



Microsoft
Dynamics CRM

User Guide

V2.0



Since this User Guide was written Microsoft have updated Dynamics CRM so there are some changes to the user interface that you need to be aware of...

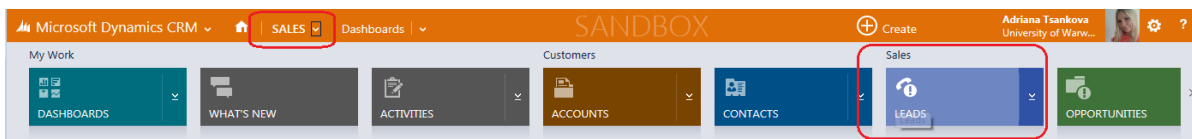
The top menu bar used to look like this:



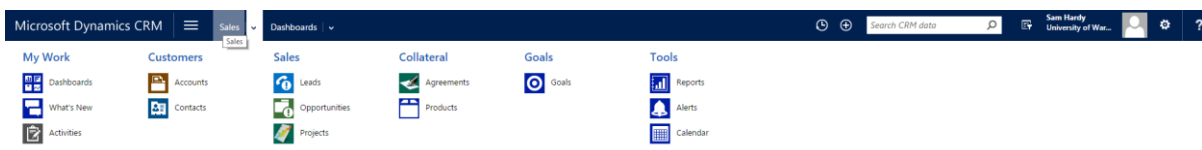
Now it looks like this:



The main menus at the top used to look like this:



Now they look like this:



You will find some other changes as well as you go through the guide and use the CRM system, but you should find it relatively easy to navigate your way around. If you do get stuck then ask an experienced user from your team for help, or contact the IT Services Helpdesk.

All faults reports or change requests should be made directly to the IT Services Help Desk.

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What is CRM & why do we have a University-wide CRM system?

Customer relationship management (CRM) is a term that refers to practices, strategies and technologies that companies use to manage and analyse customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers, assisting in customer retention and driving sales growth. CRM systems are designed to compile information on customers across different channels -- or points of contact between the customer and the company -- which could include the company's website, telephone, live chat, direct mail, marketing materials and social media. CRM systems can also give customer-facing staff detailed information on customers' personal information, purchase history, buying preferences and concerns.

- **What makes enterprise unified communications work,**
TechTarget SearchCRM.

Whilst organisation-wide CRM systems are common place in companies, they are rarely found in Universities. In fact, the University of Warwick is one of the first Universities to establish an organisation-wide CRM system to help us manage relationships with our partners and customers. Some University staff such as those working in Warwick Conferences and Jobs.ac.uk will work with customers of the University on a daily basis, whereas others may work with partners that wouldn't strictly be defined as customers. However, the principles of Customer Relationship Management are applicable to all these types of interactions with external organisations and people

Like most Universities, CRM at Warwick is fragmented with individual departments and staff managing their own relationships with externals. This has led to situations where we end up with multiple relationships with the same partner but no linkage between them. At best this can result in confusion but ultimately can lead to the University and its staff looking unprofessional, or worse still causing offence to one of our partners. Consider a situation where an alumnus of the University has suffered a bereavement and has asked not to be contacted by us for a period of time. The Alumni Team in the Development Office may be aware of this and take appropriate action to ensure that the person is not contacted, but other members of the University may not and therefore might go ahead and contact that person anyway. Having a centralised CRM system enables us to share key information across the University to help us make the most out of our relationships with external partners (and hopefully not cause them offence!).

The CRM system that we have chosen is Microsoft Dynamics CRM which is a cloud (internet) based system that interfaces directly with other Microsoft products such as Outlook and SharePoint. If you have been registered for a CRM account then you will find CRM in Office 365 which is most easily accessed through your University webmail. The Icon looks like this:



The rest of this user guide gives detailed instructions on how to use the main data entry aspects of the CRM system, as well as outlining the key procedures that should be followed when entering data to ensure its integrity.

Data Entry & Integrity

If we are to derive maximum benefit from having a University-wide CRM system then it is essential that all users follow some simple procedures when entering data to help ensure its integrity. Please carefully read and adhere to the following instructions when using the CRM system:

- Before creating a new record you must carry out a search to see if the record already exists. Use of a wildcard search may turn up the best results e.g. *IBM* will search for any records containing IBM.
- As a minimum all compulsory fields must be completed but it is good practise to fill in as much information as possible when you create a record.
- Whenever possible a Contact should have at least one method of contact recorded (e.g. phone number or email address); where possible both should be included.
- Phone numbers should include the country code in the + format e.g. +44 24 7652 3523 for a UK number.
- In addresses, the full country name should be entered e.g. United Kingdom not UK.
- The Account name that you enter must be the full registered name of the organisation. You can find details of the full name of UK companies by using the company information search on the Companies House website (www.companieshouse.gov.uk). Other countries have organisations like Companies House which should give you this information for non-UK companies.
- If you are unsure what primary industry you should assign an Account to then the associated Companies House record should state the Standard Industry Code (SIC) that the organisation is registered to. *Nb. Large companies that operate through multiple subsidiaries may be assigned to the SIC: ACTIVITIES OF HEAD OFFICE. If this is the case then you should use your judgement to decide which alternative SIC to use; it may help to look at the SICs of some of the subsidiary organisations.*
- Whenever possible include appropriate organisational hierarchies e.g. National Grid PLC is the Parent company of National Grid Electricity Transmission Ltd. These should both be added as separate Accounts with the appropriate Parent/Subsidiary flag set.
- Departments of organisations should not be entered as Accounts in their own right e.g. Warwick Ventures Limited is a subsidiary of the University of Warwick so should be recorded as a subsidiary Account, however Warwick Business School is a Department so would not be recorded as an Account in its own right.
- Often the Registered Office will be the appropriate address to record on a record and for UK companies this can be found on the Companies House record. However, sometimes the Registered Office is generic or the address of the organisation's accountant. If this is the case then you should try to use an alternative primary address, preferably the one from which the organisation carries out most of its activities. The Registered Office can be recorded as an additional address.
- Whilst you can sync data from [Social Insights](#) into the Account or Contact record you should first ensure that it is appropriate to do so. For example, financial values in Social Insights are in \$US but our CRM system is in £UK, so values will need to be manually converted using the current exchange rate before being used.
- Be aware that anything recorded in the [Notes](#) field is not searchable therefore cannot be displayed in reports or Advanced Find. Wherever possible interactions with Accounts and Contacts related to a business activity should be recorded as an Opportunity or a Project. See the [Opportunities](#) and [Projects](#) sections of this guide for more information.
- Please do not copy and paste emails into the Notes field of an Account or Contact, wherever possible emails should be tracked against the appropriate Opportunity or Project directly from Outlook Webmail or the Outlook client application. For more information see the [Activities and Notes section](#) in this guide.

Understanding Leads, Accounts, Contacts and Stakeholders

A lead represents any person or organisation that the university might have the potential to do business with. CRM is used to store data about that lead and usually creating a **Lead** record of information about a new lead is often the first step users take in the engagement process.

For instance, if your business unit receives a general inquiry over the phone or email, pick up business cards at a conference or an individual with whom you already have relationship with refers you to another individual for whom you do not know much about, you would use a Dynamics CRM lead record to collect and store information about that person or business.

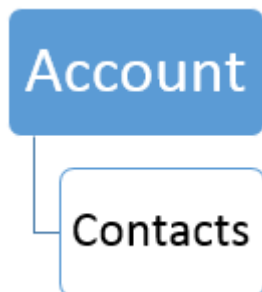
The **Lead** entity is often thought of as a temporary entity. As the engagement process progresses, a lead is converted / qualified to a **Contact**, **Account**, and **Opportunity**. This conversion identifies that a contact or company is no longer just a lead, but one which you are likely to do business with. The length of time your lead remains a lead is dependent on how the engagement cycle works within your business unit. You may nurture a lead for a long time before you convert it to an account, or this may happen quickly.

Stakeholders are **Contacts** (individuals, people) or **Accounts** (companies, organisations) which play a particular **Role** / have particular interest in Leads, Opportunities, Projects or Accounts.

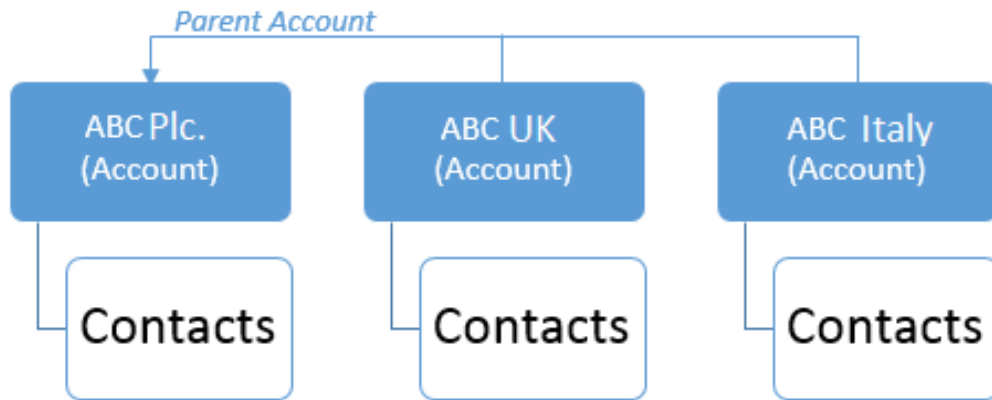
Adding stakeholders will ensure that you capture all involvements/interactions of each contact and/or account, will help build a detailed engagement history and provide target opportunities.

Relationship between Account and Contacts

The general concept is that the account is a single registered trading or charitable body and the contacts related to the account are those who work at that particular organisation.



Accounts can also be related to each other such that one account is the parent account / headquarters and others are subsidiaries.



Leads

Elements of a Lead

The lead record contains basic data such as a summary, full name of an individual, company name, contact information and details of how a lead was generated (called the **Lead Source**). The stakeholders section is where you record individuals internal to your business unit (or the wider university) that are associated with the Lead through different roles, that represent their stake / responsibilities in the further development of the relationship.

Microsoft Dynamics CRM | **SALES** | Leads | Graham Taylor | **SANDBOX** | Create | Adriana Tsankova (University of Warw...)

LEAD : WBS LEAD | **Graham Taylor** | Lead Source: External Referral | Rating: Warm | Status: New | Owner: Adriana Tsankova

Qualify (Active) | Develop | Propose | Close | Identify Project | Develop Project | Close Project | Next Stage

Summary

CONTACT & COMPANY DETAILS

Lead Summary	Potential interest in student consultancy
Full Name	Graham Taylor
Lead Source	External Referral
Company Name	Aberdeen Asset Management
Job Title	Director Business Development
Business Phone	0131125555
Mobile Phone	07557142509
Email	a.smith@aam.co.uk
Company Website	--
Rating	Warm

POSTS | **ACTIVITIES** | **NOTES**

All | Add Phone Call | Add Task | ...

- Adriana Tsankova**
WBS Presentation
Today
- Graham Taylor**
Had a phone call from Graham following my voice mail. He said he will be interested in me...
Completed by **Adriana Tsankova** Today
- Graham Taylor**
Left voice mail
Completed by **Adriana Tsankova** Today

KEY STAKEHOLDERS

Company Name	--
Primary Contact	--

STAKEHOLDERS

Type | Stakeholder Title ↑

No Stakeholder records found.

Further Details

DESCRIPTION

Have been referred to Graham and believe there is a potential interest in student consultancy project. Have not been in touch with him yet, planning to give him a call at the beginning of next week to make an introduction.

MARKETING INFORMATION

Marketing Materials	Send
Source Campaign	--
Last Campaign Date	--

CONTACT PREFERENCES

Preferred Method of	Email
Email	Do Not Allow
Bulk Email	Allow
Phone	Do Not Allow
Mail	Allow

SOCIAL INSIGHTS

Open

Summary

The Summary Tab includes multiple Sections: CONTACT & COMPANY DETAILS; POSTS, ACTIVITIES & NOTES; and KEY STAKEHOLDERS

Contact & Company Details

This is where you would record the general information about a Lead record

Lead Summary - short descriptive / meaningful title, by which the Lead can be identified when looked at high level, this should provide details of the idea.

Full Name - Person's names

Lead Source - where did you hear about this person / find their details?

Company Name - the company where the individual you have heard about works for.

Contact Details - enter if known, business & mobile phone, email address

Rating - how likely do you think it is that a relationship with this person will progress?

Posts Activities Notes

This is where you would record any Activities & Notes relevant to the particular Lead record.

Activities - Tasks, Appointments, Phone Calls, Emails or overall items relating to this Lead which need to be carried out by you or somebody else within your team.

Notes - General commentary notes which are relevant to the particular lead and will help provide useful background when the Lead is reviewed. The notes can also include file attachments.

Key Stakeholders

This is where stakeholders for the development of the particular Lead record can be recorded. CRM will pull some high level information for the Contact or Account if they already exists on the system and are matched within the Qualify Stage of the Process Flow Bar. Additional stakeholders if any can also be added by clicking the (+) button next to "STAKEHOLDERS". This will open a New Stakeholder form which should be filled in followed by the clicking the button "Save & Close" (see Stakeholders section)

Further Details

This is where you enter and manage the DESCRIPTION, MARKETING INFORMATION and CONTACT PREFERENCES

Description

Here you enter a more detailed overview of what you expect to achieve from a potential relationship with the Lead, how you plan to progress the relationship and anything else of relevance which would provide a useful overview to a third party viewing the record.

Marketing Information

In this section you can manage the Campaign preferences:

You can set up the field **Send Marketing Materials** (Send / Don't Send)

Add a **Source Campaign** in the scenario where the Lead has been generated from a marketing **Campaign** run by the University and recorded on CRM

Last Campaign Date - this field is locked since it will be auto-populated by CRM. It will display the last date this lead has been involved in Campaign Activity i.e. the last date this lead has received a marketing communication from within the CRM marketing module, from any CRM user. If the Lead has not received any such communications, the field will remain empty.

Contact Preferences

In this section you can manage the contact preferences by selecting the relevant options for:

Preferred Method of Contact - Select from the option set if known or leave as "Any".

Email - Allow or Do Not Allow; setting this option to "Do Not Allow" will prevent any emails being sent to this Lead from within CRM.

✖ At least one recipient does not have an email address or is marked as "Do Not Allow" email.

Bulk Email - Allow or Do Not Allow; setting this option to "Do Not Allow" will prevent inclusion of this Lead in Marketing Lists and stop marketing communications being sent. The default setting for Bulk Email should be Do Not Allow unless the Account or Contact have specifically opted in to receive bulk emails and marketing communications from us. This ensures that we are compliant with the latest European Data Protection legislation.

Marketing Materials – Allow or Do Not Allow; as with Bulk Email this should default to Do Not Allow unless the Account or Contact has specifically opted in to receive marketing materials from us.

Phone - Allow or Do Not Allow; a notification will be displayed within any Phone Call records related to a Lead marked as "Do not Allow".

✖ At least one recipient is marked as "Do Not Allow" phone.

Mail - Allow or Do Not Allow; a notification will be displayed if a Mail Merge activity / send a "Letter" activity is created.

Social Insights

Double clicking on the SOCIAL INSIGHTS Tab name will expand a tool which will automatically try and search for information about the Lead on a third party database, then display information which may be useful, especially if you do not know much about the individual or company recorded in your Lead record. Note that you must have already saved the Lead record at least once before you can use the Social Insights feature. (See Social Insights section)

On some occasions the displayed information may not be the one related to the company you have entered in the Company Name, as shown below. If this is the case then you have the option to select

"Not the Right Company?" and this will take you to a search screen where more Company suggestions will be retrieved for you. Hovering over the results with the mouse will pop up a summary of the company to help you identify the correct one. (Screen #2)
It is also possible that the company you have entered does not exist in the third party database.

The screenshot shows a CRM interface with a top navigation bar containing stages: Qualify (Active), Develop, Propose, Close, Identify Project, Develop Project, Close Project, and Next Stage. The main content area displays details for 'Aberdeen Asset Management', including job title 'Director Business Development', contact information, and a 'Rating' of 'Warm'. A 'STAKEHOLDERS' section is also visible. Below the main details, there are sections for 'Further Details', 'SOCIAL INSIGHTS', and 'CONTACT PREFERENCES'. The 'SOCIAL INSIGHTS' section shows a search for 'Academy of Ancient Music' with a 'Not the right company?' link.

Company Name * Aberdeen Asset Management

Job Title Director Business Development

Business Phone 0131125555

Mobile Phone 07557142509

Email a.smith@aam.co.uk

Company Website --

Rating Warm

STAKEHOLDERS

Type Stakeholder Title ↑

No Stakeholder records found.

Further Details

DESCRIPTION

Have been referred to Graham and believe there is a potential interest in student consultancy project. Have not been in touch with him yet, planning to give him a call at the beginning of next week to make an introduction.

MARKETING INFORMATION

Marketing Materials Send

Source Campaign --

Last Campaign Date --

CONTACT PREFERENCES

Preferred Method of Email

Email Allow

Bulk Email Allow

Phone Do Not Allow

Mail Allow

SOCIAL INSIGHTS

Academy of Ancient Music Not the right company?

OVERVIEW PEOPLE BUZZ ***

Ownership Private Company

Industry Telecommunications

32 Newnham Road Cambridge Cambridgeshire
Cambridge CB3 9EY
United Kingdom

Open

SOCIAL INSIGHTS

The screenshot shows a search results page for 'Aberdeen Asset Management'. It displays 20 results in a table with columns: Name, Location, Type, Revenue, and Employees. The first result is 'Aberdeen Asset Management plc' located in Aberdeen, United Kingdom, with a revenue of \$1,851.9M and 2,485 employees. A second result is also shown with a revenue of \$5.2M and 100 employees. A third result is shown with a revenue of \$1,851.9M and 2,485 employees. A fourth result is shown with a revenue of \$1,851.9M and 2,485 employees. A fifth result is shown with a revenue of \$1,851.9M and 2,485 employees. A sixth result is shown with a revenue of \$1,851.9M and 2,485 employees. A seventh result is shown with a revenue of \$1,851.9M and 2,485 employees. An eighth result is shown with a revenue of \$1,851.9M and 2,485 employees. A ninth result is shown with a revenue of \$1,851.9M and 2,485 employees. A tenth result is shown with a revenue of \$1,851.9M and 2,485 employees. An eleventh result is shown with a revenue of \$1,851.9M and 2,485 employees. A twelfth result is shown with a revenue of \$1,851.9M and 2,485 employees. A thirteenth result is shown with a revenue of \$1,851.9M and 2,485 employees. A fourteenth result is shown with a revenue of \$1,851.9M and 2,485 employees. A fifteenth result is shown with a revenue of \$1,851.9M and 2,485 employees. A sixteenth result is shown with a revenue of \$1,851.9M and 2,485 employees. A seventeenth result is shown with a revenue of \$1,851.9M and 2,485 employees. An eighteenth result is shown with a revenue of \$1,851.9M and 2,485 employees. A nineteenth result is shown with a revenue of \$1,851.9M and 2,485 employees. A twentieth result is shown with a revenue of \$1,851.9M and 2,485 employees.

We found multiple matches for: Aberdeen Asset Management

20 Results

Name	Location	Type	Revenue	Employees
Aberdeen Asset Management plc	Aberdeen, United Kingdom	Public Company (LON:ADN, LON:ADND)	\$1,851.9M	2,485
Aberdeen Ass			\$5.2M	100
Aberdeen Ass				180
Aberdeen Ass				0
Aberdeen Ass				0

Open

Lead Associated Records

Almost every record in CRM has Associated Views of other related records. In some cases these are available on the main record screen but to avoid over-cluttering of the screens, others are reviewed through the Associated Records area which can be accessed by clicking the arrow symbol next to the record name on the top CRM (blue or orange) ribbon. Accessing related records from within the associated records view will provide more details of what the records are, and give you the ability to export the data to Excel or use it to generate a variety of charts.

For leads we will be able to view:

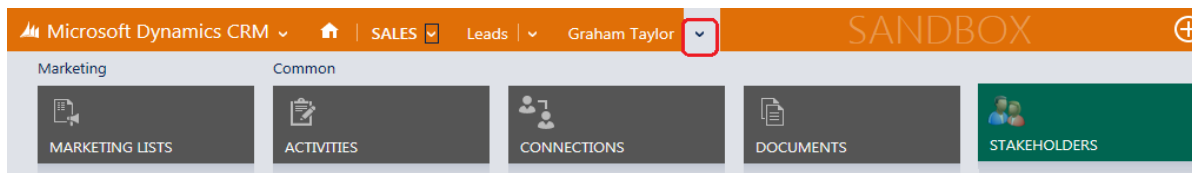
Marketing Lists - selecting the Marketing Lists tile will display all Marketing Lists in which the particular lead is included. They could appear in multiple lists, and the lead may have been included in them by a CRM user who is outside of your department/business unit.

Activities - this tile is useful for providing a more detailed overview of all activities related to the particular lead i.e. tasks, phone calls, emails, etc. Also there are easy filtering capabilities with which you can display, for example "Activities within the next 30 days", "Overdue activities", etc.

Connections - this tile will show any connections between this lead and any other object within CRM where the relationship is not quite direct. For example a Lead can be related to another lead with the role of "Colleagues". *At the University we also use connections to indicate a relationship between a Contact and an Account that is not their primary place of work. For example, Jane Smith may work for National Grid PLC but she may also be on the Council of the CBI West Midlands. This this case Jane would be a Contact at National Grid PLC but would be connected to CBI West Midlands with the role of Council Member. Connections are displayed in a grid on the Account or Contact Record, and will appear in search results.*

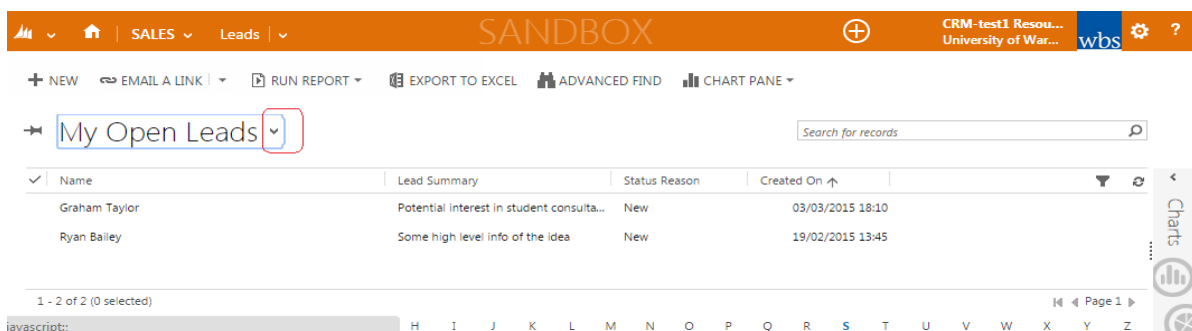
Documents - through this tile you can add SharePoint document library locations including any documents you are working on with regards to this particular lead.

Stakeholders - this tile will provide a more detailed overview of the stakeholders related to this particular lead, for example you can double click on the "Contact" column and open the actual Contact who is a stakeholder for this particular lead.

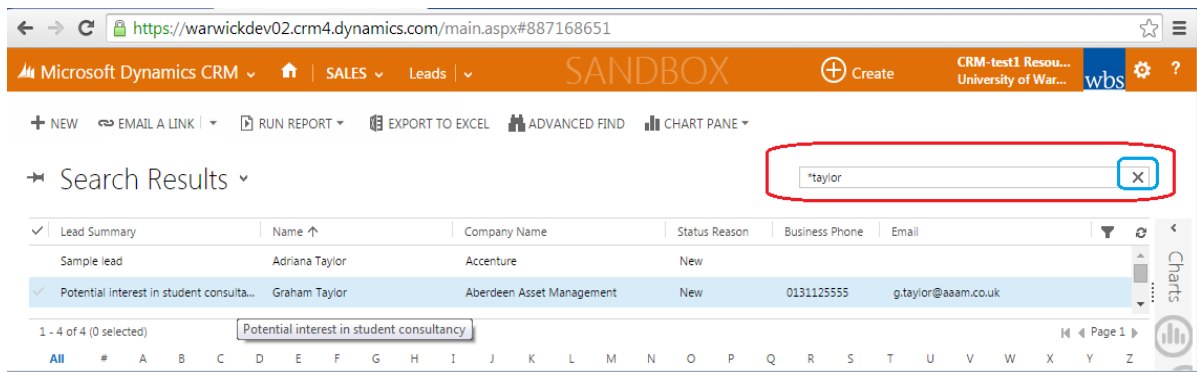


Create a Lead

1. Find the LEAD tile by navigating through: CRM HOMEPAGE -> SALES -> LEADS. A grid displaying "My Open Leads" should appear.



2. Check whether the Lead you wish to enter already exists by, (i) clicking the arrow next to "My Open Leads" to switch the grid view and display all active / current Leads **OR** (ii) use the search box to search for the Lead you wish to enter on the system. Using the Search box will look for all active existing records across the CRM, to locate Leads successfully you should type in the individual's name fully or partially combined with * (you can discard the search results by clicking on the X at the end of the search box)

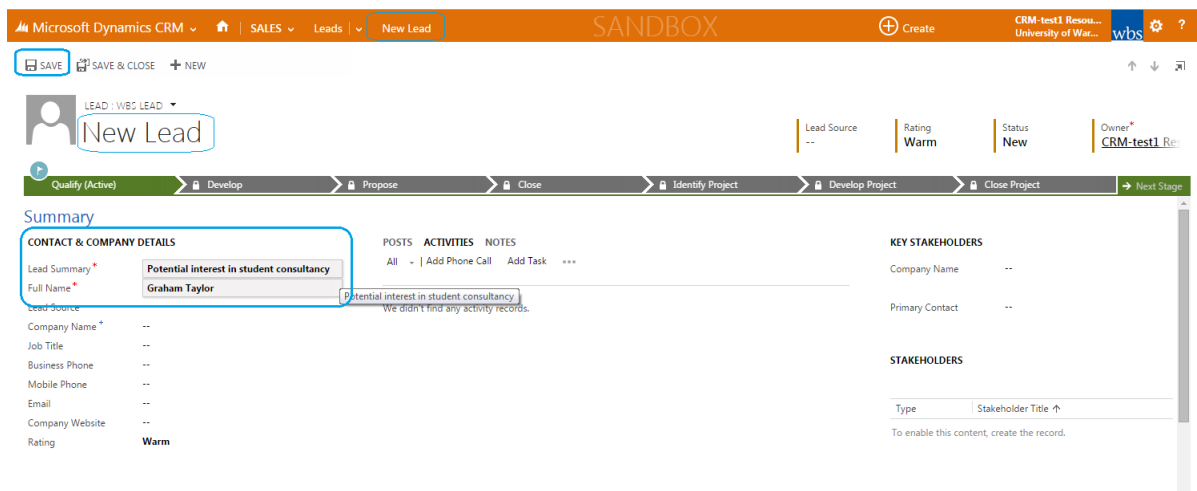


3.

a) If the Lead already exists, double click on the "Lead Summary" column or **between** the columns to open the record. You can review, update or contact the Owner of the Lead to find out more about progress of current engagements.

b) If the Lead does not exist, find the button "+New" located on the top left of the screen and a new Lead form will be presented on screen.

4. Enter the minimal required information - mandatory fields, and save the record by clicking on the "SAVE" button located on the top left of the form. *(Note: Some items functionalities become available after a new record is saved. For example, you will not be able to add stakeholders for this lead or access Social Insights before you save it)*



5. Once the record is saved, you can continue to enter information on the screen or close the screen if no further information is available at this point in time (you can always enter information at a later stage).

Microsoft Dynamics CRM | SALES | Leads | Graham Taylor | SANDBOX | Create | CRM-test1 Resou... University of War... wbs ?

NEW QUALIFY DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE EMAIL A LINK

LEAD : WBS LEAD

Graham Taylor

Lead Source: External Referral | Rating: Warm | Status: New | Owner: CRM-test1

Qualify (Active) Develop Propose Close Identify Project Develop Project Close Project Next Stage

Check if Contact exists click to enter
Check if Company exists click to enter
Est. Budget Value click to enter

Summary

CONTACT & COMPANY DETAILS

Lead Summary: Potential interest in student consultancy
Full Name: Graham Taylor
Lead Source: External Referral
Company Name: Aberdeen Asset Management
Job Title: Director Business Development
Business Phone: 0131125555
Mobile Phone: 07557142509
Email: g.taylor@aaam.co.uk
Company Website: --
Rating: Warm

POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task

We didn't find any activity records.

KEY STAKEHOLDERS

Company Name --
Primary Contact --

STAKEHOLDERS

Type Stakeholder Title

No Stakeholder records found.

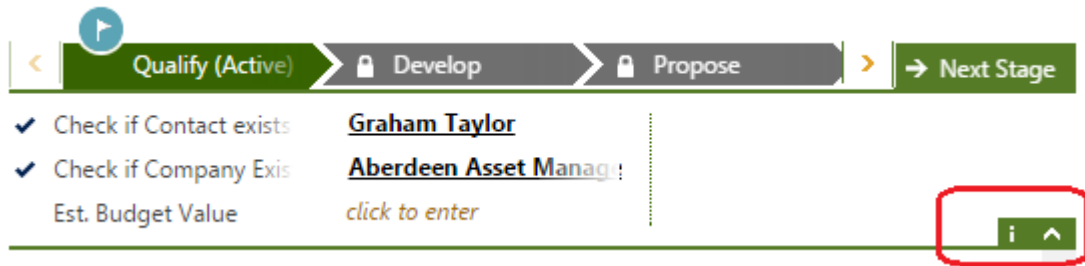
Open

6. After you create the record the Process Flow Bar will become available, and you should try and complete the steps below. Firstly however make sure the Green Process Flow Bar is expanded (if collapsed) by clicking on the Green Bar "Qualify (Active)", as shown below.




Summary


Tip! To collapse the Process Bar, click here:



- a. Check if Contact exists?- type partially the individuals name and press enter **OR** click on the magnifying glass, check if there is a Contact already on the system which is/looks like the same as the one you have specified in the Full Name field on the Lead.

No Results / No Contact Found


Qualify (Active)
Develop
Propose

Check if Contact exists 

Check if Company Exis
 Est. Budget Value

Summary

CONTACT & COMPANY DET

Lead Summary *
 Full Name *
 Lead Source
 Company Name +
 Job Title
 Business Phone
 Mobile Phone
 Email

Potential interest in student consulta
 Graham Taylor
 External Referral
 Aberdeen Asset Management
 Director Business Development
 0131125555
 07557142509
 g.taylor@aaam.co.uk

2 results + New

Look Up More Records


If a contact does not exist, leave the field empty. To achieve this, highlight the text you have typed in the field and press Backspace or Delete on the keyboard to clear it.



Qualify (Active)
Develop


Check if Contact exists 

Check if Company Exis *click to enter*

Est. Budget Value *click to enter*


Qualify (Active)
Develop

Check if Contact exists *click to enter* 

Check if Company Exis 

Est. Budget Value *click to enter*

(After Backspace / Del key has been pressed)

Existing Contact Found

If the Contact already exists, select it by clicking on the lookup field and make sure the existing Contact record is displayed within the field.

You can also, double click on the name of the Contact to review full Contact details, although CRM will display key information about the Contact under the KEY STAKEHOLDERS section within the Lead.

Qualify (Active)

Develop

Propose

Check if Contact exists

Check if Company Exists

Est. Budget Value

Summary

CONTACT & COMPANY DETAILS

Lead Summary *

Full Name *

Lead Source

Company Name +

Job Title

Business Phone

Mobile Phone

Email

Company Website

Rating

2 results

+ New

graham

Graham Taylor
graham.t@aaam.co.uk 0131125555

Graham Tomkins
graham.tomkins@uk... 0131125555

Look Up More Records

Potential interest in student consultancy

Graham Taylor

External Referral

Aberdeen Asset Management

Director Business Development

0131125555

07557142509

g.taylor@aaam.co.uk

--

Warm

Microsoft Dynamics CRM

SALES

Leads

Graham Taylor

SANDBOX

Create

CRM-test1 Resou...
University of War...

wbs

?

+ NEW

QUALIFY

DISQUALIFY

ADD TO MARKETING LIST

ASSIGN

SHARE

EMAIL A LINK

...

LEAD : WBS LEAD

Graham Taylor

Lead Source
External Referral

Rating
Warm

Status
New

Owner
CRM-test1

Qualify (Active)

Develop

Propose

Close

Identify Project

Develop Project

Close Project

Next Stage

✓ Check if Contact exists: Graham Taylor

Check if Company Exists: click to enter

Est. Budget Value: click to enter

Summary

CONTACT & COMPANY DETAILS

Lead Summary *

Full Name *

Lead Source

Company Name +

Job Title

Business Phone

Mobile Phone

Email

Company Website

Rating

Potential interest in student consultancy

Graham Taylor

External Referral

Aberdeen Asset Management

Director Business Development

0131125555

07557142509

g.taylor@aaam.co.uk

--

Warm

POSTS

ACTIVITIES

NOTES

All

Add Phone Call

Add Task

...

KEY STAKEHOLDERS

Company Name

--

Primary Contact
Graham Taylor

Email
graham.t@aaam.co.uk

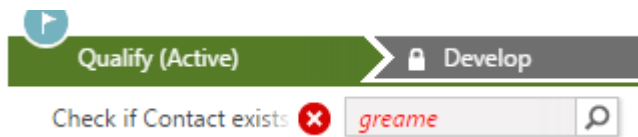
Business
0131125555

STAKEHOLDERS

+ -

Open

Tip! if the content of the field is underlined that means that the connection is made correctly to an existing Contact, if it is highlighted in red you will have to review the field



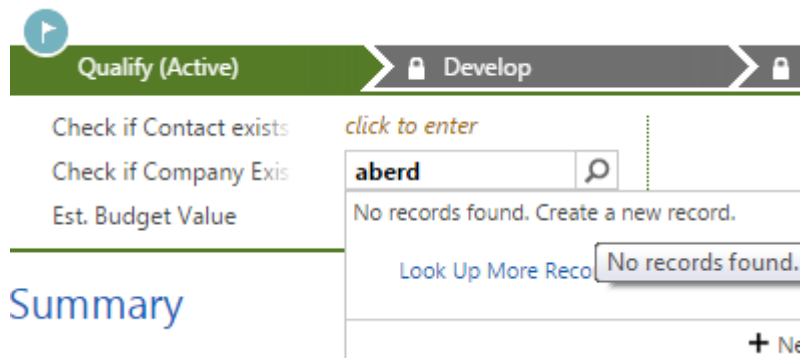
Qualify (Active) > Develop

Check if Contact exists ✖ greame 🔍

- b. Check if Account exists - type the first few letters of the Company's name and press enter **OR** click on the magnifying glass, check if there is an Account already on the system which is/looks like the same as the one you have specified in the Company Name field on the Lead.

No Results / No Account Found

If the Account does not exist, leave the field empty. To achieve this, highlight the text you have typed in the field and press Backspace or Delete on the keyboard to clear it.



Qualify (Active) > Develop

Check if Contact exists *click to enter*

Check if Company Exist aberd 🔍

Est. Budget Value

No records found. Create a new record.

Look Up More Records No records found.

Summary

+ New

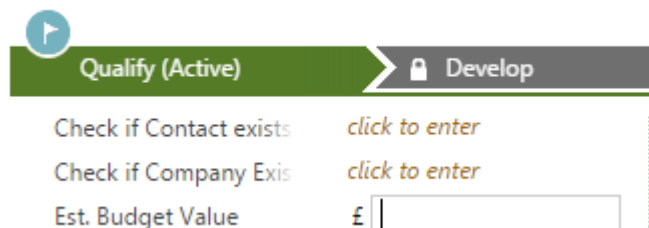


Qualify (Active) > Develop

Check if Contact exists *click to enter*

Check if Company Exist aberd 🔍

Est. Budget Value *click to enter*



Qualify (Active) > Develop

Check if Contact exists *click to enter*

Check if Company Exist *click to enter*

Est. Budget Value £

(After Backspace / Del key has been pressed)

Existing Account Found

If the Account already exists, select it by clicking on the lookup field and make sure the existing Account record is displayed within the field. You can also, double click on the name of the Account to review full Account details, although CRM will display key information about the Account under the KEY STAKEHOLDERS section within the Lead.

Qualify (Active) | **Develop** | **Propose**

Check if Contact exists *click to enter*

Check if Company Exists **aberd**

Est. Budget Value Aberdeen Asset Management

Summary

CONTACT & COMPANY DETAILS 1 result [Look Up More Records](#) [Aberdeen Asset Mana](#)

Lead Summary* **Potential interest in student consulta** All

Full Name* **Graham Taylor**

Lead Source **External Referral** We c

Company Name+ **Aberdeen Asset Management**

Job Title **Director Business Development**

Business Phone **0131125555**

Mobile Phone **07557142509**

Email **g.taylor@aaam.co.uk**

Microsoft Dynamics CRM | SALES | Leads | Graham Taylor | **SANDBOX** | Create | CRM-test1 Resou... University of War... | wbs

+ NEW | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | EMAIL A LINK | ...

LEAD: WBS LEAD

Graham Taylor | Lead Source: External Referral | Rating: Warm | Status: New | Owner: CRM-test1 Re

Qualify (Active) | **Develop** | **Propose** | **Close** | **Identify Project** | **Develop Project** | **Close Project** | **Next Stage**

Check if Contact exists *click to enter*

Check if Company Exists **Aberdeen Asset Ma**

Est. Budget Value *click to enter* Aberdeen Asset Management

Summary

CONTACT & COMPANY DETAILS

Lead Summary* **Potential interest in student consulta**

Full Name* **Graham Taylor**

Lead Source **External Referral**

Company Name+ **Aberdeen Asset Management**

Job Title **Director Business Development**

Business Phone **0131125555**

Mobile Phone **07557142509**

Email **g.taylor@aaam.co.uk**

Company Website **--**

Rating **Warm**

KEY STAKEHOLDERS

Company Name **Aberdeen Asset Management**

Aberdeen Asset Management

Email **contactus@aaam.co.uk**

Phone **0131454796597**

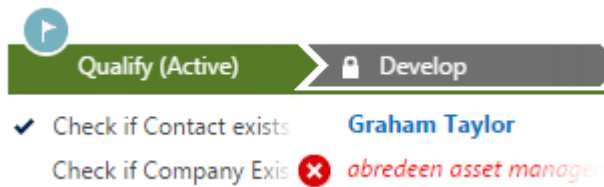
Relationship Ty: **STRATEGIC**

Owner* **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Open

Tip! if the content of the field is underlined that means that the connection is made correctly to an existing Account, if it is highlighted in red you will have to review the field as shown below

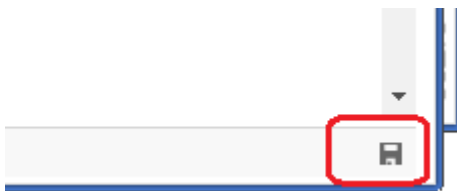


c. Budget - enter indicative budget value; if not known you can leave blank

7. You can now save and close the record, continue updating it (see Update Lead section), return to home page or close the application.



