroll across and select **Product Catalog**.



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



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



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

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

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

The screenshot shows the 'Price List: Room Hire' form in Microsoft Dynamics CRM. The 'Price List Items' link in the 'Related' section is highlighted with a red box. The form includes fields for Name, Start Date, End Date, Currency, and Description. The 'Price Lists' dropdown menu is also visible.

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

The screenshot shows the 'Price List: Room Hire' form with the 'Price List Items' ribbon tab selected. The 'Add New Price List Item' button is highlighted with a red box. The form displays a table of Price List Items with columns for Product and Unit.

Product	Unit
Hospitality - 2006 Lounge	Primary Unit
Hospitality - Green Room	Primary Unit
Hospitality - Sir Geoff Hurst Suite	Primary Unit
Hospitality - The Boardroom	Primary Unit
Hospitality - The Centre Circle Suite	Primary Unit
Hospitality - The Millennium Suite	Primary Unit
Hospitality - The Premier Lounge	Primary Unit
Knights of the Round Table School Event	Primary Unit
Sir Lancelot Venue Hire	Primary Unit

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

System Administ...
Sports

New Price List Item

SAVE SAVE & CLOSE + NEW FORM EDITOR

PRICE LIST ITEM : PRODUCT PRICE LIST

New Price List Item

General

Price List* Room Hire Currency Pound Sterling

Product* -- Discount List --

Unit* -- Quantity Selling Opt: * No Control

Pricing

Pricing Method* Currency Amount

Amount* --

Percentage --

Rounding

Rounding Policy --

Rounding Option --

Rounding Amount --

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

- 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

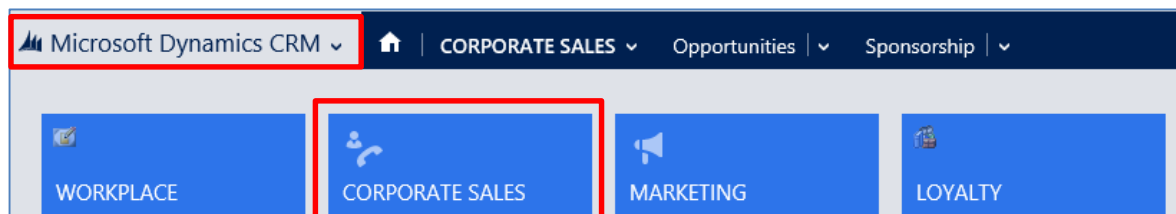
The Corporate Sales cycle describes the steps that are to be followed to turn a potential sale (A Lead) into a fulfilled order and invoice within CRM 2015. As each step is undertaken the form view will change, from a [Lead](#), [Opportunity](#), [Quote](#), [Order](#) and finally to [Invoice](#). The 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

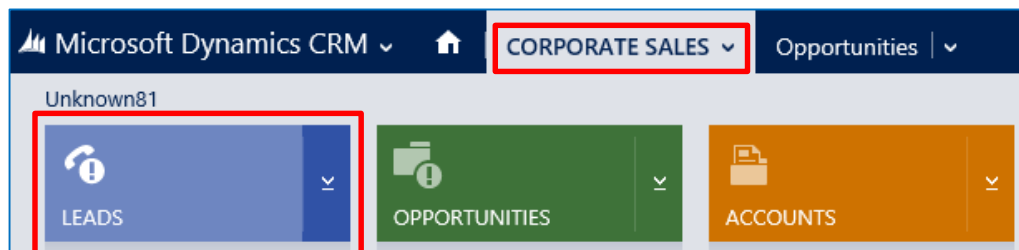
A Lead represents a potential sales contact and should be created to begin the Corporate Sales Cycle process.

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

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



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



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



- d) The progress bar at the top of the Leads form will allow the user to see which stage they are at in the sales process
- e) Complete the **Contact** area of the Lead form and if applicable enter the **Company** details.

LEAD ▾

New Lead

Qualify (Active) > De

Existing Contact? [click to enter](#)

Existing Account? [click to enter](#)

Purchase Timeframe [click to enter](#)

Estimated BUC

Purchase Proc

Identify Decis

Summary

CONTACT

Topic * Hospitality Box Hire

Name * Fred Perry

Job Title Consultant

Business Phone 0843564267

Mobile Phone 07842563

Email f.perry@green4.com

COMPANY

Company + Green 4 Solutions

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.

Microsoft Dynamics CRM ▾ | CORPORATE SALES ▾ | Leads ▾

+ NEW DELETE QUALIFY DISQUALIFY ADD TO MARKETING LIST

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

- c) Within the Opportunity form, the **Potential Customer** field will automatically be completed as this has been taken from the details entered into the [Lead](#). Additionally an **Opportunity Contact** can be added to the form as well as a **Description** of the Opportunity.
- d) Forecast Information such as the **Estimated Revenue** and **Close Date** of the Opportunity can also be entered.

