CRM Getting Started

Part 1: Basics, Entering Notes, Entering Tasks, Tips

Overview of Part 1 Training on CRM

- Understanding the Hierarchy of the system
- System Basics including shortcuts
- Adding and Searching for Contacts/Accounts
- Adding Donations and Grants
- Tasks for you and others related to Accounts

Hierarchy of the CRM – Account > Contact > Transaction

Account

Contact

- Donation
- Note
- Task
- Call

Contact

- Grant
- Task
- Call
- Case

Voss Auto

Liz McCord

- Corporate Donation
- Call, Will you donate again for upcoming year?
- Email, Survey rquest

Gerry Locker

- Donation
- Task, Send invitation to Founders Event
- Case, Lost invitation

What is an Account for CWF?

Account

- Donors
- Grant Applicants and Recipients
- Board Members
- Corporate Sponsors
- Vendors
- Person, Couple, Organization Donating or Receiving Money

What is a Contact for CWF?

Contact

- Specific Donor Name
- For Donors it is often a spouse
- Solves the issue of Mr. and Mrs. for mailings
- Very often is an exact duplicate of an Account

Click Phone Numbers to Dial

- This only works on cell phones currently.
- You can click on a phone number in the system to start a call

Search and Shortcuts

Concepts to know to use the CRM

Finding an Account

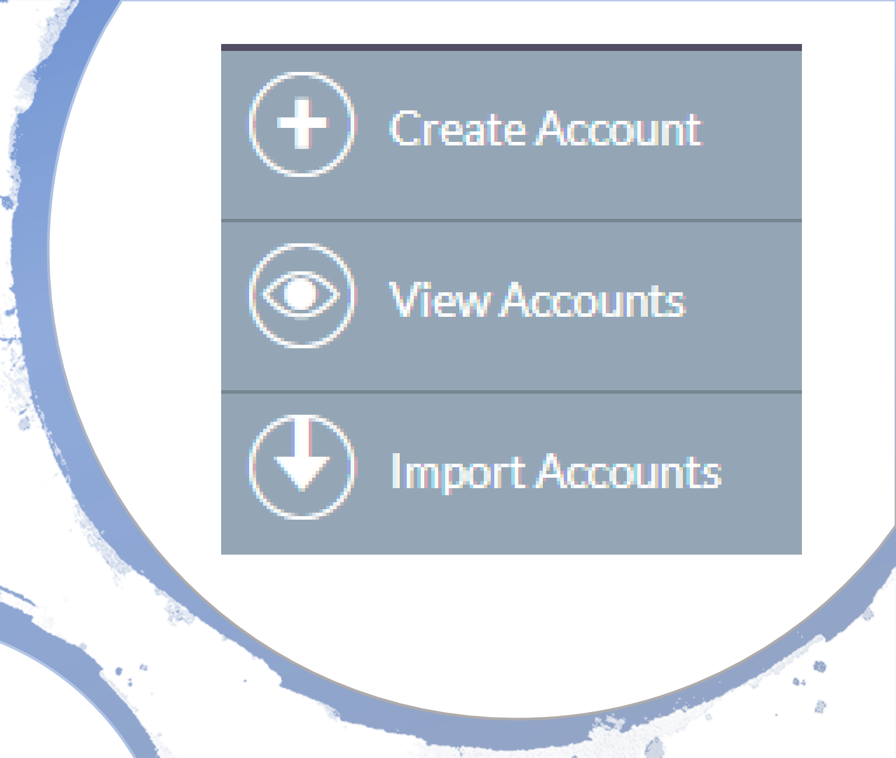
- Use the Search magnifying glass in top menu
- Enter last name and click **Search**
- Click on match
- Any field is searchable including Account Name Name, Contact Name, Email Address

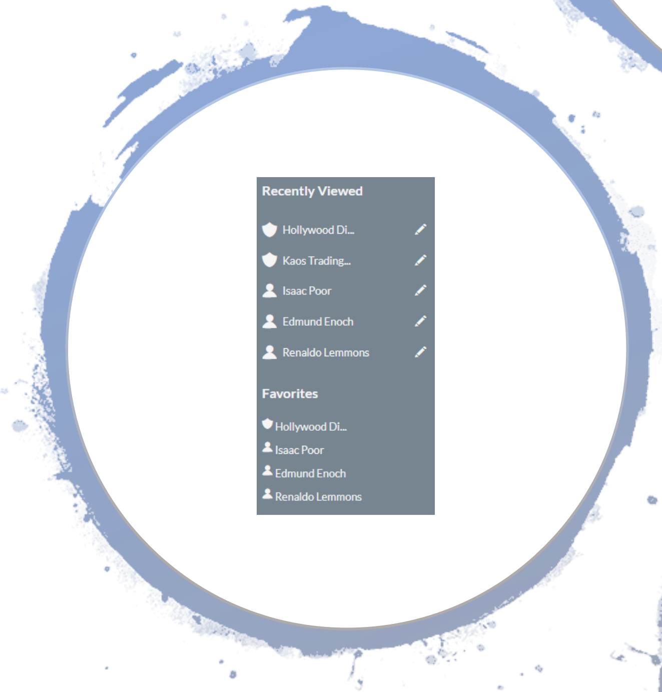
Navigation Panel on Left

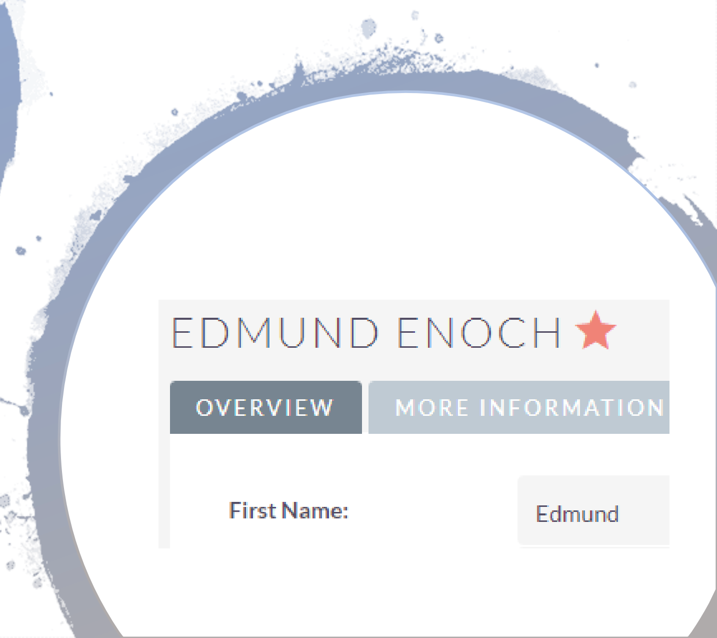
Options change based on module

It will show recent access records

Contacts and Accounts marked as favorites using Star Icon in Detail View





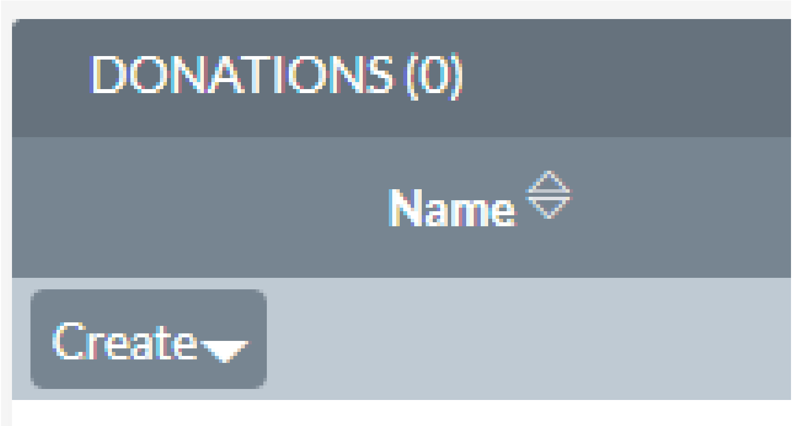


Entering Donations

Grants are very similar

Donations are added to Accounts

This will speed data entry and increase accuracy as well as maintain connections.



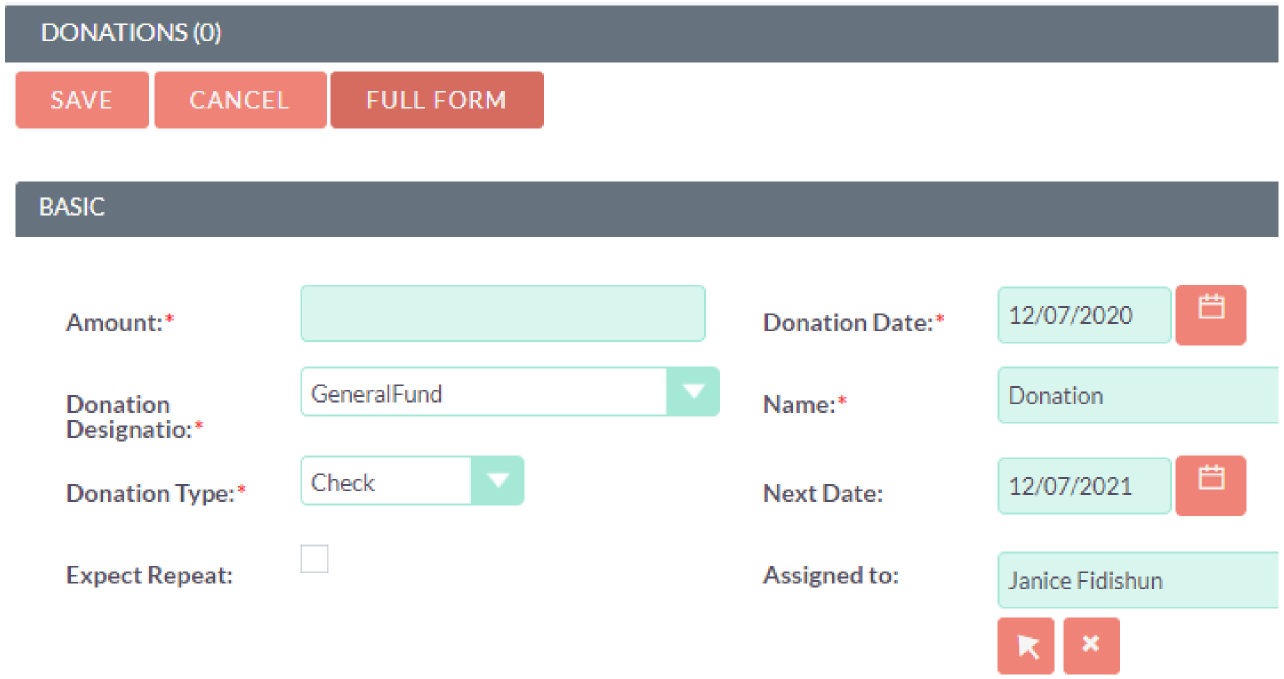
Use Search to find an Account

On an Account > Donation subpanel > Create

Populate the donation Quick Entry Form

Add Donation to an Account

- Find account with Search
- Open account by clicking on the name
- Expand Donations subpanel
- Click Create
- Populate the form and click save



Entering Notes, Tasks, and Calls

Modules that are not Donations or Grants

Always start with an Account or Contact

This will speed data entry and increase accuracy as well as maintain connections.