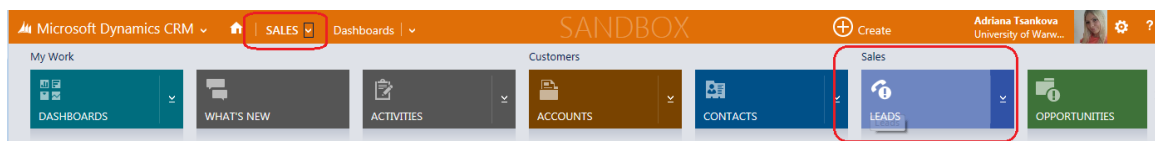
Tip! Once a new record is saved, the SAVE button on the top left of the form is no longer present. To save further changes or view advisory notifications look at the bottom right of the window. An auto-save feature runs every 30 seconds preventing data being lost, however you can choose to save the record by clicking on the SAVE icon pictured below.



Update a Lead

General Lead Information

1. Find the LEAD tile by navigating through: CRM HOMEPAGE -> SALES -> LEADS



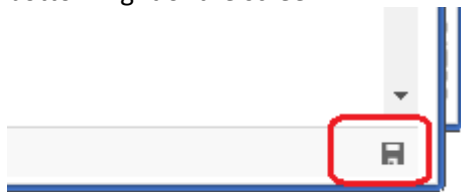
2. A grid displaying "My Open Leads" should appear. Switch the grid view to display all active / current Leads or use the search box to look for the Lead you wish to update (using the Search box will look for all existing active records on CRM).
3. Double click on the "Lead Summary" column or between the columns to open the record.

✓	Name	Lead Summary	Status Reason	Created On ↑
✓	Graham Taylor	Potential interest in student consulta...	New	03/03/2015 18:10
	Ryan Bailey	Some high level info of the idea	New	19/02/2015 13:45

1 - 2 of 2 (1 selected) Page 1

Alphabetical: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

4. Fill in any additional fields or amend the existing information and click on the SAVE icon on the bottom right of the screen.

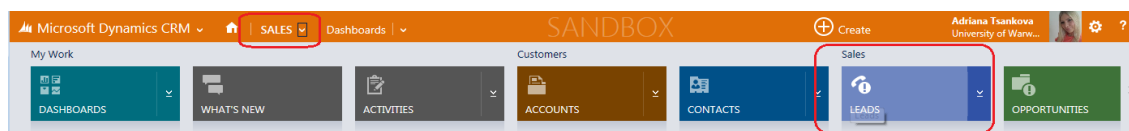


5. You can close the screen/return to previous area - Leads / go to homepage or navigate to a different area within the Sales menu.



Add Stakeholders

1. Find the LEAD tile, by navigating through: CRM HOMEPAGE -> SALES -> LEADS



2. A grid displaying "My Open Leads" should appear. Switch the grid view to display all active / current Leads or use the search box to look whether the Lead you wish to enter already exists on the system
3. Double click on the "Lead Summary" column or between the columns to open the record.

CRM interface showing a list of leads under the heading "My Open Leads". The interface includes a top navigation bar with "SALES" and "Leads" tabs, and a sidebar with "Charts". The lead list has columns for Name, Lead Summary, Status Reason, and Created On. The first lead, Graham Taylor, is selected, and its summary "Potential interest in student consulta..." is highlighted. The second lead, Ryan Bailey, has a summary "Some high level info of the idea".

Name	Lead Summary	Status Reason	Created On
Graham Taylor	Potential interest in student consulta...	New	03/03/2015 18:10
Ryan Bailey	Some high level info of the idea	New	19/02/2015 13:45

1 - 2 of 2 (1 selected) Page 1

ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

4. Find the section called **KEY STAKEHOLDERS** and click on the (+). This will pop up a NEW Stakeholder form in a new browser window.

KEY STAKEHOLDERS

Company Name **Aberdeen Asset Management**

Aberdeen Asset Management

✉ Email **contactus@aaam.co.uk**

☎ Phone **0131454796597**

Relationship Type **STRATEGIC**

Owner* **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact **Graham Taylor**

✉ Email **graham.t@aaam.co.uk**

☎ Business **0131125555**

STAKEHOLDERS



Type	Stakeholder Title ↑
------	---------------------

No Stakeholder records found.

5. Fill in the form by specifying the:

- Scope - **Contact** OR **Company**

General

Scope	Contact
Role *	Company
Lead *	<u>Graham Taylor</u>

- Type - **Internal** (any Contact who is a University of Warwick staff member whom may be involved)
- OR **External** (any Contact who **is not a** University of Warwick staff member whom may be involved)



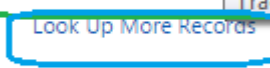
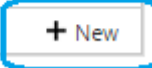
Note: Stakeholders with a Scope of "**Company**" are always of a Type "**External**" and therefore the system will not ask you to specify Type.

General

Scope	Contact
Type *	Internal
Contact *	External
Role *	-- Internal
Lead *	<u>Graham Taylor</u>

- **Contact OR Company** - start typing the name of the individual or Company in the available field followed by clicking on the magnifying glass, you can also use " * " for partial word searching or click on the "Look up More Records" option. Alternatively, if the Contact does not exist, you can select the "+ New" button located at the bottom right of the search results drop down area to create a new one.

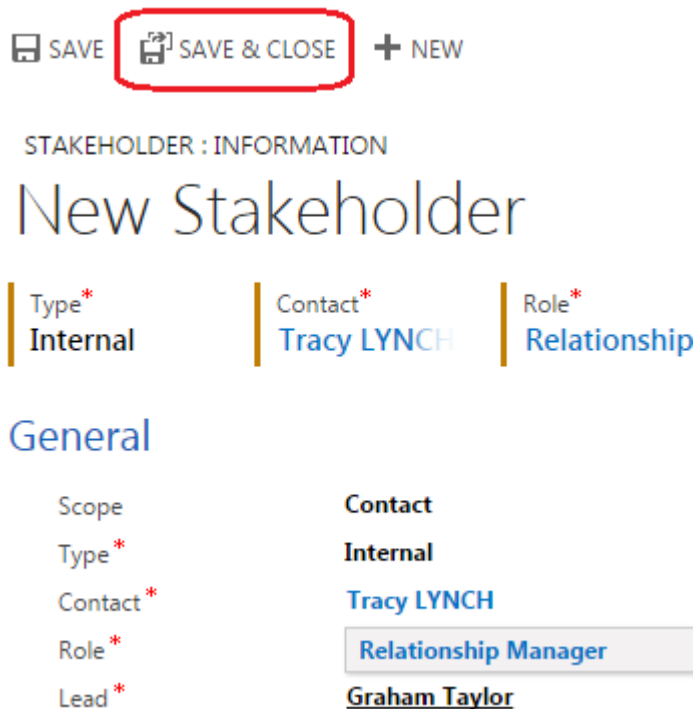
General

Scope	Contact
Type *	Internal
Contact *	<u>tracy</u> 
Role *	Tracy LOAKES Domestic Assistant Warwick Accom...
Lead *	Tracy LYNCH Relationship Mana... Warwick Business ...
STAKEHOLDER DETAILS	 Tracy LYNCH
	
	2 results 

- **Role** - to specify what role the particular Contact or Company takes with regards to this Lead, similarly to other fields, start typing a potential role, you can also use " * " for partial word searching or click on the "Look up More Records" option. Alternatively, if the Role does not exist, you can select the "+ New" button located at the bottom right of the search results drop down area to create a new one. (**Note:** if you enter a new role, please, be aware that it will be available to every other user within CRM, so ensure you have in mind general data quality principles)

Tip! Recommended search for the role is: selecting the magnifying glass at the very first instance without typing anything in the field, this will display a list of available roles which may be quicker than trying to type the exact wording of a role and checking if it exists.

6. Once you fill in the New Stakeholder form, select the "SAVE & CLOSE" button.



SAVE SAVE & CLOSE + NEW

STAKEHOLDER : INFORMATION

New Stakeholder

Type*	Contact*	Role*
Internal	Tracy LYNCH	Relationship

General

Scope	Contact
Type*	Internal
Contact*	Tracy LYNCH
Role*	Relationship Manager
Lead*	Graham Taylor

7. You will be presented with the last screen you were viewing - the Lead record for which you are adding a stakeholder to and the Stakeholder you have added should now be visible in the Key Stakeholders section.

KEY STAKEHOLDERS

Company Name **Aberdeen Asset Management**

Aberdeen Asset Management

Email **contactus@aaam.co.uk**

Phone **0131454796597**

Relationship Type **STRATEGIC**

Owner* **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact **Graham Taylor**

Email **graham.t@aaam.co.uk**

Business **0131125555**

STAKEHOLDERS



Type	Stakeholder Title ↑
Internal	Tracy LYNCH- Relationship Manager - Graham Taylor

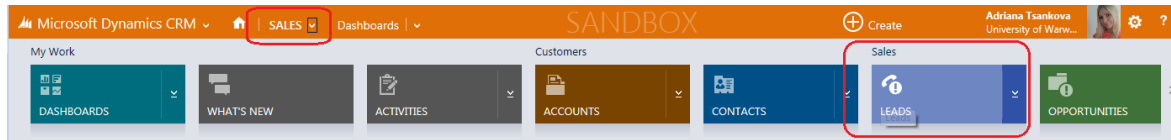
8. Fill in or amend any further information if required and click on the SAVE icon on the bottom right of the screen.
9. You can close the screen/return to previous area - Leads / go to homepage or navigate to a different area within the Sales menu.



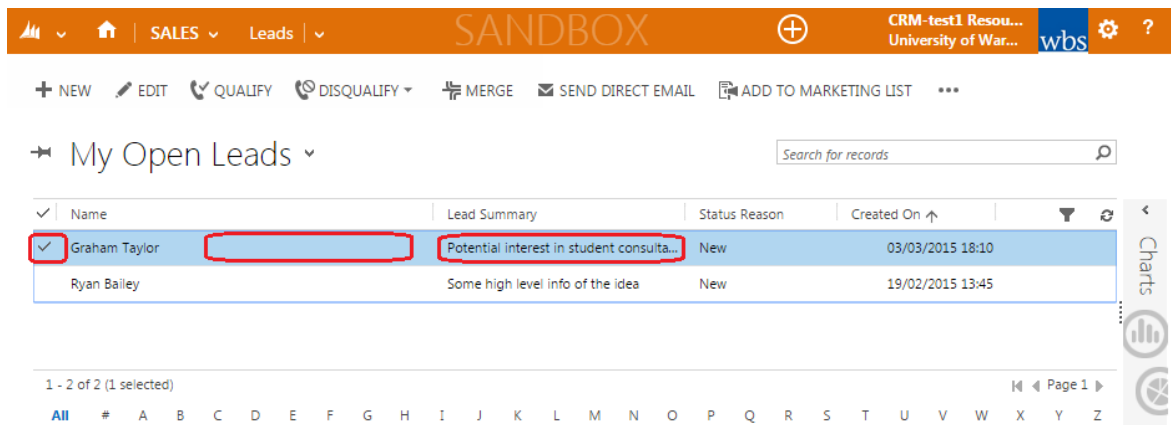
Tip! If you cannot find a stakeholder role which best describes the stake/responsibility in a particular context, you can add your own specific Role, however note that it will be available for everybody using CRM and it has to be aligned with quality data entering policies.

Disqualify a Lead

1. Find the LEAD tile by navigating through: CRM HOMEPAGE -> SALES -> LEADS



2. A grid displaying "My Open Leads" should appear. Switch the grid view to display all active / current Leads or use the search box to look for the Lead you wish to Disqualify.
3. Double click on the "Lead Summary" column or between the columns to open the record.

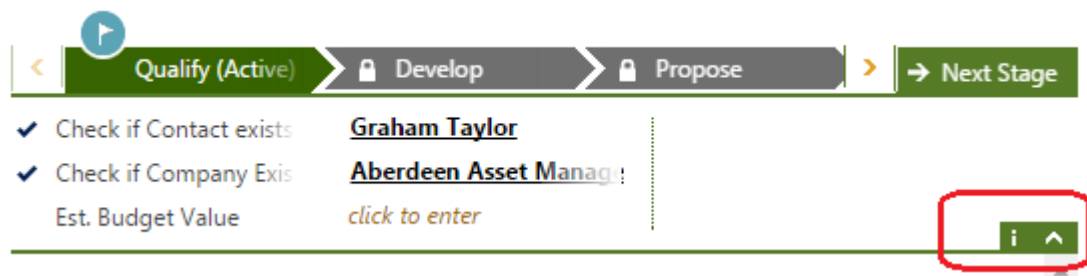


4. Expand the Green Process Flow Bar (if collapsed) and complete the steps in the "Qualify" stage. You can do this by clicking on the Green Bar "Qualify (Active)", as shown below.



Summary

Tip! To collapse the Process Bar click here:



5. Enter a short summary describing the situation of why this Lead has to be disqualified in the **NOTES & ACTIVITIES** section. NOTES & ACTIVITIES -> Select NOTES -> Click on the wording "Enter a note" and start typing in the inline form, entering Note title and body -> Done

POSTS ACTIVITIES **NOTES**

Enter a note

No Notes found.

POSTS ACTIVITIES **NOTES**

No Longer Interested...

No Longer interested because...

Attach Done

No Notes found. Done

6. Find the "Disqualify" button on the top left ribbon of the form and select it.
7. Select a disqualify reason from the drop-down menu.

+ NEW QUALIFY **DISQUALIFY** ADD TO MARKET

LEAD : WBS

Grah

Lost
Cannot Contact
No Longer Interested
Canceled

As No Longer Interested

8. The record will be archived (read-only) and Status of "Disqualified" will be displayed in the footer of the form, another status field (also known as Status Reason) will display the reason why this Lead has been disqualified.

Microsoft Dynamics CRM interface showing a lead record for **Graham Taylor**. The lead is in the **Qualify (Active)** stage. The status is **No Longer Interested** and the rating is **Warm**. A note indicates the lead is no longer interested because of a CRM-test1 Resource on Today 1:55:01 PM. The lead is marked as **Disqualified**.

CONTACT & COMPANY DETAILS

- Lead Summary: Potential interest in student col
- Full Name: Graham Taylor
- Lead Source: External Referral
- Company Name: Aberdeen Asset Management
- Job Title: Director Business Development
- Business Phone: 0131125555
- Mobile Phone: 07557142509
- Email: g.taylor@aaam.co.uk
- Company Website: --
- Rating: Warm

Summary

POSTS ACTIVITIES NOTES

No Longer Interested...
No Longer interested because...
CRM-test1 Resource - Today 1:55:01 PM

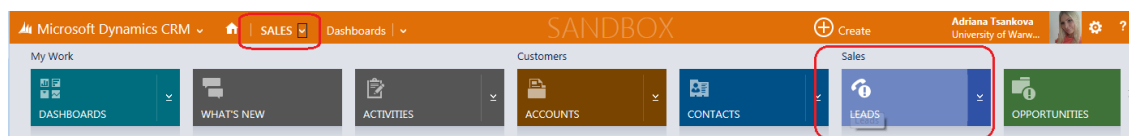
Disqualified

9. You can now close the record, return to home page or close the application.

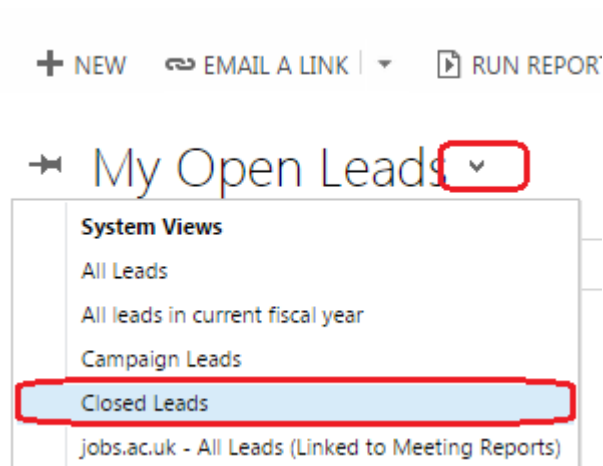


Search & Reactivate Disqualified Leads

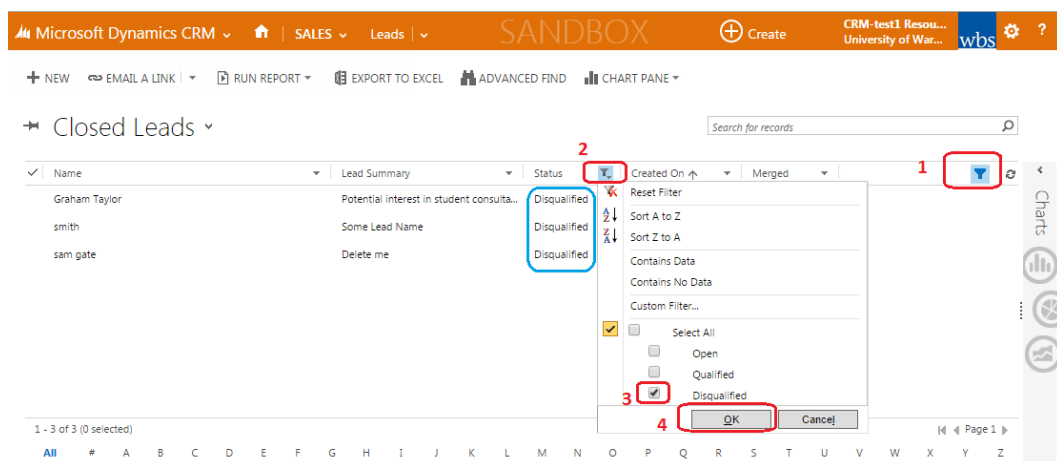
1. Find the LEAD tile, by navigating through: CRM HOMEPAGE -> SALES -> LEADS



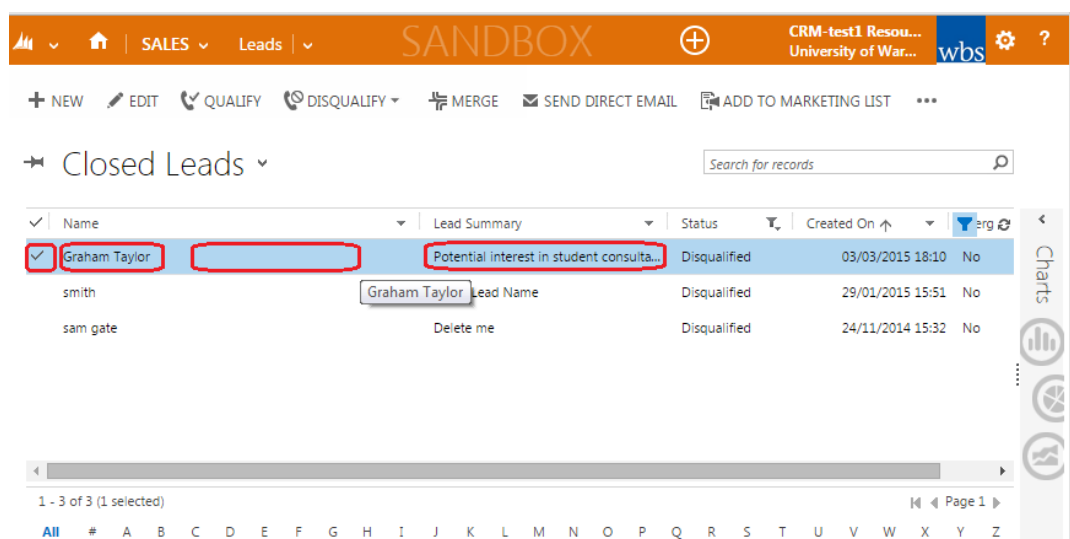
2. A grid displaying "My Open Leads" should appear. Switch the grid view to display "**Closed Leads**" and find the relevant Lead.



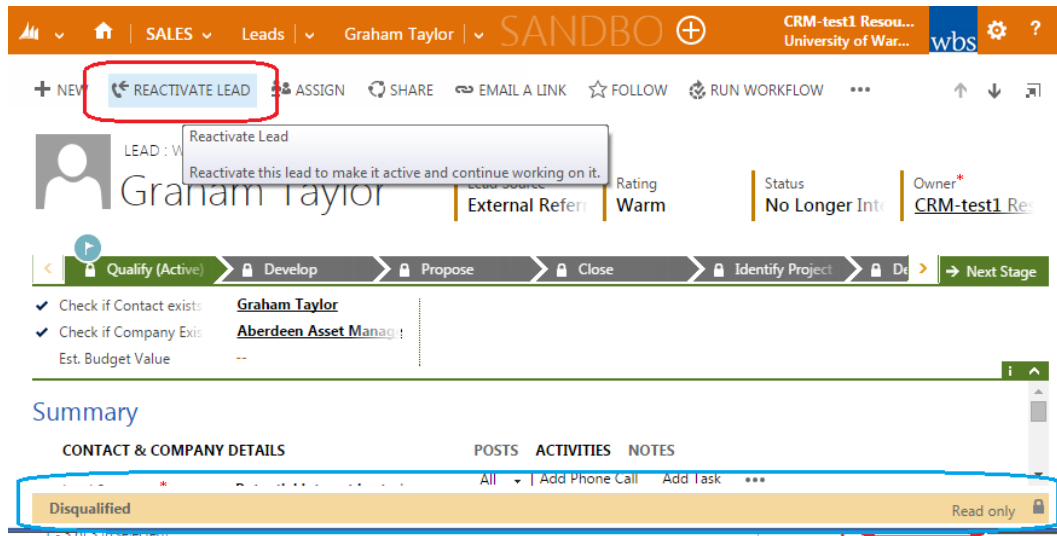
Find the Disqualified Lead you are looking for, by using the Search Box, jump bar, or sort by clicking on the column headings.
The recommended way of searching is using the Filter functionality as shown on the screen below:



Double click on the "Lead Summary" column or between the columns to open the record you wish to review. The information on the screen will be read only. If you believe that the Lead is current again, you can reactivate it, by completing step 3 below.



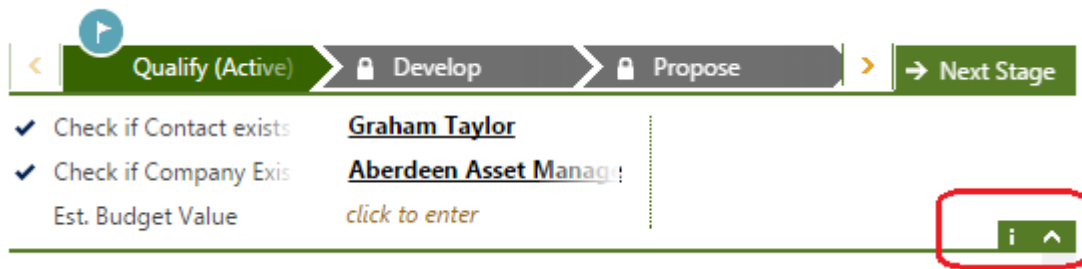
- Find and select the button "REACTIVATE LEAD" located on the top left of the form to change the state of the record from archived to active.



- Upon Reactivation you will need to complete any outstanding information in the Process Flow Bar "Qualify" stage before the Lead can be Qualified. Make sure the Green Process Flow Bar is expanded (if collapsed). You can do this by clicking on the Green Bar "Qualify (Active)", as shown below.



Tip! To collapse the Process Bar, select the:



- You can now close the record, continue updating it (see Update Lead section), return to home page or close the application.



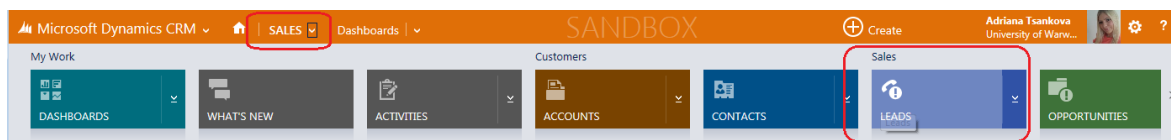
Tip! During the time whilst a Lead has been disqualified, other CRM users may have already engaged with the individual or company to which this Lead relates to, so the steps "Search for

Account" and Search for Contact within the Qualify stage will have to be reviewed and completed again after the Reactivation of a Lead.

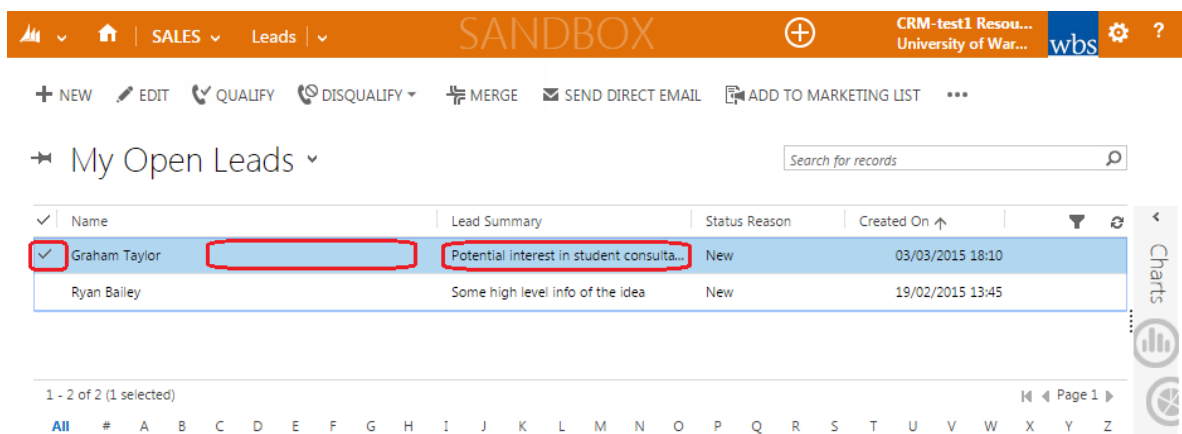
Qualify Lead

As and when you decide that a Lead has developed into a more substantial interaction between the University and the external party you can QUALIFY using the process below. When a Lead is qualified, the CRM system will convert it into an Opportunity and create any associated Contacts and Accounts (if not already present in the CRM system).

1. Find the LEAD tile, by navigating through: CRM HOMEPAGE -> SALES -> LEADS



2. A grid displaying "My Open Leads" should appear. Switch the grid view to display all active / current Leads or use the search box to look whether the Lead you wish to qualify.
3. Double click on the "Lead Summary" column or between the columns to open the record.



4. Expand the Green Process Flow Bar (if collapsed) and complete the steps in the "Qualify" stage. You can do this by clicking on the Green Bar "Qualify (Active)", as shown below.



Summary

Tip! To collapse the Process Bar, select the:

The screenshot shows a process flow bar with three stages: 'Qualify (Active)' (highlighted in green), 'Develop' (locked), and 'Propose' (locked). Below the bar, there are three fields: 'Check if Contact exists' with the value 'Graham Taylor', 'Check if Company Exis' with the value 'Aberdeen Asset Manage!', and 'Est. Budget Value' with the text 'click to enter'. A red box highlights a small green button with an 'i' and an upward arrow in the bottom right corner.

5. Enter a short summary describing the situation of why this Lead will be qualified in the **NOTES & ACTIVITIES** section. NOTES & ACTIVITIES -> Select NOTES -> Start typing in the inline form -> DONE. (for more details on notes, see sub-section Add Note / Activities in this guide [here](#))
6. Find the "QUALIFY" button on the top left ribbon of the form and select it.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, and 'SALES'. Below this is a ribbon with buttons: '+ NEW', 'QUALIFY' (highlighted with a red box), 'DISQUALIFY', and 'ADD TO MARKET'. Below the ribbon, there is a lead card for 'Graham Taylor' with a profile picture icon and the text 'LEAD : WBS LEAD'. Below the lead card, there is a process flow bar with 'Qualify (Active)' and 'Develop'. Below the flow bar, there are three fields: 'Check if Contact exists' with the text 'click to enter', 'Check if Company Exis' with the value 'Aberdeen Asset Ma' and a magnifying glass icon, and 'Est. Budget Value' with the text 'click to enter'. Below these fields, there is a 'Summary' section with the title 'CONTACT & COMPANY DETAILS'. Under the summary, there are two items: 'Lead Summary*' and 'Potential interest in student consultanc'.

7. You will then be forwarded to an **Opportunity** screen (see Opportunities section in this guide [here](#)).
8. You can now close the window / system or navigate to a different area or homepage or continue to work on the Opportunity.

Tip! Upon Lead Qualification, CRM will create records based on the actions taken within the Qualify Process Flow Bar (step 4 above). The actions are as follow:

Existing Account?	Existing Contact?	CRM Outcome
Yes	Yes	A new Opportunity record will be created, where Company and Primary contact will equal the ones selected in the process flow bar in the Lead Qualify Stage.
No	Yes	A new Account will be created, as specified in the Company Name in the Lead, the existing Contact as specified in the process flow bar in the Lead Qualify Stage will be associated to the new Account, and a new Opportunity record will be created, where Company will equal the newly created Account and Primary contact will equal the one selected in the process flow bar in the Lead Qualify Stage.
Yes	No	A new Contact will be created, as specified in the Full Name in the Lead, the existing Account as specified in the process flow bar in the Lead Qualify Stage will be associated to the new Contact and a new Opportunity record will be created, where Primary Contact will equal the newly created Contact and Company will equal the one selected in the process flow bar in the Lead Qualify Stage.
No	No	New Account and Contact will be created and associated as specified within the lead Company and Full Name and a new Opportunity record will be created, where Primary Contact and Company will be the newly created after Lead Qualification.

Accounts

Elements of an Account

The Account record contains data such as, name, contact details, industry, addresses, contacts who work there, a stakeholders section where individuals internal to your business unit or university-wide can be associated through different roles representing their relationship to this Account.



As with most other records, a Social Pane is available containing the history of all Posts, Activities and Notes related to this Account.

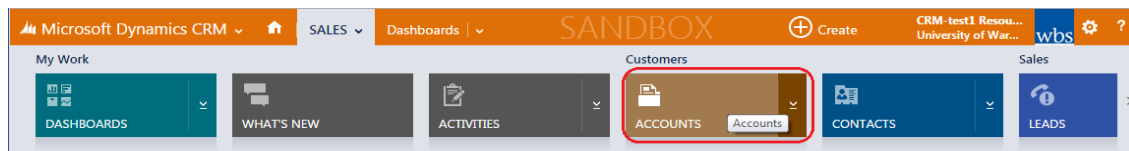
On the main form, the Account has multiple expandable tabs providing some further details e.g. Overview, Subsidiaries, Industry Segmentation, and information about any current or full engagement history as well as Social Insights.

The screenshot shows the Microsoft Dynamics CRM interface for an Account named 'Accenture'. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'Accenture'. The main form displays various details:

- Account Name:** Accenture
- Relationship Type:** Non Strategic
- Phone:** 353-1-6462000
- Fax:** 353-1-6462000
- Email:** contactus@accenture.co
- Alternative Email:** --
- Website:** www.accenture.com
- Contact Method:** Email
- Industry:** PROFESSIONAL, SCIENTIFIC AND TECHNICAL
- Relationship:** Non Strategic
- Annual Revenue:** £240,000,000.0
- No. of Employees:** 1,400
- Owner:** Ian Swann
- Primary Contact:** Kathryn Nash
- CONTACTS:** A list of contacts including Amal Ali, Dave Andrews, and Kathryn Nash.
- STAKEHOLDERS:** A table showing internal stakeholders like Tracy LYNCH.
- ADDRESS:** 1 Grand Canal Square, Grand Canal Harbour, Dublin 2, Ireland. A map is also visible.
- DETAILS:** A section with links for CURRENT ENGAGEMENTS, ENGAGEMENT HISTORY, and SOCIAL INSIGHTS.
- Metadata:** Created On: 25/02/2015 10:46, Created By: Ian Swann, Modified On: 04/03/2015 17:22, Modified By: Adriana Tsankova.

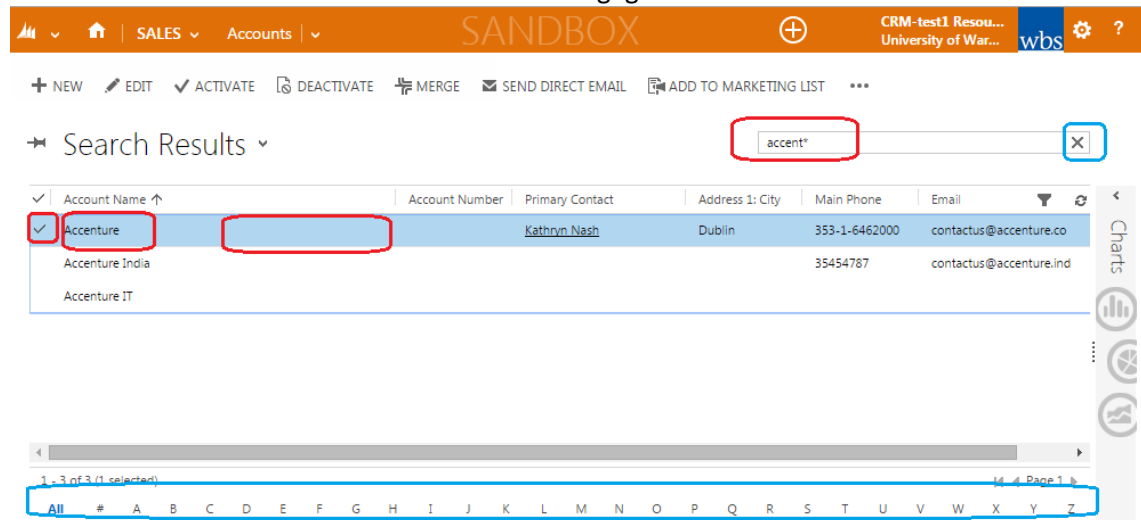
Create an Account

1. Find the ACCOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS



2. A grid displaying "My Active Accounts" should appear. You can switch the grid view to display all active Accounts or use the search box to look whether the Account you wish to enter already exists on the system (using the Search box will look for all active existing records across the CRM).
- 3.

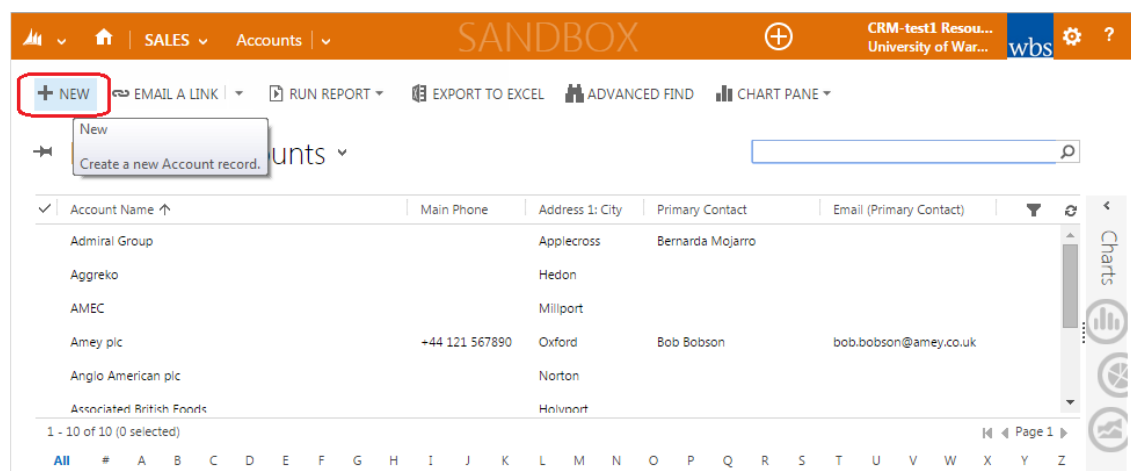
a) If the Account already exists, double click on the "Account Name" column or **between** the columns to open the record. You can review, update or contact the Owner or the Stakeholders of the Account to find out more about current engagements



The screenshot shows the CRM interface with the 'Accounts' list. A search bar at the top right contains 'accent*'. The table below lists accounts, with 'Accenture' selected. The 'Account Name' column is double-clicked, opening the record details.

Account Name	Account Number	Primary Contact	Address 1: City	Main Phone	Email
Accenture		Kathryn Nash	Dublin	353-1-6462000	contactus@accenture.co
Accenture India				35454787	contactus@accenture.ind
Accenture IT					

b) If the Account does not exist, click the "+New" button located on the top left of the screen and a new Account form will open.



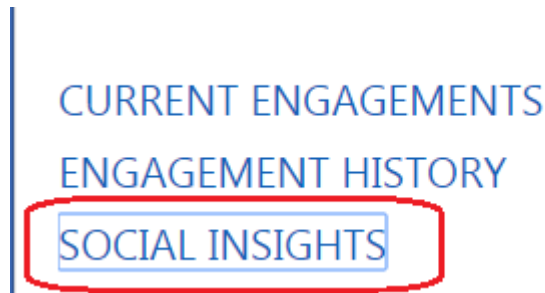
The screenshot shows the CRM interface with the 'Accounts' list. The '+New' button is highlighted in the top left corner. A dropdown menu is visible below it, showing options like 'New' and 'Create a new Account record'.

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
Admiral Group		Applecross	Bernarda Mojarro	
Aggreko		Hedon		
AMEC		Millport		
Amey plc	+44 121 567890	Oxford	Bob Bobson	bob.bobson@amey.co.uk
Anglo American plc		Norton		
Associated British Foods		Holmport		

4. You should fill in as much information as possible including the full name of the organisation. Some fields are required and these are marked with a red *, you cannot save the record until these required fields are completed. Save the record by clicking on the "SAVE" button located on the top left of the form.

window. An auto-save feature runs every 30 seconds preventing data being lost, however you can choose to Save the record by clicking on the SAVE icon.

