CRM User Training Manual

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Date	**05-29-26**
Version	**1.7**

Table of Contents

Revision Sheet

Date	Author /Updated by	Version	Change reference
04-19-23	Khaja Uddin	1.0	Document Creation
05-22-23	Khaja Uddin	1.1	Added sections Parent-Child Deals, Collaborating on Deals, Parent/Child Account – Contacts Hierarchy, Dataverse Search, Microsoft Planner.
06-05-2023	Khaja Uddin	1.2	Mobile app
08-02-2023	Khaja Uddin	1.3	Additional Features
09-24-2024	Khaja Uddin	1.4	Integration 3.0 Changes
03-03-2026	Khaja Uddin	1.5	Revisions as per Karla Towe and James Henninger
03-11-2026	Khaja Uddin	1.6	Additional comments by James Henninger
05-29-2025	Khaja Uddin	1.7	Added the Deal View changes

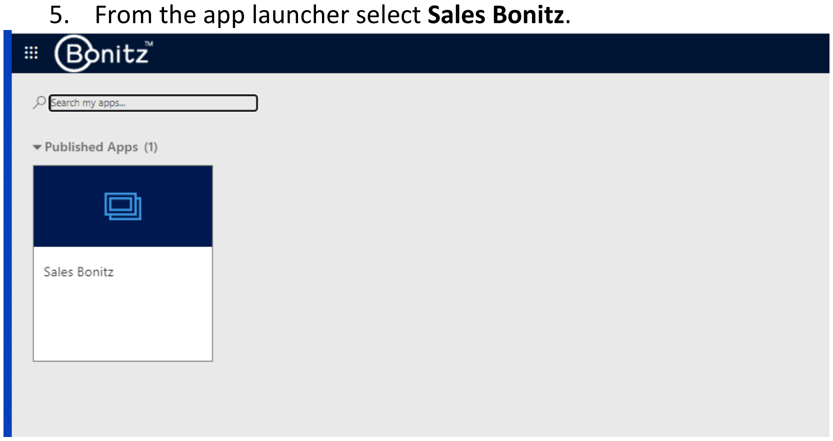
Introduction

The purpose of this user manual is to provide the users with a comprehensive guide on how to create and manage accounts, contacts, and deals with multiple stages in CRM. The manual aims to ensure that Bonitz's CE users are equipped with the necessary knowledge and skills to effectively use the system and carry out their responsibilities related to managing customer information and sales processes. The manual also serves as a reference guide that users can refer to whenever they encounter any difficulties or have questions regarding the process.

IMPORTANT – Upon discovering the opportunity, the Deal needs to be created within 24 hours of discovery. As we move through the sales process, budgets / estimates need to be entered within 24 hours of pricing. Failure to follow the process outlined below will result in forfeiture of said Deal.

Logging In via Web Browser (Primary Method)

1. Open a supported web browser (Microsoft Edge or Google Chrome recommended).
2. Navigate to the following URL:
   https://bonitz.crm.dynamics.com
3. Sign in using your Bonitz Microsoft credentials.
4. Once logged in, you will land in Microsoft Dynamics 365.
5. From the app launcher select **Sales Bonitz**.



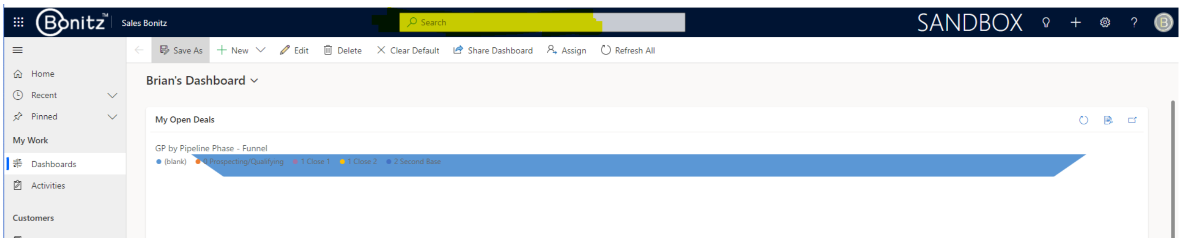
Dataverse search

Dataverse in Microsoft Power Platform provides a user-friendly and comprehensive data service. One of its features includes a full-text search that allows users to search across Accounts, contacts, Deals etc.

Here is a step-by-step guide on how to use Dataverse Search:

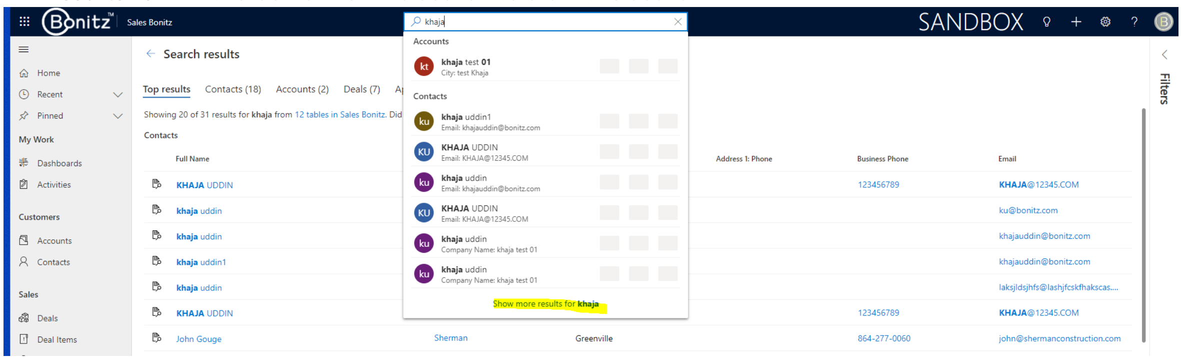
Note: Your access to data in Dataverse may vary depending on your user role and permissions.

- The Dataverse search box is located at the top of the application you are working with.

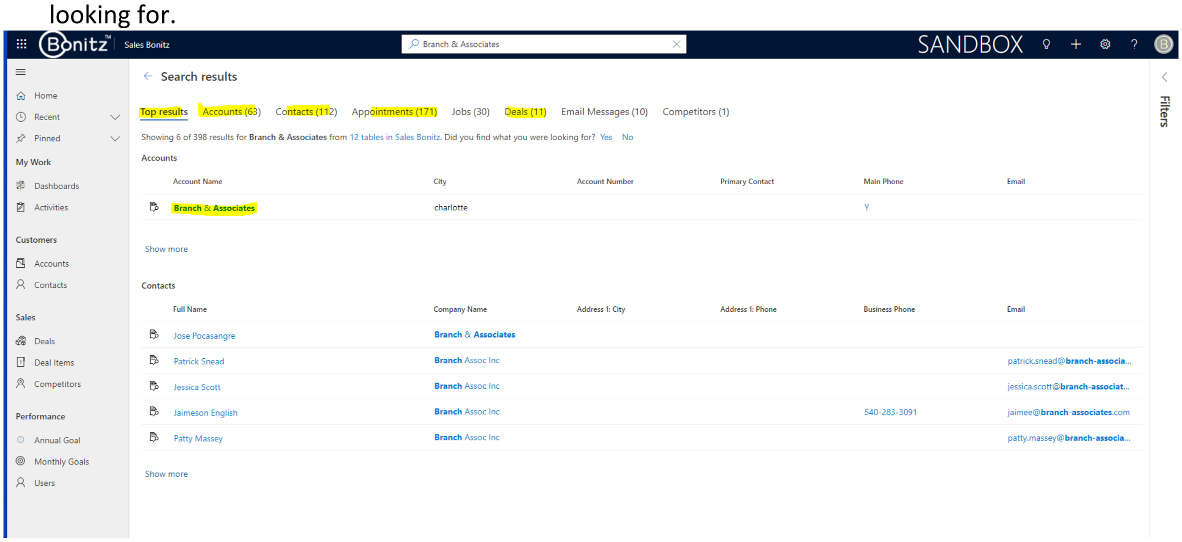


- Type in the keywords or phrases related to the data you're trying to find in the Accounts, Contacts, or Deals. The search box also supports wildcard characters for more advanced searches. For example, if you're looking for a specific account, you could enter the name of the account, the account number, or any other related keyword that might appear in the account's data. Once you start typing your keyword, it will pull up suggestions and results. The search will find matches for inflection words, leverage AI to look for spelling mistakes, abbreviations, or synonyms, and pull up the correct records despite them.

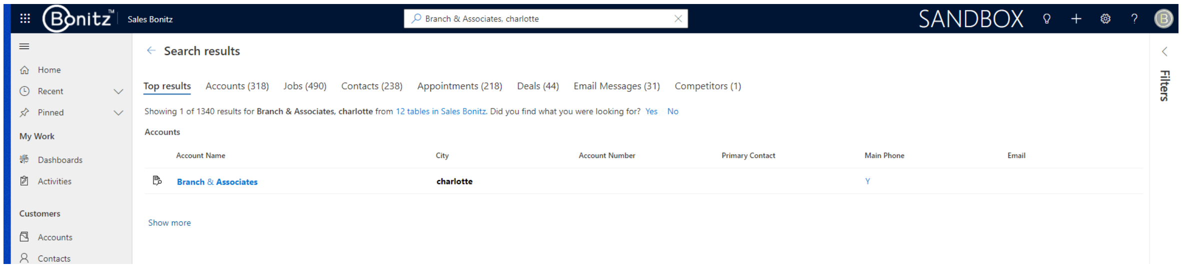
- After inputting your search term(s), hit the Enter key on your keyboard or click on "**Show more results for**" in the bottom of the search to start the search.



- The search results will be displayed in a list format, often with a brief snippet of data showing where your search term was found. Navigate through the results to find the information you're looking for.