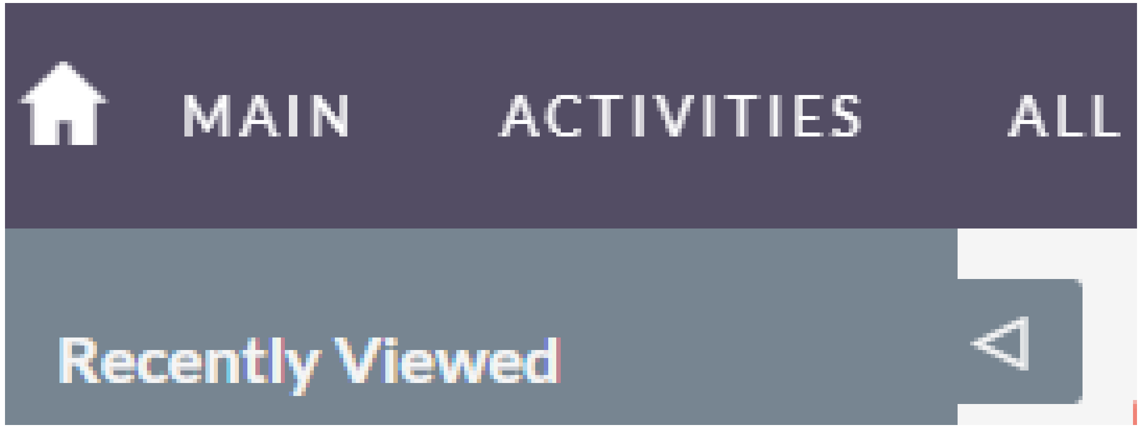
Use Search to find Account or Contact

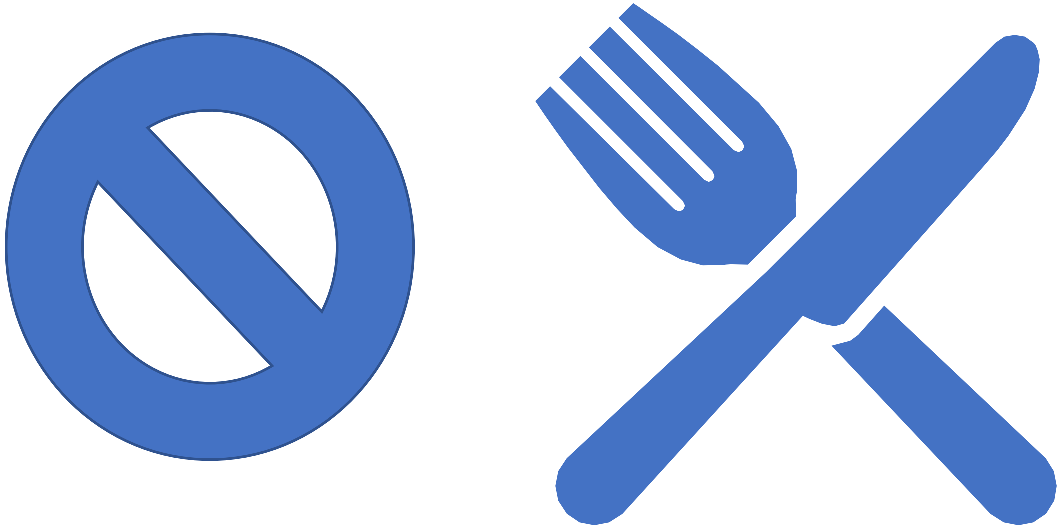
On an Account > Contact subpanel > Create

Switch to the Contact > Activity subpanel > Log Call (Sometimes History subpanel)

Navigate using Search to find contact

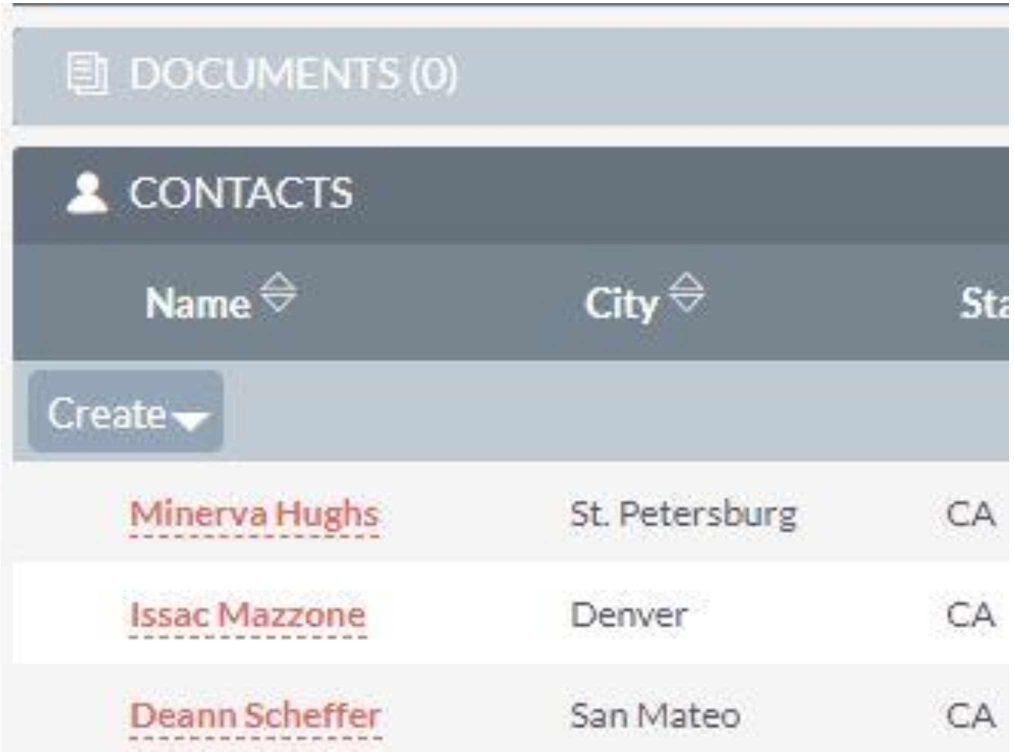
You will rarely use Menu





Add Contacts to Accounts

- Find account with Search
- Open account by clicking on the name
- Expand Contacts subpanel
- Click Create
- Most Accounts are already in the system