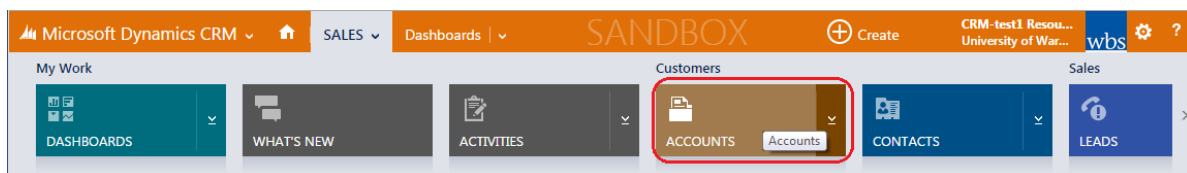
- At this point you can look at the Social Insights tab, to check if the company exists in that database and if there is useful information which you can synchronise / bring across to the new record to save you typing it in. To check Social Insights click on the tab to expand the section (please note that the content is loaded in real time and it may take few seconds) for more information regarding Social Insights refer to the Social Insights section in this guide.



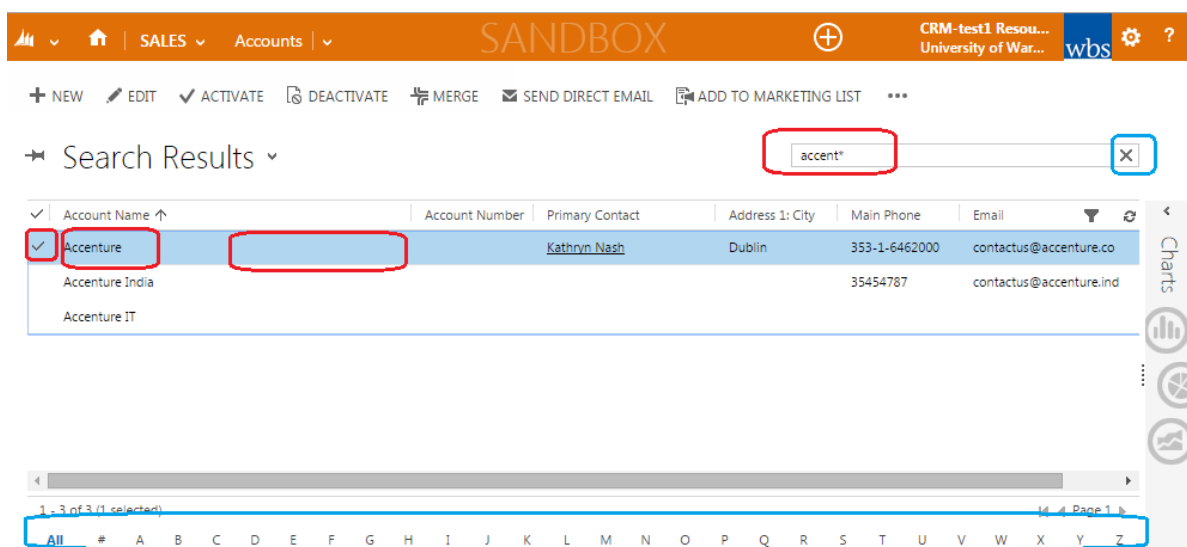
Update an Account

General Account Information

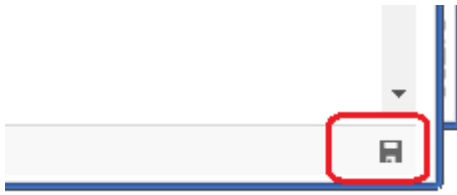
1. Find the ACOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS



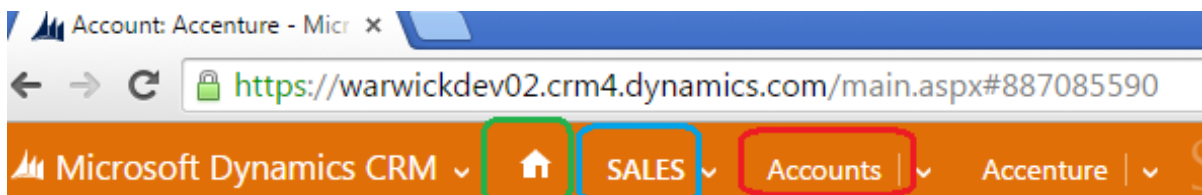
1. A grid displaying "My Active Accounts" should appear. Switch the grid view to display all active Accounts **OR** use the search box to look for the Account you wish to update (using the Search box will look for all active existing records across CRM)
2. Double click on the "Account Name" column or **between** the columns to open the record.



3. Fill in additional information or amend the existing data and click on the SAVE icon on the bottom right of the screen.



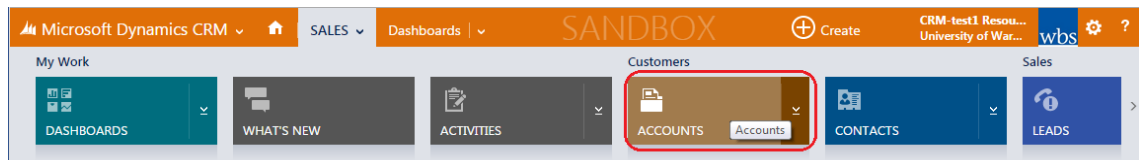
4. You can close the screen/return to previous area / go to homepage or continue to work on the Account record.



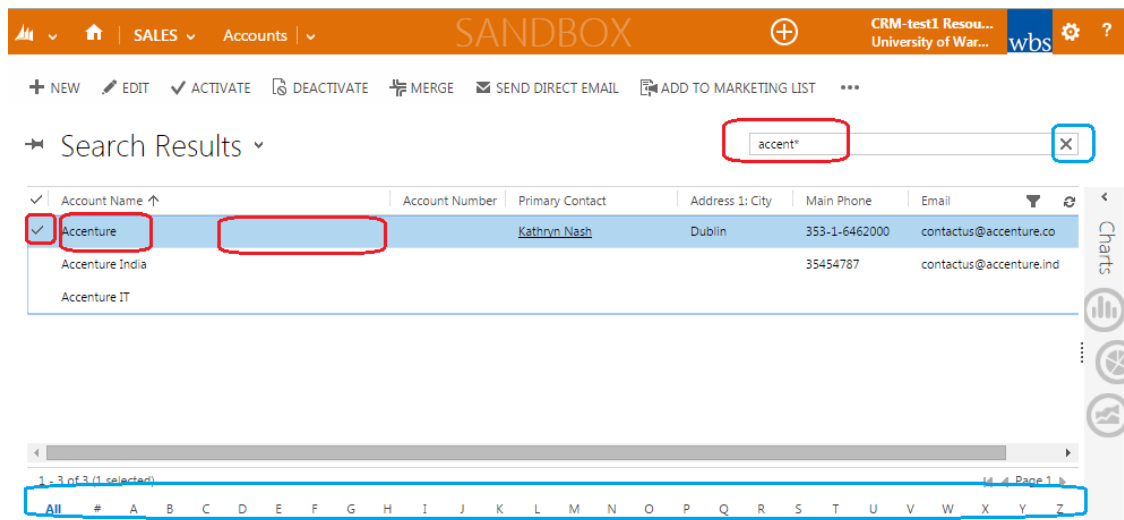
Add a Subsidiary / Parent Account

Add a Subsidiary

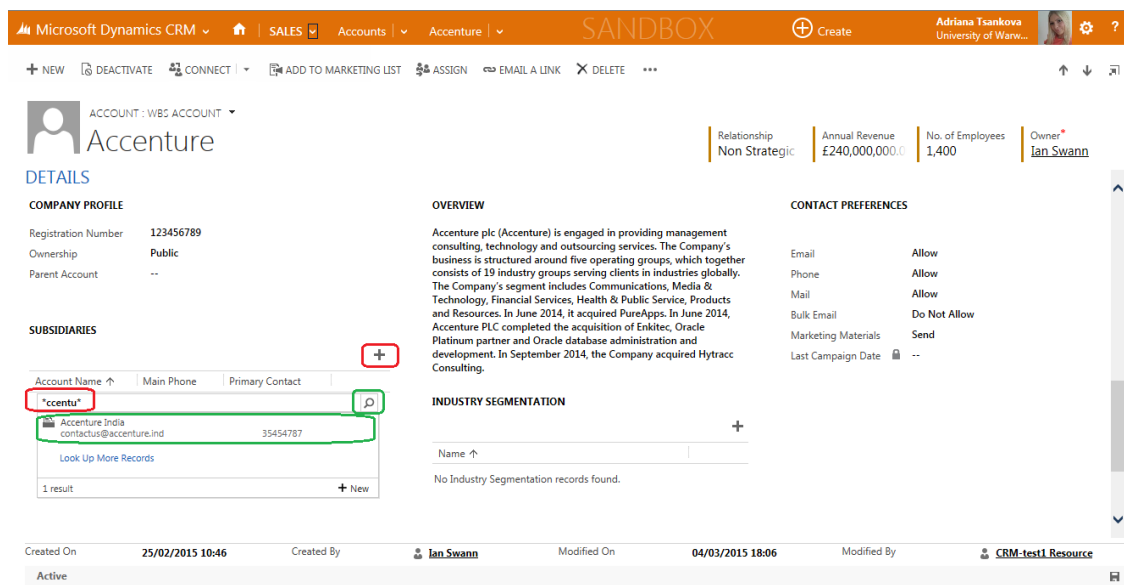
1. Find the ACCOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS



2. A grid displaying "My Active ACCOUNTS" should appear. Switch the grid view to display all active / current Accounts or use the search box to look whether the Account you wish to enter already exists on the system
3. Double click on the "Account Name" column or between the columns to open the record.



4. Open the required Account record and click on the DETAILS tab to expand it if it is not already expanded
 4. Find the SUBSIDIARIES section and Click on the (+) next to it. A Search box will appear.
 5. Start typing a name OR select "Lookup More Records" OR select "+ New" at the bottom right of the results screen.
- a) If typing the name partially, you can add " *" at the start or end (or both) of the word
- Tip!** This type of search will be useful if you already know that a particular account exists in the system



- a. If you want to browse through Accounts and see if there may be one which is a subsidiary of the current one, select the "Lookup More Records" and the Lookup Records Screen will pop up.
- b. Double click on the Account Name OR any other column to sort in ascending or descending order for easier browsing OR try the search box.
- c. If you find a company which is a subsidiary, select it by using the tick box to the left of the row
- d. Click on the button "Select". Make sure the account is now available within the "Selected records" area.
- e. Finally click on the button "Add" and the Account should be available within the subsidiaries section of the parent record.

Look Up Records [X]

Enter your search criteria.

Look for: Account [v] 1 ☐ Show Only My Records

Look in: Account Lookup View [v]

Search: Search for records [magnifying glass icon] 2

✓ Account Name ↑ 1	Email
A. Datum Corporation (sample)	someone9@example.com
Aberdeen Asset Management	contactus@aaam.co.uk
<input checked="" type="checkbox"/> Accenture India	contactus@accenture.ind 2

1 - 50 of 115 (1 selected) Page 1

3 Select Remove

Selected records: Accenture India

4 New Add Cancel

Add a Parent Account

Open the required Account record and double click on the DETAILS tab to expand it if it not already expanded

Find the **Parent Account** field and start typing a name OR select "Lookup More Records" OR select "+ New "at the bottom right of the results screen.

Double click to select the account or click on the button "+ New" to create a new Account record which you can then link as a Parent Account. You may also wish to do this at a later stage or review periodically if there has been a new Account recorded on CRM which may be the Parent Account for the one that interests you.

Microsoft Dynamics CRM | SALES | Accounts | Accenture India | **SANDBOX** | Create | CRM-test1 Resou... University of War... | wbs

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | EMAIL A LINK | SHARE | FOLLOW | ...

ACCOUNT : WBS ACCOUNT
Accenture India

Relationship -- | Annual Revenue -- | No. of Employees -- | Owner* **David Colliver**

Geographics SIO © 2015 Microsoft Corporation

DETAILS

COMPANY PROFILE

Registration Number --

Ownership --

Parent Account **accent**

Subsidiaries

1 result

Account Name ↑ | Main Phone | Primary Contact

Created On 17/07/2014 20:42 | Created By David Colliver | Modified On 04/03/2015 18:07 | Modified By CRM-test1 Resource

Active

OVERVIEW

INDUSTRY SEGMENTATION

Name ↑

Amusement and recreation activities - Division 93.2 ...

CONTACT PREFERENCES

Email Allow

Phone Allow

Mail Allow

Bulk Email Allow

Marketing Materials Send

Last Campaign Date --

unsaved changes

When you populate the **Parent Account** field, the **Ownership** for the currently viewed Account will automatically change to "Subsidiary". Also if you double click on the name of the parent Account (content of the field) you will find that the currently viewed company is now visible within the "Subsidiaries" are of this Account.

ACCOUNT : WBS ACCOUNT
Accenture India

Geographics SIO © 2015 Microsoft Corporation

DETAILS

COMPANY PROFILE

Registration Number --

Ownership **Subsidiary**

Parent Account **Accenture**



DETAILS

COMPANY PROFILE

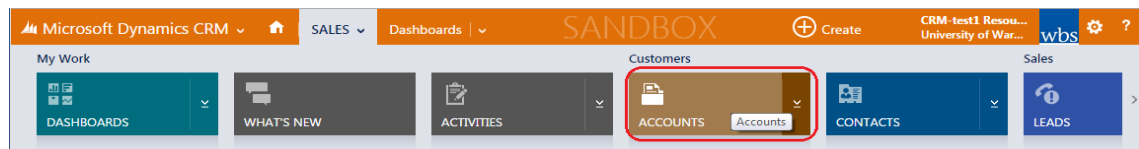
Registration Number **123456789**
Ownership **Public**
Parent Account --

SUBSIDIARIES

Account Name ↑	Main Phone	Primary Contact
Accenture India	35454787	

Industry Segmentation

1. Find the ACCOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS



2. A grid displaying "My Active ACCOUNTS" should appear. Switch the grid view to display all active / current Account's or use the search box to look whether the Account you wish to enter already exists on the system
3. Double click on the "Account Name" column or between the columns to open the record.

SANDBOX CRM-test1 Resou... University of War... wbs

SALES Accounts

+ NEW EDIT ACTIVATE DEACTIVATE MERGE SEND DIRECT EMAIL ADD TO MARKETING LIST

Search Results

Search: accent*

Account Name	Account Number	Primary Contact	Address 1: City	Main Phone	Email
Accenture		Kathryn Nash	Dublin	353-1-6462000	contactus@accenture.co
Accenture India				35454787	contactus@accenture.ind
Accenture IT					

1 - 3 of 3 (1 selected) Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Open the required Account record and click on the DETAILS tab to expand it if it is not already expanded
- Find the INDUSTRY SEGMENTATION section and Click on the (+) next to it. A new pop-up screen/form will open where CRM will prepopulate most details, such as the Primary Industry (recorded from a list during the Account creation)

DETAILS

COMPANY PROFILE

Registration Number 123456789

Ownership Public

Parent Account --

SUBSIDIARIES

Account Name Main Phone Primary Contact

Accenture India 35454787

OVERVIEW

Accenture plc (Accenture) is engaged in providing management consulting, technology and outsourcing services. The Company's business is structured around five operating groups, which together consists of 19 industry groups serving clients in industries globally. The Company's segment includes Communications, Media & Technology, Financial Services, Health & Public Service, Products and Resources.

INDUSTRY SEGMENTATION

Name Add Indust

No Industry Segmentation records found.

Microsoft Dynamics CRM | New Industry Segm... | **SANDBOX** | Create | CRM-test1 Resou... University of War... | wbs | ?

SAVE | SAVE & CLOSE | + NEW

INDUSTRY SEGMENTATION : INFORMATION

New Industry Segmentation

Account* **Accenture** | Industry Type **PROFESSIONAL** | Industry Sub-Type* -- | Owner* **CRM-test1 Res**

General

Industry Type
Industry Sub-Type*
Account*

PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES

Accenture

Advertising and market research 73 PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
 Architectural and engineering activities and related technical consultancy 71.1 PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
 Architectural and engineering activities; technical testing and analysis 71 PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
 Legal activities 69.1 PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
 Legal and accounting activities 69 PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
Management consultancy activities 70.2 PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES
 Look Up More Records Management consultancy activities
 10 results

Active

- Click on the magnifying glass / lookup to expand and view the available sub-industry types. Double click to add the required Sub-Industry type.
- Click on "Save & Close" button. You will then be back in your Account Record and be able to view the Segmentation.

Microsoft Dynamics CRM | New Industry Segm... | **SANDBOX** | Create | CRM-test1 Resou... University of War... | wbs | ?

SAVE | **SAVE & CLOSE** | + NEW

INDUSTRY SEGMENTATION : INFORMATION

New Industry Segmentation

Account* **Accenture** | Industry Type **PROFESSIONAL** | Industry Sub-Type* **Management** | Owner* **CRM-test1 Res**

General

Industry Type
Industry Sub-Type*
Account*

PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES

Management consultancy activities

Accenture

Active

DETAILS

COMPANY PROFILE

Registration Number 123456789
Ownership Public
Parent Account --

SUBSIDIARIES

Account Name ↑	Main Phone	Primary Contact
Accenture India	35454787	

OVERVIEW

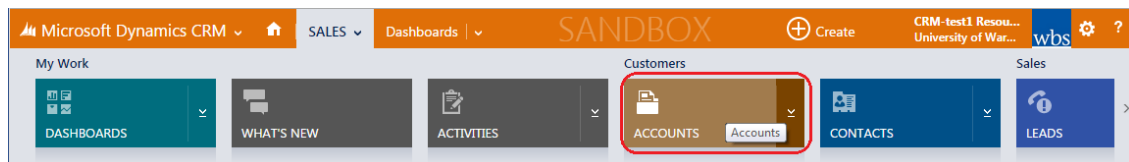
Accenture plc (Accenture) is engaged in providing management consulting, technology and outsourcing services. The Company's business is structured around five operating groups, which together consists of 19 industry groups serving clients in industries globally. The Company's segment includes Communications, Media & Technology, Financial Services, Health & Public Service, Products and Resources.

INDUSTRY SEGMENTATION

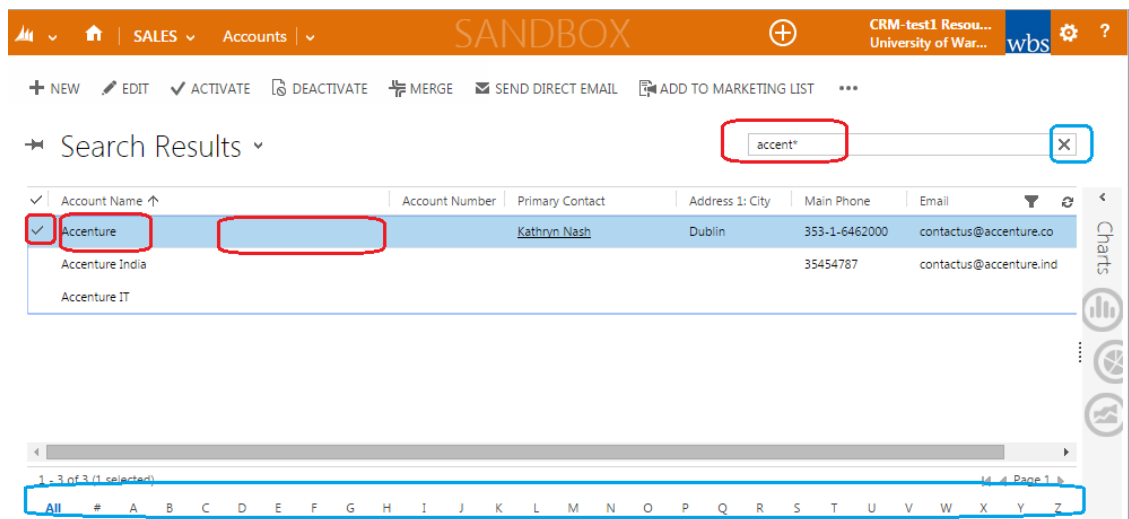
Name ↑
Management consultancy activities - M 70.2 - Accenture

Add More Addresses

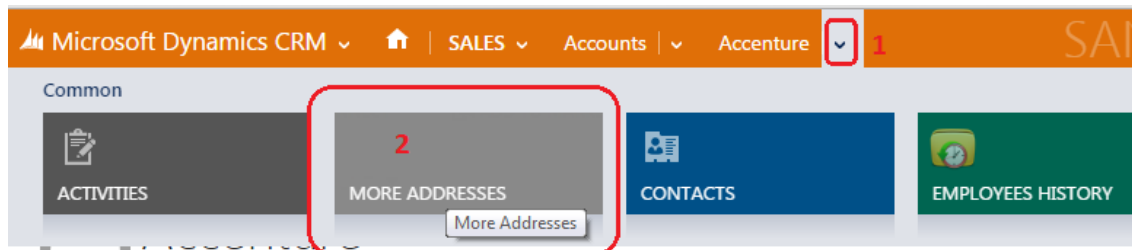
1. Find the ACCOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS



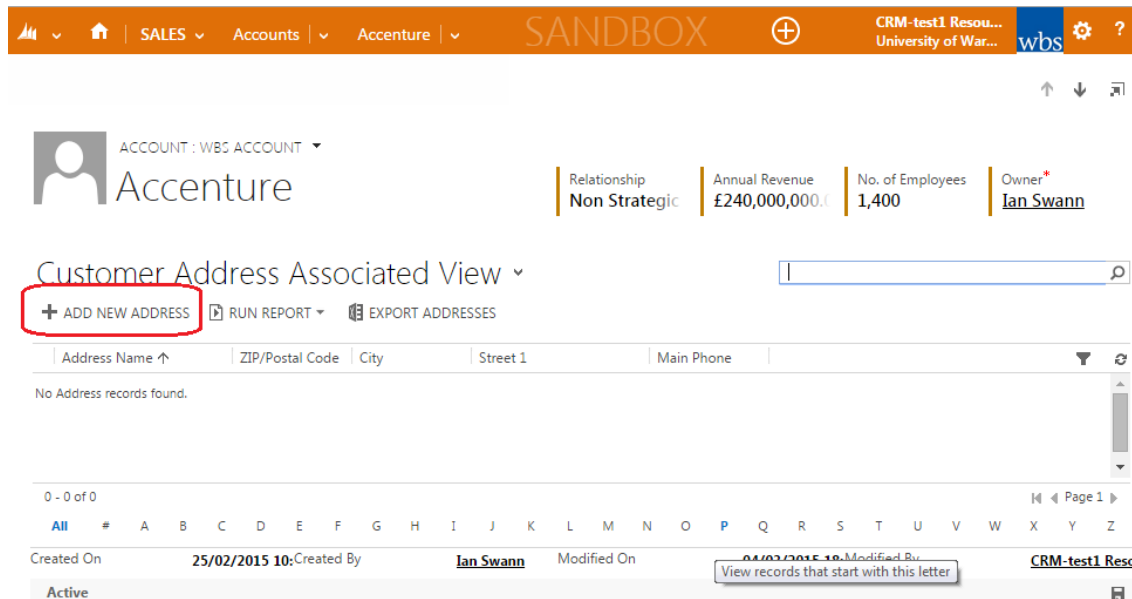
2. A grid displaying "My Active ACCOUNTS" should appear. Switch the grid view to display all active / current Accounts or use the search box to look whether the Account you wish to enter already exists on the system
3. Double click on the "Account Name" column or between the columns to open the record.



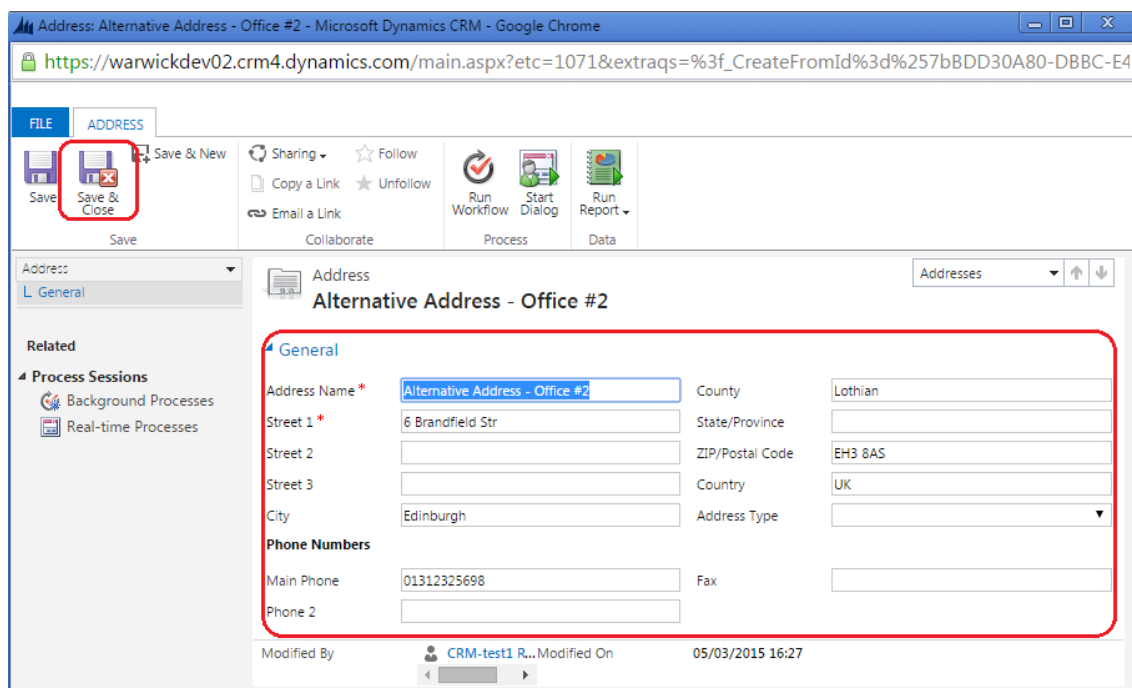
4. Select the arrow symbol next to the Account Record name on the Navigation



5. View the already existing additional addresses (if any) and if the address you wish to enter does not exist, find and select the button "Add New Address"



6. Fill in the Address Form followed by the "SAVE & CLOSE" button, and you will be returned back to the Account Record you were viewing.



- You will now be able to see the address which you have just added. You can click on the Account name next to the image or on the main navigation to view the full Account Record. Exit the associated records view of "More Addresses".

The screenshot shows the 'Account: Accenture - Microsoft Dynamics CRM' interface. The top navigation bar includes 'SALES', 'Accounts', and 'Accenture' (highlighted with a red box). The main header displays the account name 'Accenture' (highlighted with a red box) and key details: Relationship (Non Strategic), Annual Revenue (£240,000,000.0), No. of Employees (1,400), and Owner (Ian Swann). Below this is the 'Customer Address Associated View' section, which includes a table of addresses. The table has columns: Address Name, ZIP/Postal Code, City, Street 1, and Main Phone. One address is listed: 'Alternative Address - Office #2' with ZIP 'EH3 8AS', City 'Edinburgh', Street '6 Brandfield Str', and Phone '01312325698'. The bottom of the screen shows metadata: Created On (25/02/2015 10:), Created By (Ian Swann), Modified On (04/03/2015 18:), and Modified By (CRM-test1 Resc).

Stakeholders

Add Stakeholders

- Find the ACCOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS

The screenshot shows the 'Microsoft Dynamics CRM' interface. The top navigation bar includes 'SALES', 'Dashboards', and 'ACCOUNTS' (highlighted with a red box). The main navigation pane on the left shows 'My Work' and 'Customers' sections. The 'Customers' section includes tiles for 'DASHBOARDS', 'WHAT'S NEW', 'ACTIVITIES', 'ACCOUNTS' (highlighted with a red box), 'CONTACTS', and 'LEADS'.

- A grid displaying "My Active ACCOUNTS" should appear. Switch the grid view to display all active / current Accounts or use the search box to look whether the Account you wish to enter already exists on the system
- Double click on the "Account Name" column or between the columns to open the record.

SANDBOX CRM-test1 Resou... University of War... wbs

SALES Accounts

+ NEW EDIT ACTIVATE DEACTIVATE MERGE SEND DIRECT EMAIL ADD TO MARKETING LIST

Search Results

Search: accent*

Account Name	Account Number	Primary Contact	Address 1: City	Main Phone	Email
Accenture		Kathryn Nash	Dublin	353-1-6462000	contactus@accenture.co
Accenture India				35454787	contactus@accenture.ind
Accenture IT					

1 - 3 of 3 (1 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Find the section called **STAKEHOLDERS** under **KEY CONTACTS** on the right hand side of the screen and click on the (+). This will pop up a **NEW Stakeholder** form in a new browser window.

Relationship
Non Strategic

Annual Revenue
£240,000,000.0

No. of Employees
1,400

Owner*
Ian Swann

KEY CONTACTS

Primary Contact
Kathryn Nash

✉ Email **kathryn.nash@accenture.com**
☎ Business **353-1-6462000**

CONTACTS



Full Name ↑	Email
Amal Ali	
Dave Andrews	d.andrew@accenture.c...
Kathryn Nash	kathryn.nash@accentur...

STAKEHOLDERS



Type	Stakeholder Title ↑
Internal	Tracy LYNCH- Relationship Manager - Accenture

5. Fill in the form by specifying the:
 - a. Contact - start typing the name of the individual you wish to add and click on the magnifying glass. Double click to add the name to the field.

General

Scope

Type *

Contact *

Role *

Account *

Contact	POST
Internal	No re
<input type="text" value="walm"/>	<input type="button" value="🔍"/>
<div><div> Karen WALMSLEY Retail Assistant Warwick Retail</div><div> Oliver WALMSLEY Director of Corpo... Warwick Business...</div></div>	
<div>Look Up More Director of Corporate Relations</div>	
<div>2 results + New</div>	

- b. Role - start typing OR click on the magnifying glass (recommended) to view available role options. Double click to add the role to the field. If a role does not exist, you can add new one, by selecting the "+ New" option. *(however, please, note this will be available for all users within the university and you should ensure that a new Role is definitely required before adding one)*
6. Select the option "Save & Close". You will then be taken back to your Account Record and be able to view the Stakeholder.

SAVE **SAVE & CLOSE** + NEW

STAKEHOLDER : INFORMATION

New Stakeholder

Type*
Internal

Contact*
Oliver WALMSLEY

Role*
--

Owr
CRI

General

Scope

Contact

Type*

Internal

Contact*

Oliver WALMSLEY

Role*

Account*

Account Manager

Co-Investigator

Collaborator

Coordinator

Decision Maker

End User

Idiot Proof Checker

Principal Investigator

Project Coordinator

Project Manager

[Look Up More Records](#)

10 results

+ New

STAKEHOLDERS



Type

Stakeholder Title ↑

Internal

Oliver WALMSLEY- Account Manager - Accenture

Internal

Tracy LYNCH- Relationship Manager - Accenture

1. Fill in or amend any further information if required on the Account record and click on the SAVE icon on the bottom right of the screen.

7. You can close the screen/return to previous area / go to homepage.

Tip! Stakeholders for Accounts are always members of staff at the University of Warwick who have a particular stake in the relationship with this Account. That is why, the fields: **Scope** and **Type** are locked and the **Contact** field is displaying University of Warwick members of staff.

Tip2! You can view more details of the stakeholders by navigating to the Account's "Stakeholders Associated View", to do this:

1. Click on the arrow next to the Account name on the top ribbon, related records navigation will appear;
2. Select Stakeholders and a more detailed grid will be presented. You can return to the main Account record information by double-clicking on the Account Name on the navigation or the name of the account on top of the grid, which remains available.

Microsoft Dynamics CRM - SALES - Accounts - Accenture - SANDBOX - Create - CRM-test1 Resou... University of War... wbs ?

Common

ACTIVITIES MORE ADDRESSES CONTACTS EMPLOYEES HISTORY STAKEHOLDERS CONNECTIONS

Stakeholder Associated View

ADD NEW STAKEHOLDER ADD EXISTING STAKEHOL... CHART PANE RUN REPORT EXPORT STAKEHOLDERS

Type	Scope	Company Name	Contact	Department (Contact)	Role
Internal	Contact	Accenture	Oliver WALMSLEY	Warwick Business School	Account Manager
Internal	Contact	Accenture	Sam HARDY	External Affairs	Account Manager
Internal	Contact	Accenture	Tracy LYNCH	Warwick Business School	Relationship Manager

1 - 3 of 3

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Created On 25/02/2015 10:46 Created By Ian Swann Modified On 04/03/2015 18:06 Modified By CRM-test1 Resource

Add Contacts to an Account

1. Find the ACCOUNT tile, by navigating through: CRM HOMEPAGE -> SALES -> ACCOUNTS

Microsoft Dynamics CRM - SALES - Dashboards - SANDBOX - Create - CRM-test1 Resou... University of War... wbs ?

My Work DASHBOARDS WHAT'S NEW ACTIVITIES CUSTOMERS ACCOUNTS CONTACTS SALES LEADS

2. A grid displaying "My Active ACCOUNTS" should appear. Switch the grid view to display all active / current Accounts or use the search box to look whether the Account you wish to enter already exists on the system
3. Double click on the "Account Name" column or between the columns to open the record.

SANDBOX CRM-test1 Resou... University of War... wbs

SALES Accounts

+ NEW EDIT ACTIVATE DEACTIVATE MERGE SEND DIRECT EMAIL ADD TO MARKETING LIST

Search Results

Search: accent*

Account Name	Account Number	Primary Contact	Address 1: City	Main Phone	Email
Accenture		Kathryn Nash	Dublin	353-1-6462000	contactus@accenture.co
Accenture India				35454787	contactus@accenture.ind
Accenture IT					

1 - 3 of 3 (1 selected) Page 1

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Find the section called **KEY CONTACTS** and click on the (+). This will pop up a NEW Contact form in a new browser window.

Relationship: Non Strategic | Annual Revenue: £240,000,000.0 | No. of Employees: 1,400 | Owner*: Ian Swann

KEY CONTACTS

Primary Contact: Kathryn Nash

Email: kathryn.nash@accenture.com

Business: 353-1-6462000

CONTACTS

Search for records

Full Name	Email
Amal Ali	
Dave Andrews	d.andrew@accenture.c...
Kathryn Nash	kathryn.nash@accentur...

- Enter the minimal required information - mandatory fields - and save the record by clicking on the "SAVE" button located on the top left of the form.

SAVE



SAVE & CLOSE



NEW

Save

Save this Contact.

WBS CONTACT

New Contact

SUMMARY

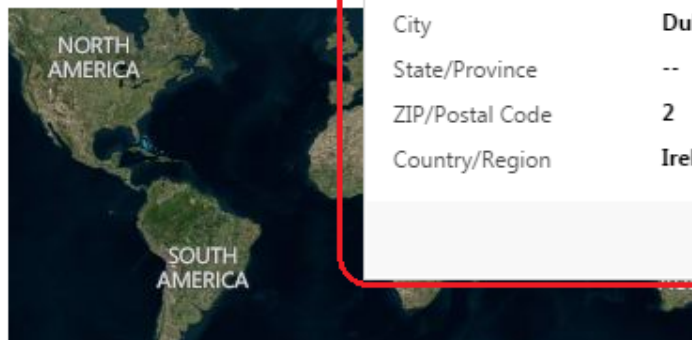
CONTACT INFORMATION

Title	Mr
Full Name *	Ryan Bailey
Job Title	--
Company Name	<u>Accenture</u>
Department	--
Email	--
Email Address 2	--
Business Phone	353-1-6462000
Mobile Phone	--
LinkedIn Profile	--

Note that when entering the Main Address, the system will pre-populate the Company address, which you can amend or keep by selecting the "Done" button.

ADDRESS

Main Address



Street 1 nd Canal Harbour, Dublin 2
 Street 2 --
 Street 3 --
 City **Dublin**
 State/Province --
 ZIP/Postal Code **2**
 Country/Region **Ireland**

Done

- Now that you have entered all the information, you can close the browser window or continue to work with the Contact record.

Relationship
Non Strategic

Annual Revenue
£240,000,000.0

No. of Employees
1,400

Owner*
Ian Swann

KEY CONTACTS

Primary Contact

Kathryn Nash

✉ Email **kathryn.nash@accenture.com**
☎ Business **353-1-6462000**

CONTACTS



Search for records



Full Name ↑

Email

Amal Ali

Dave Andrews

d.andrew@accenture.c...

Kathryn Nash

kathryn.nash@accentur...

Ryan Bailey

r.bailey@accenture.co

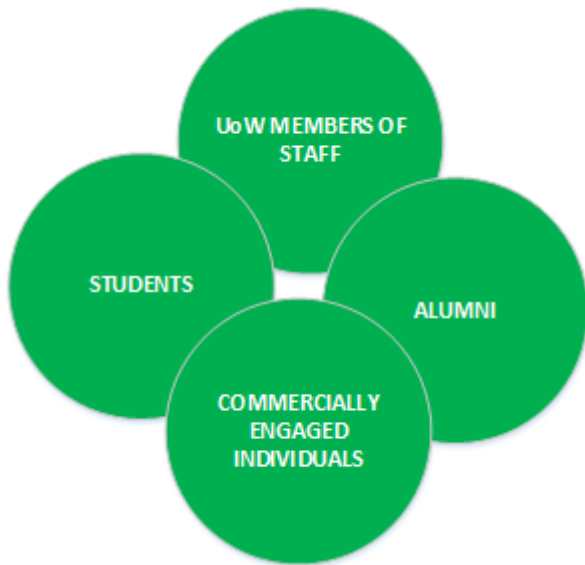
Ryan Bailey

Contacts

Elements of a Contact

The Contact record contains data such as, name, contact details and preferences, company name, addresses.

The Contact Records within the CRM can be described as follows:



As with most other records, a Social Pane is available containing a history of all Posts, Activities and Notes related to this Account.

On the main form, the Contact has multiple expandable Tabs providing some further details e.g. further details and contact preferences, information about any current or full engagement history as well as Social Insights.

Microsoft Dynamics CRM | SALES | Contacts | Kathryn Nash | **SANDBOX** | Create | CRM-test1 Resou... University of War... | wbs | ?

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | SHARE | ...

CONTACT: WBS CONTACT
Kathryn Nash

OK to Contact? **Yes** | UoW Staff Member? **No** | WBS Alumni? **No** | Owner* **Ian Swann**

SUMMARY

CONTACT INFORMATION

Title: **Mrs**
 Full Name*: **Kathryn Nash**
 Job Title: **Experienced Hire Recruiter**
 Company Name: **Accenture**
 Department: **Talent Acquisition**
 Email: **kathryn.nash@accenture.com**
 Email Address 2: **--**
 Business Phone: **353-1-6462000**
 Mobile Phone: **--**
 LinkedIn Profile: **--**

ADDRESS

Main Address: **25 Cabot Square, London, UK**
 Address 2: **--**

POSTS | ACTIVITIES | NOTES

All | Add Phone Call | Add Task | ...