Wildcard characters example:



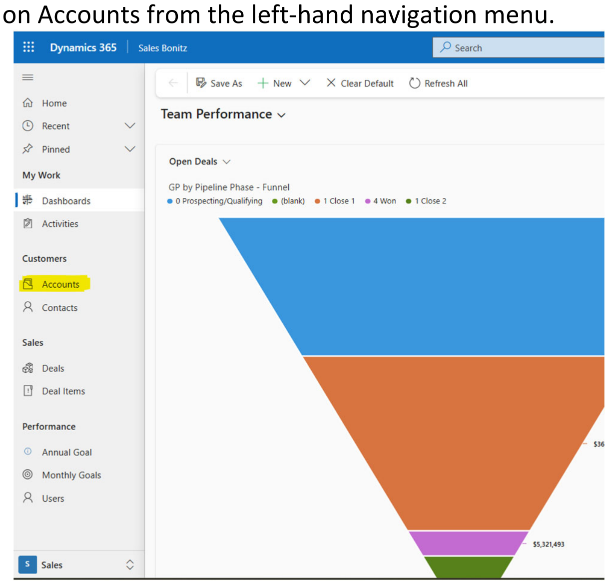
Note: Remember, the efficiency of Dataverse Search depends on the quality of your search terms. Use specific and relevant keywords to increase the accuracy of your search results.

Account

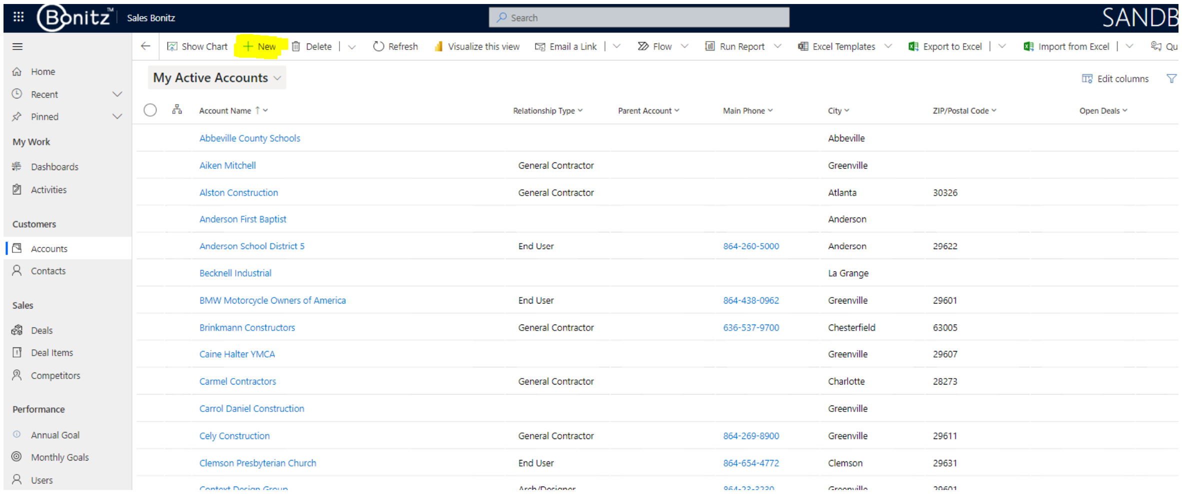
Creating a New Account

Search for an Existing Account Before creating a new account, use **Dataverse Search** to confirm the account does not already exist.

1.Click on Accounts from the left-hand navigation menu.

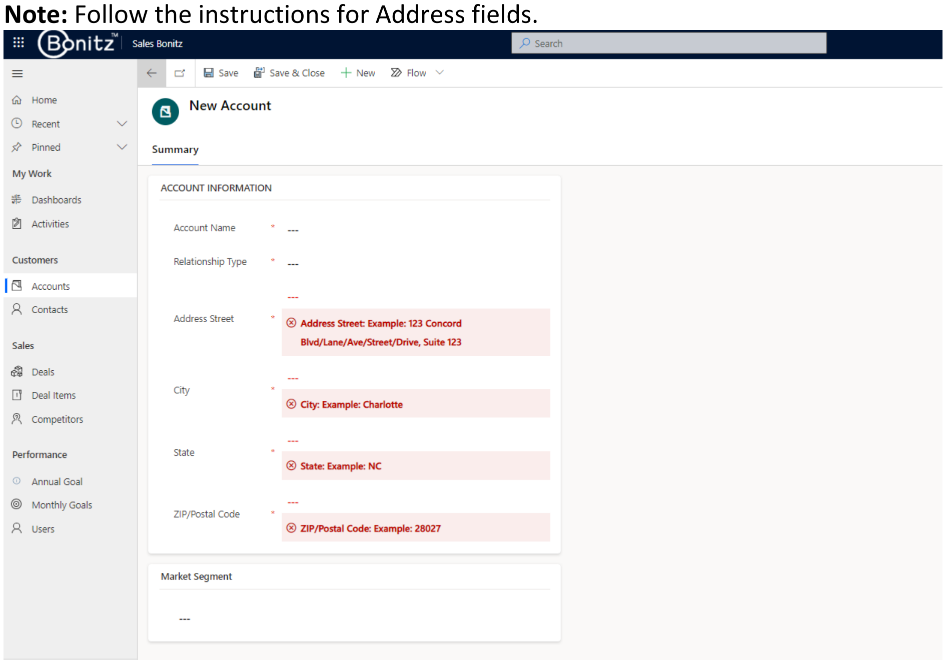


1. Click on the New button in the command bar at the top of the screen to open a new account form.



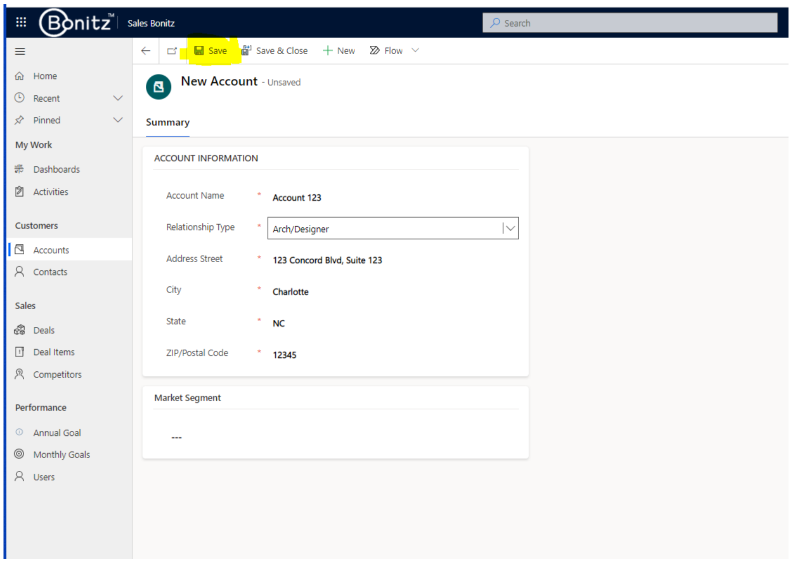
2. Fill in the required fields for the account, such as the Account Name, Relationship Type, Address street, City, State, ZIP/Postal Code.

Note: Follow the instructions for Address fields.



3. Optionally, fill in Market segment field.

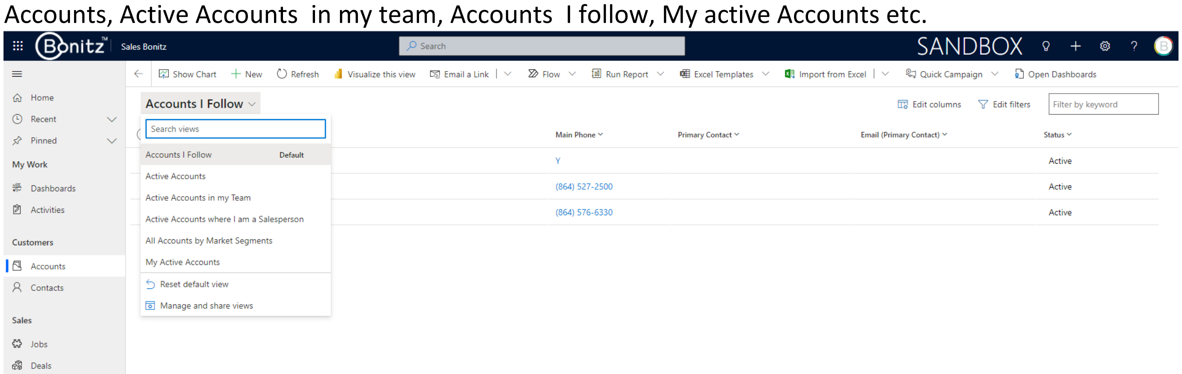
4. Save the account by clicking on the Save button in the command bar.