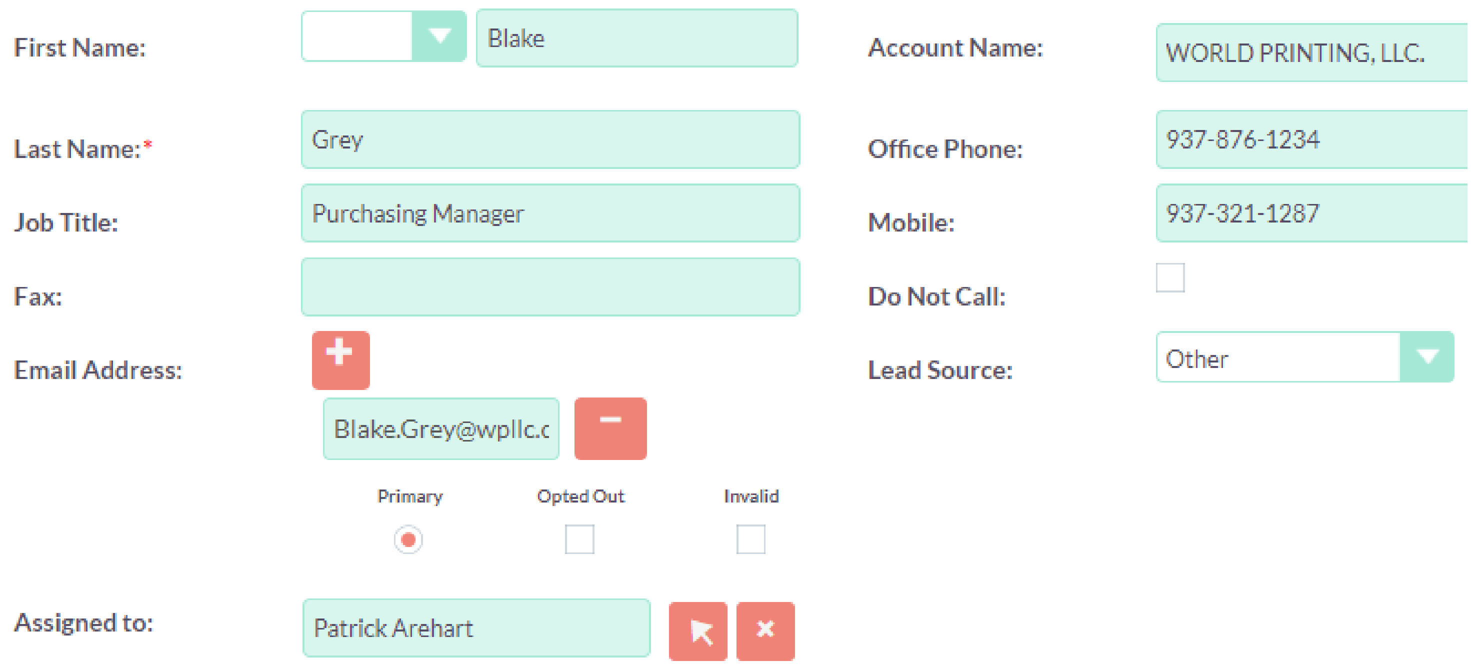


Add Contacts to Accounts – Input Form

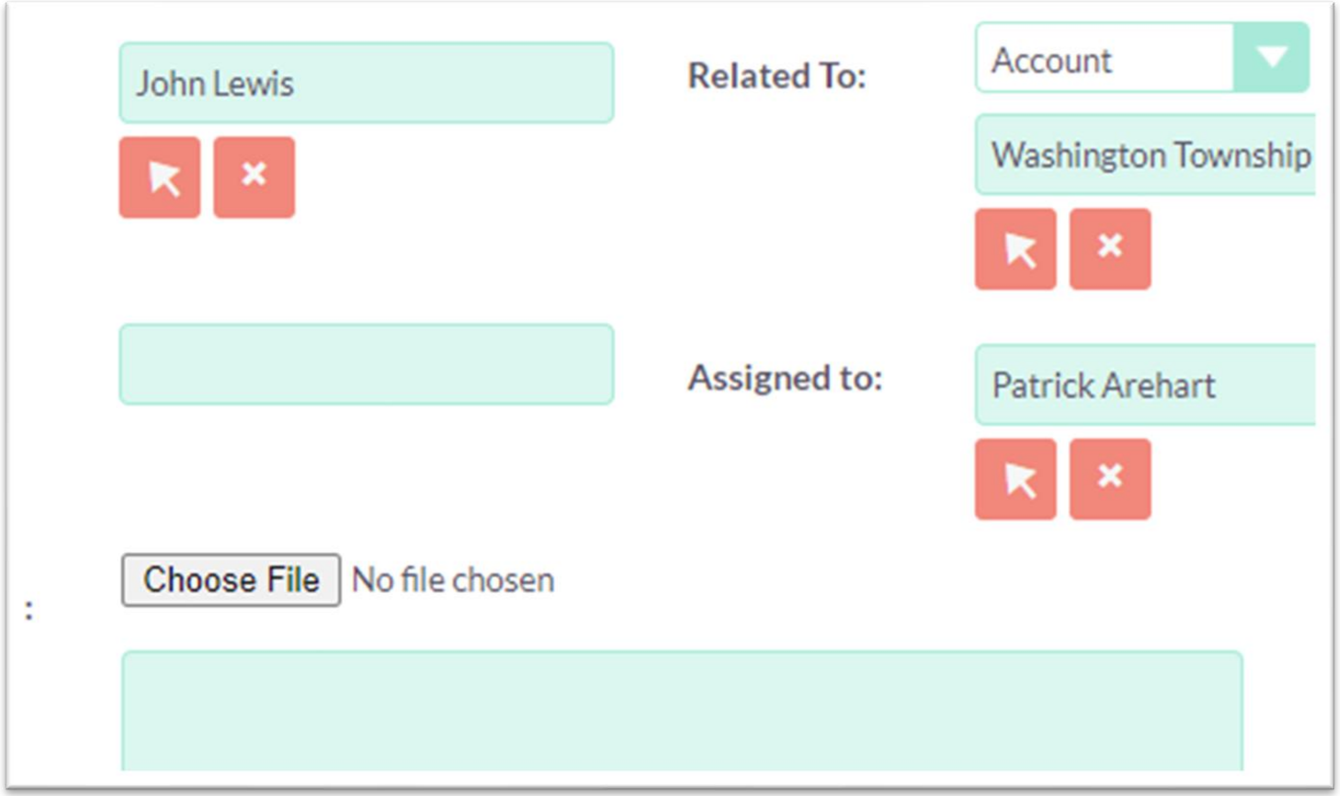
Account Name will automatically populate

Enter Name, Title, Phone Number and Email

Click Save



Adding Notes - Open Account or Contact First



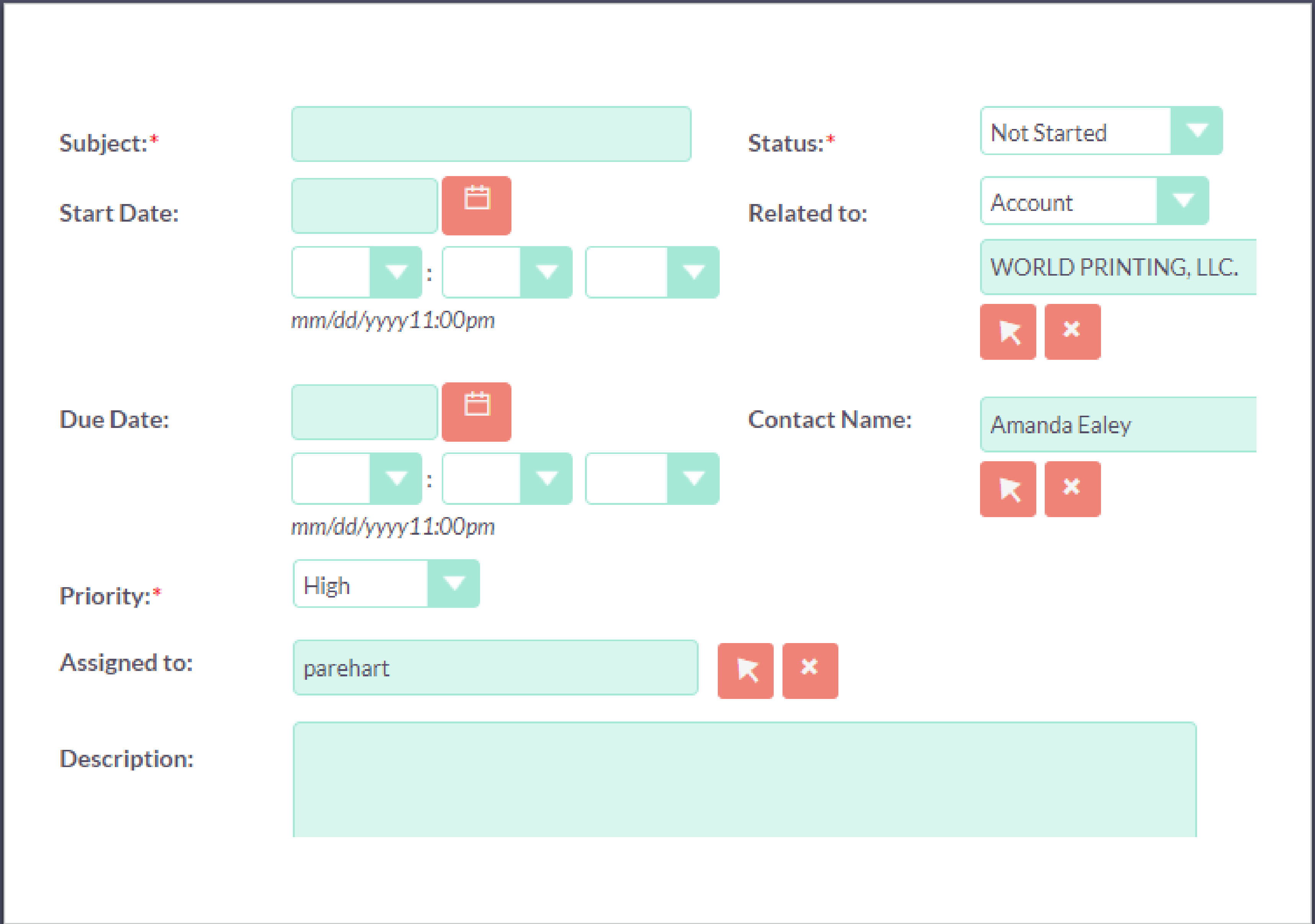
- Expand History > Create Note or Attachment
- Enter Subject (short but descriptive, helps find information later) and note
- You can add an attachment
- This is one way to log an email