Kathryn Nash
 Initial phone call taken around a student consultancy project.
 Completed by **Ian Swann** 25/02/2015 16:03

COMPANY DETAILS

Company: **Accenture**

Accenture
 Email: **contactus@accenture.co**
 Phone: **353-1-6462000**
 Relationship Ty: **Non Strategic**
 Owner*: **Ian Swann**

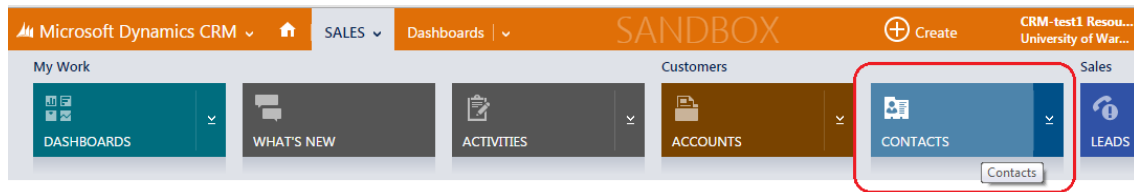
Accenture plc (Accenture) is engaged in providing management consulting, technology and outsourcing services. The Company's business is structured around five operating groups, which together consists of 19 industry groups serving clients in industries globally. The Company's segment includes Communications, Media & Technology, Financial Services, Health & Public Service, Products and Resources.

DETAILS
ENGAGEMENT HISTORY
SOCIAL INSIGHTS

Active

Create a Contact

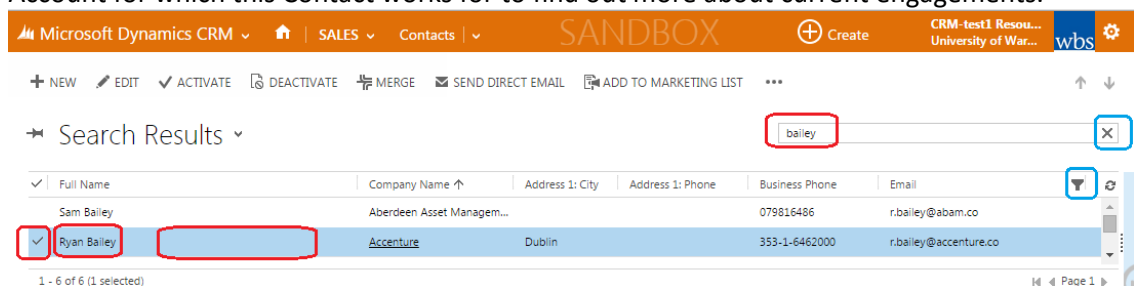
1. Find the CONTACT tile, by navigating through: CRM HOMEPAGE -> SALES -> CONTACTS



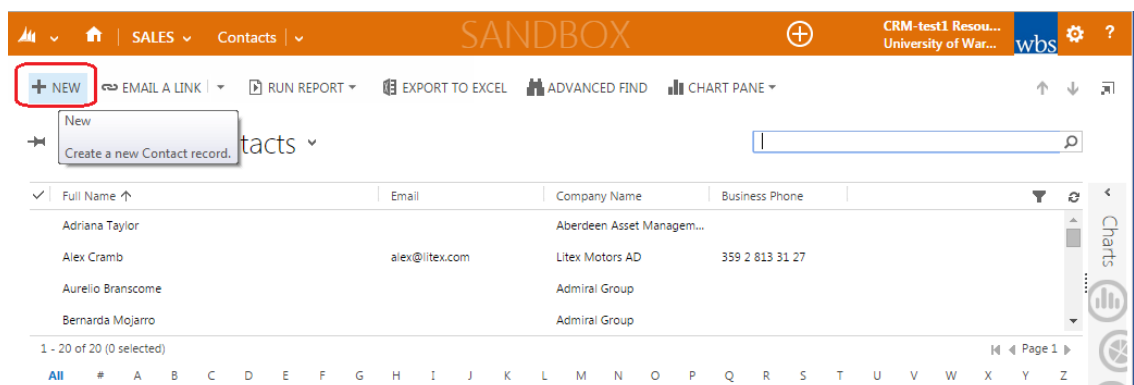
2. A grid displaying "My Active Contacts" should appear. You can switch the grid view to display all active Contacts or use the search box to look whether the Contact you wish to enter already exists on the system (using the Search box will look for all active existing records across the CRM).

3.

a) If the Contact already exists, double click on the "Full Name" column or **between** the columns to open the record. You can review, update or contact the Owner or the Stakeholders of the Account for which this Contact works for to find out more about current engagements.



b) If the Contact does not exist, find the button "+New" located on the top left of the screen and a new Contact form will appear.



4. You should fill in as much information as possible including the full name of the Contact and the Account to which they are attached (if not already populated). Some fields are required and these are marked with a red *, you cannot save the record until these required fields are completed. Save the record by clicking on the "SAVE" button located on the top left of the form.

Nb. Phone numbers should include the country code in the + format e.g. +44 24 7652 3523 for a UK number.

Microsoft Dynamics CRM | SALES | Contacts | New Contact

SAVE SAVE & CLOSE + NEW

CONTACT : WBS CONTACT

New Contact

OK t
Yes

SUMMARY

CONTACT INFORMATION

Title Miss
Full Name * Brenda Thomas
Job Title --
Company Name --
Department --

POSTS ACTIVITIES NOTES

First Name + Brenda
Last Name * Thomas

Done

- Once the record is Saved (screen below), you can continue to enter information on the screen or close the screen if no further information is available at this point in time (you can always enter more information at a later stage).

Microsoft Dynamics CRM | SALES | Contacts | Brenda Thomas | SANDBOX | Create | CRM-test1 Resou... University of War... wbs ?

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | SHARE

CONTACT : WBS CONTACT

Brenda Thomas

OK to Contact? Yes | UoW Staff Member? No | WBS Alumni? Yes | Owner * CRM-test1

CONTACT INFORMATION

Title Ms
Full Name * Brenda Thomas
Job Title Head of Business Development
Company Name Accenture
Department --
Email brenda@accenture.co
Email Address 2 brenda@gmail.com
Business Phone 0164624545757
Mobile Phone 07984534
LinkedIn Profile --

ADDRESS

Main Address 1 Grand Canal Square, Grand Canal Harbour Dublin 2 Ireland
Address 2 --

POSTS ACTIVITIES **NOTES**

Enter a note

Brenda's nephew is in Warwick
Brenda's nephew is in Warwick
You - Just now

COMPANY DETAILS

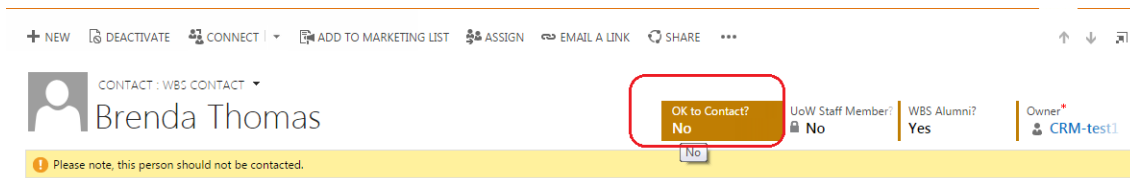
Company Accenture

Accenture
Email contactus@accenture.co
Phone 353-1-6462000
Relationship Type Non Strategic
Owner * Ian Swann

Accenture plc (Accenture) is engaged in providing management consulting, technology and outsourcing services. The Company's business is structured around five operating groups, which together consists of 19 industry groups serving clients in industries globally. The Company's segment includes Communications, Media & Technology, Financial Services, Health & Public Service, Products and Resources.

Active

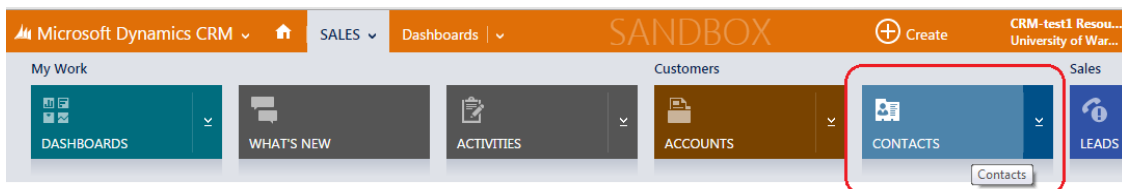
- Upon creation, you can set the option "OK to Contact?" to NO (it is Yes by default) which will mean that other users of the CRM system should not contact this individual on the first instance. You can set this at any point in time if circumstances change.



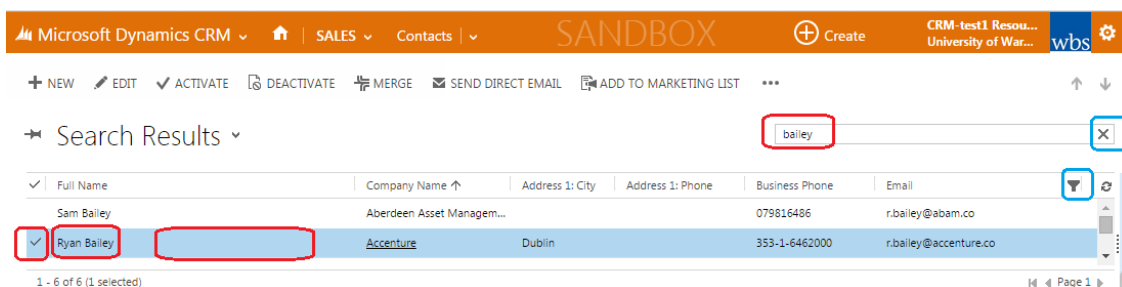
7.

Update a Contact

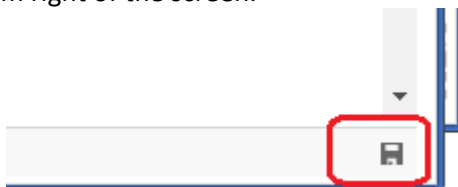
1. Find the CONTACT tile, by navigating through: CRM HOMEPAGE -> SALES -> CONTACTS



2. A grid displaying "My Active Contacts" should appear. You can switch the grid view to display all active Contacts or use the search box to look whether the Contact you wish to enter already exists on the system (using the Search box will look for all active existing records across the CRM).
3. Double click on the "Full Name" column or between the columns to open the record.



4. Fill in additional information or amend the existing data and click on the SAVE icon on the bottom right of the screen.



5. You can close the screen/return to previous area - Contacts / go to homepage or navigate to a different area within the Sales menu.



Stakeholders

Elements of a Stakeholder

Each stakeholder is defined as follows:

Scope - To indicate if the stakeholder is an Account or Contact; based on the selected option, CRM will display or hide other relevant fields in the form. Stakeholders for Accounts are always "Contacts", which is auto populated and locked.

Type - Indicates if the stakeholder is Internal or External. Stakeholders for an Account are always "Internal" i.e. from the University of Warwick, which is auto populated and locked. Also, Stakeholders with an Account scope are always "external", which is auto-populated and locked.

Based on the selected option for **Scope** either a Contact or Account field will appear:

Contact - represents the Contact (person, individual) who is the stakeholder

OR

Account - represents the Account (company, organisation) which is the stakeholder.

Role - represents what is the type of stake that the selected Contact or Account has for the particular item. e.g. Account Manager, Project Manager, Coordinator, Collaborator, End User or simply "Stakeholder" which will represent some interest and involvement however not entirely defined. If an option does not exist, you can create a new "Role" by selecting the "+New" at the bottom of the lookup.

Each Stakeholder Record will be related to ONE of the following types of record in CRM:

Lead OR Opportunity OR Project OR Account and this will be automatically populated based on where you create the Stakeholder from e.g. Adding a Stakeholder from within an Opportunity -> CRM will automatically populate and show the "Opportunity" field.

Add a Stakeholder

Please, refer to the following sections in this guide:

[Add a Stakeholder to a Lead](#)

[Add a Stakeholder to an Account](#)

[Add a Stakeholder to an Opportunity](#)

[Add a Stakeholder to a Project](#)

Social Insights

For some Accounts or Contacts the Social Insights tab can be used to find more detailed information including an address. This is particularly the case for large companies or well-known people.

SOCIAL INSIGHTS

British Gas Trading Limited | Not the right company?

OVERVIEW PEOPLE BUZZ FAMILY TREE ***

Ownership	Private Centrica PLC
Industry	Utilities - Multiline
Revenue(ttm)	\$20,456.4M
Employees	11,104
Description	British Gas Trading Limited supplies gas and electricity to homes and ... more

COMPANY INSIGHTS 30 DAYS ▼

There are no company insights for the last 30 day(s). To view insights for this company, please modify your Company Insights Settings.

View: News | Buzz

Millstream Maidenhead Road
Windsor SL4 5GD
United Kingdom
www.britishgas.co.uk | More
Phone +44 113 298 0900

CONNECTIONS

You connect to 0 people
Search for connections on LinkedIn

BUZZ All Buzz

@wetherbybear Oh that's sweet :) But don't you think that if we send you a Wilbur than your

If the Account found by Social Insights is not the one that you need then you can try clicking 'Not the right company' to search for alternatives.

SOCIAL INSIGHTS

British Gas Trading Limited Not the right company?

OVERVIEW PEOPLE BUZZ FAMILY TREE ***

Ownership	Private Centrica PLC
Industry	Utilities - Multiline
Revenue(ttm)	\$20,456.4M
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COMPANY INSIGHTS 30 DAYS ▼

There are no company insights for the last 30 day(s). To view insights for this company, please modify your Company Insights Settings.

View: News | Buzz

Once you have found the correct company then you can view a variety of useful information including news articles and social media feeds (where available). You can also synchronise some of the core company information into the Account or Contact record by clicking the 'Sync' button.

SYNC FOLLOW MORE

Millstream Maidenhead Road
Windsor SL4 5GD
United Kingdom
www.britishgas.co.uk | More
Phone +44 113 298 0900


CONNECTIONS


You connect to 0 people
Search for connections on LinkedIn

BUZZ All Buzz

@wetherbybear Oh that's sweet :) But don't you think that if we send you a Wilbur than your

This will bring up a new browser similar to the one pictured below, in which you can select the information that you would like to sync into CRM. Please do not sync the Annual Revenue figure into CRM as Social Insights will always return a value in \$US not £GB. If you want to include this figure then you need to do a manual conversion at the current exchange rate and enter the figure manually in the Annual Revenue field at the top of the Account window.



Account
British Gas Trading Limited



Insights

Check All / None ☐

Account Name	British Gas	British Gas Trading Limited	<input checked="" type="checkbox"/>
Ownership	Subsidiary	Private	<input checked="" type="checkbox"/>
SIC Code		4939	<input checked="" type="checkbox"/>
Annual Revenue		\$20,456,352,000	<input checked="" type="checkbox"/>
No. Of Employees		11,104	<input checked="" type="checkbox"/>
Main Phone		+44 113 298 0900	<input checked="" type="checkbox"/>
Fax		44 1753 494 001	<input checked="" type="checkbox"/>
Website		www.britishgas.co.uk	<input checked="" type="checkbox"/>
Address 1: Street 1	Emerging Technologies Lakeside House, 30 The Causeway	Millstream Maidenhead Road	<input checked="" type="checkbox"/>
Address 1: City	Staines	Windsor	<input checked="" type="checkbox"/>
Address 1: ZIP/Postal Code	TW183BY	SL4 5GD	<input checked="" type="checkbox"/>
Address 1: Country	UK	United Kingdom	<input checked="" type="checkbox"/>
Description	British Gas, part of Centrica plc, offers a 2 year rotational programme reporting to the MD, Customer Service & Commercial. The Customer Service & Commercial business is responsible for the customer service delivered to British Gas energy customers and leads commercial activity	British Gas Trading Limited supplies gas and electricity to homes and businesses in the United Kingdom. The company also offers insurance services for boiler and heating equipment, plumbing and drains, home electrical products, and gas and kitchen	<input checked="" type="checkbox"/>

Source(s): 

Update Account

Cancel

Nb. This syncing process is a one off event and will need to be carried out again if you want to update the information from Social Insights at a later date.

Understanding Opportunities, Projects and Agreements

An **Opportunity** is an interaction between the University and an Account and/or Contact that is still in the development/ early engagement stages. For example the planning of an event, negotiations around student consultancy, sponsorship and others, would be classed as Opportunities. Often an Opportunity would be a qualified **Lead** but this does not have to be the case (more information about Leads [here](#)). Another way of looking at an Opportunity is that "*it is an engagement that takes place before contracts are exchanged and any funding or other reward is received (if applicable)*".

An Opportunity can be Open or Closed:

Open - indicating current negotiations/ active communications for an engagement from which we are likely to benefit from monetary or reputational value against delivered agreed scope and progress into a **Project**.

OR

Closed - indicating that there are no current on-going negotiations and an outcome/decision has been reached whereby the Opportunity has either successfully evolved into a Project or not. Closed Opportunities are categorised as:

Won - whereby they have been successful and will **automatically be converted into a Project**.

OR

Lost - whereby they have been unsuccessful, there will not be any work delivered by the university to the other party and no monetary or reputational benefit to the university will be gained. Lost Opportunities **will not** be converted into a Project and will remain in archived/read only state with the potential to be Reopened if at a later stage the circumstances change and the other party Account and/or Contact wish to proceed to a Project.

The **Project** represents the interaction between the University and an Account and/or Contact through which the scope agreed during an Opportunity development stages is delivered. The Projects are automatically generated from Won Opportunities and the originating Opportunity remains linked to the Project via the **Business Process Flow Bar**, so that you can always track back the source and history behind a Project. However, once an Opportunity has been won and converted to a Project the Opportunity stages in the Business Process Flow Bar will become read only.

A **Business Process Flow** in CRM is a tool which is meant to help guide users through a business process in the system. Business process flows are representations of your business processes and are displayed visually in CRM in the form of a heading across the top of a form.

A business process flow is composed of **Stages**, and within each stage there are **Steps** to complete, these are called fields. In the business process flow heading, a user can see which stage they are at in the process, and which steps they need to complete before they progress in the process.

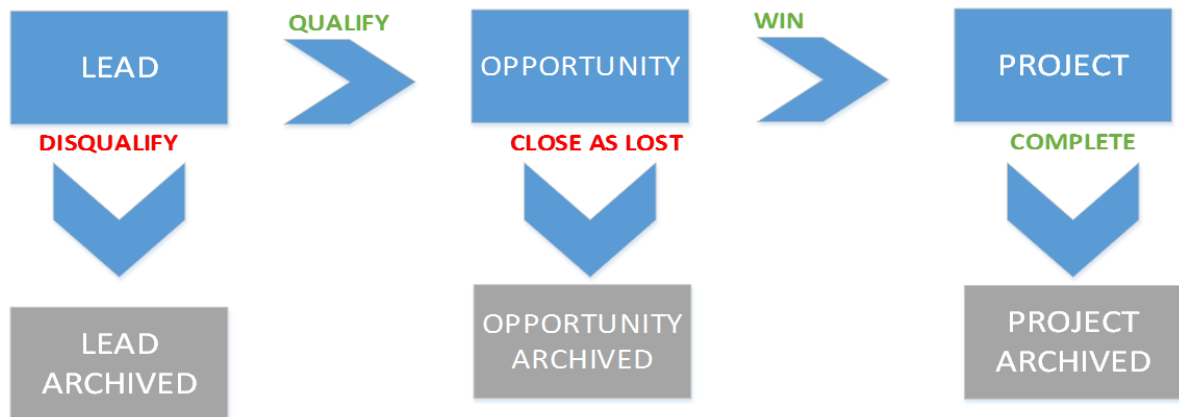
The process flows are **not** automated processes in CRM. They are meant to be a guide for a user to aid them in completing a process and join together records such as Lead, Opportunity and Project so that you can easily navigate to the source of the current record.

The Core Solution business process flow spans from **Lead to Opportunity and Project**, however the process can be started at each record point i.e. it can start from Lead right through to Project; it may start from Opportunity; it may start from a Project; The Business Process can also be stopped at any of those points in case the engagement does not progress further.

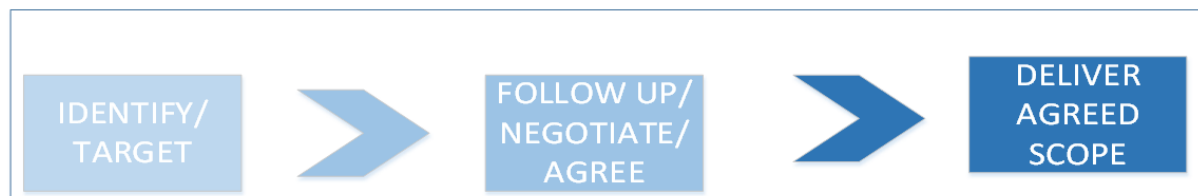
Business Process flow in CRM including Stages



Business Process flow in CRM Records Terms



Business Process flow in Business Terms



Opportunities

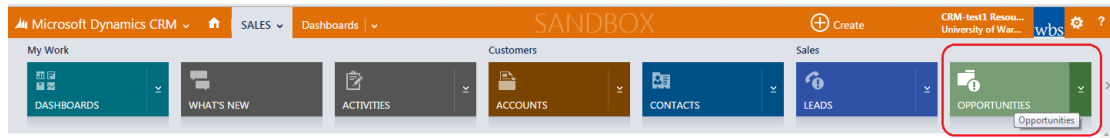
Opportunities in Dynamics CRM are the core record in the engagement or sales process and represent a potential engagement or sale for a particular Account or / and Contact.

The creation of an opportunity record in CRM adds this potential engagement to the engagement /sales pipeline and therefore makes it easier for users or management teams to monitor progress. In addition to creating a pipeline, opportunities allow us to track the success of marketing efforts by tracking engagements/sales back to the original lead source and / or source campaign. In the same way, when an opportunity is lost the reasons for this loss can be tracked.

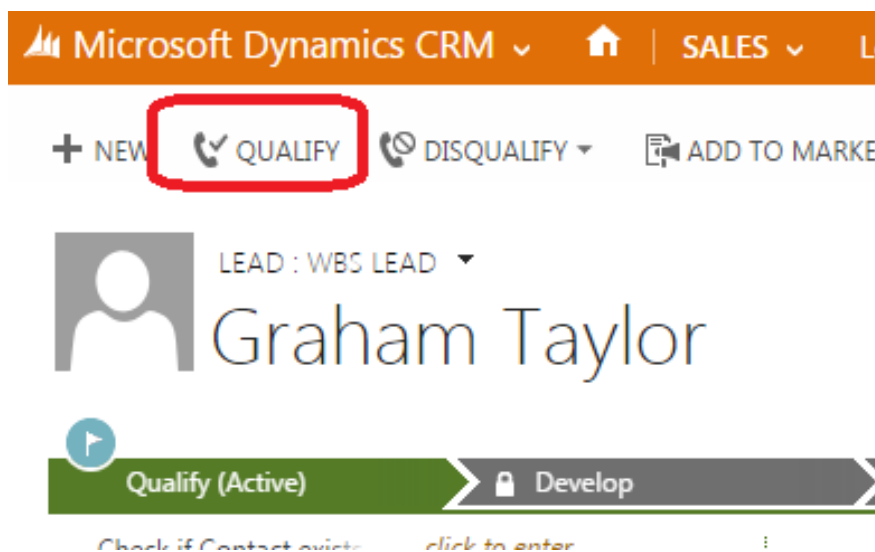
Create an Opportunity

Opportunities can be created in the following ways:

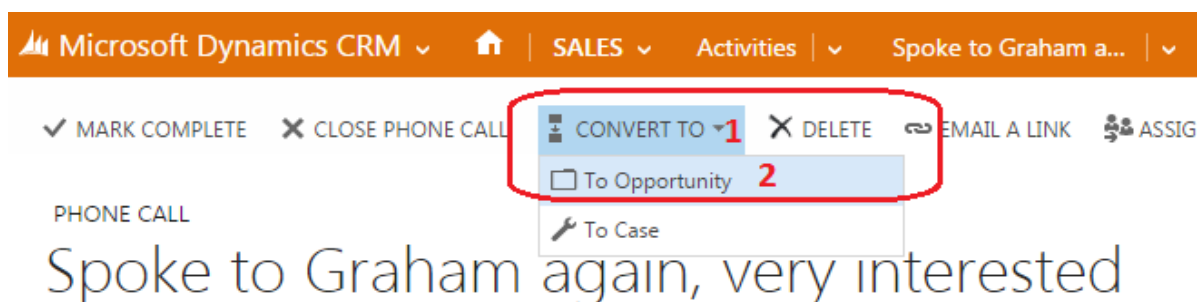
- a. From the main navigation in the "Opportunities" section / tile



- b. Automatically generated after Qualifying a Lead

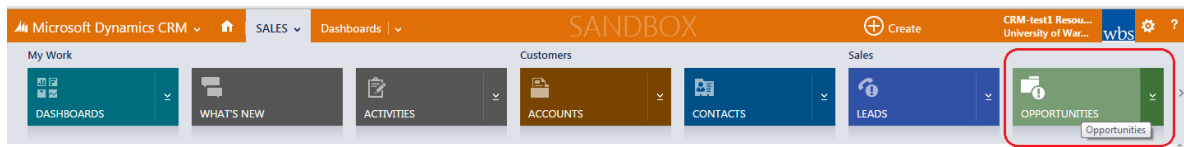


- c. Converting a CRM Activity (e.g. Phone Call, Email)

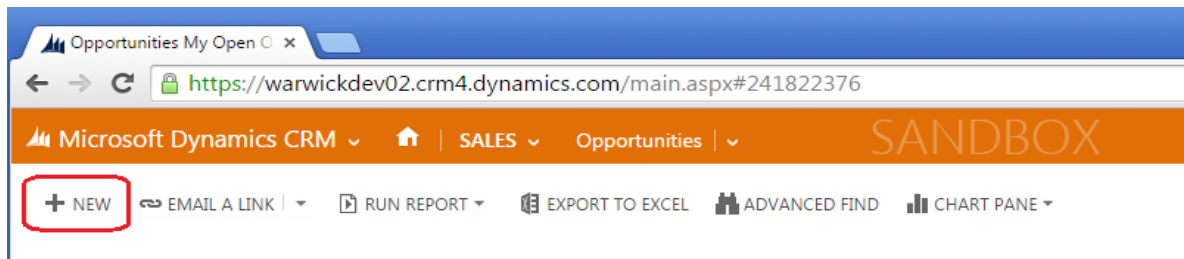


Main Navigation

1. Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES.



2. Find the button + NEW located on the top left corner of the screen and select it.



1. A New Opportunity window will pop up. Fill in the minimum required information marked with a red * on the form, and select the "SAVE" button located on the top left of the screen.

Microsoft Dynamics CRM | SALES | Opportunities | New Opportunity | **SANDBOX** | Create | CRM-test1 Resou... University of War... wbs ?

SAVE | SAVE & CLOSE | + NEW

OPPORTUNITY : WBS OPPORTUNITY
New Opportunity

Est. Revenue: -- | Est. Close Date: -- | Status: In Progress | Owner: CRM-test1 Resou...

Develop (Active) | Propose | Close | Identify Project | Develop Project | Close Project | Next Stage

General

SUMMARY

Opportunity Title * Potential for an Event Project
Opportunity Type * Event
Financial Year --
Company Name * Aberdeen Asset Management
Primary Contact Graham Taylor
Not For Profit? No
Est. Revenue --
Est. Close Date --

DETAILS

Current Situation --

Need to be addressed *
More detailed descriptive information about the potential event project.

Proposed Solution * --

POSTS | ACTIVITIES | NOTES
All | Add Phone Call | Add Task | ...
We didn't find any activity records.

KEY STAKEHOLDERS

Aberdeen Asset Management
Email: contactus@aaam.co.uk
Phone: 0131454796597
Relationship Type: STRATEGIC
Owner: Adriana Tsankova
Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions.

Primary Contact: Graham Taylor
Email: gt@abam.co
Business: 079816486454

Created On: Created By: Modified On: Modified By:

4. Continue to work on the Opportunity Record and fill in the general information or as much information as you currently have.
The process flow bar will guide you through what should be completed at what stage. When you create an Opportunity from within the main navigation the process flow will start from the Develop **STAGE** , to move the record to the next stage (Propose) you will need to complete all the **STEPS** within the stage and only then you can select the " -> Next Stage " button which will move the opportunity a stage forward. This ensures the opportunity is categorised in the correct pipeline area to quickly identify "where are we at with this opportunity", as well as guide you through the next steps that need to be completed.

Microsoft Dynamics CRM | SALES | Opportunities | Potential Event Project | **SANDBOX** | Create | CRM-test1 Resource | wbs

NEW | CLOSE AS WON | CLOSE AS LOST | ASSIGN | EMAIL A LINK | SWITCH PROCESS | SHARE

OPPORTUNITY: WBS OPPORTUNITY

Potential Event Project

Est. Revenue: £5,000.00 | Est. Close Date: 31/05/2015 | Status: In Progress | Owner: CRM-test1

Develop (Active) | Propose | Close | Identify Project | Develop Project | Close Project | Next Stage

Set Title: Potential Event Project | Set FY: 14/15 | Outline the Need: More detailed description | Set Est. Revenue: £5,000.00 | Set Est. Decision Date: 31/05/2015 | Identify Stakeholders: mark complete

Set Type: Event | Not For Profit? No | Set Company: Aberdeen Asset Management | Set Primary Contact: Graham Taylor

General

SUMMARY

Opportunity Title: Potential Event Project
 Opportunity Type: Event
 Financial Year: 14/15
 Company Name: Aberdeen Asset Management
 Primary Contact: Graham Taylor
 Not For Profit? No
 Est. Revenue: £5,000.00
 Est. Close Date: 31/05/2015

DETAILS

Current Situation: --

Need to be addressed: More detailed description of the Opportunity.

KEY STAKEHOLDERS

Aberdeen Asset Management

Email: contactus@aaam.co.uk
 Phone: 0131454796597
 Relationship Type: STRATEGIC
 Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

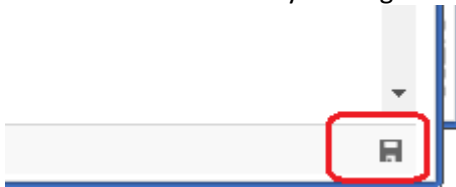
Email: gt@abam.co
 Business: 079816486454

Created On: 11/03/2015 11:44 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 11:56 | Modified By: CRM-test1 Resource

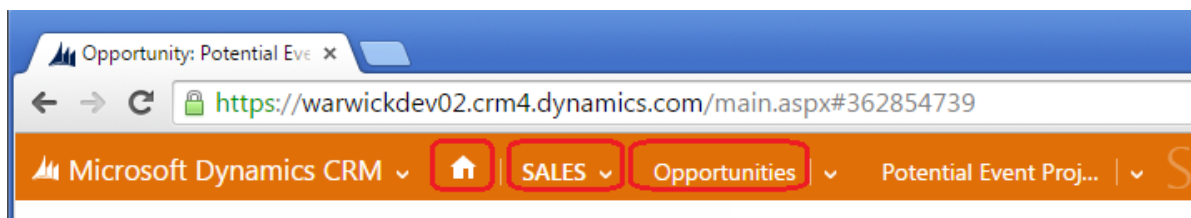
Open

Tip! At the Develop stage you may not have all necessary information to complete everything on the form or within the Process Flow Bar, you can do this at any point in time and the Opportunity record should act as an on-going "workspace" in the context of this particular Account and/or Contact. Opportunities can be found and accessed easily from within the team member dashboard/homepage.

5. Save the record by clicking on the SAVE icon on the bottom right of the screen.



6. You can now close the screen/navigate away to the Opportunities area, go to homepage or navigate to a different area within the Sales menu.



Through Lead Qualify

1. To prompt an Opportunity generation from a Lead, please refer to the [Qualify Lead](#) sub-section in this user guide and complete all the steps.

Once a Lead is qualified an Opportunity Record is auto-generated, whereby the "Develop" Process Flow stage is unlocked and Opportunity Title, Company and Contact will be automatically set to those from the Originating Lead record. All activities will also be transferred across to the Opportunity record.

Microsoft Dynamics CRM | SALES

+ NEW **QUALIFY** DISQUALIFY ADD TO MARKET

LEAD : WBS LEAD

Graham Taylor

Qualify (Active) Develop

Check if Contact exists *click to enter*

✓ Check if Company Exists **Aberdeen Asset Management**

Est. Budget Value *click to enter*

Summary

CONTACT & COMPANY DETAILS

Lead Summary* Potential interest in student consultancy

2. Fill in the minimum required information marked with a red * on the form. At this stage you may not have all necessary information to complete everything on screen or within the Process Flow Bar, you can do this at any point in time and the Opportunity record should act as an on-going "workspace" in the context of this particular Account and/or Contact. Opportunities can be found and accessed easily from within the team member dashboard/homepage.

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in ... | **SANDBOX** | Create | CRM-test1 Resou... University of War... | wbs

OPPORTUNITY : WBS OPPORTUNITY

Potential interest in event project

Est. Revenue: -- | Est. Close Date: -- | Status: In Progress | Owner: CRM-test1 Resou...

Qualify | **Develop (Active)** | Propose | Close | Identify Project | Develop Project | Close Project | Next Stage

Set Title * **Potential interest in event project** | Set FY * **Event** | Set Company * **Aberdeen Asset Management** | Set Contact * **Graham Taylor** | Outline the Need * **More detailed description of the Opportunity.** | Set Est. Revenue * **---** | Set Est. Decision Date * **---** | Identify Stakeholders * **mark complete**

Not For Profit? **No** | No

SUMMARY

Opportunity Title * **Potential interest in event project**

Opportunity Type * **Event**

Financial Year * **--**

Company Name * **Aberdeen Asset Management**

Primary Contact * **Graham Taylor**

Not For Profit? **No**

Est. Revenue * **--**

Est. Close Date * **--**

DETAILS

Current Situation * **--**

Need to be addressed * **More detailed description of the Opportunity.**

Proposed Solution * **--**

POSTS | ACTIVITIES | NOTES

All | Add Phone Call | Add Task | ...

Follow-up

E-mail or phone call to explore likely possibility of a student presentation at WBS.

Modified by SYSTEM Yesterday

KEY STAKEHOLDERS

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: **0131454796597**

Relationship Type: **STRATEGIC**

Owner * **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact **Graham Taylor**

Email: graham.t@aaam

Business: **0131125555**

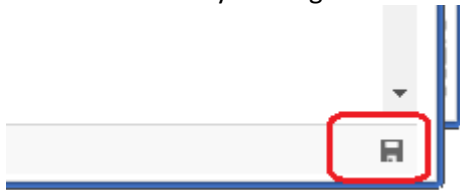
Type | Stakeholder Title ↑

No Stakeholder records found.

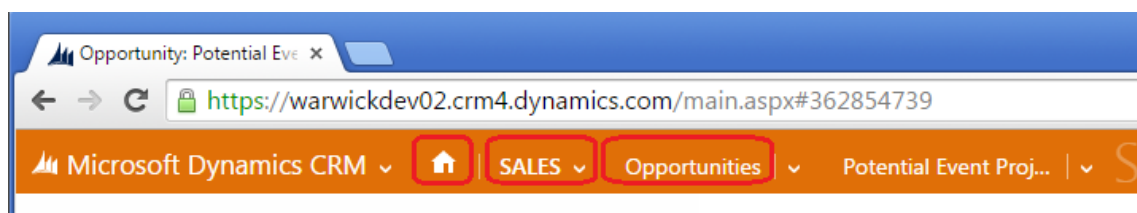
Created On: **11/03/2015 16:27** | Created By: **CRM-test1 Resource** | Modified On: **11/03/2015 16:27** | Modified By: **CRM-test1 Resource**

Open | unsaved changes

- Save the record by clicking on the SAVE icon on the bottom right of the screen.

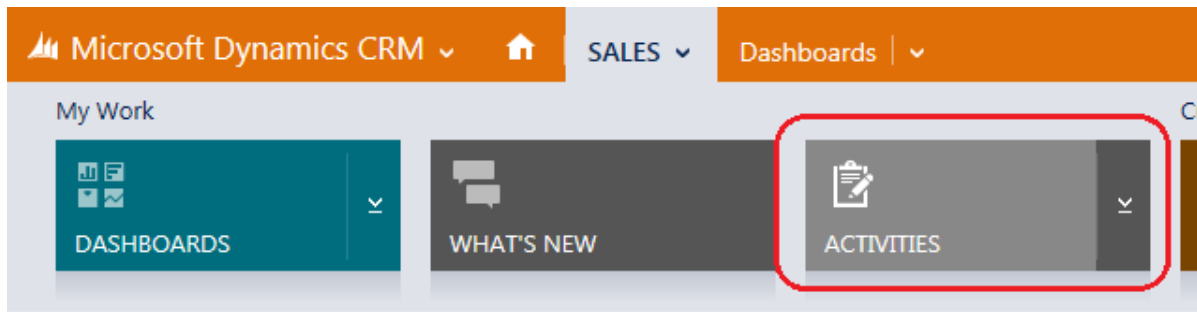


- You can now close the screen/navigate away to the Opportunities area, go to homepage or navigate to a different area within the Sales menu.

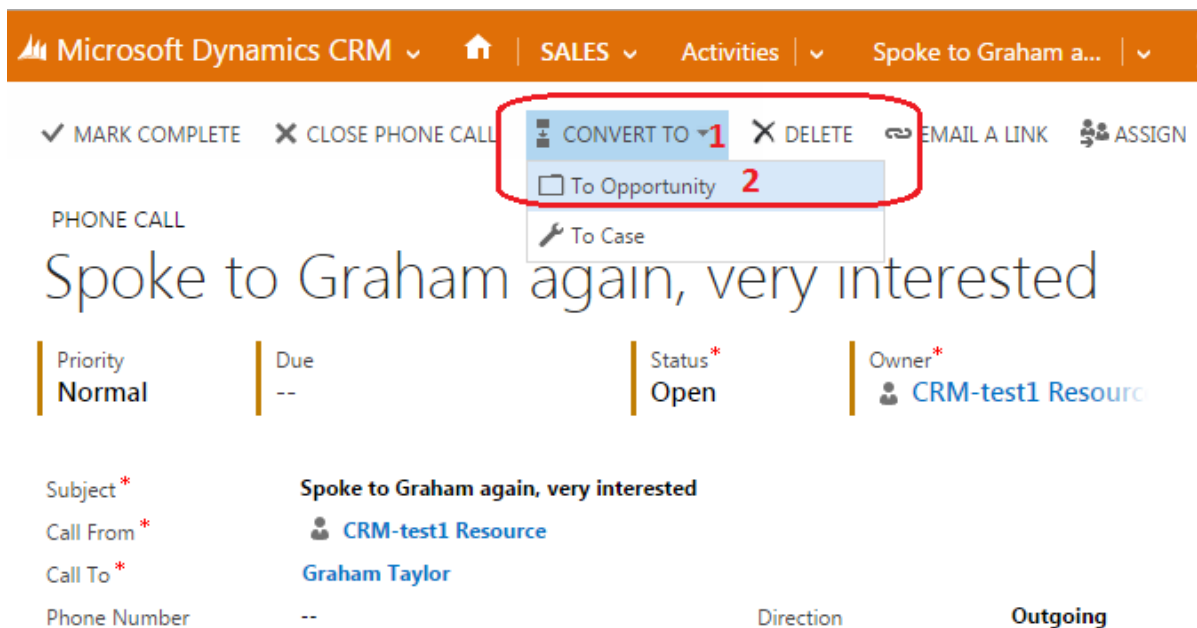


Convert CRM Activity

- Open an Activity from the "My Activities" section on your homepage dashboard **OR** navigate to Sales -> Activities from the main navigation to locate the activity you wish to convert into an Opportunity.