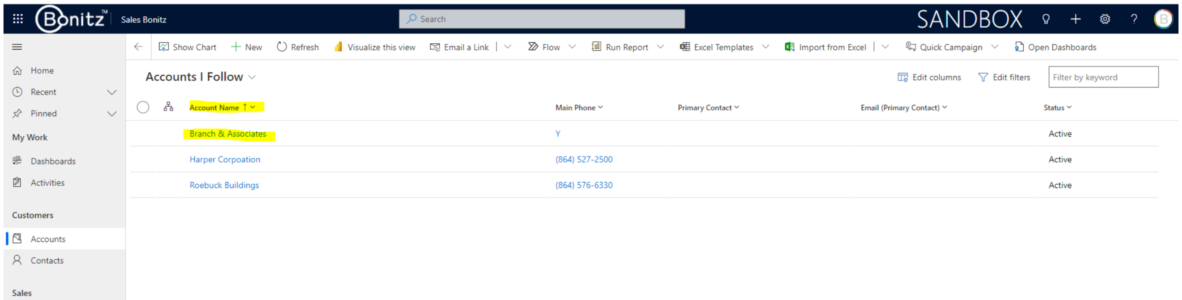
Managing Existing Accounts

Once an account is created, users can manage it by:

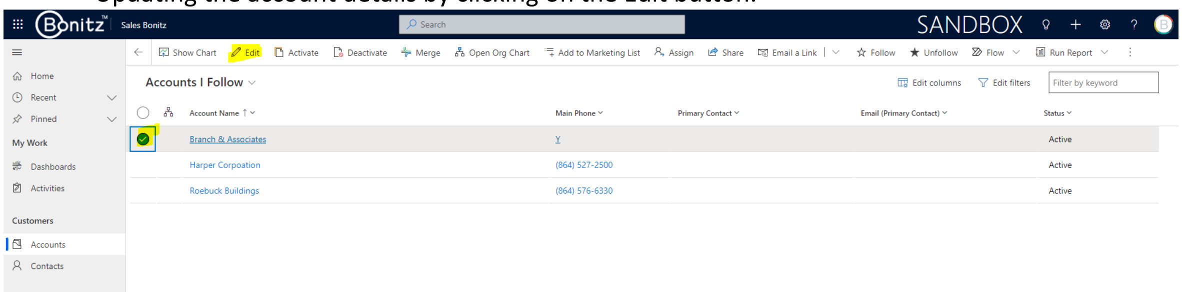
- Viewing the Account in different views based on different filter criterias such as Active Accounts, Active Accounts in my team, Accounts I follow, My active Accounts etc.



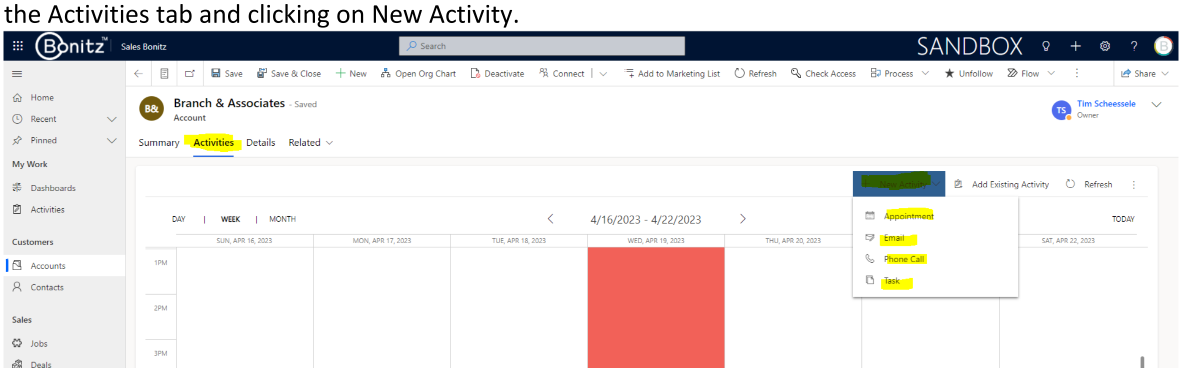
- Viewing the account details by clicking on the account name in the account list view.



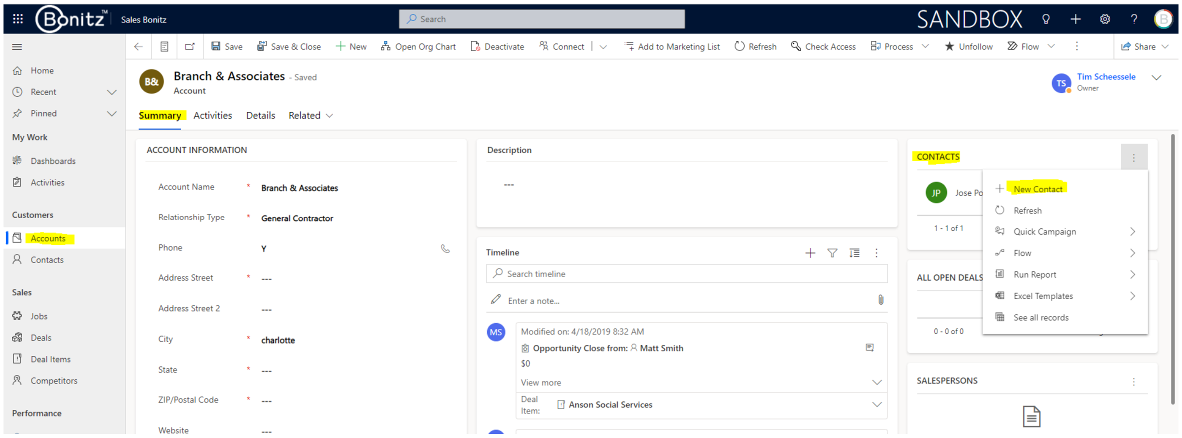
- Updating the account details by clicking on the Edit button.



- Adding activities to the account such as tasks, appointments, and phone calls by clicking on the Activities tab and clicking on New Activity.



- Creating and managing contacts related to the account by clicking on the Contacts tab and clicking on New Contact.

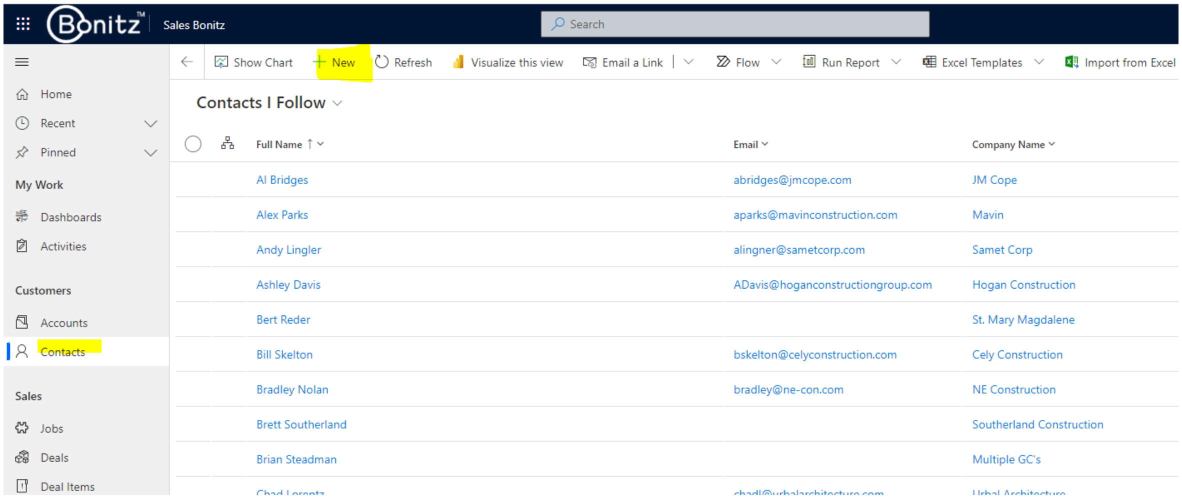


Contact

Creating a New Contact

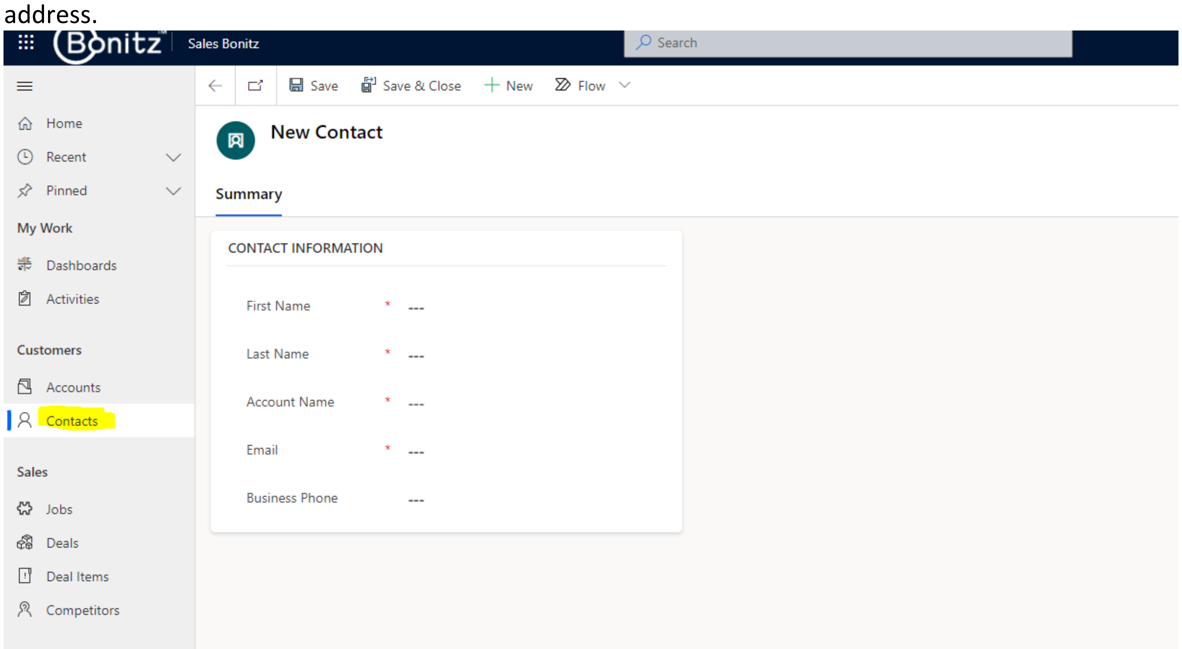
Search for an Existing Contact Always search before creating a new contact to prevent duplicates. Go ahead with creating a new contact if the contact doesn't exist or if it is a new contact.