When to use the Notes Module

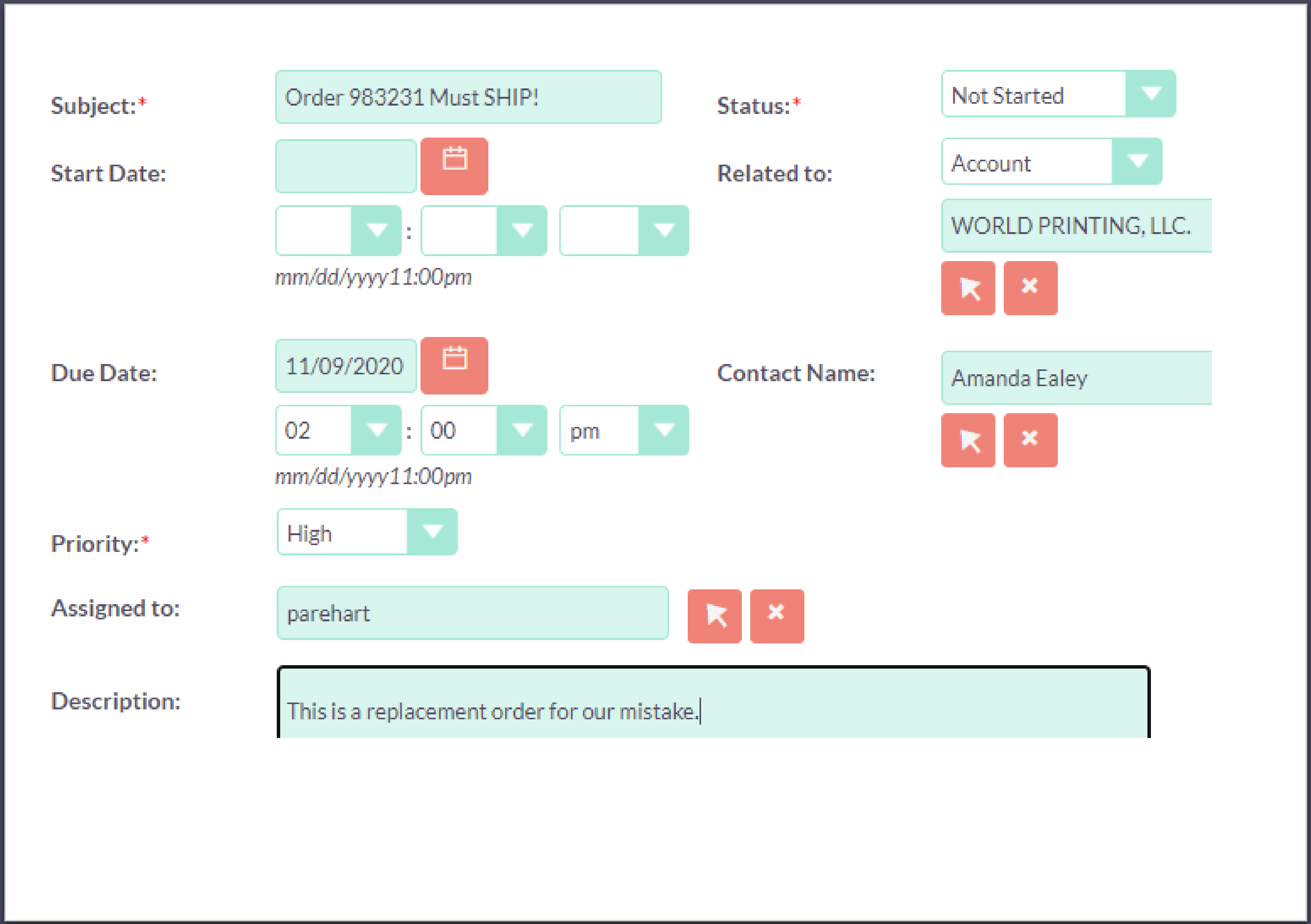
- Use if nothing else makes sense; it is not a meeting, not a phone call, not a task
- Use if no follow up is necessary
- Information you and others could use
- Already completed tasks
- Email logging
- Anything you want, space is not an issue.

Tasks - Open Account or Contact First

- Expand Activities > Create Task
- Enter Subject (short but descriptive, helps find information later)
- Enter a Due Date and a Start Date
- Set the priority
- Change the “Assigned to:” if appropriate
- Enter Description



Task Input Form



Task Input Form - Populated

Uses for Tasks

- Anything you need to do and want on your dashboard
- Book event space
- Send thank you note
- Complete expense report
- Create Blog Entry
- Send invitations

Updating or Closing a Task

MY OPEN TASKS

(1 - 2 of 2)

Close	Subject	Related to	Priority	Status	Start Date	Due Date
✖	follow up on sample pkg	BLOCH PRINTING COMPANY	High	Not Started	11/17/2020 11:00	
✖	courtesy call	WILLIAMSBURG PRESS	Medium	In Progress	11/03/2020 11:00	

- Status: Not Started, In Progress, Completed, Pending Input, Deferred
- From Dashboard you can click the X to indicate Completed
- Very important to keep your task list clean

Email Notifications

- You will get an email if a task is assigned to you.
- You can use the link to got directly to the task
- Periodically check your dashboard for open tasks
- Other notifications are sent when you are assigned calls, cases, accounts or contacts