2. Find the button "CONVERT TO" on the top of the activity form and select the option "To Opportunity" from the drop down options.



3. A new form will pop-up on screen where you can fill in further details, as follow:

Convert to Opportunity

×

Specify the details of the new opportunity.

For Lead *

Graham Taylor

Customer *

Aberdeen Asset Mana

Currency *

Pound Sterling

Related Campaign

☒ Open the new opportunity

☒ Change the Phone Call status to Completed and close the form

☐ Record a closed campaign response

Convert

Cancel

4. You will be presented with an Opportunity screen, the Customer which you have selected within the field will be automatically populated and the leading activity will be available/attached within the Opportunity.

Opportunity: Spoke to Graham again, very interested

Est. Revenue: -- Est. Close Date: -- Status: In Progress Owner: CRM-test1 Resource

Develop (Active) Propose Close Identify Project Develop Project Close Project Next Stage

Set Title * Spoke to Graham again, very interested Set FY * click to enter Set Company * Aberdeen Asset Management Set Primary Contact * click to enter Outline the Need * click to enter Set Est. Revenue * click to enter Set Est. Decision Date * click to enter Identify Stakeholders * mark complete

General

SUMMARY

Opportunity Title * Spoke to Graham again, very interested

Opportunity Type * --

Financial Year --

Company Name * Aberdeen Asset Management

Primary Contact --

Not For Profit? No

Est. Revenue --

Est. Close Date --

DETAILS

Current Situation --

Created On 11/03/2015 11:44 Created By CRM-test1 Resource Modified On 11/03/2015 11:44 Modified By CRM-test1 Resource

Open

POSTS ACTIVITIES NOTES

Graham Taylor Called Graham, still interested Completed by CRM-test1 Resource Today

KEY STAKEHOLDERS

Aberdeen Asset Management

Email contactus@aaam.co.uk

Phone 0131454796597

Relationship Type: STRATEGIC

Owner * Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

1. Fill in the minimum required information marked with a red * on the form. At this stage you may not have all necessary information to complete everything on screen or within the Process Flow Bar, you can do this at any point in time and the Opportunity record should act as an on-going "workspace" in the context of this particular Account and/or Contact. Opportunities can be found and accessed easily from within the team member dashboard/homepage.

(Note that the Opportunity Title by default will include the Activity Title for the activity which you have converted and you may need to change it so that it is more descriptive.)

Opportunity: Potential Event Project

Est. Revenue: £5,000.00 Est. Close Date: 31/05/2015 Status: In Progress Owner: CRM-test1 Resource

Develop (Active) Propose Close Identify Project Develop Project Close Project Next Stage

Set Title * Potential Event Project Set FY * 14/15 Set Company * Aberdeen Asset Management Set Primary Contact * Graham Taylor Outline the Need * More detailed description Set Est. Revenue * £5,000.00 Set Est. Decision Date * 31/05/2015 Identify Stakeholders * mark complete

General

SUMMARY

Opportunity Title * Potential Event Project

Opportunity Type * Event

Financial Year 14/15

Company Name * Aberdeen Asset Management

Primary Contact Graham Taylor

Not For Profit? No

Est. Revenue £5,000.00

Est. Close Date 31/05/2015

DETAILS

Current Situation --

Need to be addressed * More detailed description of the Opportunity.

Created On 11/03/2015 11:44 Created By CRM-test1 Resource Modified On 11/03/2015 11:56 Modified By CRM-test1 Resource

Open

POSTS ACTIVITIES NOTES

Graham Taylor Called Graham, still interested Completed by CRM-test1 Resource Today

KEY STAKEHOLDERS

Aberdeen Asset Management

Email contactus@aaam.co.uk

Phone 0131454796597

Relationship Type: STRATEGIC

Owner * Adriana Tsankova

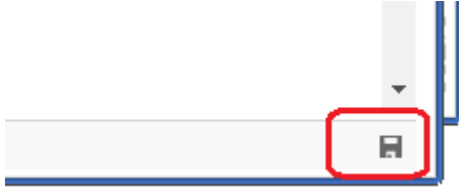
Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact Graham Taylor

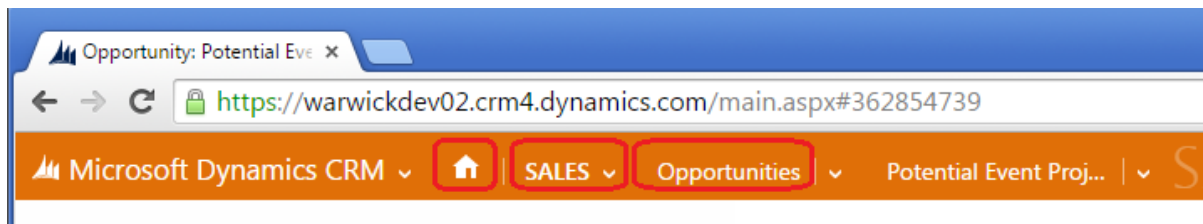
Email gt@abam.co

Business 079816486454

6. Save the record by clicking on the SAVE icon on the bottom right of the screen.



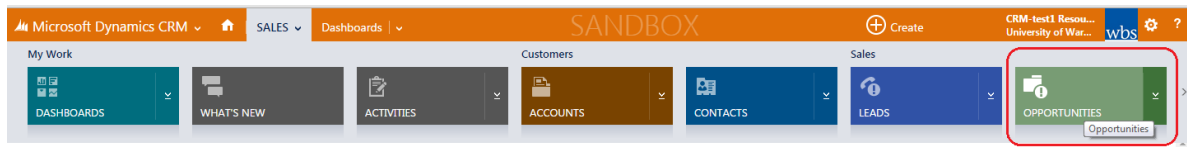
7. You can now close the screen/navigate away to the Opportunities area, go to homepage or navigate to a different area within the Sales menu.



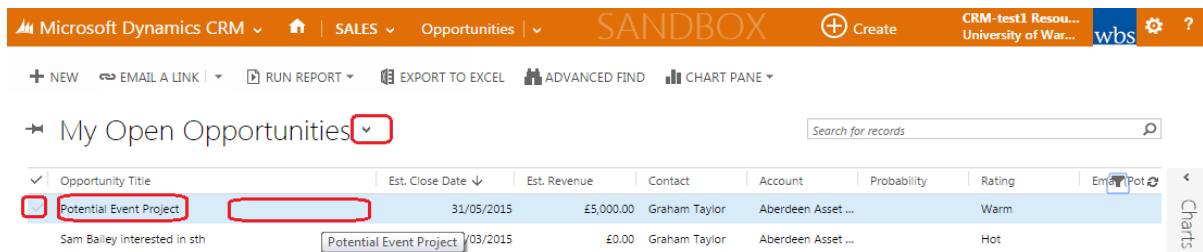
Update an Opportunity

General OPPORTUNITY Information

1. Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES

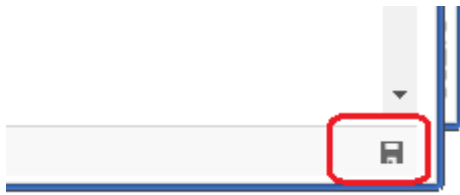


2. A grid displaying "My Open Opportunities" should appear where you can locate the record you wish to edit/view.
Double click on the "Opportunity Title" column or between the columns to open the record.

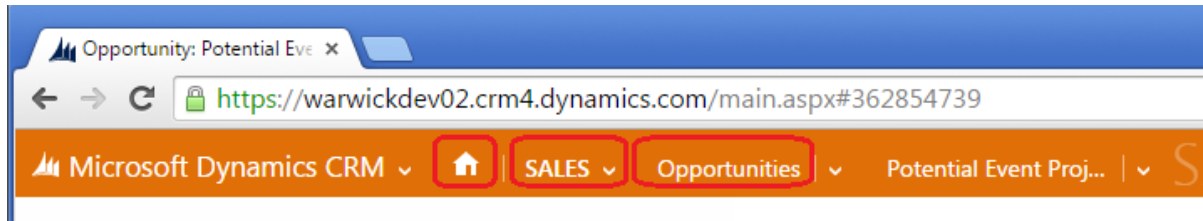


Tip! If you are working on an Opportunity owned by another member of your team, switch the grid view to display all open / current Opportunities or use the search box to look for the Opportunity you wish to update.

3. Fill in additional information or amend the existing data and click on the SAVE icon on the bottom right of the screen.

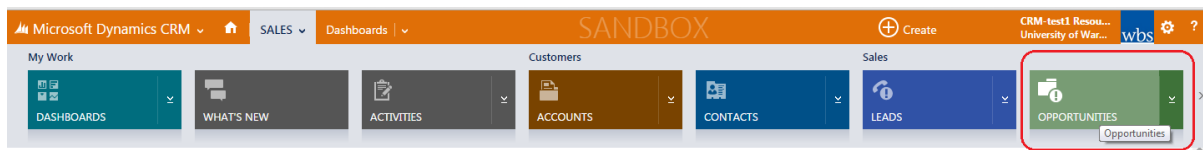


4. You can close the screen/return to the previous area - Opportunities / go to homepage or navigate to a different area within the Sales menu.

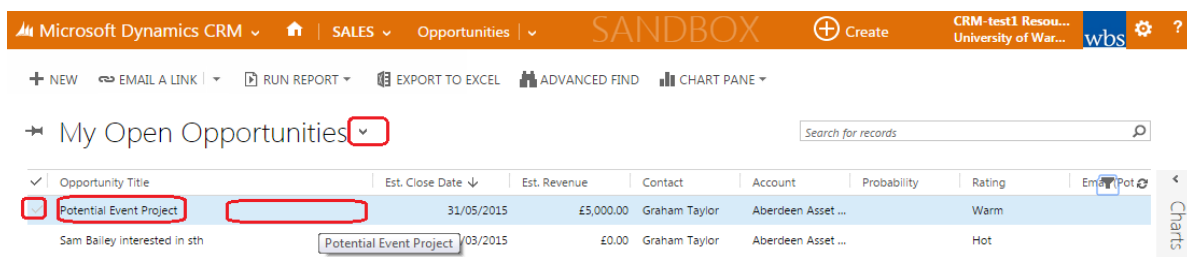


Add Stakeholders

1. Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES



2. A grid displaying "My Open Opportunities" should appear where you can locate the record you wish to edit/view.
Double click on the "Opportunity Title" column or between the columns to open the record.



Tip! If you are working on an Opportunity owned by another member of your team, switch the grid view to display all open / current Opportunities or use the search box to look for the Opportunity you wish to update.

3. Find the section called **KEY STAKEHOLDERS** and click on the (+), this will pop up a NEW Stakeholder form in a new browser window.

KEY STAKEHOLDERS

Company Name **Aberdeen Asset Management**

Aberdeen Asset Management

✉ Email **contactus@aaam.co.uk**

☎ Phone **0131454796597**

Relationship Type **STRATEGIC**

Owner*  **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact **Graham Taylor**

✉ Email **graham.t@aaam.co.uk**

☎ Business **0131125555**

STAKEHOLDERS



Type	Stakeholder Title ↑
------	---------------------

No Stakeholder records found.

4. Fill in the form by specifying the:
 - a. Scope - **Contact** OR **Company**

General

Scope	
Role *	Contact
	Company
Opportunity *	<u>Potential Event Project</u>

- b. Type - **Internal** (any Contact who **is** a member of staff at the University of Warwick who is involved) OR **External** (any Contact who **is not** a member of staff at the University of Warwick who is involved)

Note: Stakeholders with a Scope of "**Company**" are always of a Type "**External**" and therefore the system will not ask you to specify Type.

General

Scope	Contact
Type *	
Contact *	Internal
	External
Role *	--
Opportunity *	<u>Potential Event Project</u>

- c) Contact / Company - start typing the name of the individual or Company in the available field followed by clicking on the magnifying glass, you can also use " * " for partial word searching or click on the "Look up More Records" option. Alternatively, if the Contact does not exist, you can select the "+ New" button located at the bottom right of the search results drop down area to create a new one.

General

Scope

Type *

Contact *

Role *

Opportunity *

Contact

Internal

tracy l

Tracy LOAKES
Domestic Assistant Warwick Accom...

Tracy LYNCH
Relationship Man... Warwick Business...

Look Up More Records

2 results + New

- d. Role - to specify what role the particular Contact or Company takes with respect to this Opportunity, as with other fields, start typing a potential role, use " * " for partial word searching or click on the "Look up More Records" option. Alternatively, if the Role does not exist, you can select the "+ New" button located at the bottom right of the search results drop down area to create a new one.

(**Note:** if you enter a new role, please be aware that it will be available to every other CRM user, so please make sure that the information you are entering is accurate and appropriate)

Tip! The recommended way to search for the role is: In the first instance click the magnifying glass icon without typing anything in the field to display a list of available roles, this should be quicker than trying to type the exact wording of a role to check if it exists.

General

Scope

Type *

Contact *

Role *

Opportunity *

Contact

Internal

Tracy LYNCH

sec

Secondary Contact

Look Up More Records Secondary Contact

1 result + New

5. Once you fill in the New Stakeholder form, click the "SAVE & CLOSE" button.

| New Stakeholder

 CRM-test1 Resou...
University of War...

SAVE
 SAVE & CLOSE
 NEW

STAKEHOLDER : INFORMATION

New Stakeholder

Type*	Contact*	Role*	Owner*
Internal	Tracy LYNCH	Secondary Contact	CRM-test1 Resource

General

Scope	Contact	POSTS	ACTIVITIES	NOTES	STAKEHOLDER DETAILS
Type*	Internal	No records found.			
Contact*	Tracy LYNCH				Email T.Lynch@warwick.ac.uk
Role*	Secondary Contact				Business 75835
Opportunity*	Potential Event Project				

Active

You will be presented with the last screen you were viewing - the Opportunity record for which you are adding a stakeholder to; the new Stakeholder should now be visible in the Stakeholders section.

KEY STAKEHOLDERS

Aberdeen Asset Management

Email contactus@aaam.co.uk

Phone [0131454796597](tel:0131454796597)

Relationship Type **STRATEGIC**

Owner*  [Adriana Tsankova](#)

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact

Graham Taylor

Email gt@abam.co

Business [079816486454](tel:079816486454)

STAKEHOLDERS



Type	Stakeholder Title ↑
Internal	Tracy LYNCH- Secondary Contact - Potential Event ...

Modified By

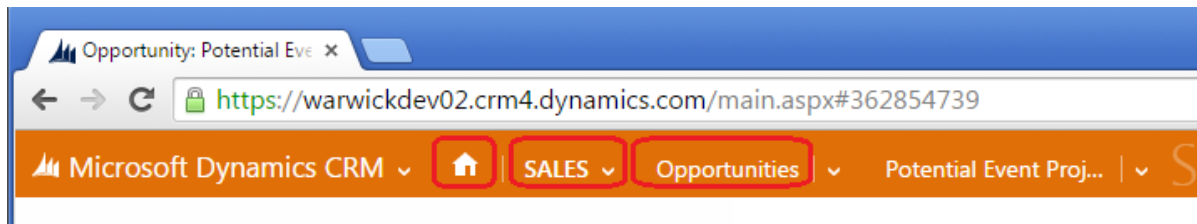
CRM-test1 Resource



6. Fill in or amend any further information if required and click on the SAVE icon on the bottom right of the screen.



7. You can close the screen/return to previous area - Opportunities / go to homepage or navigate to a different area within the Sales menu.



Add Activities

Please, refer to the "[Activities and Notes](#)" section of this User Guide.

Move Process Flow Stage

To move the Opportunity to the next stage, you will have to complete all mandatory steps (marked with red *) within the process flow bar, and then click on the "-> **Next Stage**" button located at the end of the Process flow bar.

A blue flag and the addition of the word "(Active)" to the stage name will be a clear indication of which stage you are at and which steps within it you will have to complete.

*(Note: you can navigate around the different stages in the process flow bar, for example to see what information will be required in a later stage, or to review information that you entered in an earlier stage. Please be aware however that navigating through the process in this way will **not** change which stage is currently active, this can only be achieved by clicking "-> **Next Stage**").*

Develop (Active) to Propose

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in ... | **SANDBOX** | Create | CRM-test1 Resource | University of War...

OPPORTUNITY: WBS OPPORTUNITY
Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: In Progress | Owner: CRM-test1

Process Flow Bar: Qualify | **Develop (Active)** | Propose | Close | Identify Project | Develop Project | Close Project | **Next Stage**

Steps in Develop (Active):
 ✓ Set Title *
 ✓ Set Type *
 Not For Profit?
 ✓ Set PI *
 ✓ Set Company *
 ✓ Set Contact *

General Summary:
 Opportunity Title: Potential interest in event project
 Opportunity Type: Event
 Financial Year: 15/16
 Company Name: Aberdeen Asset Management
 Primary Contact: Graham Taylor
 Not For Profit?: No
 Est. Revenue: £5,000.00
 Est. Close Date: 24/05/2015

DETAILS:
 Current Situation: --
 Need to be addressed: --
 More detailed description of the Opportunity:
 Proposed Solution: --

ACTIVITIES:
 To follow up with Graham on the Agenda
 To follow up with Graham on the Agenda
 Put together an Event Agenda
 To put together an Event Agenda and circulate it for approval internally before I send out to Graham
 Follow-up
 E-mail or phone call to explore likely possibility of a student presentation at WBS.

KEY STAKEHOLDERS:
Aberdeen Asset Management
 Email: contactus@aaam.co.uk
 Phone: 0131454796597
 Relationship Type: STRATEGIC
 Owner: Adriana Tsankova
 Primary Contact: Graham Taylor
 Email: graham.t@aaam
 Business: 0131125555

Footer: Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 16:47 | Modified By: CRM-test1 Resource | Open

Propose (Active) to Close

Microsoft Dynamics CRM - SALES - Opportunities - Potential interest in ...

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: In Progress | Owner: CRM-test1

Process Flow: Quality → Develop → **Propose (Active)** → Identify Project → Develop Project → Close Project → Next Stage

Activities:

- ✓ Outline the Proposed Solution
- ✓ Set Est. Profit

General

SUMMARY

Opportunity Title: Potential interest in event project
 Opportunity Type: Event
 Financial Year: 15/16
 Company Name: Aberdeen Asset Management
 Primary Contact: Graham Taylor
 Not For Profit?: No
 Est. Revenue: £5,000.00
 Est. Close Date: 24/05/2015

DETAILS

Current Situation: ..

Need to be addressed: More detailed description of the Opportunity.

Proposed Solution: More details of the proposed solution e.g. event package, sponsorship terms, etc.

POSTS

- ✓ To follow up with Graham on the Agenda
To follow up with Graham on the Agenda
Modified by CRM-test1 Resource Just now
- ✓ Put together an Event Agenda
To put together an Event Agenda and circulate it for approval internally before I send out to Graham
Modified by CRM-test1 Resource Just now
- ✓ Follow-up
E-mail or phone call to explore likely possibility of a student presentation at WBS.
Modified by SYSTEM Yesterday

KEY STAKEHOLDERS

Aberdeen Asset Management

Email: contactus@aaam.co.uk
 Phone: 011454796597
 Relationship Type: STRATEGIC
 Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

Email: graham.t@aaam
 Business: 0131125555

Type: Stakeholder Title ↑

External: Adriana Taylor- Coordinator - Potential interest in e...
 Internal: Tracy LYNCH- Secondary Contact - Potential interes...

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 16:47 | Modified By: CRM-test1 Resource

Open

Close (Active) to Identify Project

Microsoft Dynamics CRM - SALES - Opportunities - Potential interest in ...

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: In Progress | Owner: CRM-test1

Process Flow: Quality → Develop → Propose → **Close (Active)** → Identify Project → Develop Project → Close Project → Next Stage

Activities:

- ✓ Outline the Current Situation
- ✓ Outline some details of the expected outcome for this Opportunity.

General

SUMMARY

Opportunity Title: Potential interest in event project
 Opportunity Type: Event
 Financial Year: 15/16
 Company Name: Aberdeen Asset Management
 Primary Contact: Graham Taylor
 Not For Profit?: No
 Est. Revenue: £5,000.00
 Est. Close Date: 24/05/2015

DETAILS

Current Situation: Outline some details of the expected outcome for this Opportunity.

Need to be addressed: More detailed description of the Opportunity.

Proposed Solution: More details of the proposed solution e.g. event package, sponsorship terms, etc.

POSTS

- ✓ To follow up with Graham on the Agenda
To follow up with Graham on the Agenda
Modified by CRM-test1 Resource Just now
- ✓ Put together an Event Agenda
To put together an Event Agenda and circulate it for approval internally before I send out to Graham
Modified by CRM-test1 Resource Just now
- ✓ Follow-up
E-mail or phone call to explore likely possibility of a student presentation at WBS.
Modified by SYSTEM Yesterday

KEY STAKEHOLDERS

Aberdeen Asset Management

Email: contactus@aaam.co.uk
 Phone: 011454796597
 Relationship Type: STRATEGIC
 Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

Email: graham.t@aaam
 Business: 0131125555

Type: Stakeholder Title ↑

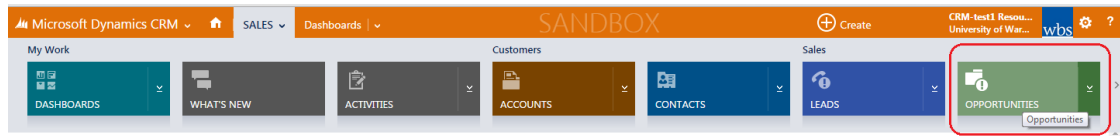
External: Adriana Taylor- Coordinator - Potential interest in e...
 Internal: Tracy LYNCH- Secondary Contact - Potential interes...

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 16:47 | Modified By: CRM-test1 Resource

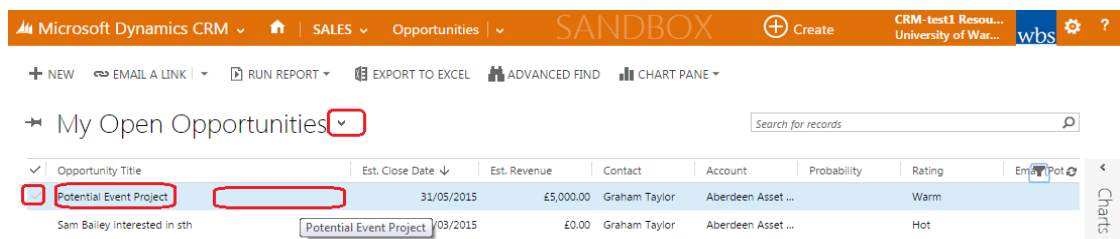
Open

Add Agreements

1. Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES

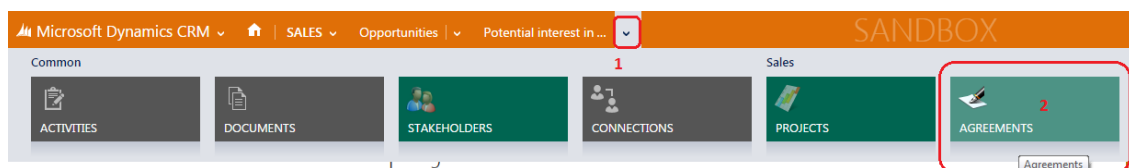


2. A grid displaying "My Open Opportunities" should appear. Where you can locate the record you wish to edit/view.
Double click on the "Opportunity Title" column or between the columns to open the record.



Tip! If you are working on an Opportunity owned by another member of your team, switch the grid view to display all open / current Opportunities or use the search box to look for the Opportunity you wish to update.

3. Click on the arrow next to the Opportunity Title on the top ribbon and related records navigation will appear;
4. Select Agreement and a more detailed grid will be presented.



5. Find the button "ADD NEW AGREEMENT" and a New Agreement screen/form will pop-up in a separate browser window, whereby the Company Name and Primary Contact will be automatically pre-populated with the ones specified in the Opportunity.

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in ... | **SANDBOX** | Create | CRM-test1 Resource | University of War...

OPPORTUNITY: WBS OPPORTUNITY

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: In Progress | Owner: CRM-test1

Process: Quality → Develop → Propose → **Close (Active)** → Identify Project → Develop Project → Close Project → Next Stage

Agreement Associated View

+ ADD NEW AGREEMENT | ADD EXISTING AGREEMENT | CHART PANE | RUN REPORT | EXPORT AGREEMENTS

Agreement Title | Add New Agreement | Add a related Agreement to this record.

No Agreement records found.

0 - 0 of 0

ID	Agreement Title	Agreement Type	Company Name	Primary Contact	Signed by Com...	Signed by Warw...	Start Date	End Date	Status Reason	Owner	Created On	Originating Project
1												

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 16:47 | Modified By: CRM-test1 Resource

Open

- Fill in the form and click on the "SAVE & CLOSE" button on the top left. You will be back to the Opportunity record you were viewing.

Microsoft Dynamics CRM | SALES | Agreements | New Agreement | **SANDBOX** | Create | CRM-test1 Resource | University of War...

SAVE | **SAVE & CLOSE** | + NEW

AGREEMENT: WBS AGREEMENT

New Agreement

Status Reason: Pending | Agreement Type: MOU | Company Name: Aberdeen Asset Management | Owner: CRM-test1 Resource

General

ID: -- | POSTS: -- | ACTIVITIES: -- | NOTES: --

Agreement Title: **MOU Re Event Title...** | No records found.

Company Name: **Aberdeen Asset Management**

Primary Contact: **Graham Taylor**

Agreement Type: **MOU**

Signed by Company?: **No**

Signed by Warwick?: **No**

Start Date: --

End Date: --

Originating Opportunity: **Potential interest in event project**

Originating Project: --

SUMMARY OF PURPOSE

Further descriptive information about this Agreement filled in here..

CONTACT DETAILS

Company Name: **Aberdeen Asset Management**

Aberdeen Asset Management

Email: **contactus@aaam.co.uk**

Phone: **0131454796597**

Relationship Type: **STRATEGIC**

Owner: **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: **Graham Taylor**

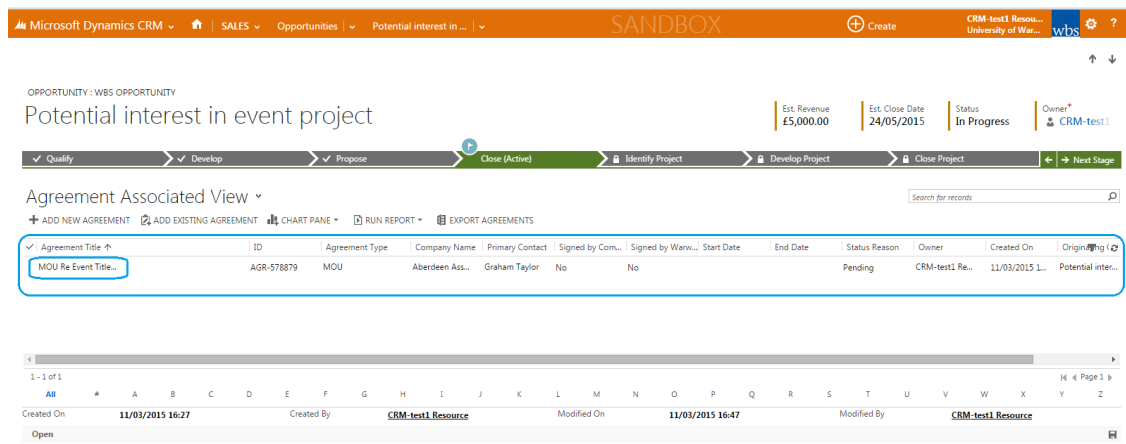
Email: **graham.t@aaam**

Business: **0131125555**

Created On: -- | Created By: -- | Modified On: -- | Modified By: --

Active

- The Agreement should now be visible within the related records navigation area (also available within the Engagement History for the both Account and Contact when viewing them). You can double click on the Agreement title column and open the full details of the agreement should you wish to review or amend them.



Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in...

SANDBOX

CRM-test1 Resource University of War...

OPPORTUNITY : WBS OPPORTUNITY

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: In Progress | Owner: CRM-test1

Process Flow: Qualify → Develop → Propose → **Close (Active)** → Identify Project → Develop Project → Close Project → Next Stage

Agreement Associated View

ADD NEW AGREEMENT | ADD EXISTING AGREEMENT | CHART PANE | RUN REPORT | EXPORT AGREEMENTS

Agreement Title	ID	Agreement Type	Company Name	Primary Contact	Signed by Com...	Signed by War...	Start Date	End Date	Status Reason	Owner	Created On	Originaling
MOU Re Event Title...	AGR-578879	MOU	Aberdeen Ass...	Graham Taylor	No	No			Pending	CRM-test1 Re...	11/03/2015 1...	Potential inter...

1 - 1 of 1

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 16:47 | Modified By: CRM-test1 Resource

Close an Opportunity

A **Closed** Opportunity indicates that there are no current on-going negotiations and an outcome/decision has been reached whereby the Opportunity has either successfully evolved into a Project, or not.

Closed Opportunities are categorised as:

Won - whereby they have been successful and will be **automatically converted into a Project**.

OR

Lost - whereby they have been unsuccessful, no work will be delivered by the university to the other party and no monetary or reputational benefit to the university will be gained. Lost Opportunities **will not** be converted into a Project and will remain in an archived/read only state with the potential to be reopened if at a later stage the circumstances change and the other party wish to proceed.

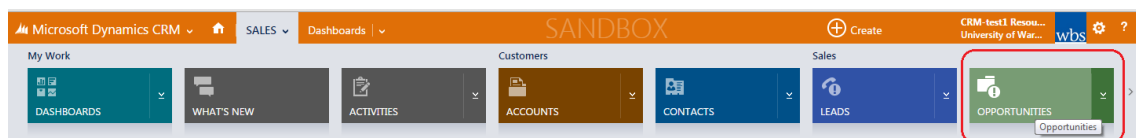
NOTE: To keep the information as current and accurate as possible it is important that Opportunities are managed i.e. regularly updated by the owning user or members of their team.

The Process Flow bar should always indicate the current stage of the engagement and Status Reason should display the outcome. I.e. Closed as Won or Closed as Lost.

You will have to **ensure that the Process Flow Bar is at the stage "Close"** before closing an Opportunity **as Won**.

Close as Lost

1. Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES



2. A grid displaying "My Open Opportunities" should appear where you can locate the record you wish to edit/view.
Double click on the "Opportunity Title" column or between the columns to open the record.

Opportunity Title	Est. Close Date	Est. Revenue	Contact	Account	Probability	Rating	Email Pot
Potential Event Project	31/05/2015	£5,000.00	Graham Taylor	Aberdeen Asset ...		Warm	
Sam Bailey interested in sth	Potential Event Project	03/2015	£0.00	Graham Taylor	Aberdeen Asset ...	Hot	

Tip! If you are working on an Opportunity owned by another member of your team, switch the grid view to display all open / current Opportunities or use the search box to look for the Opportunity you wish to update.

3. Enter any relevant Notes in the **NOTES** section. POST ACTIVITIES NOTES -> Select NOTES -> Click on the wording "Enter a note" and start typing in the inline form, entering Note title and body -> Done

POSTS ACTIVITIES **NOTES**

Enter a note

No Notes found.

POSTS ACTIVITIES **NOTES**

No Longer Interested...

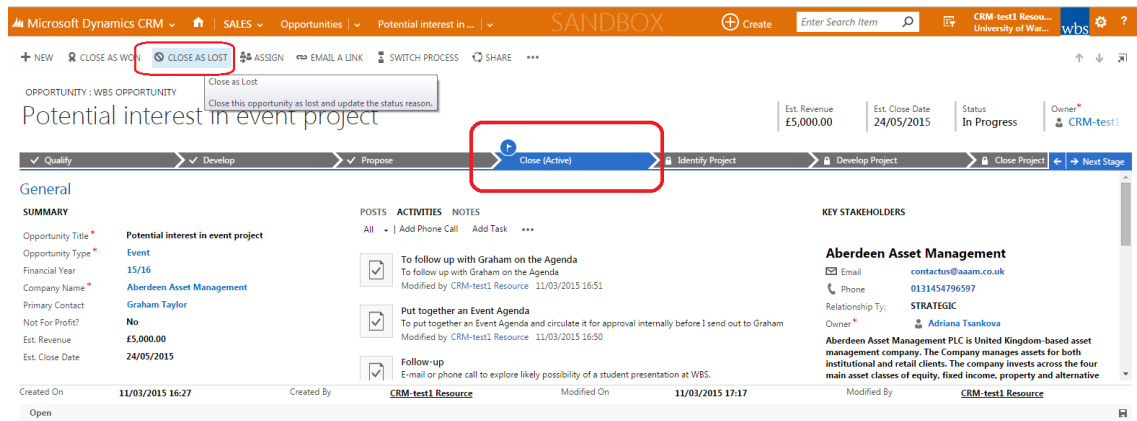
No Longer interested because...

Attach Done

No Notes found.

Done

4. Ensure that the Opportunity Record is at the relevant Process Flow Stage and select the button "**CLOSE AS LOST**" located on the top left corner of the form.



5. Selecting the button will trigger a pop-up form which will ask for more details, some of the fields will be pre-populated, double check them, fill in the form where more information is available and select **OK**.

The screenshot shows a 'Close Opportunity' pop-up form. The form title is 'Close Opportunity' with a close button (X) in the top right corner. Below the title, it says 'Provide the following information about why this opportunity is being closed.' The form contains several fields: 'Status Reason' (a dropdown menu with 'Cancelled' selected), 'Actual Revenue' (a text field with '£0.00'), 'Close Date' (a date picker with '17/03/2015' selected), and 'Competitor' (a text field with a search icon). Below these fields is a 'Description' section with a text area containing the text 'Description of why this Opportunity did not go ahead...'. At the bottom of the form, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangle.

6. The Opportunity will revert to a Read-Only / archived state. You can close the screen or return to the previous area - You can navigate to Opportunities or go to the homepage. Finally you can navigate to a different area within the Sales menu.

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in ... | SAI | Create | Enter Search Item | CRM-test1 Resou... University of War... | wbs | ?

REOPEN OPPORTUNITY | ASSIGN | EMAIL A LINK | SWITCH PROCESS | SHARE | FOLLOW | RUN WORKFLOW | ...

OPPORTUNITY : WBS OPPORTUNITY

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: Cancelled | Owner: CRM-test1

Qualify | Develop | Propose | **Close (Active)** | Identify Project | Develop Project | Close | Next Stage

General

SUMMARY

Opportunity Title: Potential interest in event project
 Opportunity Type: Event
 Financial Year: 15/16
 Company Name: Aberdeen Asset Management
 Primary Contact: Graham Taylor
 Not For Profit?: No
 Est. Revenue: £5,000.00
 Est. Close Date: 24/05/2015

DETAILS

Current Situation
 Outline some details of the expected outcome for this Opportunity.

POSTS | **ACTIVITIES** | **NOTES**

All | Add Phone Call | Add Task | ...