- Click on Contacts from the left-hand navigation menu.



- Click on the New button in the command bar at the top of the screen to open a new contact form.

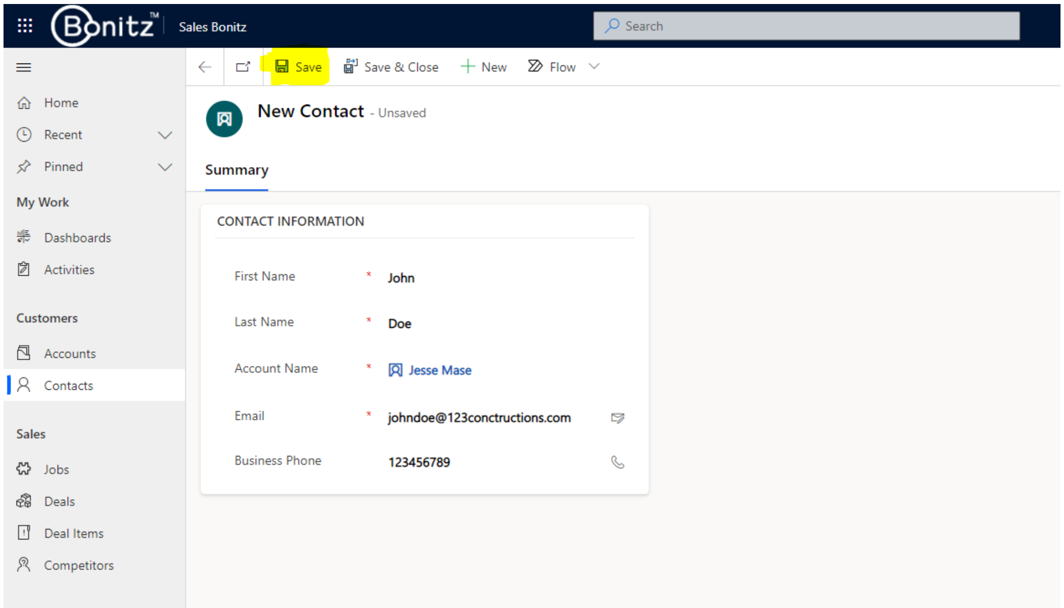
- Fill in the required fields for the contact, such as the first name, last name, and email address.



- Optionally, fill in Business phone field.

- If the contact is associated with an account, click on the lookup icon next to the Account name field and select the appropriate account from the list.

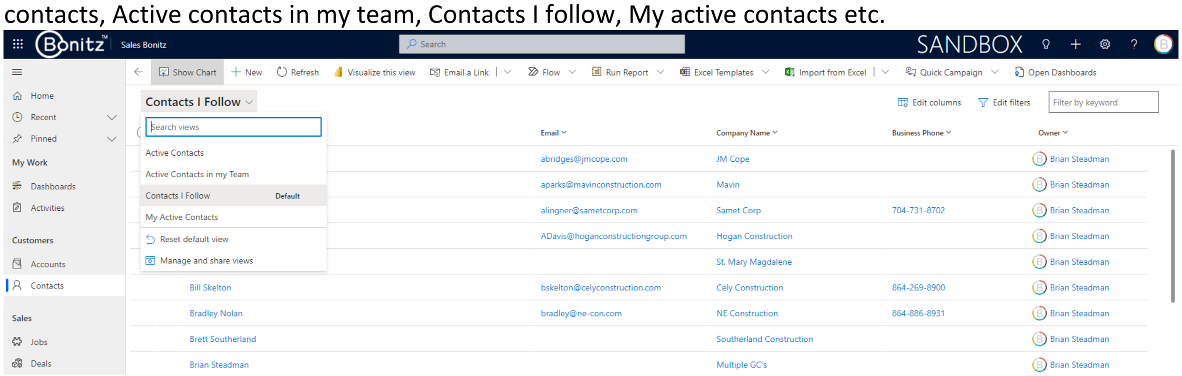
- Save the contact by clicking on the Save button in the command bar.



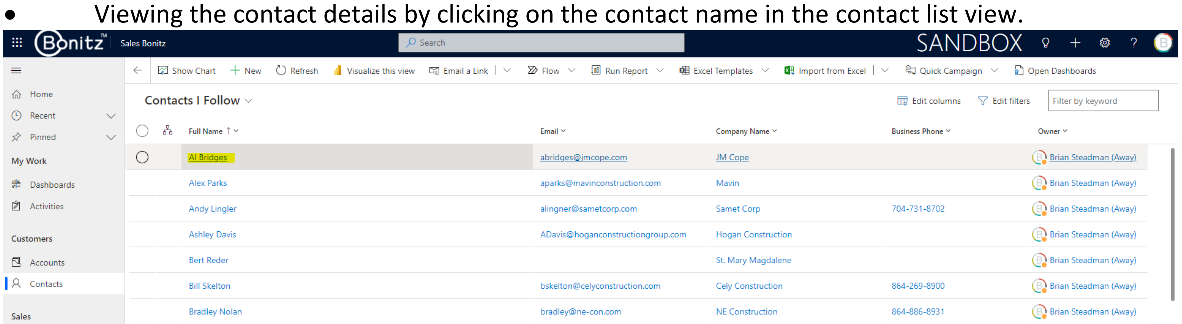
Managing existing Contacts

Once a contact is created, users can manage it by:

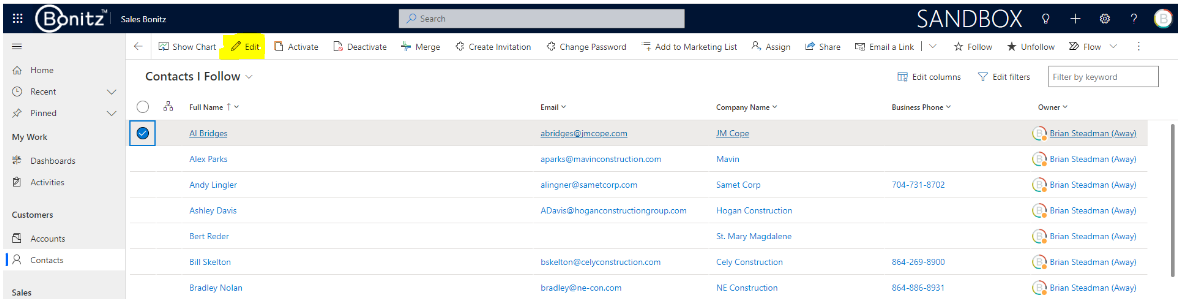
- Viewing the contacts in different views based on different filter criterias such as Active contacts, Active contacts in my team, Contacts I follow, My active contacts etc.



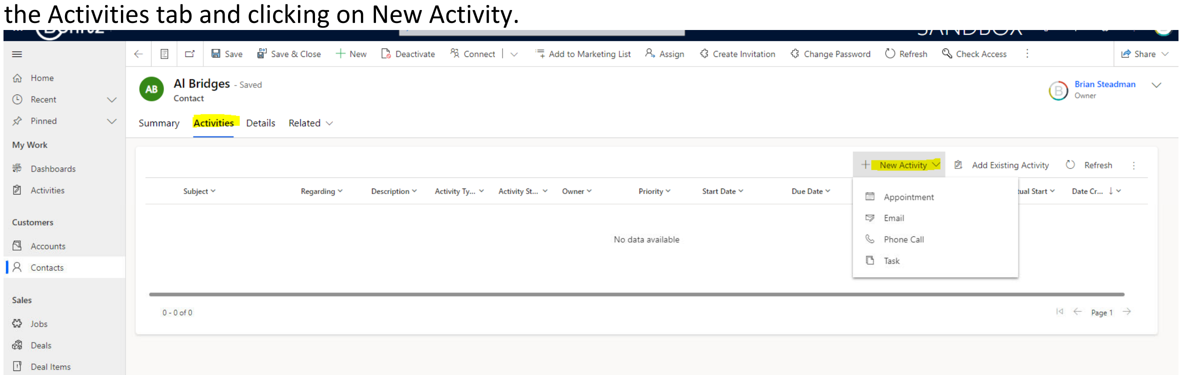
- Viewing the contact details by clicking on the contact name in the contact list view.



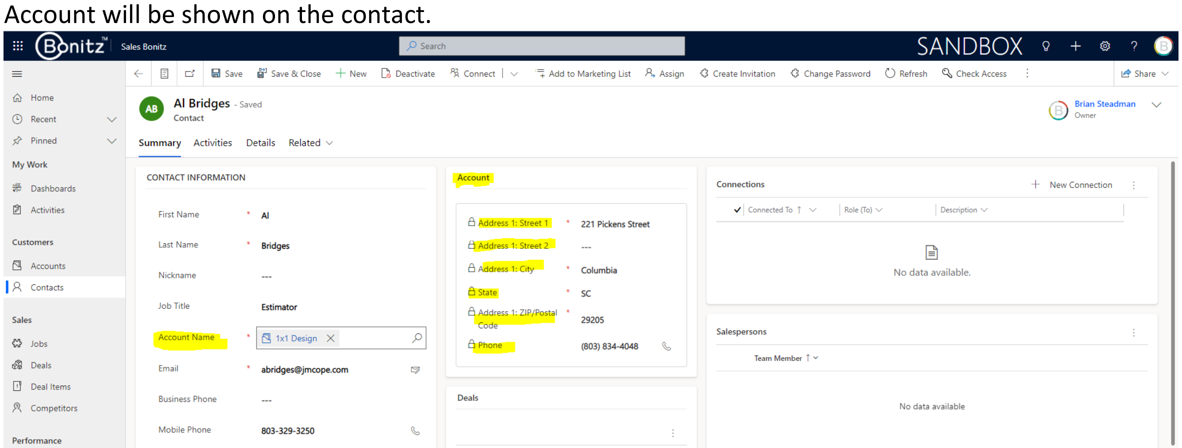
- Updating the contact details by clicking on the Edit button.