Dashboard

Your central hub

Add My Open Tasks from the Actions menu

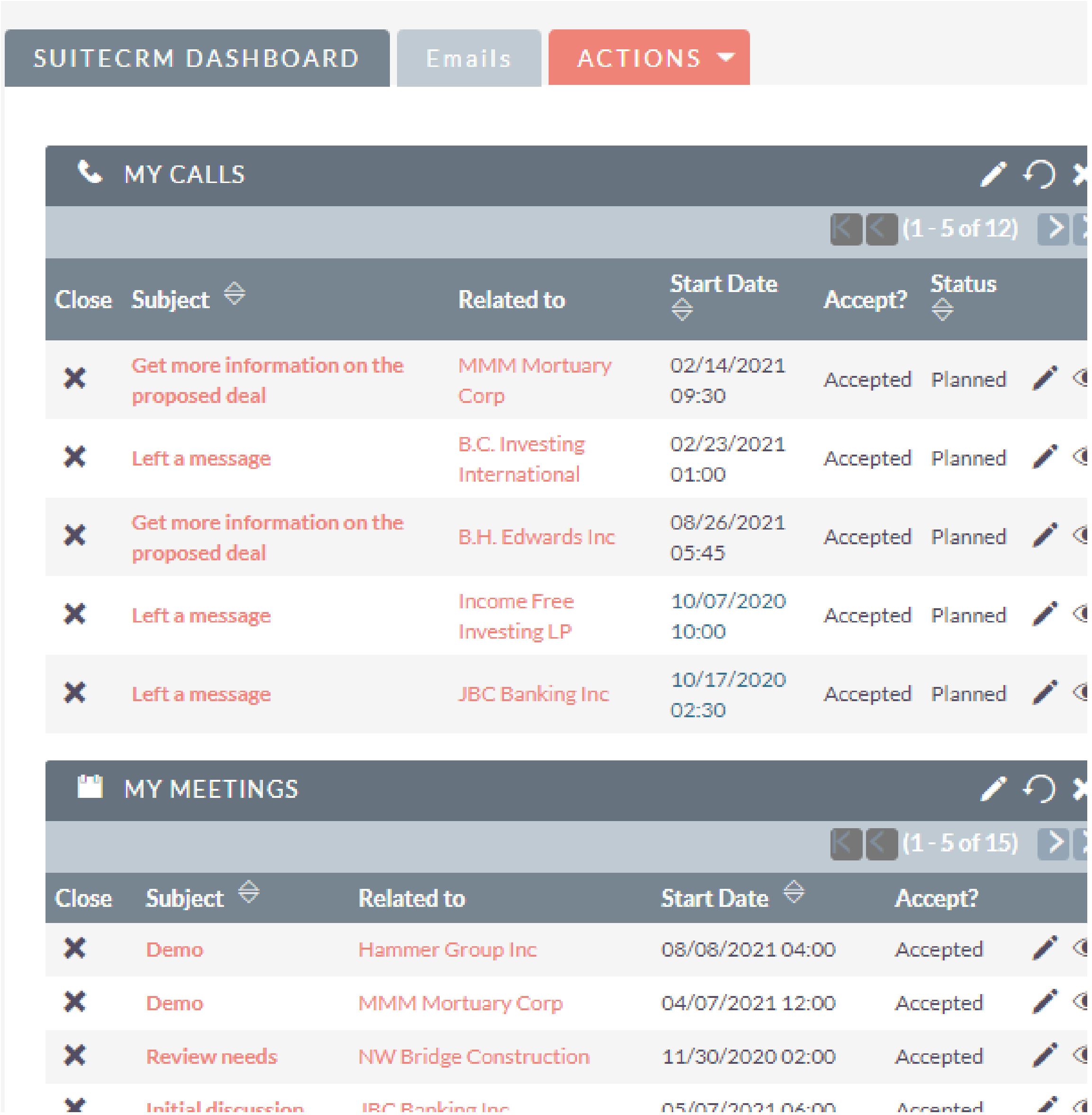
You can drag and drop their positions

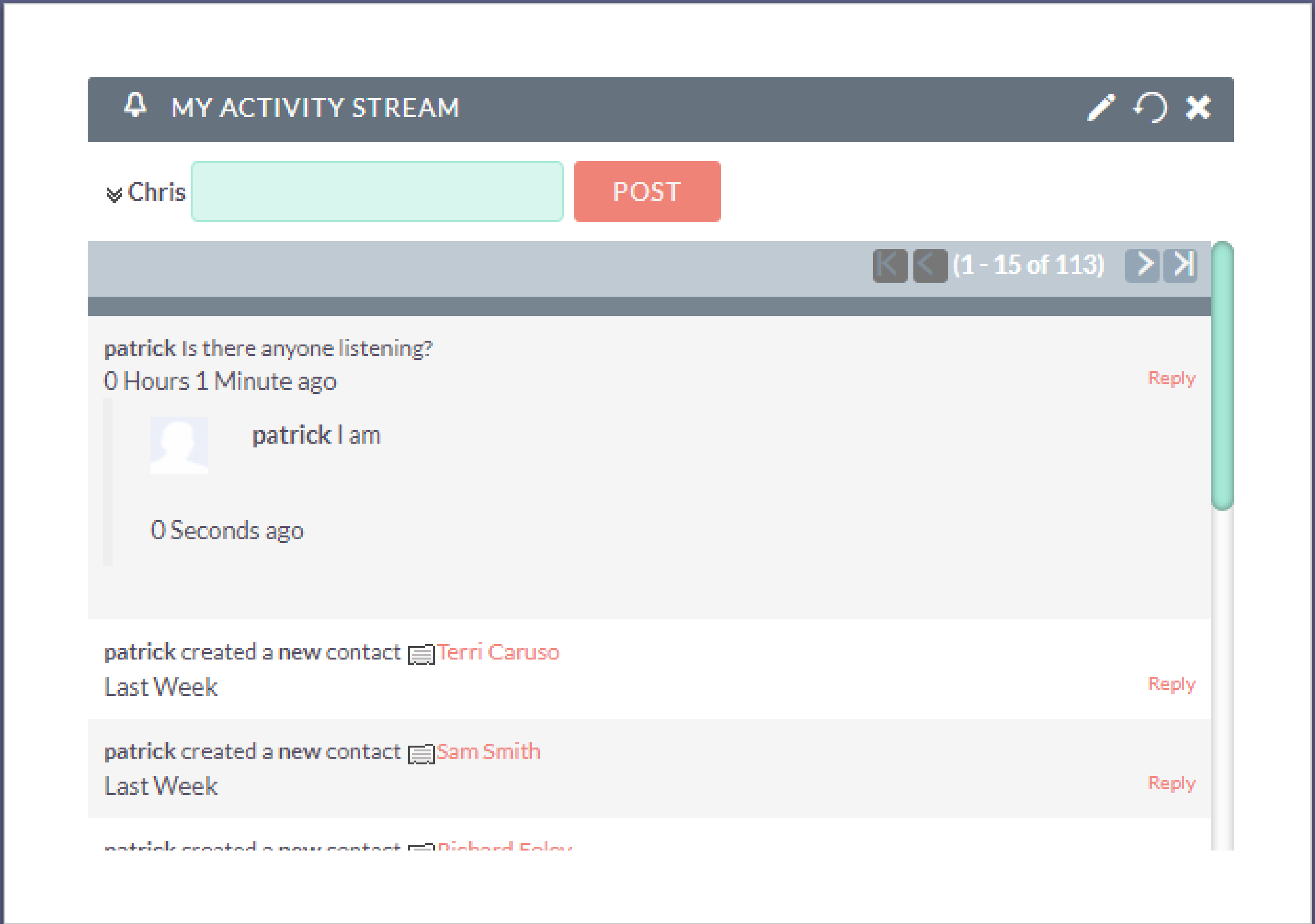
You can create additional tabs

If you accidentally delete a dashlet, you can add it back

Customized for you, it can always be fixed

Dashboard - Example





My Activity Stream – Chat board

Using View Summary for an Account or Contact

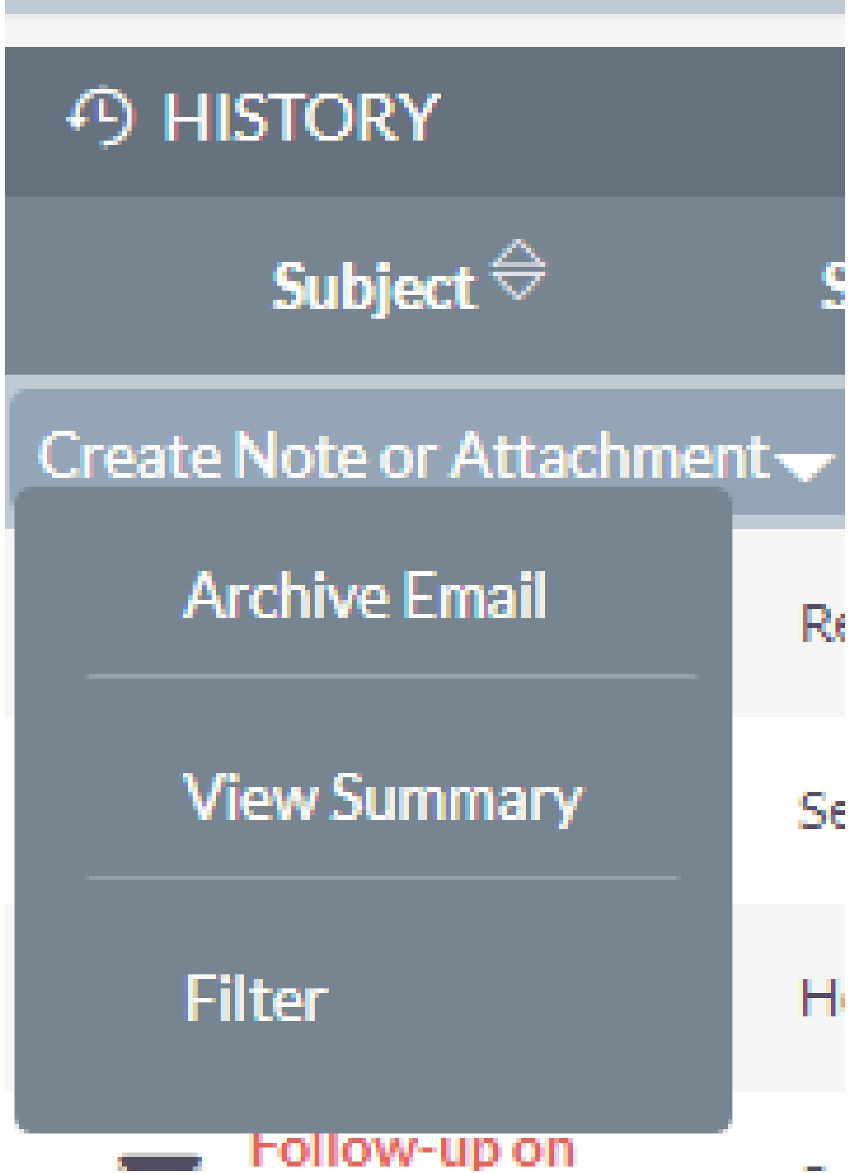
Open a record using detail view

Open the History subpanel

Click the arrow next to “Create Note or Attachment”

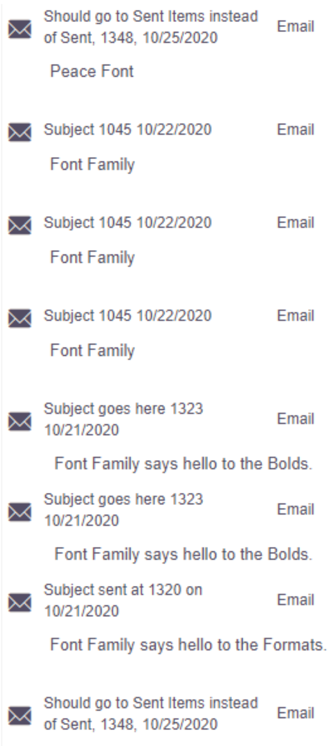
Click View Summary

See overview, or just meetings, notes, emails etc.



View Summary

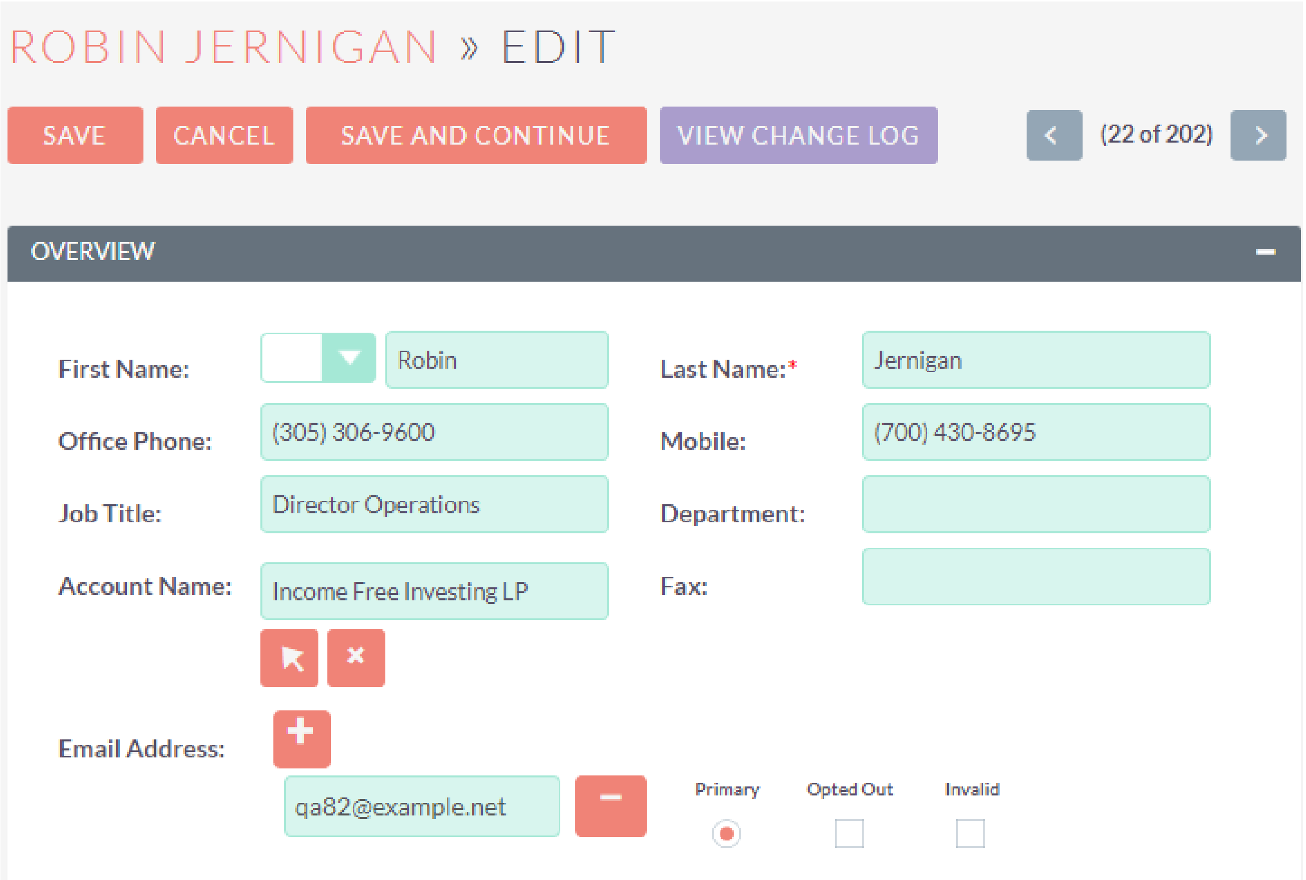
- View all or by record type
- Option to print
- Faster than opening every record one at a time