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

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



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

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

STEP 3. CREATING A QUOTE FROM AN OPPORTUNITY

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

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

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

- c) If applicable additional information such as shipping information can also be added to the quote form.
- d) Within the Product table of the Quote form further discounts can be added easily by entering the amount as highlighted below. After entering any discounts, refresh the Quote form by selecting the save icon in the bottom right hand corner of the form.

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

Microsoft Dynamics CRM | CORPORATE SALES | Quotes | Hospitalsity Box Hire

NEW DELETE LOOK UP ADDRESS ACTIVATE QUOTE PRINT QUOTE FOR CUSTO... GET PRODUCTS ASSIGN

QUOTE

Hospitalsity Box Hire

Summary

Quote ID: QUD-01033-S850H9
Revision ID: 0
Name: Hospitalsity Box Hire

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Form Editor
Hospitalsity		Primary Unit	£1,000.00	1.00000	£0.00
					£1,000.00

Total Amount: £900.00

Run on Current Record

Quote

- f) The Quote will be generated:

Form

Select information that needs to be displayed in the form details area: Product ID, Quantity, Price per unit

1 of 1

100%

Find & Print

To:

Green 4 Solutions
16 - 17 Midland Court
Central Park
Lutterworth
Leicestershire, LE15 3LW

From:

System Administrator

Summary

Total Amount: £900.00
Quote ID: QUD-01033-S850H9
Shipping Method:
Requested Delivery Date:
Payment Terms:
Due By:

Date: 24/06/2015
Effective From:
Effective To:

Shipping Information

Ship To:
Bill To:

Details

Product ID	Product	Quantity	Price	Sub Total
G1006	Hospitalsity - The Premier Lounge	1.00	£1,000.00	£1,000.00

Quote Discount (%)	10.00 %
Total Tax	£0.00
Total	£900.00

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- 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 | Quotes | Good Prospect

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.

Microsoft Dynamics CRM | CORPORATE SALES | Quotes | 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 Booking

Use this quote to create an order.

Status Reason: Won

Date Won: 20/08/2015

Description

☒ Close Enquiry
 Actual revenue is: ☐ £
☒ Calculated from quotes
☐ Don'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 Dynamics CRM - CORPORATE SALES - Orders - Hospitality Box Hire

NEW DELETE CREATE RPOICE FULFILL BOOKING CANCEL BOOKING RECALCULATE LOOK UP ADDRESS

ORDER - Hospitality Box Hire

Total Amount: £900.00 Status: Active Status Reason: New Owner: System

Summary

Order ID: ORD-01013-000502

Name: Hospitality Box Hire

Currency: Pound Sterling

Price List: Basic Hire

Price Locked: Yes

SHIPPING DATES

Requested Delivery: --

Date Fulfilled: --

SHIPPING INFORMATION

Shipping Method: --

Payment Terms: --

Freight Terms: --

ADDRESSES

Bill To Address: --

Ship To: Address

Ship To Address: --

Product Name	Proportion	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
Hostpitality	Primary Unit	£1,000.00	1	£0.00	£1,000.00		

SALES INFORMATION

Opportunity: Hospitality Box Hire

Quote: Hospitality Box Hire

Potential Customer: Green 4 Solutions

DESCRIPTION

--

Detail Amount	£1,000.00
(-) Discount (%)	10.00
(-) Discount	--
Pre-Freight Amount	£900.00
(-) Freight Amount	--
(-) Total Tax	£0.00
Total Amount	£900.00

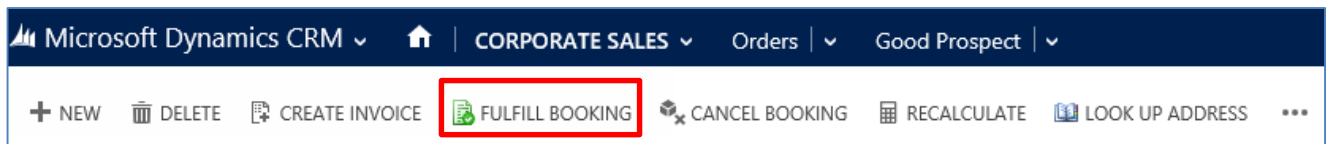
- k) Select the **Save** icon in the bottom right hand corner of the Order form.

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.



- 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.

The 'Fulfil Booking' window is displayed. It has a title bar 'Fulfil Booking' and a subtitle 'Provide fulfillment information for this booking.' The 'Status Reason' dropdown is set to 'Complete'. The 'Date Fulfilled' is set to '21/08/2015'. There is a text area for 'Description'. At the bottom, there are 'Fulfil' and 'Cancel' buttons, with 'Fulfil' highlighted by a red box.