- Adding activities to the contact such as tasks, appointments, and phone calls by clicking on the Activities tab and clicking on New Activity.



- When an Account is selected from the list in **Account Name.** The Address fields from the Account will be shown on the contact.



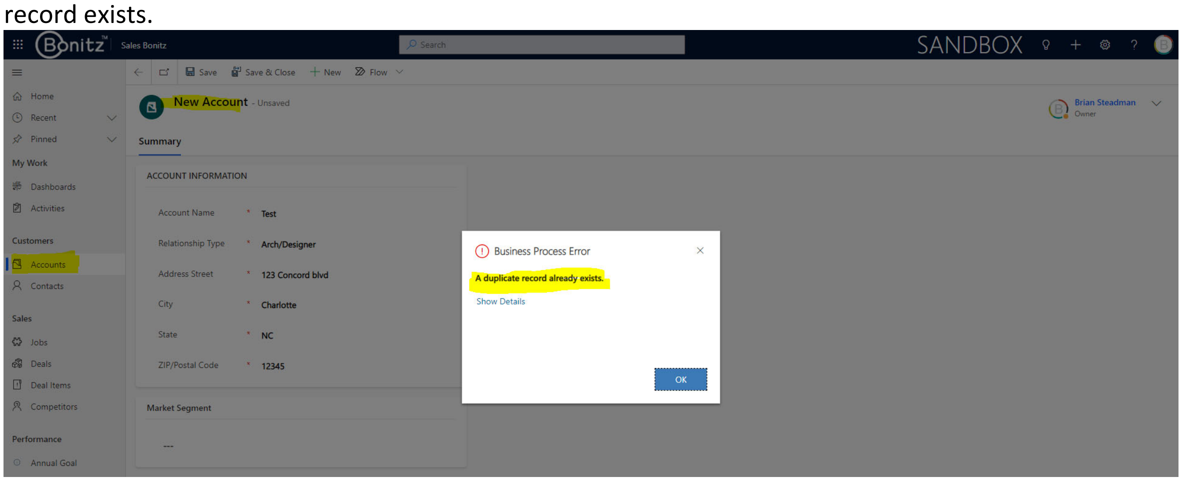
Duplicates Detection in CRM

Duplicate records in CRM can cause confusion and inaccuracies in your data. To prevent this, a duplicate detection plugin has been created to restrict users from adding duplicate accounts or contacts..

Account Duplicate Detection

When adding a new account, if the address fields are the same as an existing account, the plugin will prevent the user from saving the record. To ensure that you are not creating a duplicate account, follow these steps:

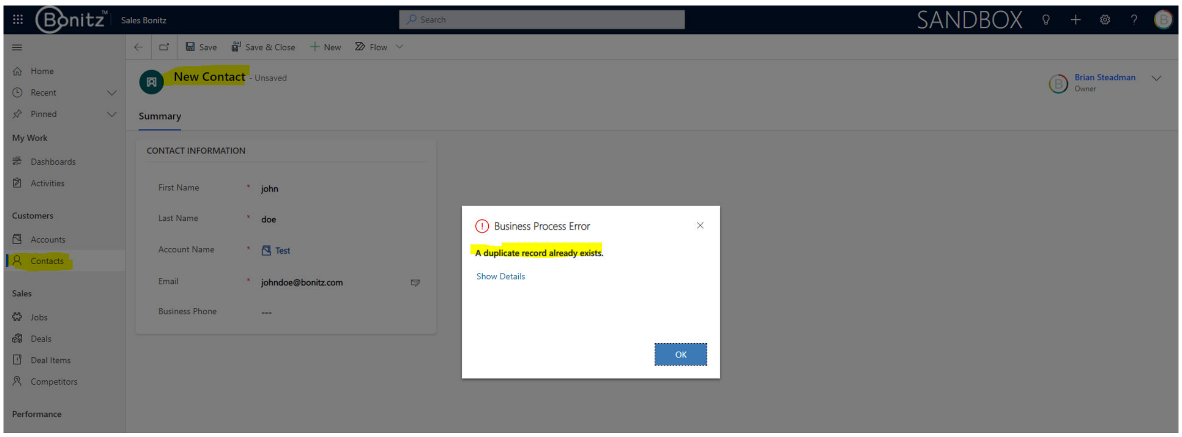
1. Navigate to the Accounts tab in the navigation menu.
2. Click on the New button to create a new account.
3. Fill out the required fields and ensure that the address fields are unique.
4. Click on the Save button.
5. If the plugin detects a duplicate record, a notification will appear indicating that a duplicate record exists.



Contact Duplicate Detection

When adding a new contact, if the first name, last name, and email fields are the same as an existing contact, the plugin will prevent the user from saving the record. To ensure that you are not creating a duplicate contact, follow these steps:

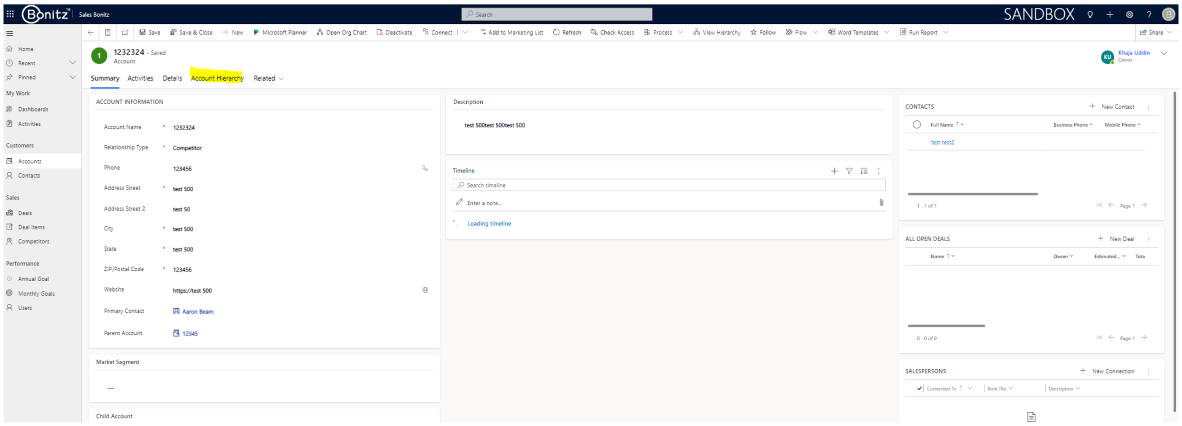
1. Navigate to the Contacts tab in the navigation menu.
2. Click on the New button to create a new contact.
3. Fill out the required fields and ensure that the first name, last name, and email fields are unique.
4. Click on the Save button.
5. If the plugin detects a duplicate record, a notification will appear indicating that a duplicate record exists.



Parent/Child Account - Contacts Hierarchy

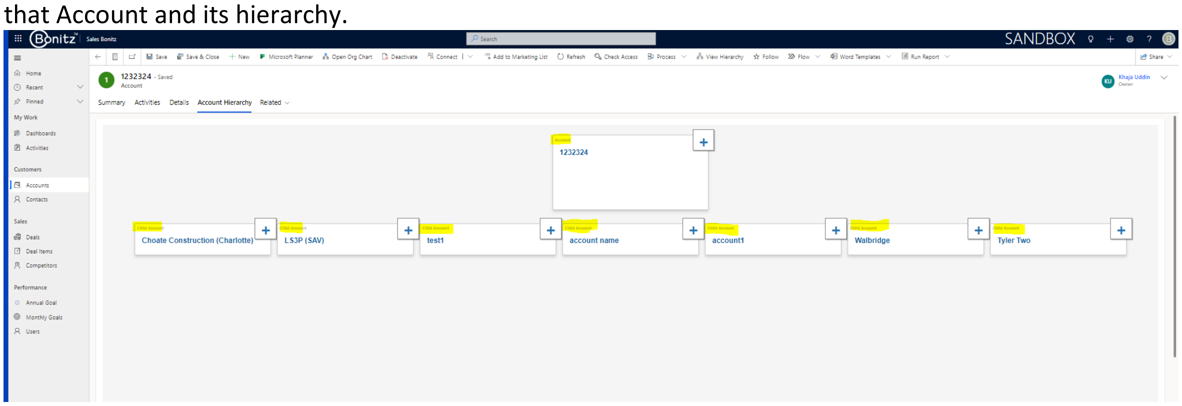
The hierarchy allows you to visualize the relationships between a parent account and its child accounts. It also lists out all contacts related to each account. Here are the steps to navigate this feature.

- A list of all the accounts will be displayed. Click on the account you wish to explore.
- In the account record, navigate to the "Account Hierarchy" tab.