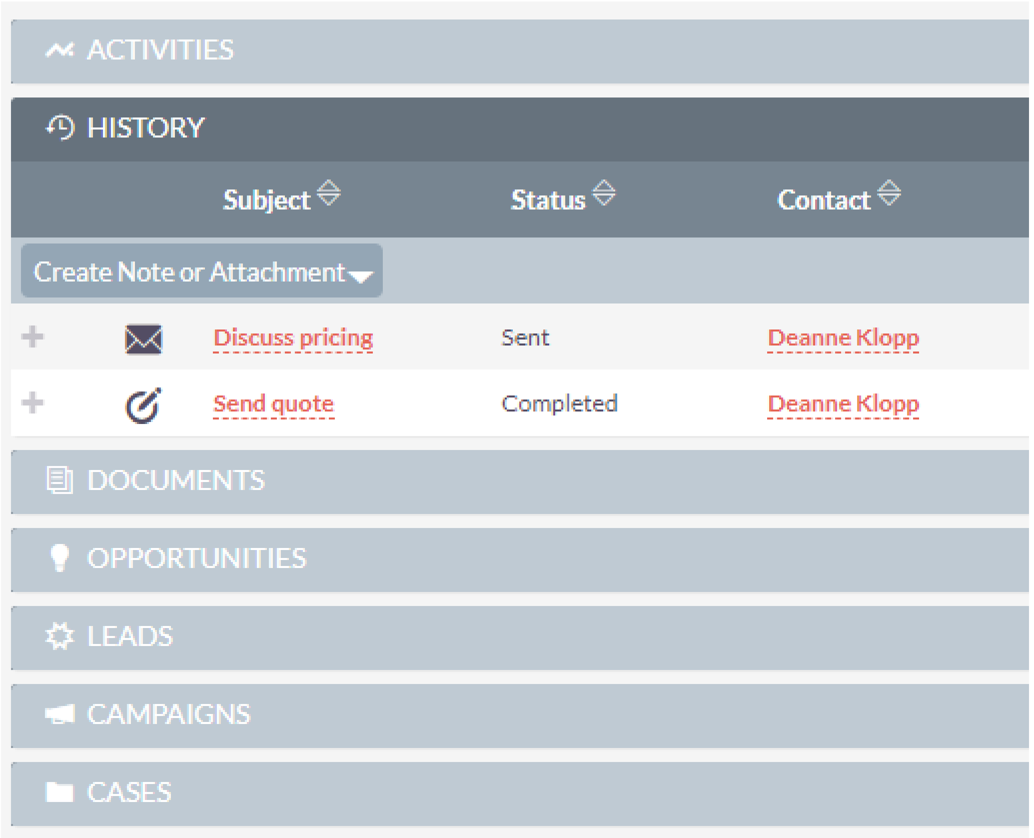


Concepts

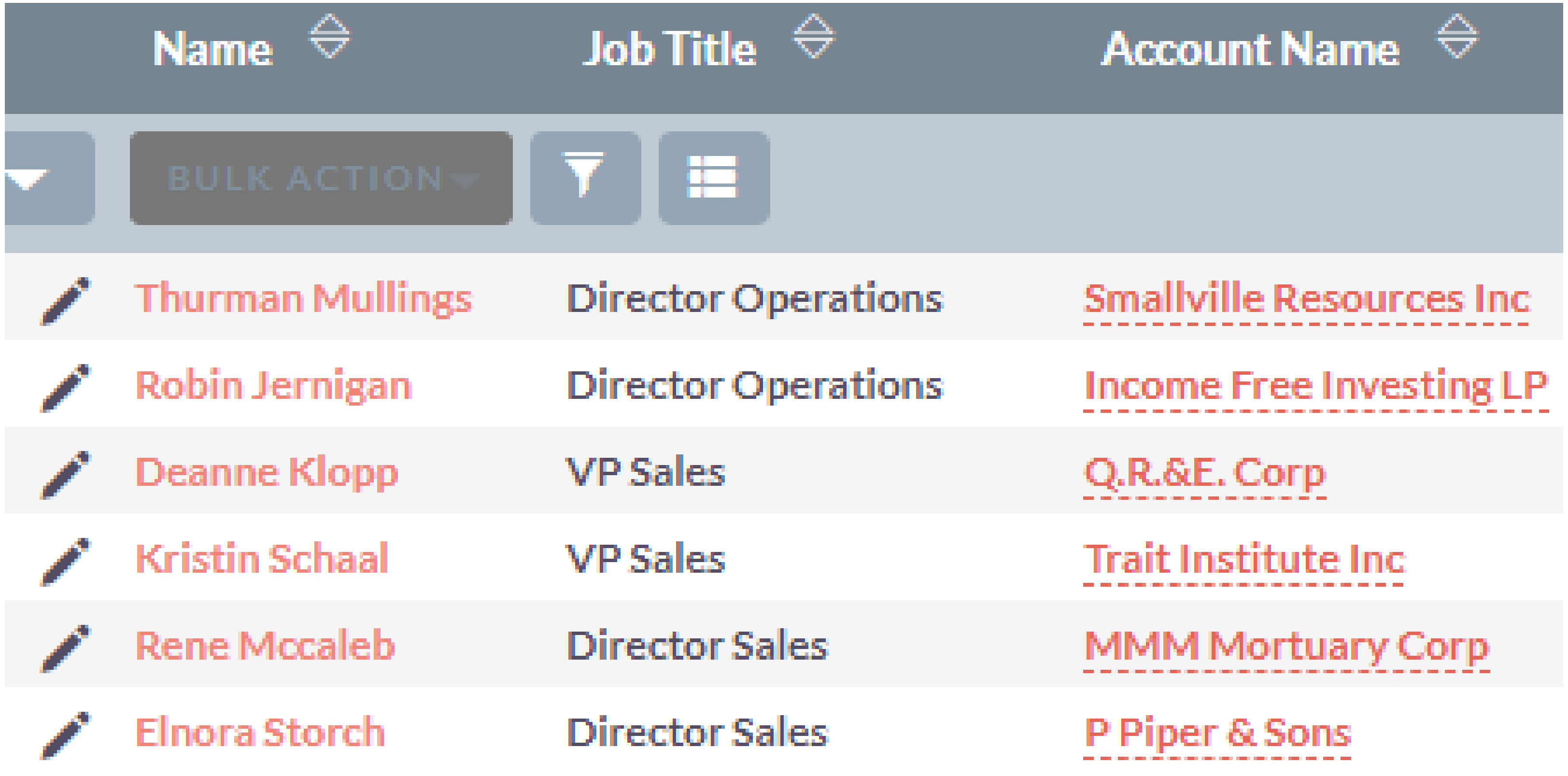
Things to know about the CRM

Edit View and Detail View





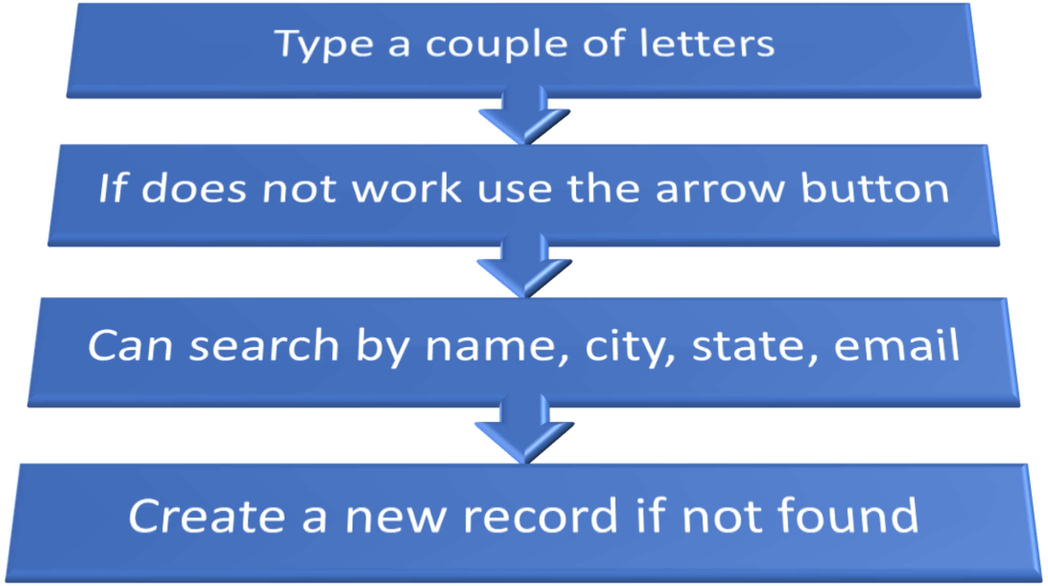
Navigation Tips – Edit vs Detail Views

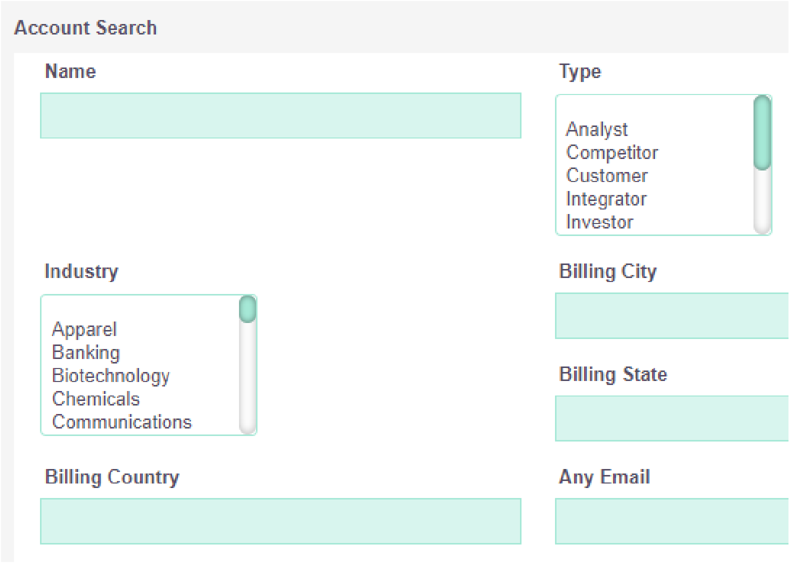


Name	Job Title	Account Name
Thurman Mullings	Director Operations	Smallville Resources Inc
Robin Jernigan	Director Operations	Income Free Investing LP
Deanne Klopp	VP Sales	Q.R.&E. Corp
Kristin Schaal	VP Sales	Trait Institute Inc
Rene Mccaleb	Director Sales	MMM Mortuary Corp
Elnora Storch	Director Sales	P Piper & Sons