- 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.

Microsoft Dynamics CRM - CORPORATE SALES - Invoices - Hospality Box Hire

INVOICE *
Hospality Box Hire

Summary

Invoice ID: INV-01006-S9C4K3
Name: Hospality Box Hire
Currency: Pound Sterling
Price List: Room Hire

Shipping Dates

Shipping Information

Shipping Method: --
Payment Terms: --

Addresses

Bill To Address: --
Ship To: --
Ship To Address: --

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
Hospality	Primary Unit	100000	£1,000.00	1.00	£0.00	£1,000.00	

SALES INFORMATION

Opportunity: --
Order: --
Customer: --
Description: --

Total Amount: £900.00
Status: Active
Status Reason: New

Detail Amount: £1,000.00
(-) Discount (%): (10.00)
(-) Discount: --
Pre-Freight Amount: £900.00
(-) Freight Amount: --
(-) Total Tax: £0.00
Total Amount: £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**.

Microsoft Dynamics CRM - CORPORATE SALES - Invoices - Hospality Box Hire

INVOICE *
Hospality Box Hire

Summary

Invoice ID: INV-01006-S9C4K3
Name: Hospality Box Hire
Currency: Pound Sterling
Price List: Room Hire

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
Hospality	Primary Unit	100000	£1,000.00	1.00	£0.00	£1,000.00	

SALES INFORMATION

Opportunity: --
Order: --
Customer: --
Description: --

Total Amount: £900.00

Run Report dropdown menu:

- Assign
- Share
- Email a Link
- Run Workflow
- Start Dialog
- Run Report
- Other Activities
- Form Editor

Invoice

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

File Edit Filter

Select information that needs to be displayed in the Item Details area: Product ID, Quantity, Price per unit

1 of 1 100% Print View

Invoice: Sports

To: Green 4 Solutions
16 - 17 Midland Court
Central Park
Lutterworth
Leicestershire, LE19 3LW

From: System Administrator

Summary

Total Amount: £900.00
Invoice ID: INV-01006-S9C4K3
Shipping Method: --
Date: 24/06/2015
Payment Terms: --

Shipping Information

Ship To: --
Bill To: --

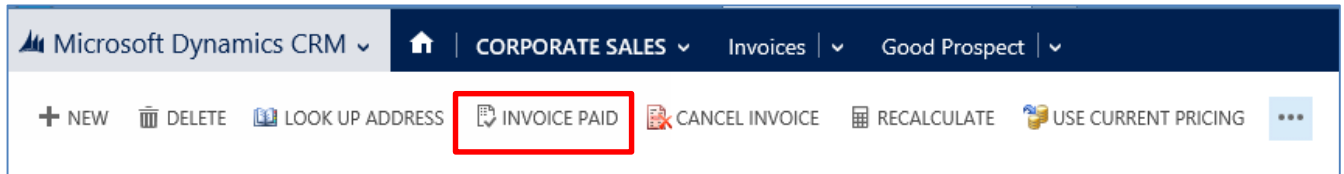
Details

Product ID	Product	Quantity	Price	Sub-Total
G1005	Hospality - The Premier Lounge	1.00	£1,000.00	£1,000.00

Invoice Discount (%): 10.00 %
Total Tax: £0.00
Total: £900.00

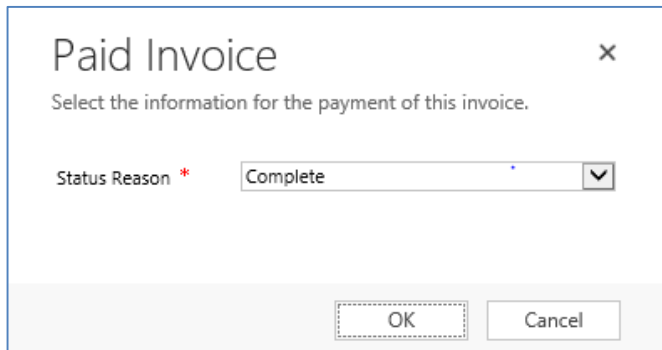
24/06/2015 10:39 Prepared by: System Administrator Page 1 of 1

- 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.



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon is set to 'CORPORATE SALES' > 'Invoices' > 'Good Prospect'. The 'INVOICE PAID' button, represented by a document icon with a checkmark, is highlighted with a red rectangular box. Other buttons visible include '+ NEW', 'DELETE', 'LOOK UP ADDRESS', 'CANCEL INVOICE', 'RECALCULATE', and '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**.



The screenshot shows a 'Paid Invoice' dialog box with a close button (X) in the top right corner. The text inside says 'Select the information for the payment of this invoice.' Below this, there is a 'Status Reason *' label followed by a dropdown menu currently showing 'Complete'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- 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 ***