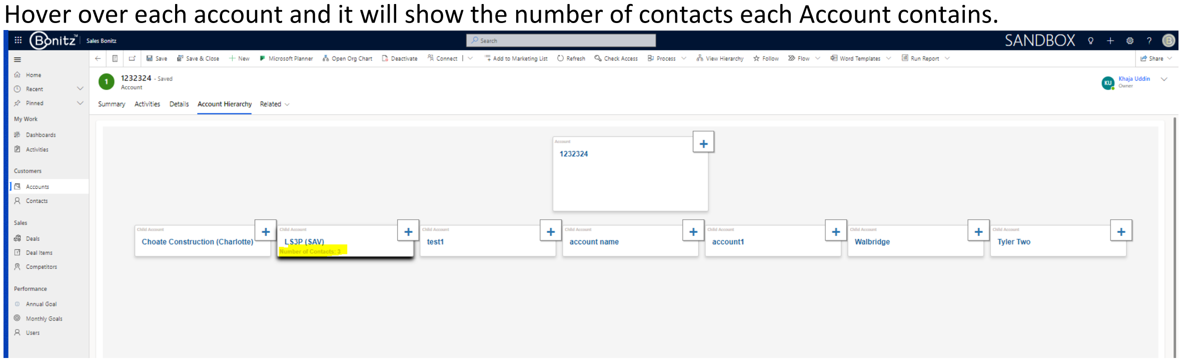


Navigating the Account Hierarchy

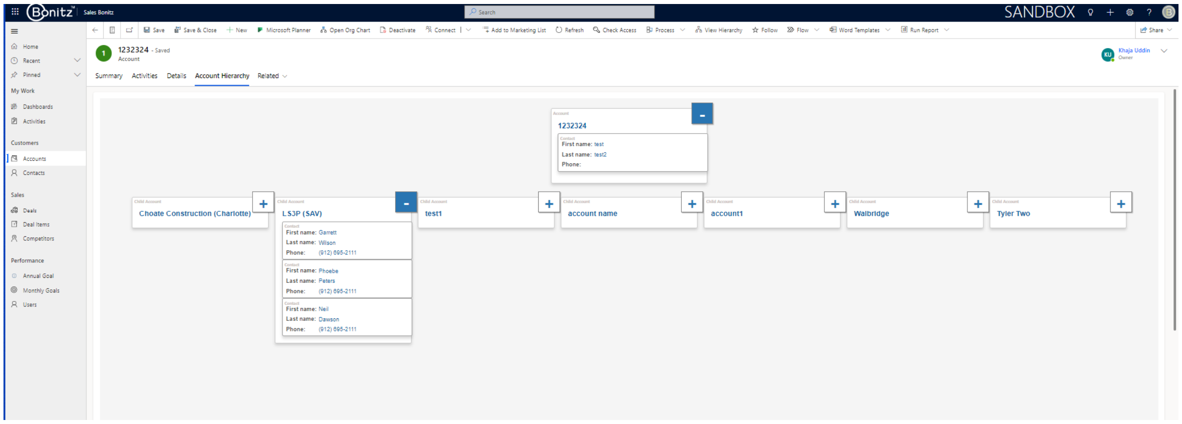
- The "Account Hierarchy" tab will display the Parent Account (the current account) and any associated Child Accounts. If there are no Child accounts for that Account, it will just display that Account and its hierarchy.



- Hover over each account and it will show the number of contacts each Account contains.



- For each account, you will see a list of related contacts.
- You can expand or collapse the hierarchy of each account by clicking the "+" or "-" button next to each account name.



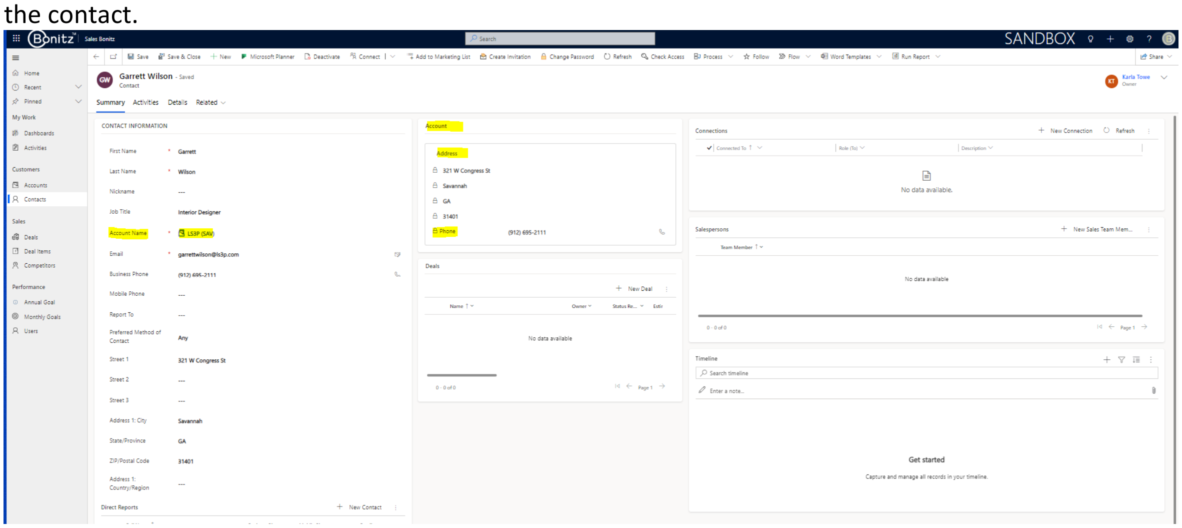
Accessing Accounts and Contacts from the Hierarchy

- To open an account, click on the account tile. The system will redirect you to the selected account's detailed view.
- To open a contact, click on any contact name listed under the parent or child account. The system will redirect you to the selected contact's detailed view.

Note: This hierarchy page allows you to quickly understand the relationships between different accounts and access associated contacts, enhancing the efficiency of account and contact management.

View Account Related Data in contact

When you navigate to contact. You will be able to view account address and contact details within the contact.



Deal

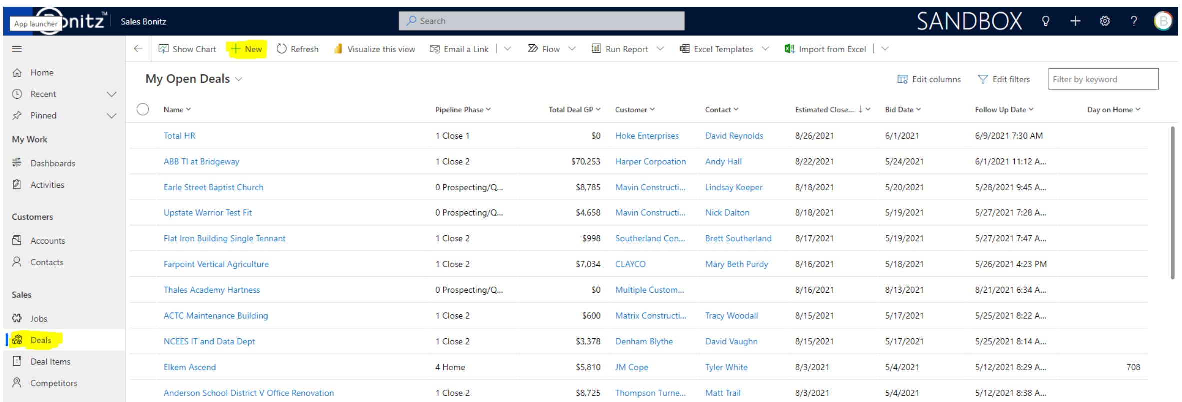
The user can manage deals by: Creating a deal, Viewing the list of deals in the Sales Bonitz, Filtering deals by various criteria such as stage, owner, etc., Updating the details of the deal, Moving the deal from one stage to another, adding notes to the deal, Adding activities such as tasks, appointments, and phone calls to the deal. By following these steps and effectively managing the deal stages, the user can increase the chances of winning the customer's business and contributing to the organization's overall sales success.

Creating a New Deal

Search for an Existing Deal Before creating a deal:

- Search by multiple possible project names Business development may have started one

- Click on the Deals

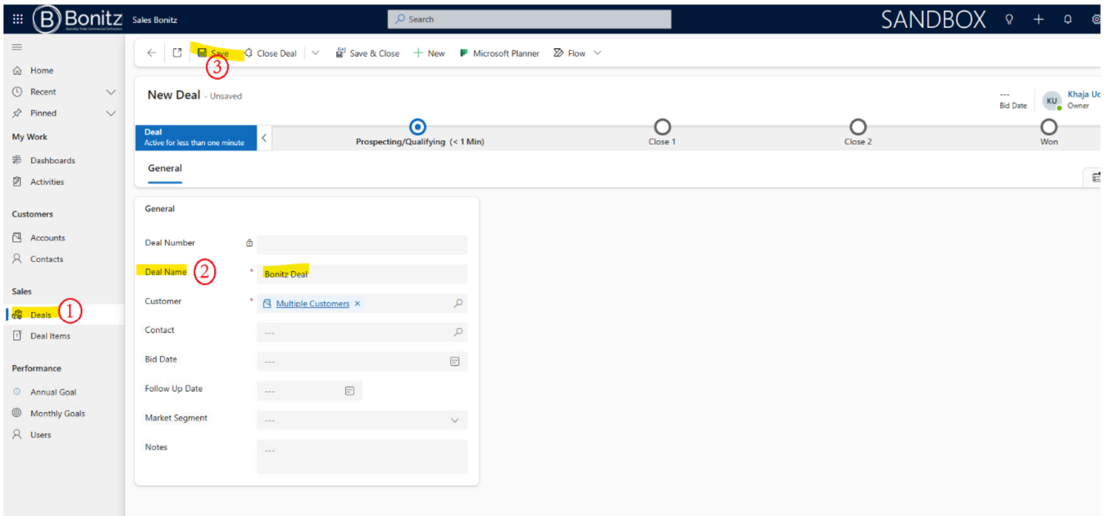


- Click on the New Deal button.