- On Accounts and Contacts the pencil opens in Edit View
- Only use the pencil when you know you want to change a record
- Click on the Contact Name to access Detail View and see the history on the subpanels without the ability to edit

Autocomplete Fields – Similar to drop downs





Assigning Board Positions

Create a Position Record

- Each year start a new set
- Pull up last year record by clicking on its name
- Use action button to duplicate
- Fix the Start Date, Stop Date and Year

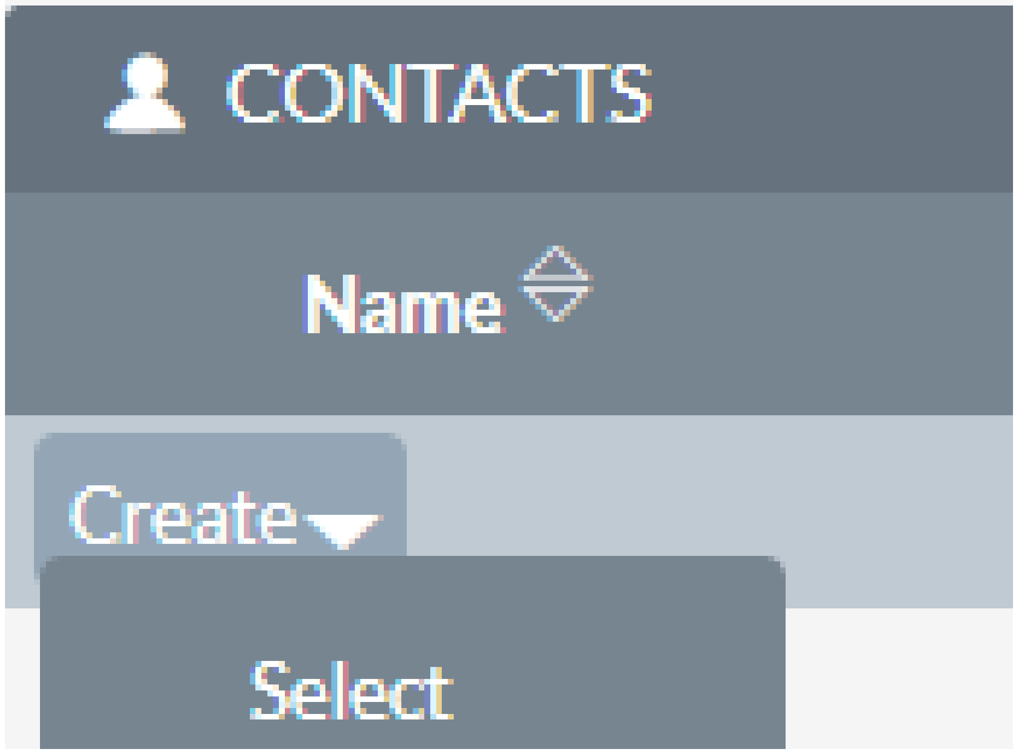
Assign Contacts to Positions

Open the Position Record

Expand the Contacts Tab

Choose Select (hit the down arrow on the button first)

Find contact and choose select



End of Getting Started Part 1

CRM Getting Started

Part 2: Logging and Scheduling Calls

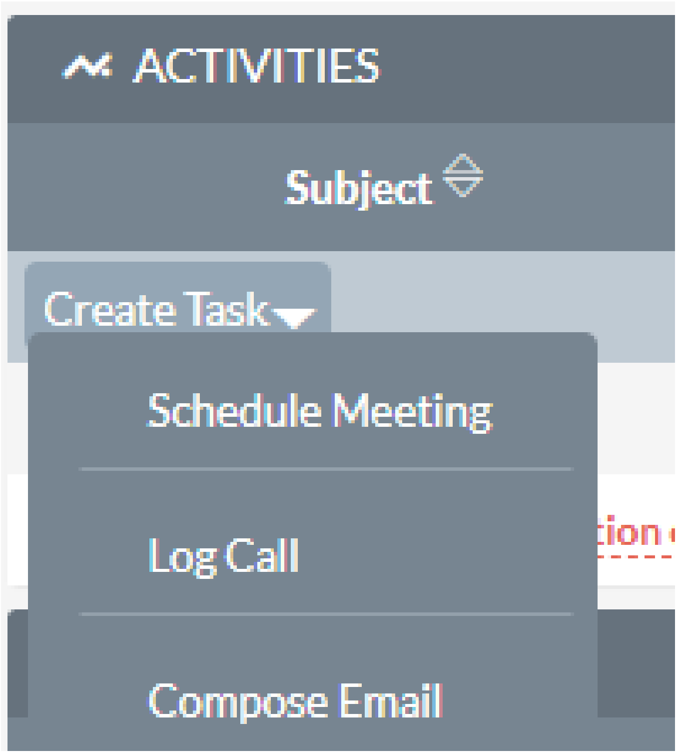
Log incoming, outgoing, scheduled calls.

How to close.

How to use reschedule function.

Logging Phone Calls

Logging Calls

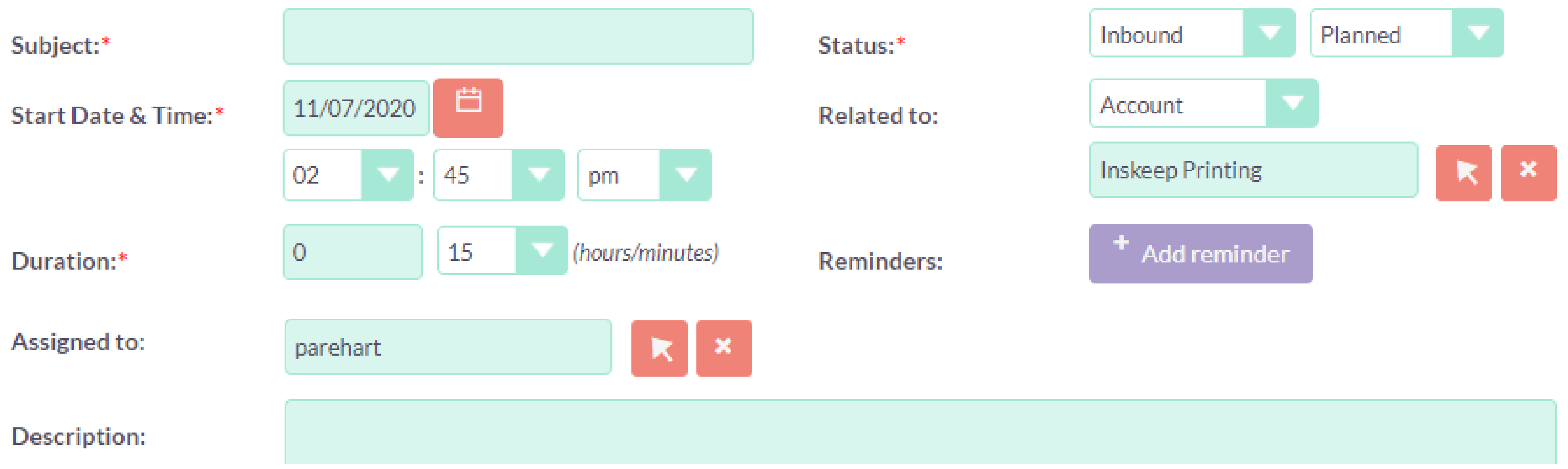


- Sales > Contacts > Select Contact> Activities > + > Down Arrow > Log Call
- You can log current calls or setup calls in the future
- Enter Subject (short but descriptive, helps find information later, VERY IMPORTANT)
- Mark the call as Inbound/Outbound and planned, held, not held
- Set the date, time and duration
- Enter Description
- Use “Full Form” if want to enable reminders

Logging a Call – Input Form

“Related to” will already be prepopulated. It will be related to Account and behind the scenes the contact will be added as well.