☒ To follow up with Graham on the Agenda
 To follow up with Graham on the Agenda
 Modified by CRM-test1 Resource 11/03/2015 16:51

☒ Put together an Event Agenda
 To put together an Event Agenda and circulate it for approval internally before ...
 Modified by CRM-test1 Resource 11/03/2015 16:50

☒ Follow-up
 E-mail or phone call to explore likely possibility of a student presentation at WBS.
 Modified by SYSTEM 10/03/2015 17:44

KEY STAKEHOLDERS

Aberdeen Asset Management
 Email: contactus@aaam.co.uk
 Phone: 0131454796597
 Relationship Type: STRATEGIC
 Owner: Adriana Tsankova

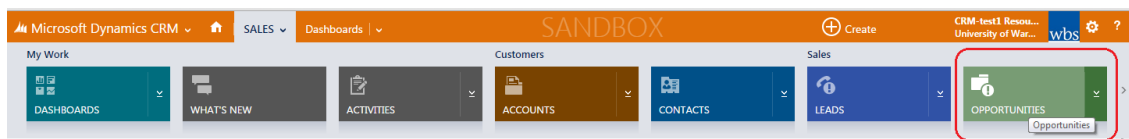
Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 17:17 | Modified By: CRM-test1 Resource

Lost | Read only

Search & Reopen Lost Opportunities

1. Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES



2. A grid displaying "My Open Opportunities" should appear. Switch the view to "My Closed Opportunities".

Microsoft Dynamics CRM | SALES | Opportunities

+ NEW | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

My Open Opportunities 1

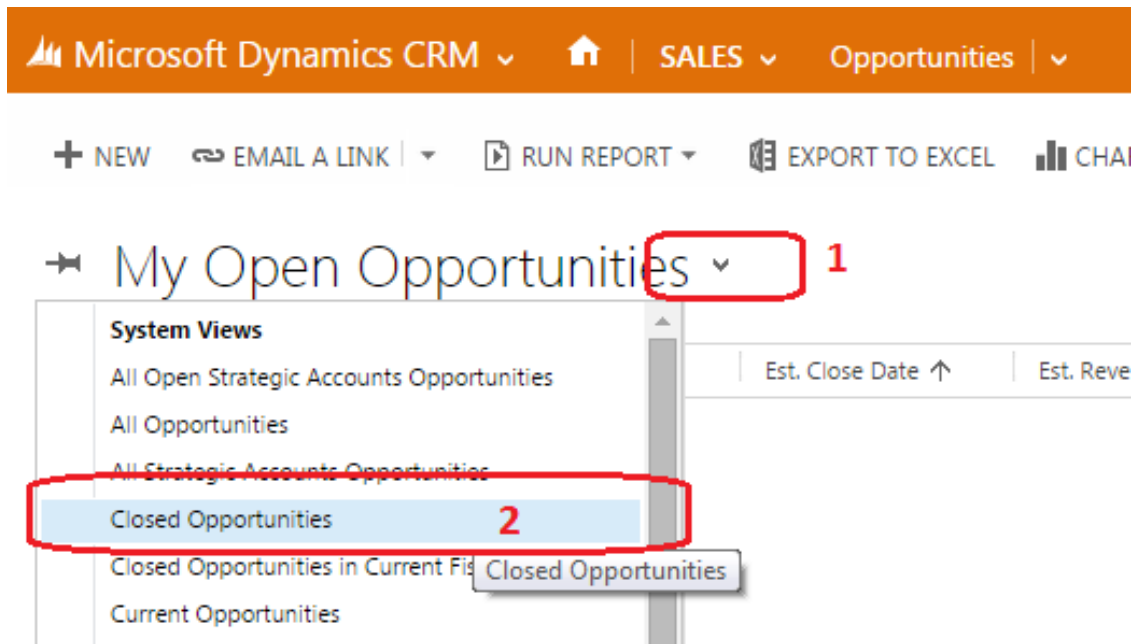
System Views

- All Open Strategic Accounts Opportunities
- All Opportunities
- All Strategic Accounts Opportunities
- Closed Opportunities
- Closed Opportunities in Current Fiscal Year
- Current Opportunities
- jobs.ac.uk - All Opportunities (Linked to Meeting...
- jobs.ac.uk International Lost Opportunities
- jobs.ac.uk International Won Opportunities
- jobs.ac.uk Open International Opportunities
- jobs.ac.uk UK Lost Opportunities
- jobs.ac.uk UK Open Opportunities
- jobs.ac.uk UK Won Opportunities
- Lost Opportunities
- My Closed Opportunities 2**
- My Closed Opportunities in Current Financial Year
- My Connections
- My Open Opportunities

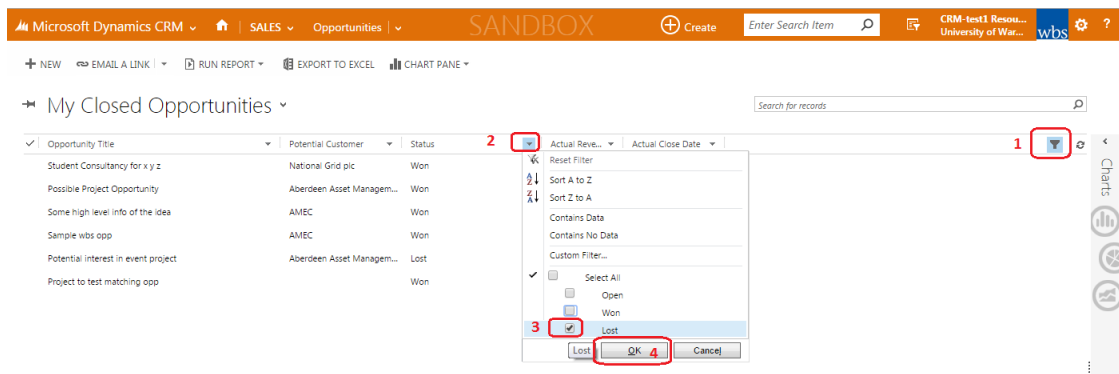
Est. Close Date ↑

jobs.ac.uk - All Opportunities (Linked to Meeting...	22/02/20
jobs.ac.uk International Lost Opportunities	15/03/20
jobs.ac.uk International Won Opportunities	31/05/20

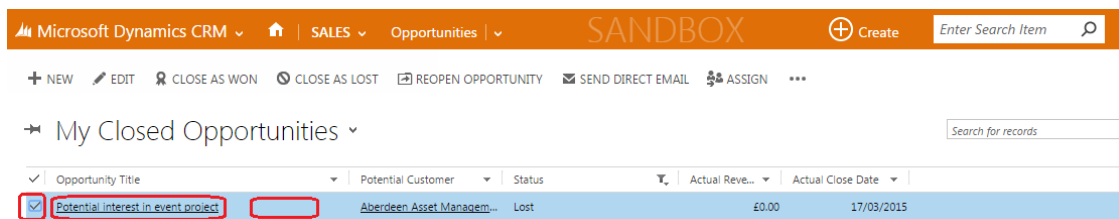
If you are looking for an Opportunity which you do not own then select the "Closed Opportunities" view.



- Find the particular Opportunity of interest in the grid **OR** Enable the filter on the top right of the grid and filter by Status. Select the option "Lost" within the Status column.



- Double click on the "Opportunity Title" column or between the columns to open the record of interest.



- Once you have accessed the Lost Opportunity record, find the button "REOPEN OPPORTUNITY" located on the top left of the form and select it.

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in ... | Create | Enter Search Item | CRM-test1 Resource | University of War...

REOPEN OPPORTUNITY | ASSIGN | EMAIL A LINK | SWITCH PROCESS | SHARE | FOLLOW | RUN WORKFLOW

OPPORTUNITY: WBS OPPORTUNITY

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: Cancelled | Owner: CRM-test1

Qualify | Develop | Propose | **Close (Active)** | Identify Project | Develop Project | Close | Next Stage

General

SUMMARY

Opportunity Title: Potential interest in event project

Opportunity Type: Event

Financial Year: 15/16

Company Name: Aberdeen Asset Management

Primary Contact: Graham Taylor

Not For Profit?: No

Est. Revenue: £5,000.00

Est. Close Date: 24/05/2015

DETAILS

Current Situation

Outline some details of the expected outcome for this Opportunity.

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 12:52 | Modified By: CRM-test1 Resource

POSTS | ACTIVITIES | NOTES

All | Add Phone Call | Add Task

Potential interest in event project

Completed by CRM-test1 Resource Today

To follow up with Graham on the Agenda

To follow up with Graham on the Agenda

Modified by CRM-test1 Resource 11/03/2015 16:51

Put together an Event Agenda

To put together an Event Agenda and circulate it for approval internally before ...

Modified by CRM-test1 Resource 11/03/2015 16:50

Follow-up

E-mail or phone call to explore likely possibility of a student presentation at W...

KEY STAKEHOLDERS

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: 0131454796597

Relationship Type: STRATEGIC

Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment

Read only

- The Opportunity record will become editable again and you can continue working on it. I.e. adding/ updating information, activities or stakeholders, move the stage back a step e.g. Propose, or close it as Won (see section [Close as Won](#)) if the other party has decided to go ahead with the proposed engagement scope. You can also close the screen/return to the previous area - Opportunities / go to homepage or navigate to a different area within the Sales menu.

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in ... | Create | Enter Search Item | CRM-test1 Resource | University of War...

NEW | CLOSE AS WON | CLOSE AS LOST | ASSIGN | EMAIL A LINK | SWITCH PROCESS | SHARE

OPPORTUNITY: WBS OPPORTUNITY

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: Cancelled | Owner: CRM-test1

Qualify | Develop | Propose | **Close (Active)** | Identify Project | Develop Project | Close | Next Stage

Outline the Current Situation | Outline some details of this Opportunity

General

SUMMARY

Opportunity Title: Potential interest in event project

Opportunity Type: Event

Financial Year: 15/16

Company Name: Aberdeen Asset Management

Primary Contact: Graham Taylor

Not For Profit?: No

Est. Revenue: £5,000.00

Est. Close Date: 24/05/2015

DETAILS

Current Situation

Outline some details of the expected outcome for this Opportunity.

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 12:52 | Modified By: CRM-test1 Resource

POSTS | ACTIVITIES | NOTES

All | Add Phone Call | Add Task

Description of why this Opportunity did not go ahead...

Cancelled by CRM-test1 Resource Today

To follow up with Graham on the Agenda

To follow up with Graham on the Agenda

Modified by CRM-test1 Resource 11/03/2015 16:51

Put together an Event Agenda

To put together an Event Agenda and circulate it for approval internally before I send...

Modified by CRM-test1 Resource 11/03/2015 16:50

Follow-up

E-mail or phone call to explore likely possibility of a student presentation at WBS.

Modified by SYSTEM 10/03/2015 17:44

KEY STAKEHOLDERS

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: 0131454796597

Relationship Type: STRATEGIC

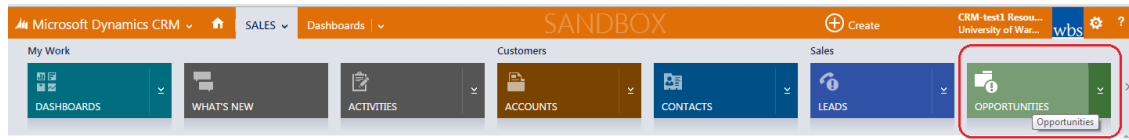
Owner: Adriana Tsankova

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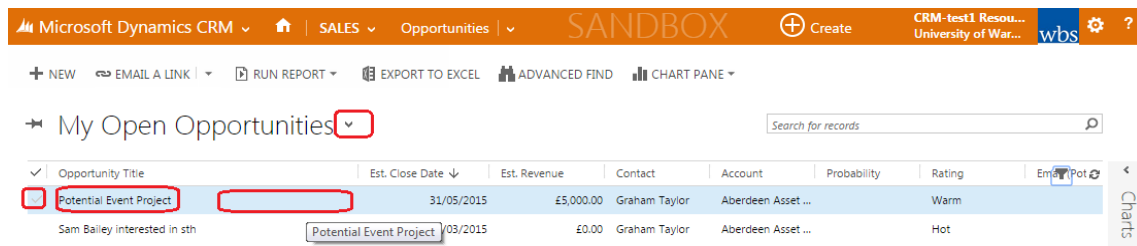
Open

Close as Won

- Find the OPPORTUNITIES tile, by navigating through: CRM HOMEPAGE -> SALES -> OPPORTUNITIES



2. A grid displaying "My Open Opportunities" should appear. Where you can locate the record you wish to edit/view.
Double click on the "Opportunity Title" column or between the columns to open the record.



Tip! If you are working on an Opportunity owned by another member of your team, switch the grid view to display all open / current Opportunities or use the search box to look for the Opportunity you wish to update.

3. Enter any relevant Notes in the **NOTES** section. POST ACTIVITIES NOTES -> Select NOTES -> Click on the wording "Enter a note" and start typing in the inline form, entering Note title and body -> Done

POSTS ACTIVITIES **NOTES**

Enter a note

No Notes found.

POSTS ACTIVITIES **NOTES**

Contract signed

Contract signed by both parties on...

Attach Done

4. Ensure that the Opportunity Record is at the relevant "CLOSE" Process Flow Stage (if not, move it to the Close Stage by selecting the " -> Next Stage" button at the end of the process bar) and select the button "CLOSE AS WON" located at the top left corner of the form.

Microsoft Dynamics CRM | SALES | Opportunities | Potential interest in... | SANDBC | Create | Enter Search Item | CRM-test1 Resou... | University of War... | wbs

NEW | **CLOSE AS WON** | CLOSE AS LOST | ASSIGN | EMAIL A LINK | SWITCH PROCESS | SHARE | ...

Close as Won
Close this opportunity as won and update the status reason.

Potential interest in event project

Est. Revenue: £5,000.00 | Est. Close Date: 24/05/2015 | Status: Cancelled | Owner: CRM-test1

Process Bar: Quality | Develop | Propose | **Close (Active)** | Identify Project | Develop Project | Close Proj | Next Stage

General

SUMMARY

Opportunity Title: Potential interest in event project
 Opportunity Type: Event
 Financial Year: 15/16
 Company Name: Aberdeen Asset Management
 Primary Contact: Graham Taylor
 Not For Profit?: No
 Est. Revenue: £5,000.00
 Est. Close Date: 24/05/2015

DETAILS

Current Situation
 Outline some details of the expected outcome for this Opportunity.

POSTS | ACTIVITIES | NOTES

All | Add Phone Call | Add Task | ...

KEY STAKEHOLDERS

Aberdeen Asset Management
 Email: contactus@aaam.co.uk
 Phone: 0131454796597
 Relationship Type: STRATEGIC
 Owner: Adriana Tsankova
 Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Created On: 11/03/2015 16:27 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 12:52 | Modified By: CRM-test1 Resource

Open

5. Selecting the button will trigger a pop-up form which will ask for more details. Some of the fields will be pre-populated. Double check the **Actual Revenue** and overwrite it if the actual revenue is different to the estimated. Fill in the form where more information is available and select **OK**. *Nb. The competitor box is only relevant if you know that you lost the business to a competitor, if not then you can ignore this field.*

Close Opportunity

Provide the following information about why this opportunity is being closed.

Status Reason *: Won

Actual Revenue *: £6,500.00

Close Date *: 17/03/2015

Competitor

Description
 Some further details..e.g. got additional £1500 to cover for...

OK | Cancel

6. Once the Opportunity has been closed as Won, you will have to move the record to the **Next Stage**, which then leads to an auto-generated Project. Select the "-> **Next Stage**" button at the

end of the process flow bar and select the generated project with the same title as the Opportunity from the drop down option.

This screenshot shows the 'Potential interest in event project' record in Microsoft Dynamics CRM. The record is in the 'Close (Active)' stage of the process flow. A red box highlights the 'Next Stage' button in the process bar, and another red box highlights the 'Potential interest in event...' option in the dropdown menu. The record details include: Opportunity Title: Potential interest in event project; Opportunity Type: Event; Financial Year: 15/16; Company Name: Aberdeen Asset Management; Primary Contact: Graham Taylor; Not For Profit?: No; Est. Revenue: £5,000.00; Est. Close Date: 24/05/2015; Status: Won; Owner: CRM-test1 Resource. The 'General' tab is active, showing a summary of the opportunity and a list of activities.

7. Moving to the next stage will unlock the process flow bars relevant to the Project record representing the delivery stage of the agreed engagement scope. Since it has been carried through automatically from the Opportunity, you may need to review the Project details and edit the Project Title if it is no longer appropriate.

You can close the screen and return to the previous area - Opportunities / go to homepage or navigate to a different area within the Sales menu.

This screenshot shows the 'Potential interest in event project' record in Microsoft Dynamics CRM, now as a Project. The record is in the 'Identify Project (Active)' stage of the process flow. A red box highlights the 'Identify Project (Active)' button in the process bar. The record details include: Project Title: Potential interest in event project; Project Type: Event; Financial Year: 15/16; Company Name: Aberdeen Asset Management; Primary Contact: Graham Taylor; Not For Profit?: No; Start Date: --; End Date: --; Project Value On Co: £6,500.00; Status: Active; Owner: CRM-test1 Resource. The 'General' tab is active, showing a summary of the project and a list of activities.

Projects

Projects in Dynamics CRM are the core record in the **delivery process** of the agreed engagement scope. They represent work being undertaken by the University of Warwick for a particular Account and / or Contact for which the university receives monetary or reputational benefits.

The creation of a Project adds this agreed engagement to the overall university-wide and separate business units' current and historical delivery overview. It allows us to plan, track, record and manage activities related to the delivery of the agreed scope.

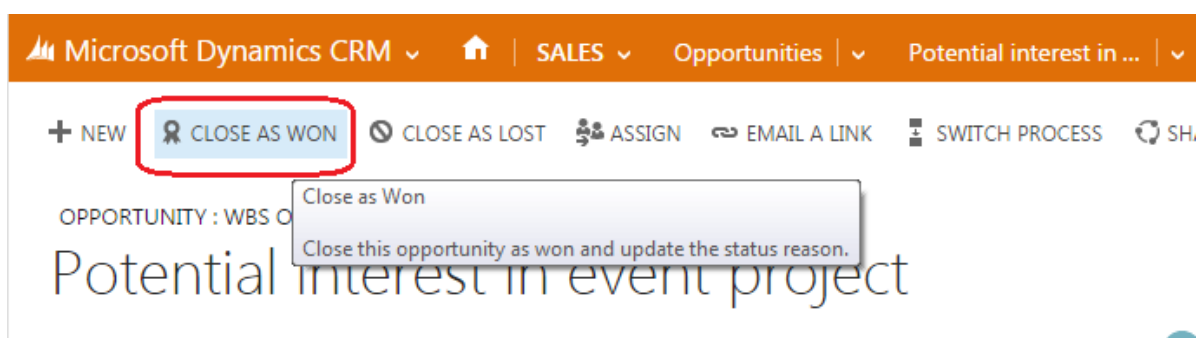
In addition to creating an engagement delivery overview, Projects allow us to track the success of marketing efforts by tracking engagements back to the original lead and / or campaign sources.



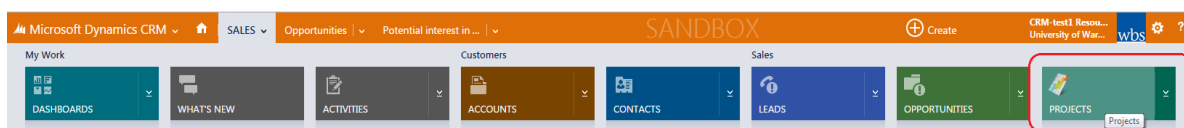
Create a Project

Projects can be created in the following ways:

- a. Automatically Generated from Opportunities which are closed as "Won"

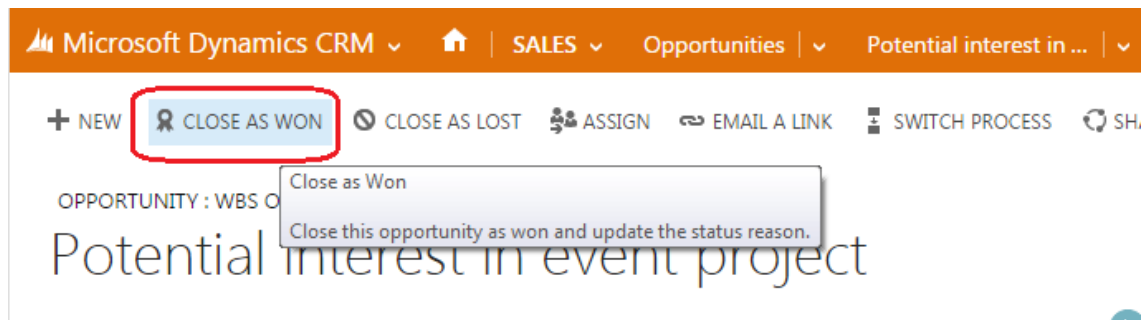


- b. From the main navigation in the "Projects" section / tile



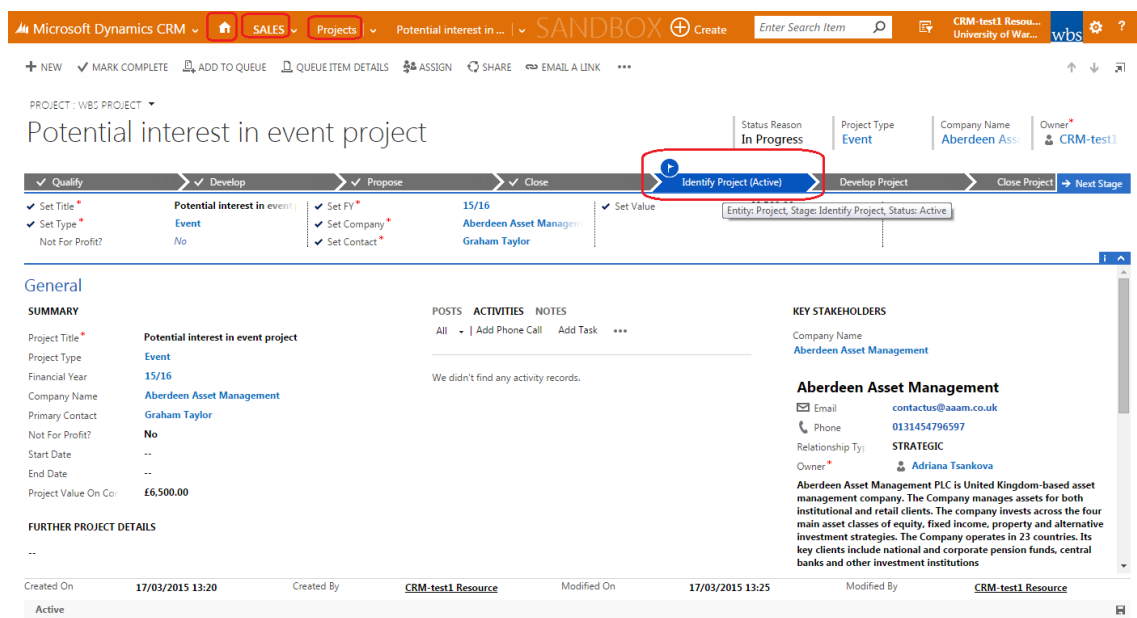
Through Opportunity Win

1. To prompt Project auto-generation from an existing Opportunity, please refer to the [Close as Won](#) sub-section in this user guide and complete all the steps.



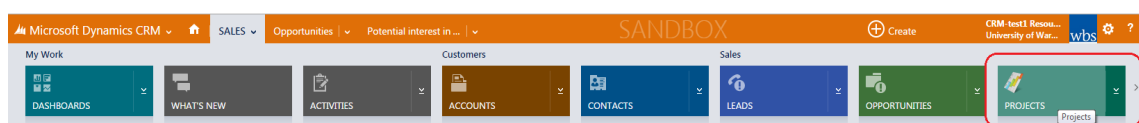
Once an Opportunity is closed as Won a Project record is auto-generated and the "Identify Project" Process Flow stage is unlocked; most details will be carried through automatically from within the originating Opportunity Record.

Any Activities related to the Originating Opportunity will not be transferred to the Project as activities will only be relevant to the negotiation stage rather than delivery stage entered during the lifecycle of a project.

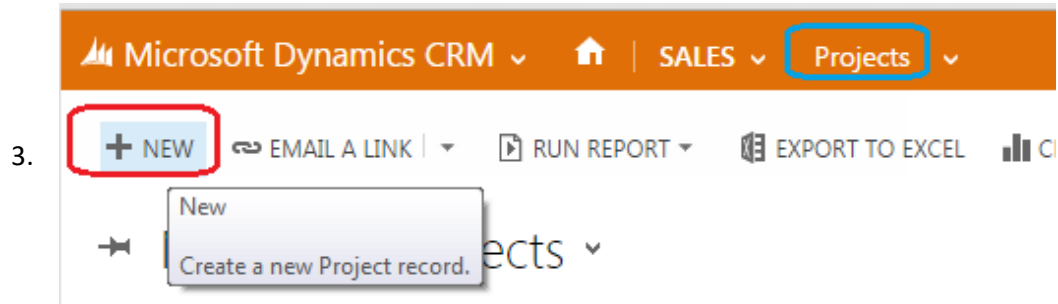


Through Main Navigation

1. Find the PROJECTS tile, by navigating through: CRM HOMEPAGE -> SALES -> PROJECTS



2. Click the + NEW button located on the top left corner of the screen.



4. A New Project screen will pop up. Fill in the minimum required information marked with a red * on the form, and click the "SAVE" button located on the top left of the screen.

5. Continue to work on the Project Record and fill in as much information as you currently have. The process flow bar will guide you through what should be completed at each stage. When you create a Project from within the main navigation the process flow will start from the 'Identify' **STAGE**, to move the record to the next stage (Develop) you will need to complete all the **STEPS** within the current stage and only then you can click the " -> Next Stage " button. This will move the Project a stage forward allowing you to categorise this Project in the correct delivery overview graph area to quickly identify the current status of this project, as well as provide guidance on the next steps to be completed.

Microsoft Dynamics CRM | SALES | Projects | Event Project short ... | SANDBOX | Create | Enter Search Item | CRM-test1 Resource... University of War... | wbs | ?

+ NEW | MARK COMPLETE | ADD TO QUEUE | QUEUE ITEM DETAILS | ASSIGN | SHARE | EMAIL A LINK | ...

PROJECT : WBS PROJECT ▾
Event Project short descriptive title..

Status Reason: In Progress | Project Type: Event | Company Name: Aberdeen Asset Management | Owner: CRM-test1

Identify (Active) | Develop | Close | Next Stage

General

SUMMARY

Project Title: Event Project short descriptive title..
Project Type: Event
Financial Year: 15/16
Company Name: Aberdeen Asset Management
Primary Contact: Graham Taylor
Not For Profit?: No
Start Date: 23/03/2015
End Date: 25/03/2015
Project Value On Co: £6,500.00

FURTHER PROJECT DETAILS

Some further Project details outlines here...

KEY STAKEHOLDERS

Company Name: Aberdeen Asset Management

Aberdeen Asset Management

Email: contactus@aaam.co.uk
Phone: 0131454796597
Relationship Type: STRATEGIC
Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

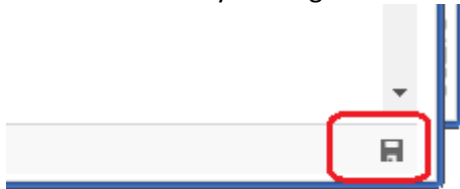
Primary Contact: Graham Taylor

Department: --
Job Title: Business Development Manager
Email: graham.t@aaam.co.uk
Business Phone: 01315446679

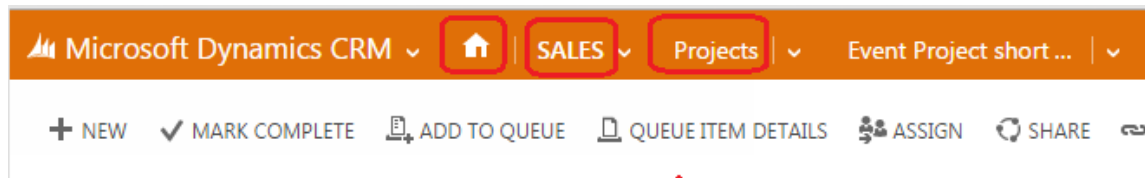
Created On: 17/03/2015 14:49 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 14:50 | Modified By: CRM-test1 Resource

Active

- Save the record by clicking on the SAVE icon on the bottom right of the screen.



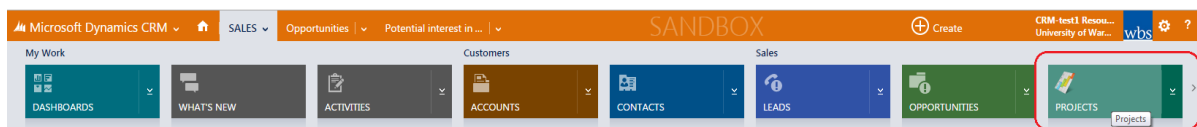
- You can now close the screen/navigate away to the Projects area, go to your homepage or navigate to a different area within the Sales menu.



Update a Project

General Project Information

- Find the PROJECTS tile, by navigating through: CRM HOMEPAGE -> SALES -> PROJECTS

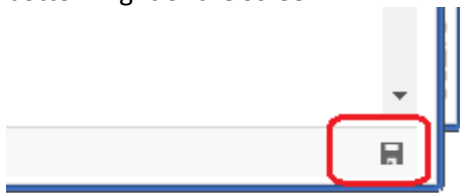


- A grid displaying "My Active Projects" should appear where you can locate the record you wish to edit/view.
Double click on the "Project Title" column or **between** the columns to open the record.

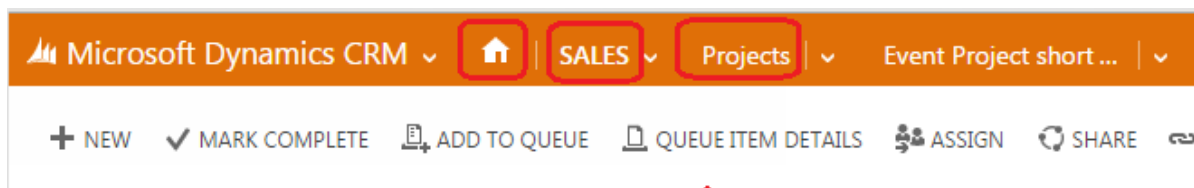
Project Title ↑	Company Name	Project Type	Financial Ye...	Budget Value	Primary Contact	Owner	Status
Event Project short descriptive title...	Aberdeen Asset Management	Event	15/16		Graham Taylor	CRM-test1 Reso...	Active
H2020 Lighthouse bid	Event Project short descriptive title...	Research	14/15	£3,000,000.00	Bob Bobson	CRM-test1 Reso...	Active
Sample Project	Accenture	Student Consult...	14/15		Dave Andrews	CRM-test1 Reso...	Active

Tip! If you are working on a Project owned by another member of your team, switch the grid view to display all Active Projects or use the search box to look for the Project you wish to update.

3. Fill in additional information or amend the existing data then click on the SAVE icon on the bottom right of the screen.

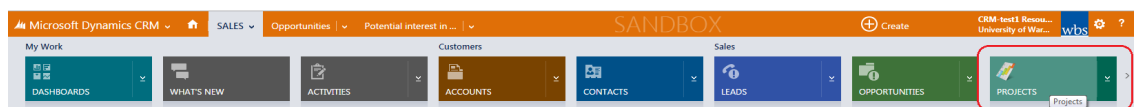


4. You can close the screen/return to the previous area - Projects / go to homepage or navigate to a different area within the Sales menu.



Add Stakeholders

1. Find the PROJECTS tile, by navigating through: CRM HOMEPAGE -> SALES -> PROJECTS



2. A grid displaying "My Active Projects" should appear where you can locate the record you wish to edit/view.
Double click on the "Project Title" column or **between** the columns to open the record.

Project Title ↑	Company Name	Project Type	Financial Ye...	Budget Value	Primary Contact	Owner	Status
Event Project short descriptive title...	Aberdeen Asset Management	Event	15/16		Graham Taylor	CRM-test1 Reso...	Active
H2020 Lighthouse bid	Event Project short descriptive title...	Research	14/15	£3,000,000.00	Bob Bobson	CRM-test1 Reso...	Active
Sample Project	Accenture	Student Consult...	14/15		Dave Andrews	CRM-test1 Reso...	Active

Tip! If you are working on a Project owned by another member of your team, switch the grid view to display all Active Projects or use the search box to look for the Project you wish to update.

3. Find the section called **KEY STAKEHOLDERS** and click on the (+), this will pop up a NEW Stakeholder form in a new browser window.

KEY STAKEHOLDERS

Company NameAberdeen Asset Management

Aberdeen Asset Management

Emailcontactus@aaam.co.uk

Phone0131454796597

Relationship TypeSTRATEGIC

Owner*

Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact

Graham Taylor

Emailgraham.t@aaam.co.uk

Business0131125555

STAKEHOLDERS

+

TypeStakeholder Title ↑

No Stakeholder records found.

4. Fill in the form by specifying the:
- a. Scope - **Contact** OR **Company**

General

Scope

Role *

Project *

Contact

Company

Event **Contact** short descriptive title..

- b. Type - **Internal** (any Contact who **is** a member of staff at the University of Warwick who may be involved) OR **External** (any Contact who **is not** a member of staff at the University of Warwick who may be involved)

Note: Stakeholders with a Scope of "**Company**" are always of the Type "**External**" and therefore the system will not ask you to specify Type.

General

Scope

Type *

Contact *

Role *

Project *

Contact

Internal

External

--

Internal

Event Project short descriptive title..

c) Contact / Company - start typing the name of the individual or Company in the available field followed by clicking on the magnifying glass, you can also use " * " for partial word searching or click on the "Look up More Records" option. Alternatively, if the Contact does not exist, you can click the "+ New" button located at the bottom right of the search results drop down area to create a new one.

General

Scope

Type *

Contact *

Role *

Project *

Contact

Internal

tracy l



- Tracy LOAKES
Domestic Assistant Warwick Accom...
- Tracy LYNCH
Relationship Man... Warwick Business...

Tracy LYNCH

2 results

+ New

- c. Role - As with other fields, to specify what role the particular Contact or Company takes with regards to this Project start typing a potential role, you can also use " * " for partial word searching or click on the "Look up More Records" option. Alternatively, if the Role does not exist, you can select the "+ New" button located at the bottom right of the search results drop down area to create a new one.

(**Note:** if you enter a new role, please be aware that it will be available to every other CRM user, so please make sure that the information you are entering is accurate and appropriate)

Tip! The recommended way to search for the role is: In the first instance click the magnifying glass icon without typing anything in the field to display a list of available roles, this should be quicker than trying to type the exact wording of a role to check if it exists.

General

Scope

Type *

Contact *

Role *

Project *

Contact

Internal

Tracy LYNCH

sec



Secondary Contact

Look Up More Records

Secondary Contact

1 result

+ New

4. Once you fill in the New Stakeholder form click the "SAVE & CLOSE" button.

The screenshot shows a web application interface for creating a new stakeholder. The top navigation bar is orange and contains the text 'New Stakeholder' and 'SANDBOX'. Below the navigation bar, there are three buttons: 'SAVE', 'SAVE & CLOSE' (highlighted with a red box), and '+ NEW'. The main content area is titled 'STAKEHOLDER : INFORMATION' and 'New Stakeholder'. It contains several fields for entering stakeholder information:

- Type***: Internal
- Contact***: Tracy LYNCH
- Role***: Secondary Contact
- Owner***: CRM-test1 Resource

Below these fields, there is a 'General' section with a table of stakeholder details:

Scope	Contact	POSTS	ACTIVITIES	NOTES	STAKEHOLDER DETAILS
Type*	Internal	No records found.			Department: Warwick Business School
Contact*	Tracy LYNCH				Job Title: Relationship Manager
Role*	Secondary Contact				Email: T.Lynch@warwick.ac.uk
Project*	Event Project short descriptive t t				Business Pho: 75835

At the bottom of the form, there is a status bar with the text 'Active'.

You will be presented with the last screen you were viewing - the Project record for which you are adding a stakeholder to; the new Stakeholder should now be visible in the Stakeholders section.

KEY STAKEHOLDERS

Company Name

Aberdeen Asset Management

Aberdeen Asset Management

✉ Email **contactus@aaam.co.uk**

☎ Phone **0131454796597**

Relationship Type **STRATEGIC**

Owner* **Adriana Tsankova**

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact

Graham Taylor

Department **--**

Job Title **Business Development Manager**

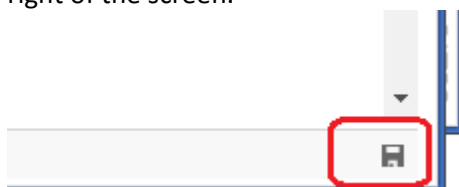
✉ Email **graham.t@aam.co.uk**

☎ Business Pho **01315446679**



Type	Stakeholder Title ↑
Internal	Tracy LYNCH- Secondary Contact - Event Project short descriptive title..

5. Fill in or amend any further information if required and click on the SAVE icon on the bottom right of the screen.



6. You can close the screen/return to previous area - Projects / go to homepage or navigate to a different area within the Sales menu.

General

Scope

Type *

Contact *

Role *

Project *

Contact

Internal

Tracy LYNCH

Co-Investigator

Collaborator

Coordinator

Decision Maker

End User

Idiot Proof Checker

Principal Investigator

Project Coordinator

Project Manager

Look Up More Records

10 results

+ New

Move Process Flow Stages

To move the Project to the next stage, you will have to complete all mandatory steps (marked with a red *) within the process flow bar, and then click on the “-> **Next Stage**” button located at the end of the Process flow bar.

A blue flag and the addition of the word "(Active)" to the stage name will be a clear indication of which stage you are at and which steps within it you will have to complete.

Identify (Active) to Develop

Microsoft Dynamics CRM | SALES | Projects | Event Project short... | **SANDBOX** | Create | Enter Search Item | CRM-test1 Resource... University of War... | wbs

NEW | MARK COMPLETE | ADD TO QUEUE | QUEUE ITEM DETAILS | ASSIGN | SHARE | EMAIL A LINK

PROJECT: WBS PROJECT

Event Project short descriptive title..

Status Reason: In Progress | Project Type: Event | Company Name: Aberdeen Ass... | Owner: CRM-test1

Identify (Active) | Develop | Close

Next Stage

Set Title: Event Project short descriptive title.. | Set FY: 15/16 | Set Value: £6,500.00

Set Type: Event | Set Company: Aberdeen Asset Management | Set Contact: Graham Taylor

Not For Profit? No

SUMMARY

Project Title: Event Project short descriptive title..

Project Type: Event

Financial Year: 15/16

Company Name: Aberdeen Asset Management

Primary Contact: Graham Taylor

Not For Profit?: No

Start Date: 23/03/2015

End Date: 25/03/2015

Project Value On Co: £6,500.00

FURTHER PROJECT DETAILS

Some further Project details outlines here....

KEY STAKEHOLDERS

Company Name: Aberdeen Asset Management

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: 0131454796597

Relationship Typ: STRATEGIC

Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

Created On: 17/03/2015 14:49 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 14:50 | Modified By: CRM-test1 Resource

Active

Develop (Active) to Close

Microsoft Dynamics CRM | SALES | Projects | Event Project short... | **SANDBOX** | Create | Enter Search Item | CRM-test1 Resource... University of War... | wbs

NEW | MARK COMPLETE | ADD TO QUEUE | QUEUE ITEM DETAILS | ASSIGN | SHARE | EMAIL A LINK

PROJECT: WBS PROJECT

Event Project short descriptive title..

Status Reason: In Progress | Project Type: Event | Company Name: Aberdeen Ass... | Owner: CRM-test1

Identify | Develop (Active) | Close

Next Stage

Set the Start Date: 23/03/2015 | Schedule Activities: completed

Set the End Date: 25/03/2015

Identify Stakeholders: completed

General

SUMMARY

Project Title: Event Project short descriptive title..

Project Type: Event

Financial Year: 15/16

Company Name: Aberdeen Asset Management

Primary Contact: Graham Taylor

Not For Profit?: No

Start Date: 23/03/2015

End Date: 25/03/2015

Project Value On Co: £6,500.00

FURTHER PROJECT DETAILS

Some further Project details outlines here....

KEY STAKEHOLDERS

Company Name: Aberdeen Asset Management

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: 0131454796597

Relationship Typ: STRATEGIC

Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

Created On: 17/03/2015 14:49 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 15:35 | Modified By: CRM-test1 Resource

Active

unsaved changes

Close Stage

The screenshot shows the Microsoft Dynamics CRM interface for a project record titled "Event Project short descriptive title..". The top ribbon includes tabs for "NEW", "MARK COMPLETE", "ADD TO QUEUE", "QUEUE ITEM DETAILS", "ASSIGN", "SHARE", and "EMAIL A LINK". The "MARK COMPLETE" tab is selected and highlighted with a red box. Below the ribbon, the project details are displayed, including the project title, type (Event), company name (Aberdeen Asset Management), and primary contact (Graham Taylor). The "KEY STAKEHOLDERS" section shows contact information for Aberdeen Asset Management. The bottom of the page displays the record's creation and modification history.