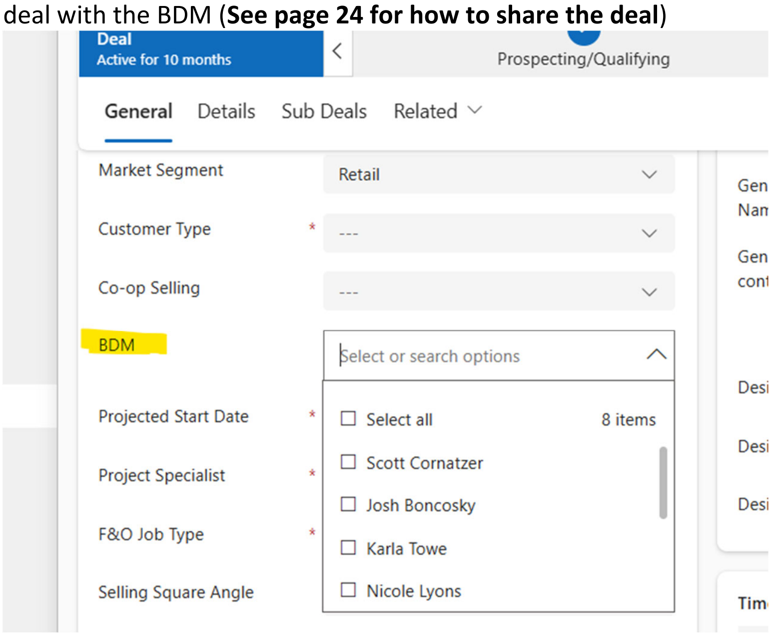
- Enter the required details in the form. The Deal Name is a mandatory field. The customer field will default to “Multiple Customers” automatically. Optional fields can be entered and Click on Save to save the deal.

- If this Deal is located in any of the location below – please name your Deal with the appropiate abbreviations at the end. Ex – Lobby – ASH

  a. Asheville, NC – AVL
  b. Myrtle Beach SC / Wilmington NC– MBW
  c. Savannah GA – SAV
  d. Atlanta GA – ATL
  e. Richmond, VA – RIC
  f. Birmingham, AL – BHM
  g. Huntsville, AL - HSV



- After saving the deal, Add Business Developer to BDM field if involved and save. Share the deal with the BDM (**See page 24 for how to share the deal**)



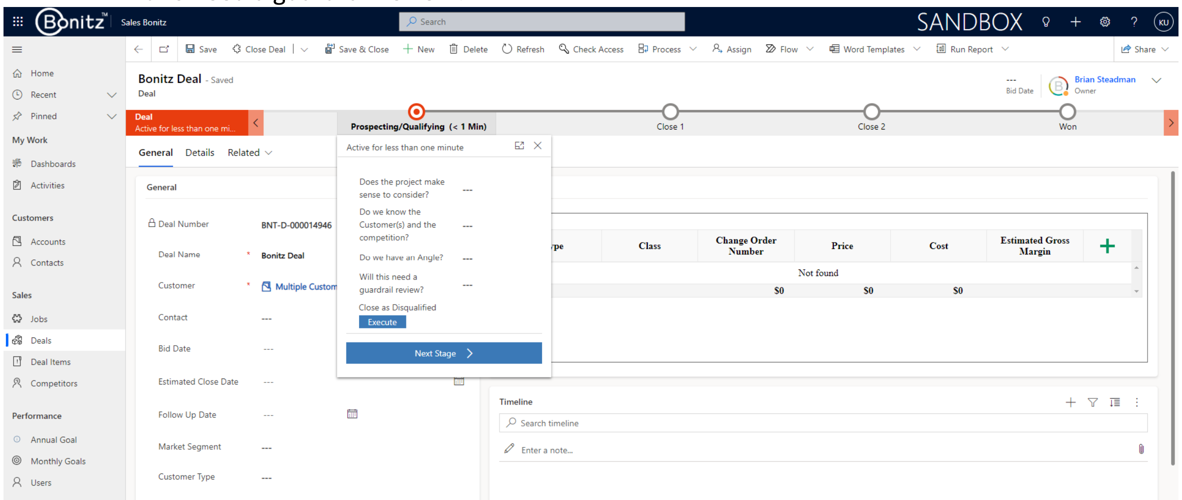
Deal Stages/Sales Process

The deal has multiple stages - Prospecting/qualifying, Close 1, Close 2, and won. The user can move the deal from one stage to another by completing the necessary tasks at each stage. The user can view the current stage of the deal by checking the Stage field.

Prospecting/Qualifying Stage

In the Prospecting/Qualifying stage, the user may check the following questions(Not required – for coaching purposes):

- Does the project make sense to consider?
- Do we know the customer(s) and the competition?
- Do we have an angle?
- Will this need a guardrail review?



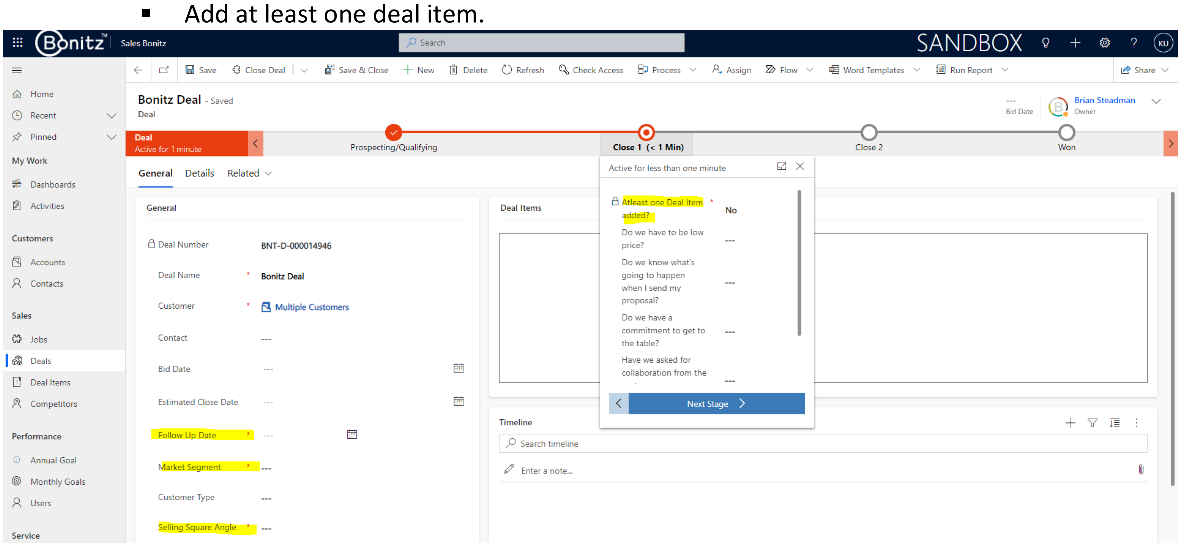
- The user will click on **Next stage** to move to **Close 1** stage.

Note: If the deal is lost at this stage, the user will click the Close as Disqualified "**Execute**" button on the stage.

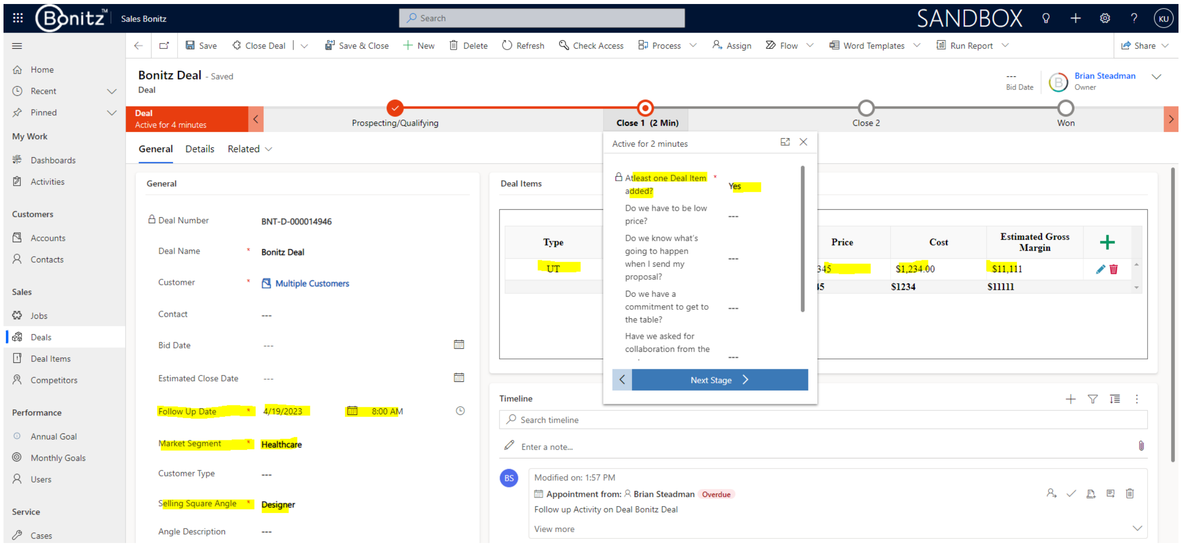
Close 1 Stage

In the Close 1 stage, the user needs to perform the following tasks:

- Fill in the required fields.
    - Follow Up Date
    - Market Segment
    - Selling Square Angle
    - Add at least one deal item.