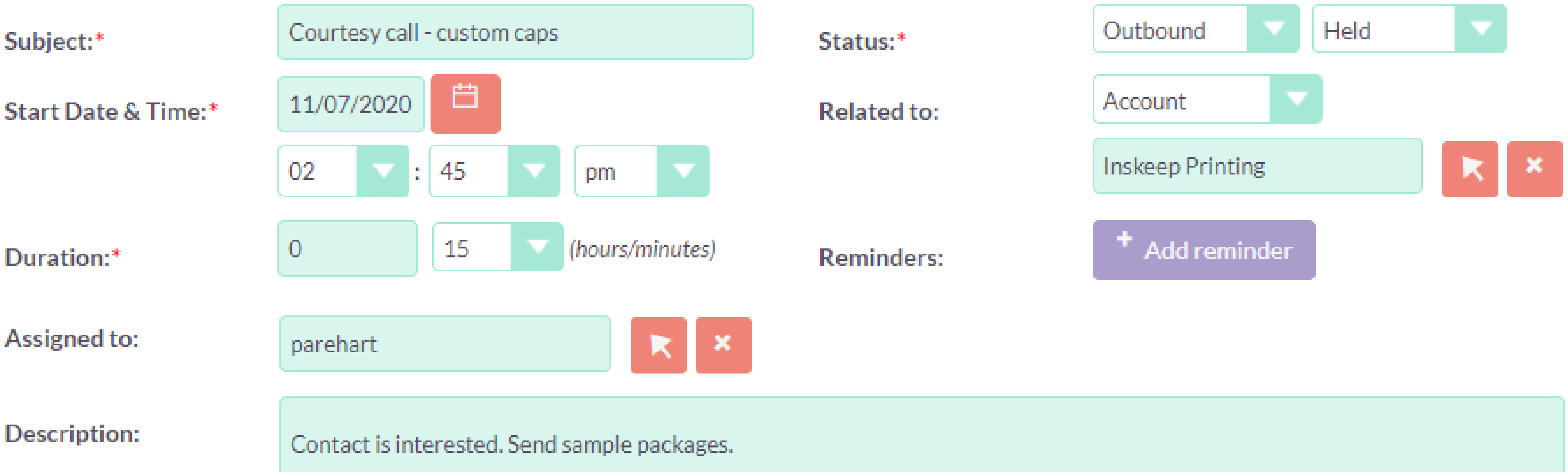
- Was the call inbound or outbound?
- Did the call happen?
- Change “Planned” to “Held”



Saving the call

Information for you and others to refer to later about the calls you make.

- Enter subject - this is very important
- In this case, Outbound and Held are chosen
- Add a description of the discussion
- Include specifics like package was sent or follow up email was sent



Logging Calls – Subject Line Examples

Introduction	Courtesy Call – Customer Caps	Any Interest?	Re-order Time
Quarterly Call	Follow Up Quote 43253	Review Needs	Introduce Players

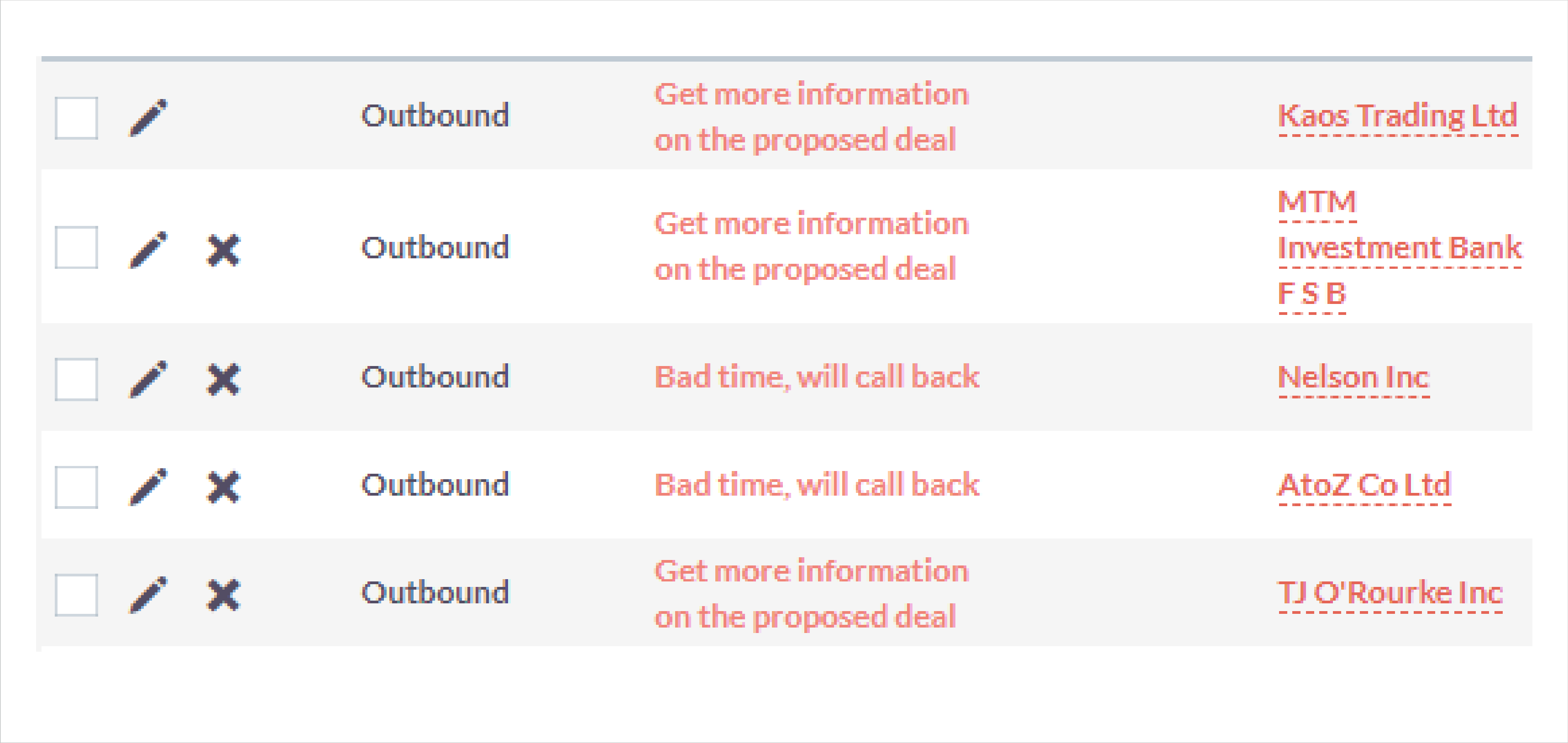
Closing a call

If a call is “Planned” then it is an open task

If you had a conversation with contact, then “Held”

If the call did not occur, reschedule it, not close

If you give up, mark the call as “Not Held” and do not delete

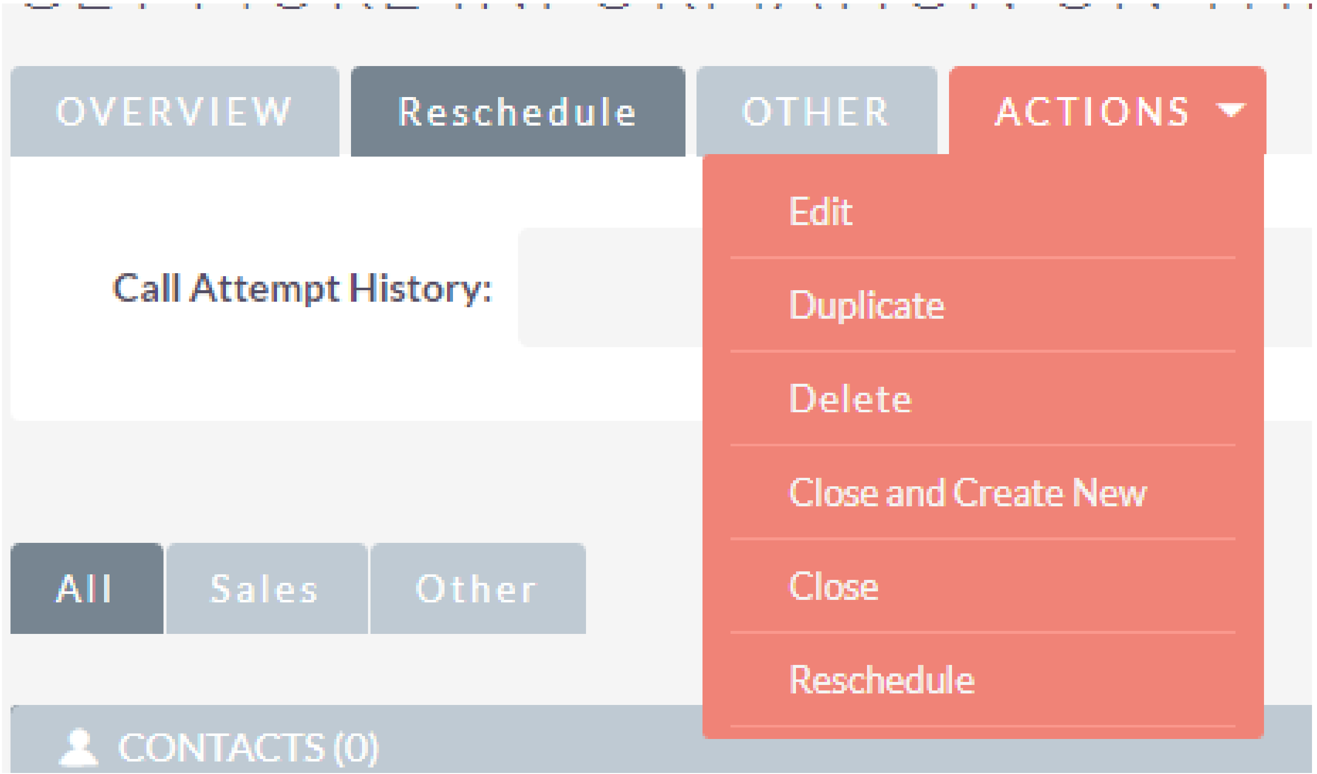


	Outbound	Get more information on the proposed deal	Kaos Trading Ltd
X	Outbound	Get more information on the proposed deal	MTM Investment Bank F S B
X	Outbound	Bad time, will call back	Nelson Inc
X	Outbound	Bad time, will call back	AtoZ Co Ltd
X	Outbound	Get more information on the proposed deal	TJ O'Rourke Inc

List of Calls

An X indicates the call has not been closed

Reschedule a Call – Planning later attempt



- Leave call open
- Use Actions menu to Reschedule
- Reschedule tab will log previous call attempts

Visualization of a CRM