Add Agreements

1. Find the PROJECTS tile, by navigating through: CRM HOMEPAGE -> SALES -> PROJECTS

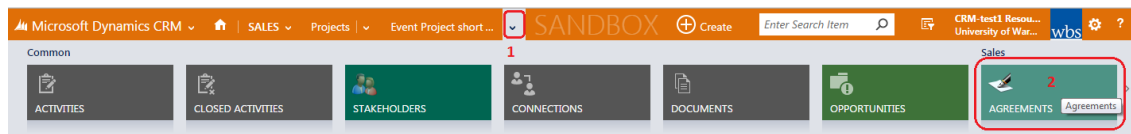
The screenshot shows the Microsoft Dynamics CRM interface with the "SALES" ribbon selected. The "PROJECTS" tile is highlighted with a red box, indicating it is the target for navigation.

2. A grid displaying "My Active Projects" should appear where you can locate the record you wish to edit/view.
Double click on the "Project Title" column or between the columns to open the record.

The screenshot shows the "My Active Projects" grid in Microsoft Dynamics CRM. The grid displays a list of projects with columns for Project Title, Company Name, Project Type, Financial Year, Budget Value, Primary Contact, Owner, and Status. The first row, "Event Project short descriptive title..", is highlighted with a red box. The grid is titled "My Active Projects" and includes a search bar and a "Charts" pane on the right.

Project Title	Company Name	Project Type	Financial Year	Budget Value	Primary Contact	Owner	Status
Event Project short descriptive title..	Aberdeen Asset Management	Event	15/16		Graham Taylor	CRM-test1 Reso...	Active
H2020 Lighthouse bid	Event Project short descriptive title..	Research	14/15	£3,000,000.00	Bob Bobson	CRM-test1 Reso...	Active
Sample Project	Accenture	Student Consult...	14/15		Dave Andrews	CRM-test1 Reso...	Active

3. Click on the arrow next to the Project Title on the top ribbon and the related records navigation will appear;
4. Select Agreement and a more detailed grid will be presented.



5. Click the button "ADD NEW AGREEMENT" and a New Agreement screen/form will pop-up in a separate browser window, the Company Name and Primary Contact will be automatically pre-populated with the ones specified in the Project.

PROJECT : WBS PROJECT ▾

Event Project short descriptive title..

Status Reason: In Progress | Project Type: Event | Company Name: Aberdeen Asset Manager | Owner: CRM-test1 Resource

Identify | Develop (Active) | Close | Next Stage

✓ Set the Start Date: 23/03/2015 | ✓ Schedule Activities: completed
 ✓ Set the End Date: 25/03/2015
 ✓ Identify Stakeholders: completed

Agreement Associated View ▾

+ ADD NEW AGREEMENT | ADD EXISTING AGREEMENT | CHART PANE | RUN REPORT | EXPORT AGREEMENTS

Agreement Title ↑	ID	Agreement Type	Company Na...	Primary Conta...	Signed by Co...	Signed by Wa...	Start Date	End Date
No Agreement records found.								

Created On: 17/03/2015 14:49 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 15:42 | Modified By: CRM-test1 Resource

Active

Tip! You may wish to add an already existing agreement to the Project, which may have been added to an Account directly or created through an earlier engagement stage such as the Opportunity. To do this select the "ADD EXISTING AGREEMENT" button.

6. Fill in the form and click on the "SAVE & CLOSE" button on the top left of the form. You will be back to the Project record you were viewing.

Microsoft Dynamics CRM | SALES | Agreements | New Agreement | SANDI | Create | Enter Search Item | CRM-test1 Resource | University of War...

SAVE | **SAVE & CLOSE** | NEW

AGREEMENT : WBS | Save & Close | Save and close this Agreement.

New Agreement

Status Reason: Pending | Agreement Type: NDA | Company Name: Aberdeen Asset Management | Owner: CRM-test1

General

ID: -- | POSTS: -- | ACTIVITIES: -- | NOTES: --

Agreement Title: Sample Short Descriptive Agreement Title | No records found.

Company Name: Aberdeen Asset Management

Primary Contact: Graham Taylor

Agreement Type: NDA

Signed by Company?: No

Signed by Warwick?: No

Start Date: 22/03/2015

End Date: 22/03/2016

Originating Opportunity: --

Originating Project: Event Project short descriptive title

SUMMARY OF PURPOSE

Further Description of the Agreement..

CONTACT DETAILS

Company Name: Aberdeen Asset Management

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: 0131454796597

Relationship Type: STRATEGIC

Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

Department: --

Job Title: Business Development Manager

Email: graham.t@aaam.co.uk

Business Phone: 01315446679

Created On: -- | Created By: -- | Modified On: -- | Modified By: --

Active

- The Agreement should now be visible within the related records navigation area (also available within the Engagement History for the both Account and Contact when viewing them). You can double click on the Agreement title column and open the full details of the agreement should you wish to review or amend them.

Microsoft Dynamics CRM | SALES | Projects | Event Project short descriptive title.. | SANDI | Create | Enter Search Item | CRM-test1 Resource | University of War...

PROJECT : WBS PROJECT | Status Reason: In Progress | Project Type: Event | Company Name: Aberdeen Asset Management | Owner: CRM-test1

Identify | **Develop (Active)** | Close | Next Stage

Set the Start Date: 23/03/2015 | Schedule Activities: completed

Set the End Date: 25/03/2015

Identify Stakeholders: completed

Agreement Associated View

+ ADD NEW AGREEMENT | ADD EXISTING AGREEMENT | CHART PANE | RUN REPORT | EXPORT AGREEMENTS

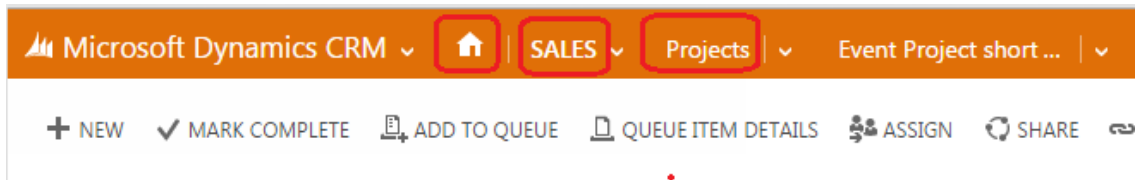
Agreement Title	ID	Agreement Type	Company Name	Primary Contact	Signed by Company	Signed by Warwick	Start Date	End Date	Status
Sample Short Descriptive Agreement Title	AGR-443366	NDA	Aberdeen Asset..	Graham Taylor	No	No	22/03/2015	22/03/2016	Pending

Sample Short Descriptive Agreement Title

Created On: 17/03/2015 14:49 | Created By: CRM-test1 Resource | Modified On: 17/03/2015 15:42 | Modified By: CRM-test1 Resource

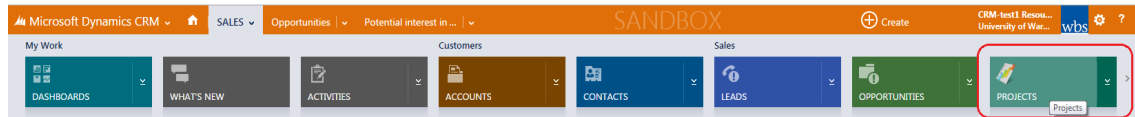
Active

- You can close the screen/return to previous area - Projects / go to homepage or navigate to a different area within the Sales menu.

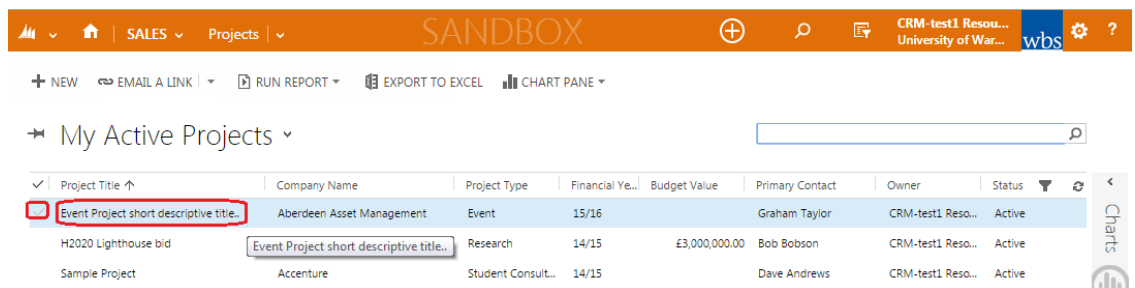


Complete a Project

1. Find the PROJECTS tile, by navigating through: CRM HOMEPAGE -> SALES -> PROJECTS

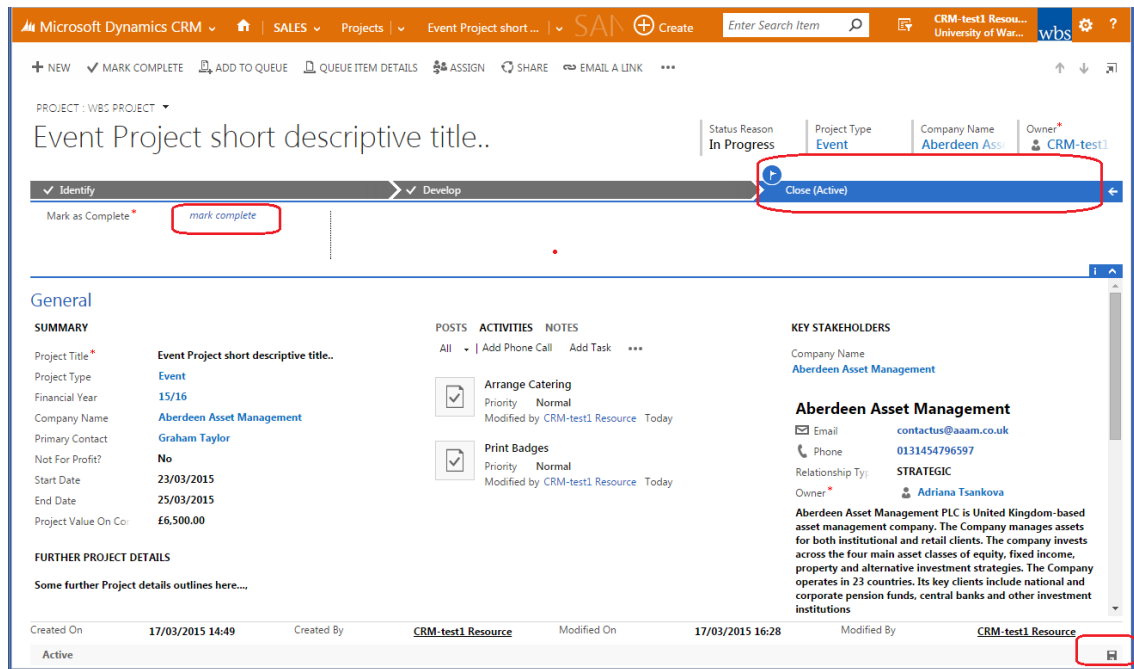


2. A grid displaying "My Active Projects" should appear where you can locate the record you wish to edit/view.
Double click on the "Project Title" column or between the columns to open the record.

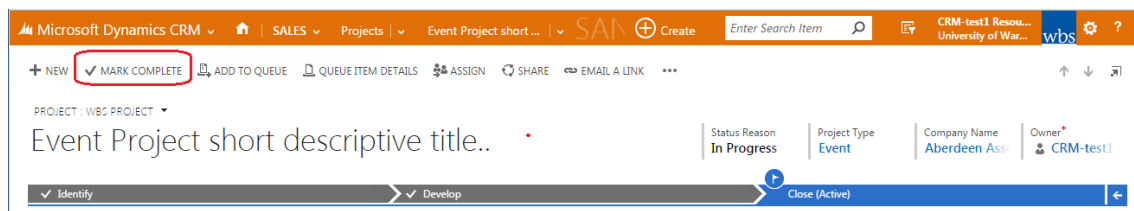


Tip! If you are working on a Project owned by another member of your team, switch the grid view to display all Active Projects or use the search box to look for the Project you wish to update.

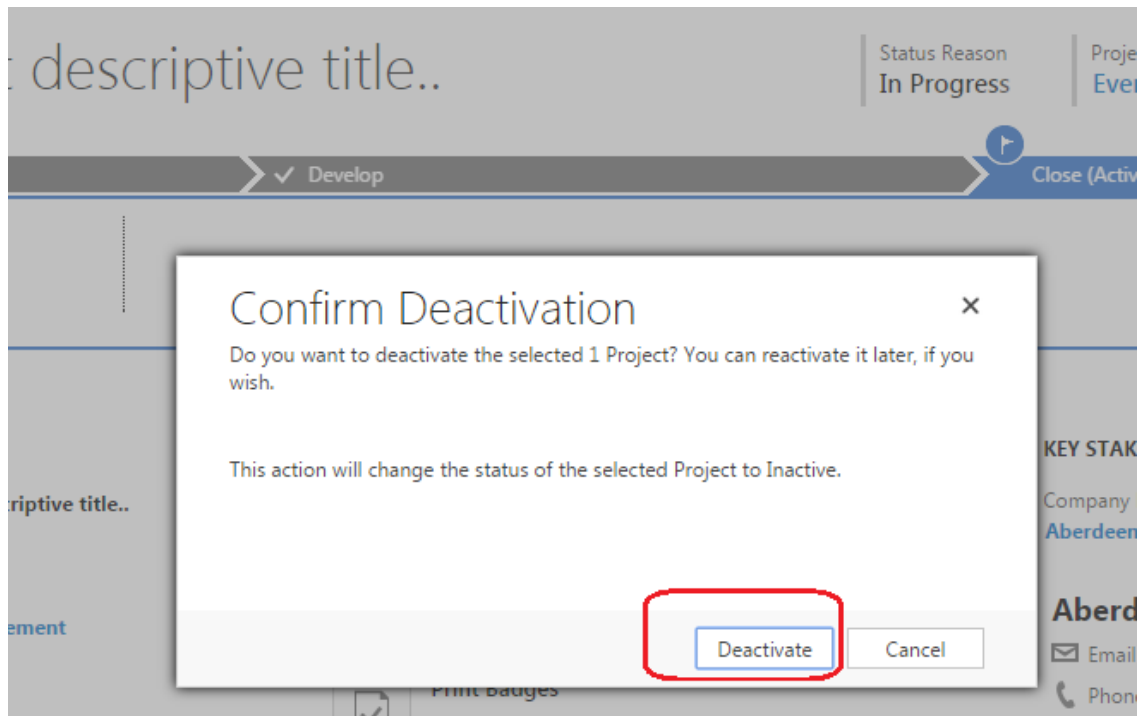
3. To mark the Project as Complete you can either:
 - a) Toggle the "mark complete" step within the "Close" stage



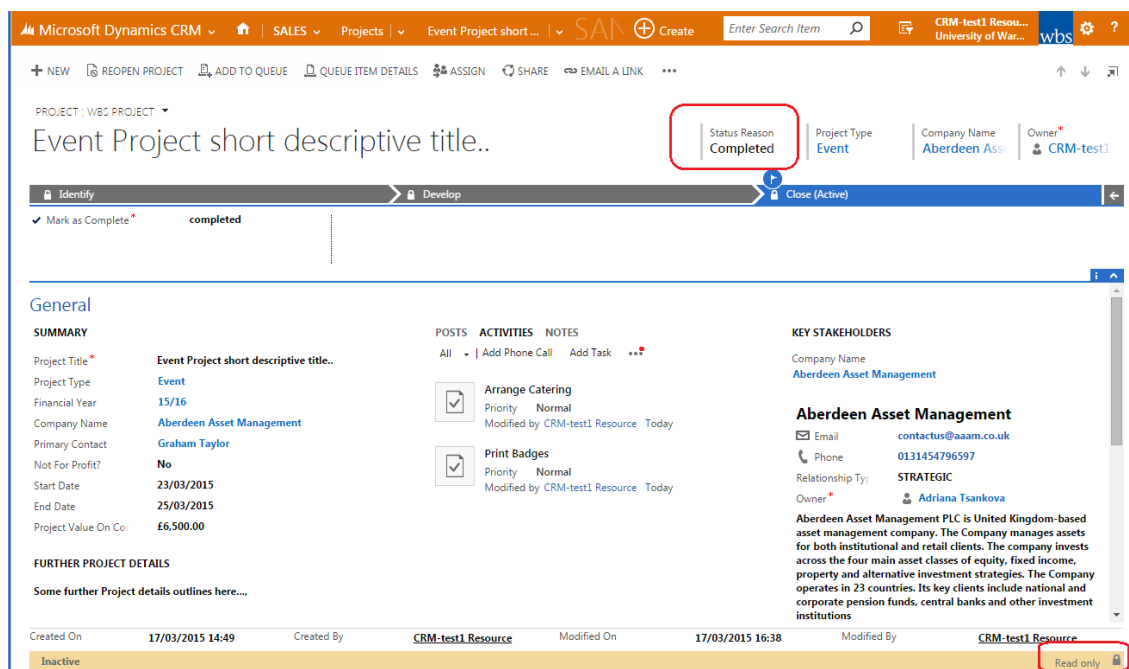
- b. Find the "MARK COMPLETE" button located on the top left corner of the screen and select it.



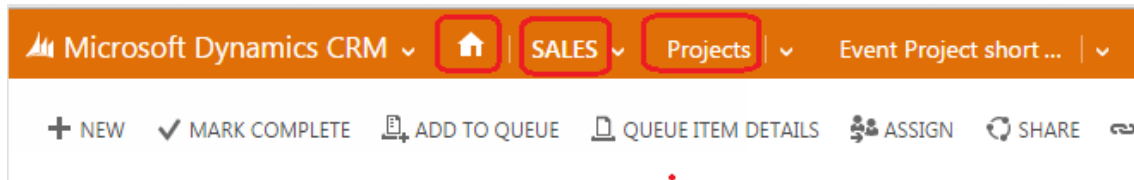
4. Once the button is selected, a confirmation of Deactivation will be displayed on screen. This is to inform that the Completed project will be archived / deactivated.



5. Once the deactivation is confirmed, the Project record will revert to an archived / Read Only state, the Status Reason will be set to Completed.
Tip! You can reopen the project from the button "REOPEN PROJECT" which will become available on the top left of the Project form.



6. You can close the screen/return to previous area - Projects / go to homepage or navigate to a different area within the Sales menu.



Agreements

Agreements are any contract or similar that will be put in place between the University and the Account and/or Contact to support a particular **Opportunity** or **Project**.

Examples would be Confidentiality Agreements, Research Contracts, Memoranda of Understanding and others.

Each Opportunity or Project may have multiple related Agreements and can be created at any time during the engagement lifecycle, as long as they are related to the relevant Opportunity or Project.

Elements of an Agreement

Microsoft Dynamics CRM | SALES | Agreements | MOU Re Event Title... | Create | Enter Search Item

NEW | DEACTIVATE | ASSIGN | SHARE | EMAIL A LINK | FOLLOW | RUN WORKFLOW

AGREEMENT : WBS AGREEMENT

MOU Re Event Title...

Status Reason: Pending | Agreement Type: MOU | Company Name: Aberdeen Asset Management | Owner: CRM-test1 Resource

General

ID: AGR-578879

Agreement Title: MOU Re Event Title...

Company Name: Aberdeen Asset Management

Primary Contact: Graham Taylor

Agreement Type: MOU

Signed by Company?: No

Signed by Warwick?: No

Start Date: 23/03/2015

End Date: 23/03/2016

Originating Opportunity: Potential interest in event project

Originating Project: Event Project short descriptive title

POSTS | ACTIVITIES | NOTES

Enter a note

No Notes found.

CONTACT DETAILS

Company Name: Aberdeen Asset Management

Aberdeen Asset Management

Email: contactus@aaam.co.uk

Phone: 0131454796597

Relationship Type: STRATEGIC

Owner: Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact: Graham Taylor

Department: --

Created On: 11/03/2015 17:31 | Created By: CRM-test1 Resource | Modified On: 11/03/2015 17:31 | Modified By: CRM-test1 Resource

Active

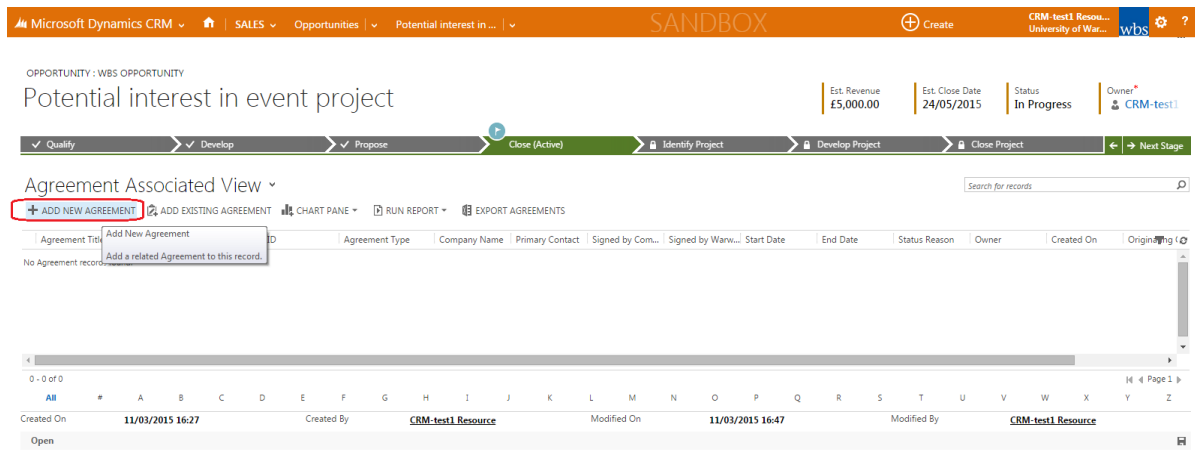
Create an Agreement

Agreements can be created the following ways:

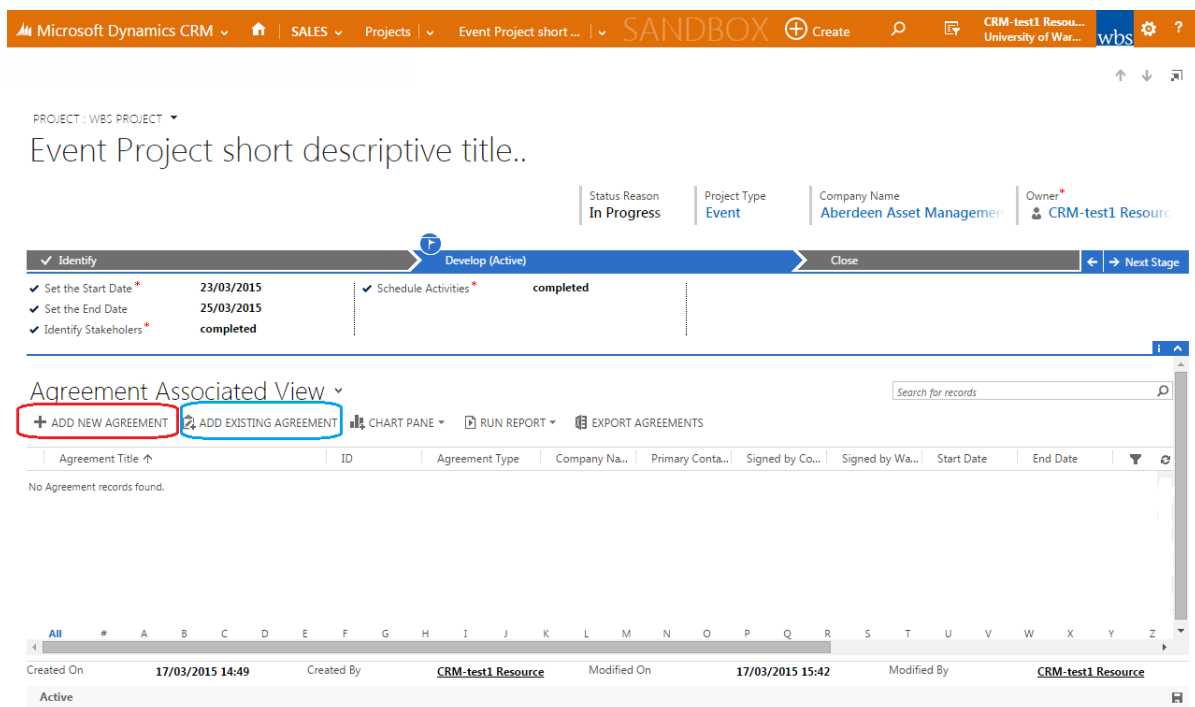
- From the main navigation in the "Agreements" section / tile



b. From within an Opportunity

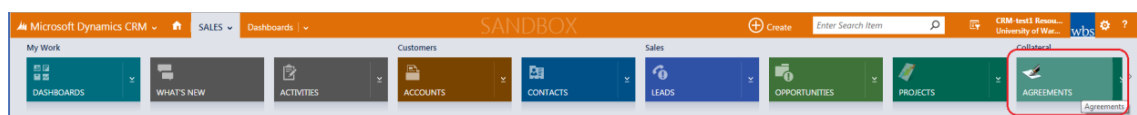


c. From within a Project

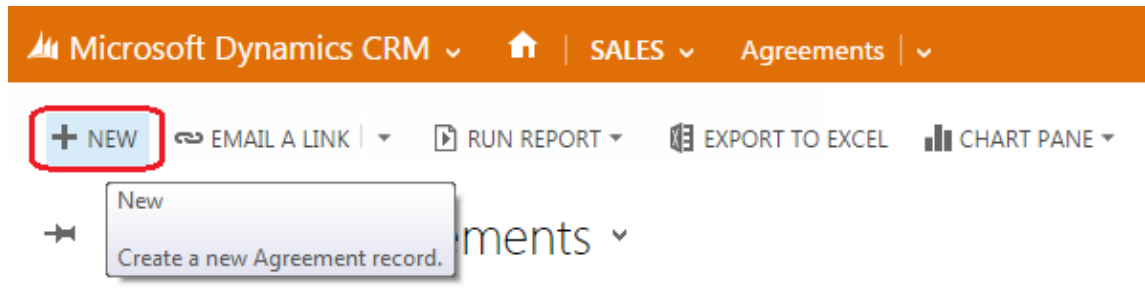


Main Navigation

1. Find the AGREEMENTS tile by navigating through: CRM HOMEPAGE -> SALES -> AGREEMENTS



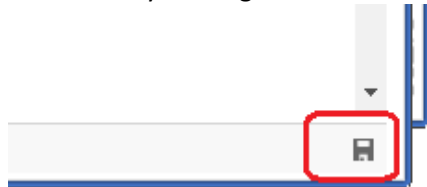
2. A grid displaying "My Active Agreements" should appear. Find the button + NEW located on the top left corner of the screen and select it.



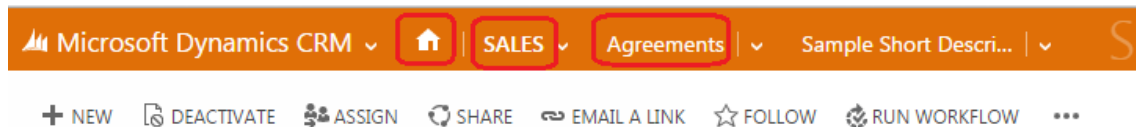
3. A New Agreement screen will pop up. Fill in the minimum required information marked with a red * on the form, and select the "SAVE" button located on the top left of the screen. Continue to work on the Agreement Record and fill in the general information or as much information as you currently are aware of.

4. Continue to work on the Agreement Record and fill in the general information or as much information as you currently are aware of.

5. Save the record by clicking on the SAVE icon on the bottom right of the screen.



6. You can close the screen/return to previous area - Agreements / go to homepage or navigate to a different area within the Sales menu.



Through Opportunity / Project

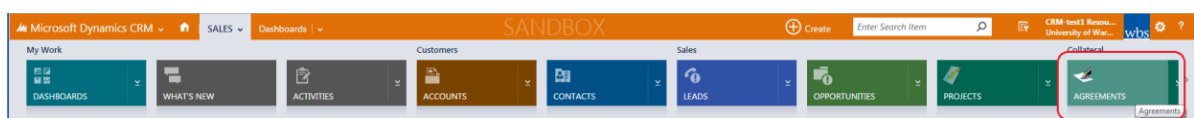
Please, refer to the following sections in this guide:

[Add an Agreement to Opportunity](#)

[Add an Agreement to Project](#)

Update Agreements

1. Find the AGREEMENTS tile, by navigating through: CRM HOMEPAGE -> SALES -> AGREEMENTS



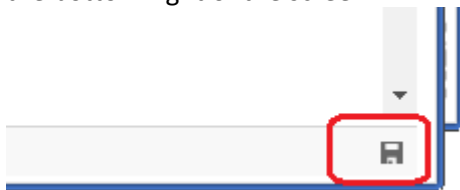
2. A grid displaying "My Active Agreements" should appear where you can locate the record you wish to edit/view.

Double click on the "Agreement Title" column or between the columns to open the record.

✓	Agreement Title ↑	Agreement Type	Primary Contact	Signed by Company?	Signed by Warwick?
	Sample agreement #2	MOU	Aurelio Bransco...	No	No
✓	Sample Short Descriptive Agreement Title	NDA	Graham Taylor	No	No
	Short Descriptive title of the Agreement	MOU	Graham Taylor	No	No

Tip! If you are working on an Agreement owned by another member of your team, switch the grid view to display All Agreements or use the search box to look for the Agreement you wish to update.

3. Fill in additional information or amend the already existing data and click on the SAVE icon on the bottom right of the screen.

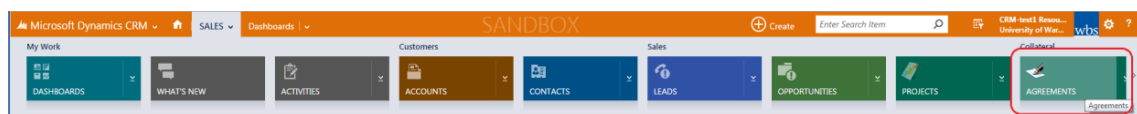


4. You can close the screen/return to previous area - Agreements / go to homepage or navigate to a different area within the Sales menu.

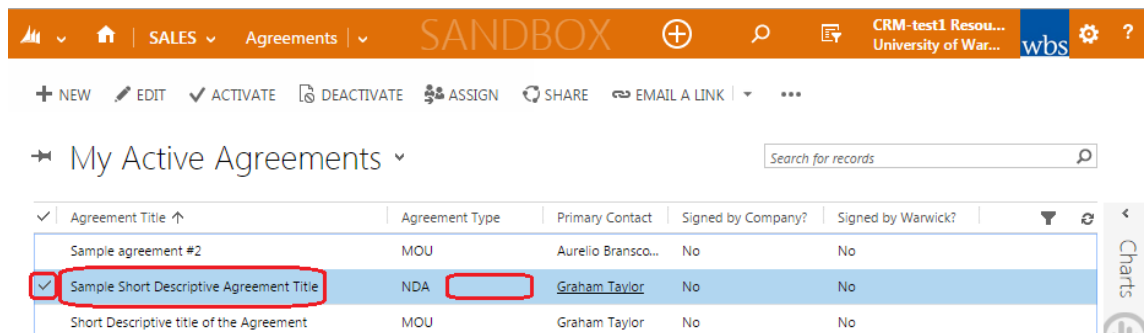


Deactivate

1. Find the AGREEMENTS tile, by navigating through: CRM HOMEPAGE -> SALES -> AGREEMENTS



2. A grid displaying "My Active Agreements" should appear where you can locate the record you wish to edit/view.
Double click on the "Agreement Title" column or between the columns to open the record.



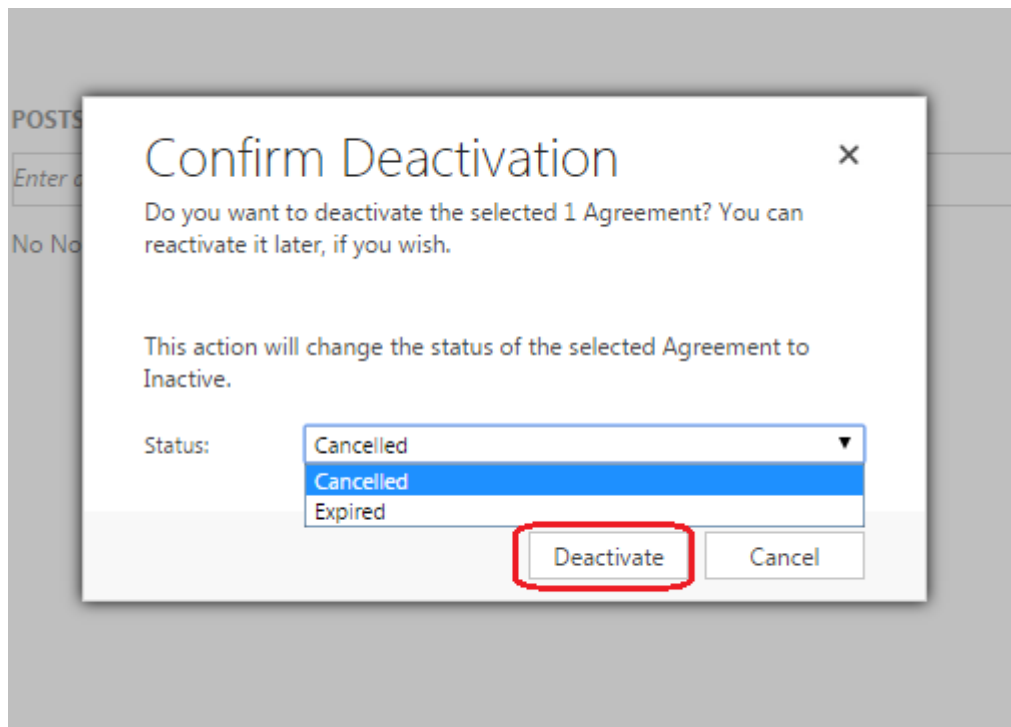
Agreement Title ↑	Agreement Type	Primary Contact	Signed by Company?	Signed by Warwick?
Sample agreement #2	MOU	Aurelio Bransco...	No	No
Sample Short Descriptive Agreement Title	NDA	Graham Taylor	No	No
Short Descriptive title of the Agreement	MOU	Graham Taylor	No	No

Tip! If you are working on an Agreement owned by another member of your team, switch the grid view to display All Agreements or use the search box to look for the Agreement you wish to update.

3. Find the "DEACTIVATE" button on the top left of the screen and select it. A confirmation pop up window will appear.



4. Select the Status Reason for the Deactivation: **Cancelled** or **Expired** and click on the "Deactivate" button

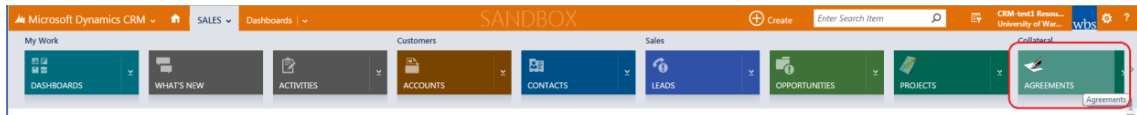


- The record will revert to a read-only state displaying the relevant Status within the Status Reason field. An "ACTIVATE" button will become available should you wish to reactivate the Agreement.

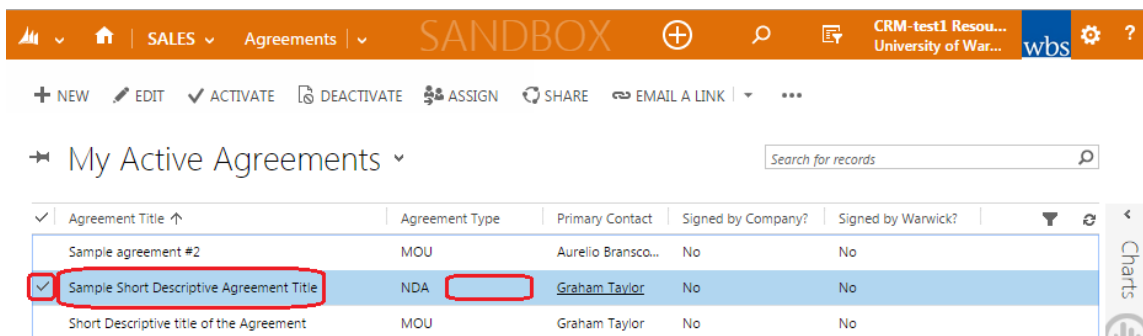
You can close the screen/return to previous area - Agreements / go to homepage or navigate to a different area within the Sales menu.

Reactivate

1. Find the AGREEMENTS tile, by navigating through: CRM HOMEPAGE -> SALES -> AGREEMENTS



2. A grid displaying "My Active Agreements" should appear where you can locate the record you wish to edit/view.
Double click on the "Agreement Title" column or between the columns to open the record.



Tip! If you are working on an Agreement owned by another member of your team, switch the grid view to display All Agreements or use the search box to look for the Agreement you wish to update.

3. Find the "ACTIVATE" button on the top left of the screen and select it.



4. The record will become available for editing again and the Status Reason will be set to "Pending" after an Agreement Re-activation.
You can close the screen/return to previous area - Agreements / go to homepage or navigate to a different area within the Sales menu.

Microsoft Dynamics CRM

SALES

Agreements

Sample Short Descri...

SANE

Create

Enter Search Item

CRM-test1 Resou...
University of War...

wbs

NEW

DEACTIVATE

ASSIGN

SHARE

EMAIL A LINK

FOLLOW

RUN WORKFLOW

AGREEMENT: WBS AGREEMENT

Sample Short Descriptive Agreement Title

Status Reason
Pending

Agreement Type
NDA

Company Name
Aberdeen Ass...

Owner*
CRM-test1

General

ID
AGR-443366

Agreement Title*
Sample Short Descriptive Agree...

Company Name
Aberdeen Asset Management

Primary Contact
Graham Taylor

Agreement Type
NDA

Signed by Company?
Yes

Signed by Warwick?
Yes

Start Date
22/03/2015

End Date
22/03/2016

Originating Opportu...
--

Originating Project
Event Project short descriptive title.

POSTS

ACTIVITIES

NOTES

Enter a note

No Notes found.

CONTACT DETAILS

Company Name
Aberdeen Asset Managemen...

Aberdeen Asset Management

Email
contactus@aaam.co.uk

Phone
0131454796597

Relationship Ty:
STRATEGIC

Owner*
Adriana Tsankova

Aberdeen Asset Management PLC is United Kingdom-based asset management company. The Company manages assets for both institutional and retail clients. The company invests across the four main asset classes of equity, fixed income, property and alternative investment strategies. The Company operates in 23 countries. Its key clients include national and corporate pension funds, central banks and other investment institutions

Primary Contact
Graham Taylor

SUMMARY OF PURPOSE

Further Description of the Agreement..

Created On
17/03/2015 15:51

Created By
CRM-test1 Resource

Modified On
17/03/2015 15:51

Modified By
CRM-test1 Resource

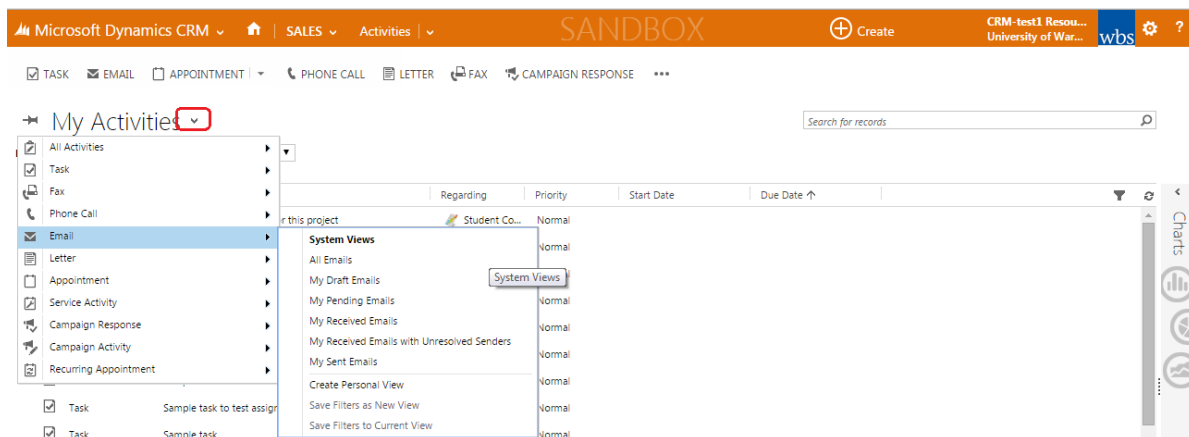
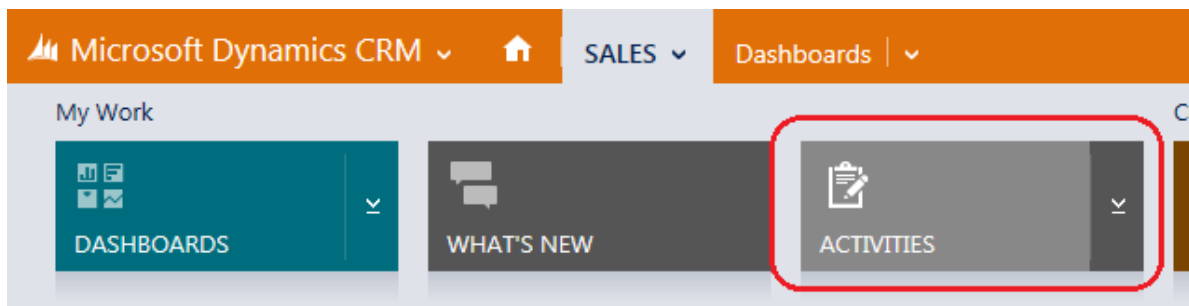
Active

Understanding Activities & Notes

The Dynamics CRM **Activities** are used to record a specific type of communication, as well as the subject, time and details of that communication. Activities are actions such as emails, phone calls, meetings, etc. Using activities helps you and your organisation understand all of the communication your organisation has had with each Company or Individual.

Activities should be used by every user that has external relationships and communications and the "**My Activities**" view/screen should act as a "To Do" list used on a daily basis.

You can create search queries, views, and reports to track activities by Account/Individual or activity type. By utilising activities we ensure that all communications can be accessed later.



Activities in CRM have a rollup functionality. This means that if you add or track an activity to a "child" record, it will also appear in the "parent" records activity list. For example, if you add an activity to an **Opportunity**, that same activity will appear on the **Contact** record and **Account** record associated with the **Opportunity**. This helps prevent history and data from being lost or overlooked. Since there is no roll-down functionality, **you should add or track an activity to the most specific record.**

Notes are an open text field that automatically create a time-stamp and show the author of the note. Attached files are added to the notes section.

Best practices for activities and notes

Users like using **notes** because they are quick, easy, and create a time-stamp. It is common for users to try and enter information that should be added as an activity type into a note. For example, a user may add a note that says "Had a follow up phone call with Joe about the proposal we submitted on 6/3. He will make a decision by next week." However, it is best practice to NOT use notes in this way. Actions such as **tasks, emails, phone calls, and appointments** should not be added as notes. Instead, these should be entered as activities.

Likewise, it is not good practice to copy and paste the text from emails into the notes field for the reasons stated below. If an email is important then it can be tracked directly from Outlook Webmail in Office 365 or the Outlook Client. To use tracking in either form of Outlook you need to have the Dynamics CRM Add-in activated on your University Office 365 account. This can be achieved by clicking the settings cog towards the top right of Outlook Webmail in Office 365 and selecting 'Manage Add-ins'. The Add-in that you need to turn on is called Dynamics CRM. Once you have done this you should see Dynamics CRM options appearing within emails in both webmail and Outlook Client, just above the email text. If you do not see this then you should report this through the IT Services Helpdesk and it will be activated on your CRM account.

Below is a list of downfalls to using notes:

Notes are not searchable. Notes cannot be included in reports or advanced finds. Many organisations like to have statistics and reports around what activities have been completed.

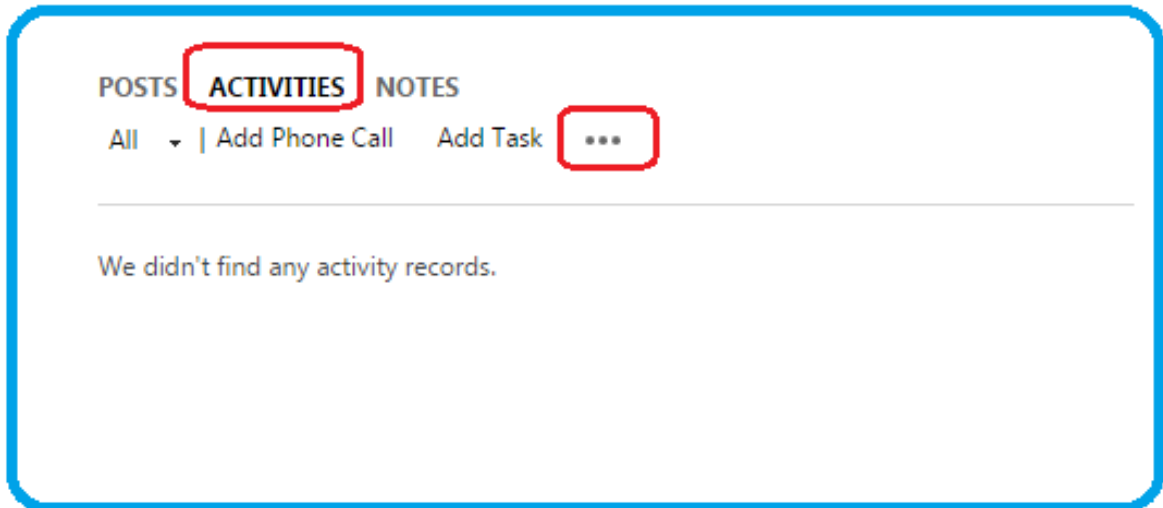
Notes do not roll-up. Unlike activities, if a note is added to an opportunity it will not appear on the account. This may cause data to be lost or extra work because users have to re-create the same note several times for different records.

Information may be lost. Using notes creates another place (rather than Activities history) for users to look when trying to find all information about that record. Users may not find the note when looking for background history on the record.

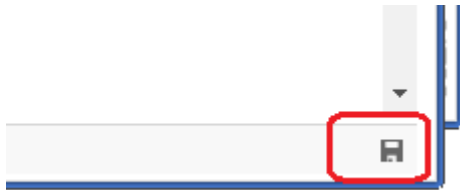
Create Activities

Add Activities (Tasks, Phone Calls, Emails, Appointments)

1. Find the **POSTS, ACTIVITIES, NOTES** section on ANY record you are viewing (Lead, Account, Contact, Opportunity, Project, Agreement)
2. If not already highlighted, click on "**ACTIVITIES**"
3. Select the type of activity you wish to add - Task, Phone Call, Email, Appointment (please, note some are available within the menu extension (...), fill in the relevant inline form and Save.

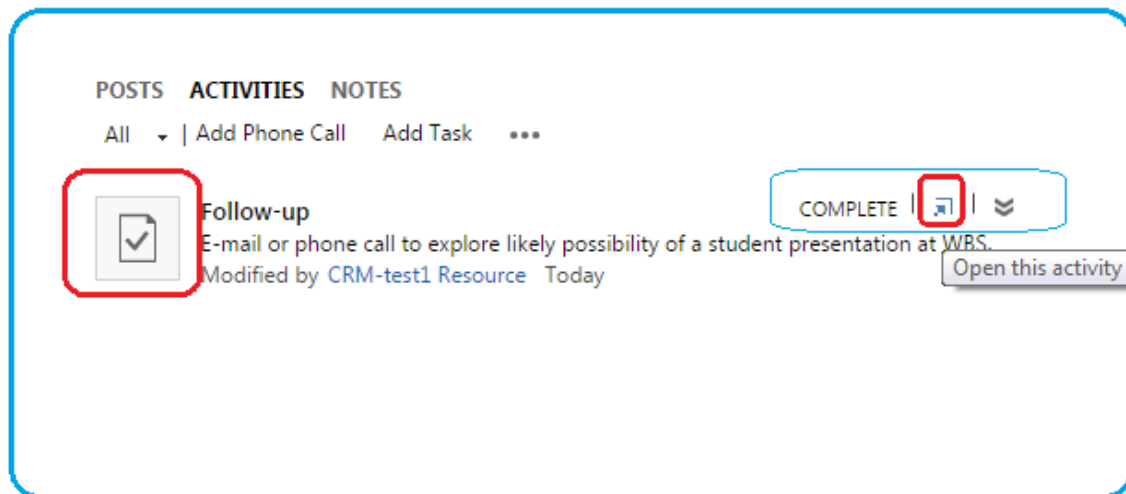


4. If you have filled any other additional information or amended any already existing, click on the SAVE icon on the bottom right of the screen.



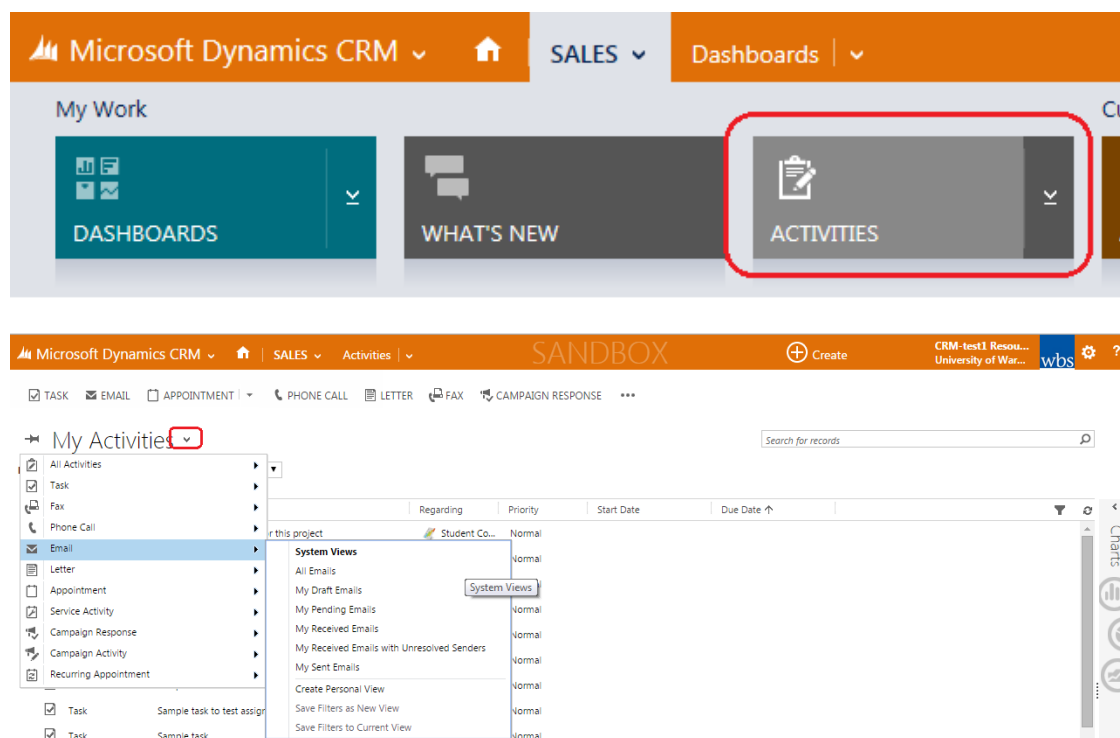
Assign Activities

1. Find the relevant Activity record which you wish to assign, by:
 - a. Find the **POSTS ACTIVITIES NOTES** section on **ANY** record you are viewing (Lead, Account, Contact, Opportunity, Project). If not already highlighted, click on "**ACTIVITIES**"Double click on the image/icon of the activity OR use the middle icon from the menu available when hovering over the activity. This will open the full activity record.

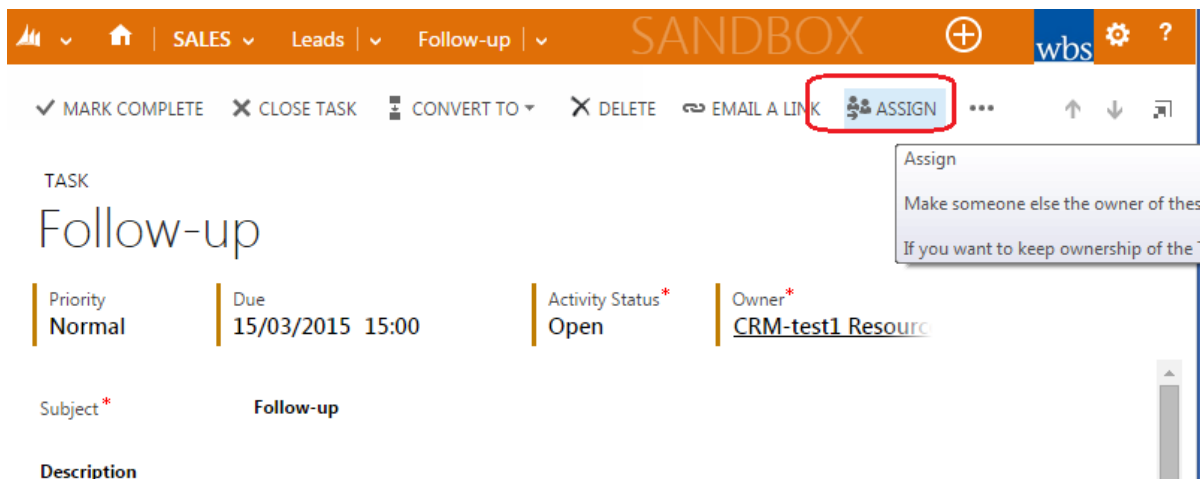


OR

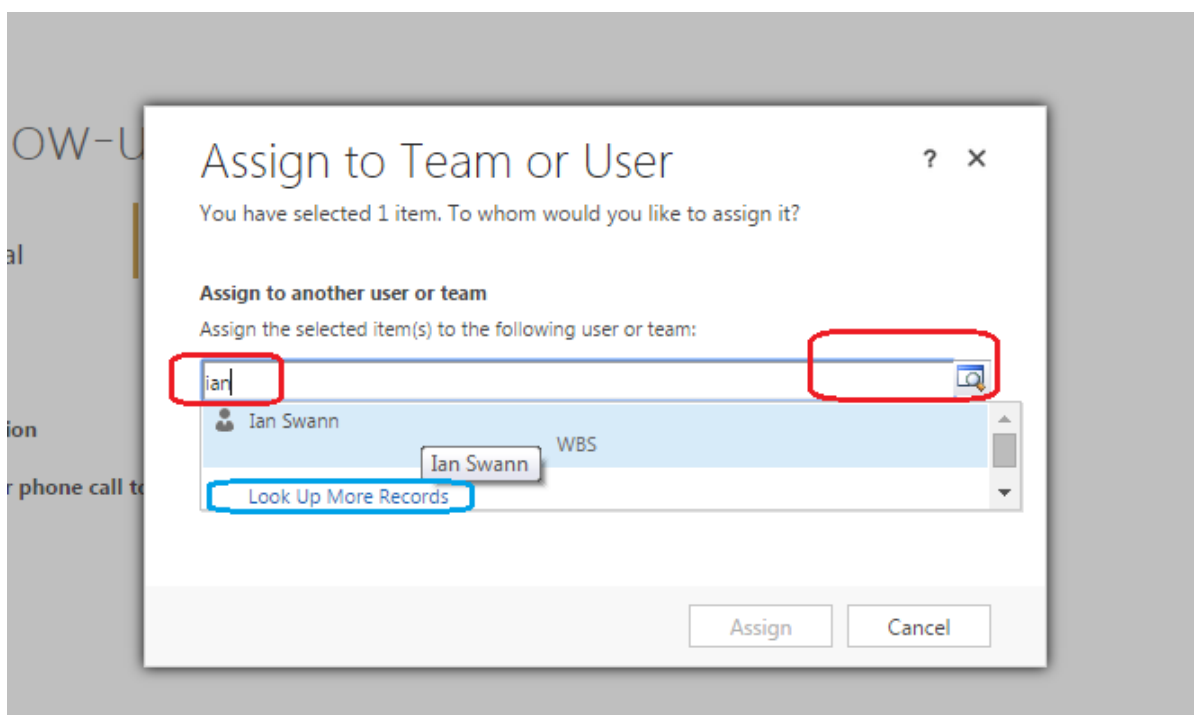
- b. Access the relevant record from the main navigation in the "Activities" section / tile



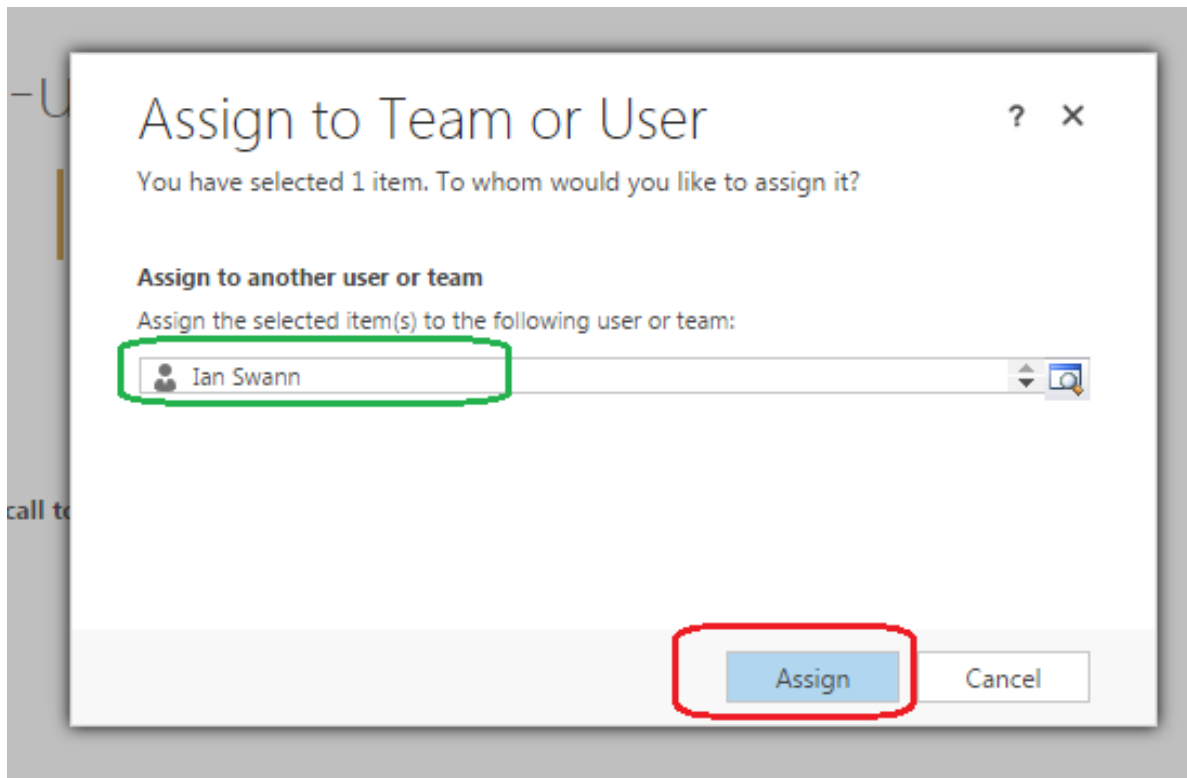
4. Find the button "ASSIGN" on the top of the Activity form, which will prompt a pop up lookup to appear on screen.



5. Start typing the name of the user to whom you wish to assign the Activity to and click on the magnifying glass/ press enter to view the results.
You can also access a more detailed search screen by selecting the option "Look Up More Records"



6. Once the name you are looking for is available, select it and click on the "Assign" button.



7. You should now be able to see that the Owner of the Activity is set to the User you have selected and you can now:
 - return back to the item you were reviewing by clicking on the underlined item displayed in the Regarding Field
 - navigate to any other area within CRM by selecting the relevant section on the top navigation
 - Exit CRM by closing the browser

Follow-up

Priority: Normal | Due: 15/03/2015 15:00 | Activity Status: Open | Owner: Ian Swann

Subject: Follow-up

Description: E-mail or phone call to explore likely possibility of a student presentation at WBS.

Regarding: Graham Taylor | Assigned by: CRM-test1 Resource

Open

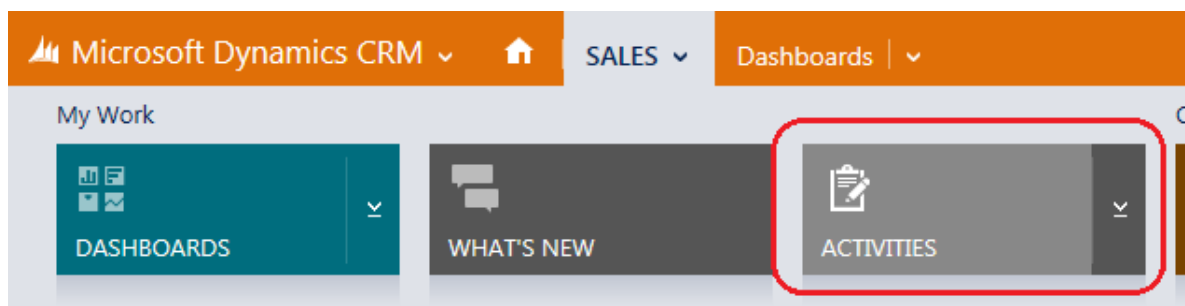
Tip! Once an activity has been marked as completed it cannot be assigned.

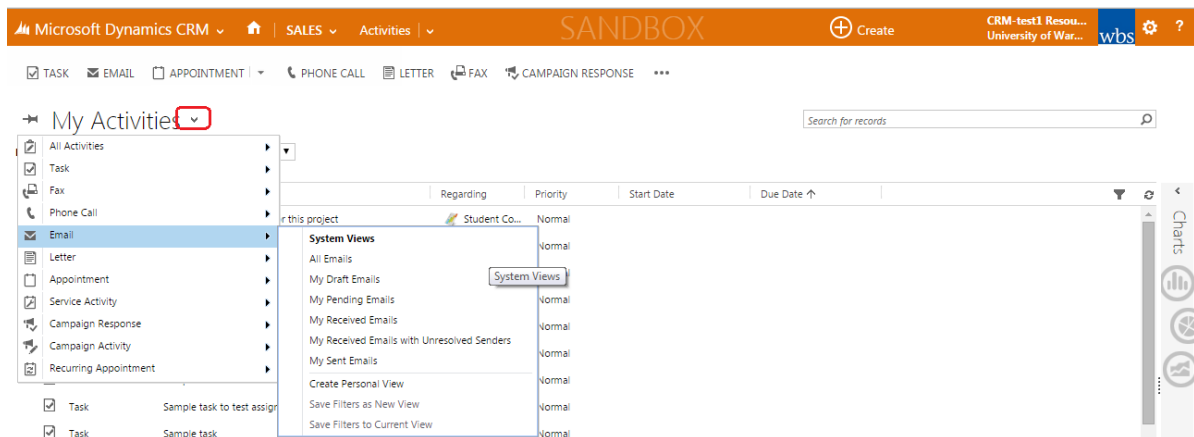
Tip! #2 You can assign activities which your team members own to yourself. The "Assigned by" field will capture who has assigned this task last, so expect to see your names at both fields: Owner and Assigned by.

Update / Complete Activities

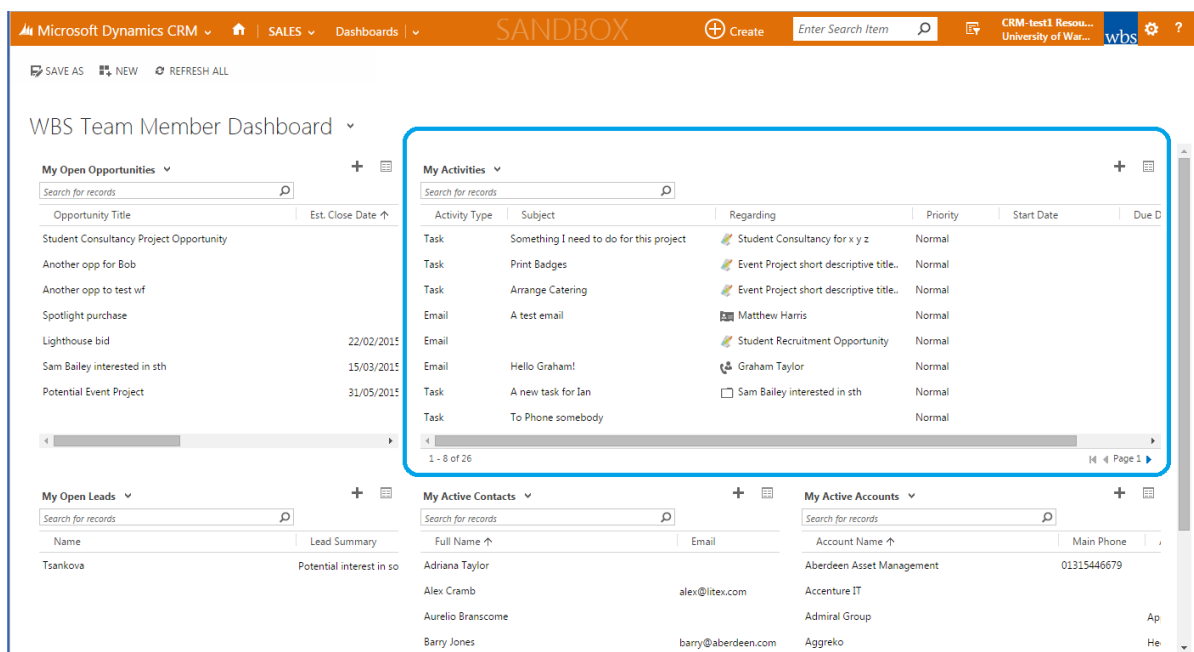
Activities can be accessed and updated / completed, the following way:

- From the main navigation in the "Activities" section / tile





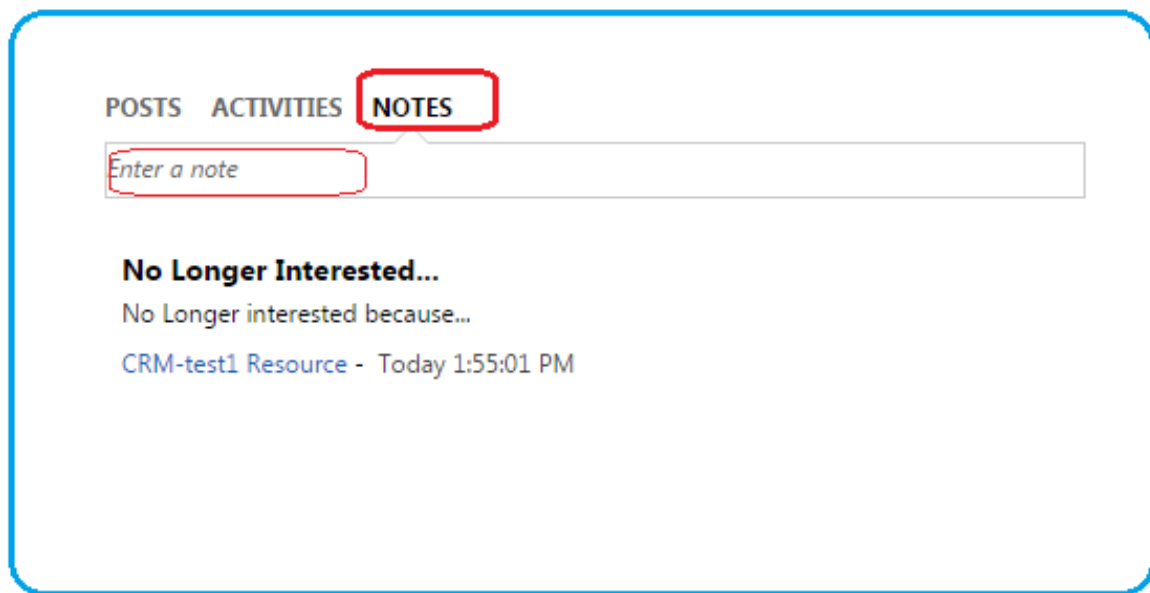
b. Through the "My Activities" section on the WBS Team Member Dashboard



Add Notes

1. Find the **POSTS, ACTIVITIES, NOTES** section on ANY record you are viewing (Lead, Account, Contact,)
2. If not already highlighted, click on **"NOTES"**
3. Click on the wording "Enter a note" and start typing in the inline form, entering Note title and body -> Done

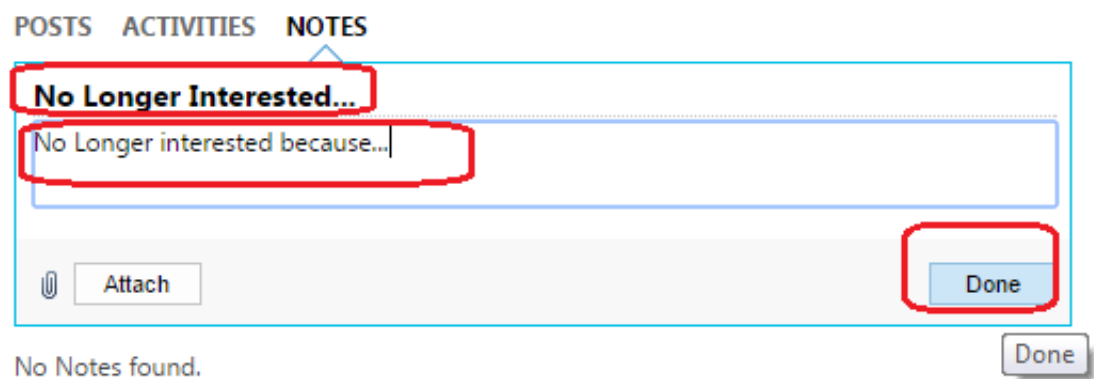
You can also use the attach button to add files to your note.



POSTS ACTIVITIES **NOTES**

Enter a note

No Longer Interested...
No Longer interested because...
CRM-test1 Resource - Today 1:55:01 PM



POSTS ACTIVITIES **NOTES**

No Longer Interested...
No Longer interested because...

Attach Done

No Notes found. Done

4. If you have filled any other additional information or amended any already existing, click on the SAVE icon on the bottom right of the screen.



Glossary of Terms

Account	This is the record for the company. An Active Account is one that is live and in use on the CRM system. If an Account is inactive then it has been switched off, but all the original information still remains in the CRM; to be updated the Account must be activated. An account may be inactivated if we are certain that we have no further dealings with the company and are unlikely to do so in the foreseeable future, for example if the organisation has closed down. Given that multiple departments use the CRM you should be very careful to ensure that no other users are using the Account before it is inactivated.
Activities	Tasks, appointments, emails etc. are all classed as activities.
Advanced Find	This is the place where you can search for information that is stored within the CRM system. See the section on Searching CRM for more information on how to use this function.
Agreements	Agreements are any contract (or similar) that will be put in place between the University and the organisation. Examples would be Confidentiality Agreements,, Research Contracts, Memoranda of Understanding etc.
Appointments	Appointments can be made through the CRM system and will be synced to your Outlook account if you wish this to be set up.
Assign	The Assign function can be used to transfer ownership of an entity to another user. For example, if another user takes over management of a Project then the Project can be assigned to them.
Close as Won / Lost	This function is used when an Opportunity has run its course and we have either won the contract and associated income (Close as Won) or the Opportunity did not progress. If closed as won then an associated Project will be created which can be accessed through the Process Bar . If closed as lost then the Opportunity will not progress to a Project and it will no longer be editable, but it can be reopened if the situation changes.
Connections	Connections are relationships between organisations and or contacts. Examples of connections would be if one organisation is a supplier to another organisation, or if a contact is a Non-Executive Director for another organisation that is not their main employer.
Contact	This is a record of a person, it would normally be linked to an account but in some cases may not be. If a Contact is inactive then it has been switched off but all the original information still remains in the CRM; to be updated the Contact must be activated. An example of when to inactivate a Contact would be if the individual leaves the organisation and we do not know their new circumstances. Given that multiple departments use the CRM you should be very careful to ensure that no other users are using the Contact before it is inactivated.

Dashboard	A dashboard displays data stored within the CRM. The data can be displayed as text in tables or graphically in charts. Some dashboards are preconfigured for you but they can be customised by users, and Personal Views can also be created.
Employment History	This section will be populated automatically. As a Contact changes roles within an organisation or moves between organisations, this will be reflected in the Employment History , provided the changes have been made on the Contact's record.
Follow	This function allows you to interact with other users of the CRM system. If you follow someone then you will receive updates on some of their CRM usage in the social pane on your homepage .
Follower	This is another user of the CRM that is following you.
Homepage	Your homepage is the screen that you will always land on when you first open the CRM. It displays the dashboard for your team, and from here you can access basic information about your Accounts, Activities, Opportunities, Projects & What's New social feed. You can return to your Homepage at any time by clicking on the house image at the top left of the screen.
Industry	This field should be populated with the option that is most relevant to the key activities of the organisation. Further detail, or other industries can be added in the Industry Segmentation section.
Industry Segmentation	This section can be used to add more detail to the Industry category in which you have placed the organisation. It can also be used to add other industry classifications that are not related to the parent Industry , for example if an organisation carries out activities across different industries. You can add as many industry sub-types as are needed in this section, but they should be limited to industries in which the University and Organisation wish to collaborate.
Key Contact	The Key Contact is the person identified as the main point of contact within an Account
Lead	The Leads tab is where you can quickly add some basic information about a contact (and related idea) that you believe could be of interest. A lead is in the very early stage and the Contact and associated Account are not yet created in the CRM. When Qualified a new Contact and Account will be created unless you associated the Lead with existing records in the Process Bar . Likewise, the associated idea does not become an Opportunity until Qualification .
Notes	This section can be used to record any information that you or other users may find important. It can also be used to upload the final version of a file, but once uploaded it cannot be edited unless downloaded first; the new version will then need to be uploaded. In most cases it would be better to use the Documents area in each record instead since this provides more flexibility. You will find a Notes section in each record (e.g. Account, Contact, Opportunity etc.).

Opportunity	An Opportunity is an interaction between the University and an organisation that is still in the development stages. For example the development of a collaborative bid or the planning of an event would be classed as Opportunities. An opportunity can be won or lost, if won then a contract will have been signed and any associated income received (or agreed) by the University. An Opportunity that is Closed as Won will automatically be converted to a Project in the CRM. An Opportunity that is Closed as Lost will be inactivated and will not be converted into a Project .
Posts	Posts appear in the What's New feed on your Homepage and on each record (e.g. Account, Contact, Opportunity), think of them as being a bit like a Twitter feed just for the CRM. Some Posts are automatically generated, for example when a new Account is created or an Opportunity is won, however users can also create posts.
Process Bar	The Process Bar is situated towards to top of the screen on a Lead, Opportunity or Project . If it is not fully visible then you can click on it to expand it. The Process Bar acts as a guide to steer you through the development of the Lead/Opportunity/Project . It is not a comprehensive list of actions however there are some mandatory fields that must be completed before advancing to the next stage.
Project	A Project is defined as the stage in the lifecycle of a specific interaction with an organisation once an Opportunity has been won e.g. the main contract has been signed and any income due has been received by the University. If this were a research project then during this phase the research would now be underway.
Qualify / Disqualify	Once you have decided whether or not a Lead will progress to an Opportunity , you either Qualify , or Disqualify it. A Qualified Lead will automatically progress to a new Opportunity , and a new Contact and Account will also be created. A Disqualified Lead will not progress any further but the original information will be retained within the CRM.
Social Insights	Social Insights can be found on both Account and Contact records, towards the bottom of the screen. It can be used to find further information about an organisation or person, which can then be synched back to the CRM record. This is a one off synch so will need to be repeated if the information changes at a later date. Please not that Social Insights is from an external provider and the accuracy of the information it provides cannot be guaranteed, so use with due care.
Stakeholder (Account)	A Stakeholder on an Account is <u>always</u> member of staff at the University who is associated with the organisation, for example a member of academic staff who is a collaborator or a member of staff in Warwick Conferences who manages the organisation's conference account.
Stakeholder (Opportunity/Project)	A Stakeholder on an Opportunity or a Project can be internal or external to the University. For example they could be a member of staff who is collaborating on the Project , but they could also be an individual from another organisation who is collaborating on the

	Project. As well as individuals, other Accounts can also be Stakeholders on a Project or Opportunity .
Strategic Account	A Strategic Account is one that has been deemed to be of great significance to the University
Subsidiaries	A Subsidiary is an organisation that is wholly, or partly owned by another organisation. This parent - subsidiary relationship will be recorded on both Accounts within the CRM.
Tasks	The Task list is like your To Do list specific for a particular record (Account, Contact, Opportunity, Project etc.). You can set tasks for yourself but you can also set tasks for other users of the CRM system. If configured to so CRM tasks can be synchronised back to your Outlook tasks.
What's New?	The What's New window is a social media feed which appears on all records (Account, Contact, Opportunity, Project etc.) and displays updates on changes made to that record; look at it as a CRM-specific Twitter feed. Many of the Posts are automatically generated as you use the CRM, but users can post their own updates on the feed. A What's New window also appears on your Homepage which will display updates on records that you own, but also on the changes made by other CRM users that you are following.