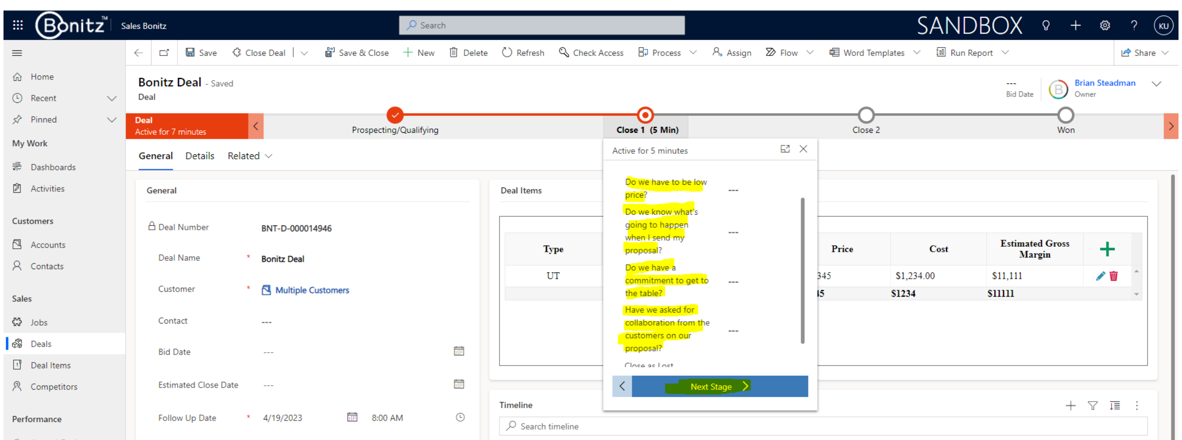


- Once the Deal item is added, the flag "**At least one deal item added?**" will change to **Yes.**
    - Note: If the flag does not change after you add the deal item, refresh the page by clicking **Refresh**.



Before moving to close 2 stage, the user may check the following questions(Not required – for coaching purposes):

1. Do we have to be low price?
2. Do we know what's going to happen when I send my proposal?
3. Do we have a commitment to get to the table?
4. Have we asked for collaboration from the customers on our proposal?



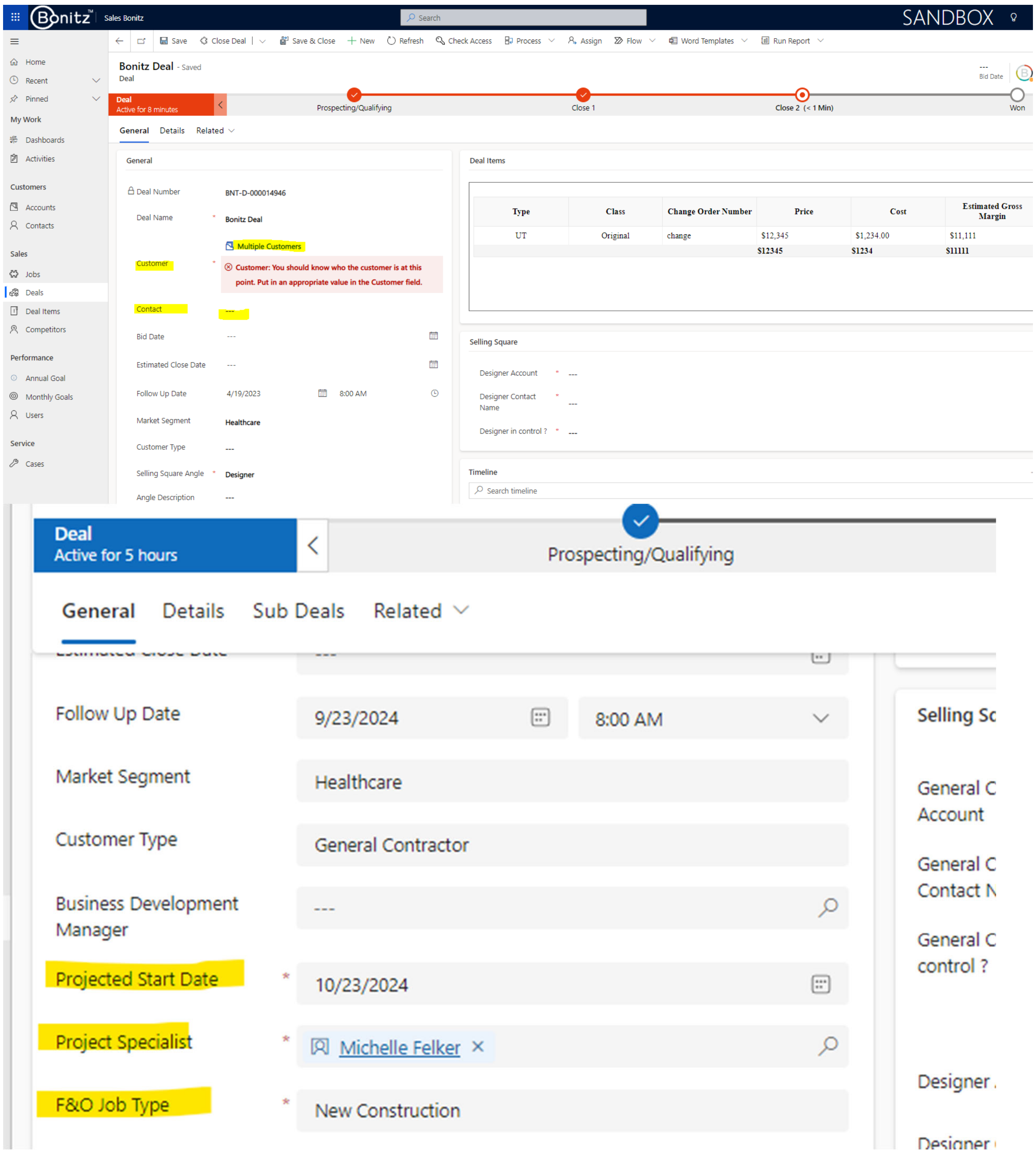
- Once these tasks are completed, the user can move the deal to the Close 2 stage by clicking Next Stage.

  Note: If the deal is lost at this stage, the user will click the Close as Disqualified "**Execute**" button on the stage.

Close 2 Stage

In the Close 2 stage, the user needs to perform the following tasks:

- Fill in the required fields.
    - Customer
    - Contact
    - Projected Start Date
    - Project Specialist
    - F&O Job Type



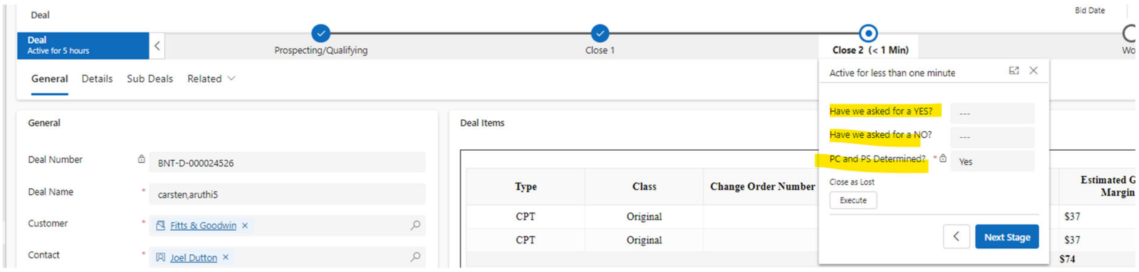
Before moving to **Won** stage, the user may check the following questions:

1. Have we asked for a YES? Yes - we are getting the job

2. Have we asked for a NO? No – we didn't get the job

Note: The current production system does not require an entry for either "Have we asked for a YES?" or "Have we asked for a NO?"

3. PS Determined? (This will automatically be set to "Yes" if the PC and PS have been identified in D365 F&O. If the value is not "Yes," please verify that the selected PS has a valid Bonitz email address.)



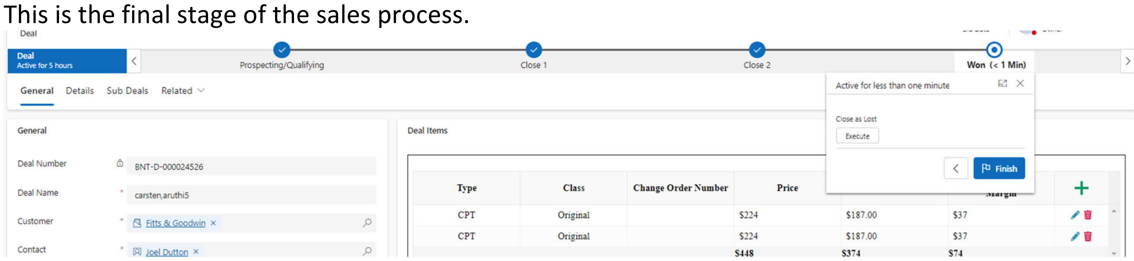
Once these tasks are completed, the user can move the deal to the won stage by clicking **Next Stage.** **Note**: If the deal is lost at this stage, the user will click the Close as Disqualified "**Execute**" button on the stage.

Before clicking Next Stage to move the deal to Won, confirm the following details are accurate and complete:

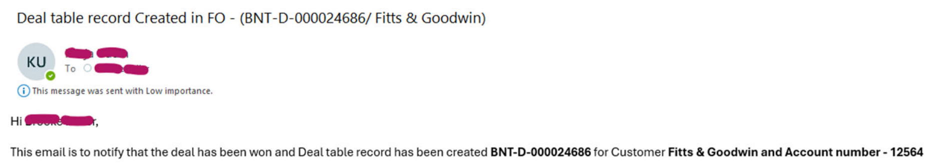
1. Owner / Project Consultant
2. Customer
   - Including Billing Address
3. Contact
   - Email address
   - Phone number
4. Job Type
5. Market Segment
6. Contract Value
   - Ensure it matches the approved proposal
7. Scopes Match in Deal Items
   - All deal items accurately reflect the agreed scope of work

Won Stage

This is the final stage of the sales process.



Once the deal is won, an email notification is sent to the project specialist containing all the relevant deal details. [See screenshot below.]


Deal table record Created in FO - (BNT-D-000024686/ Fitts & Goodwin)

KU [redacted]
To [redacted]
This message was sent with Low importance.

Hi [redacted],

This email is to notify that the deal has been won and Deal table record has been created **BNT-D-000024686** for Customer **Fitts & Goodwin and Account number - 12564**

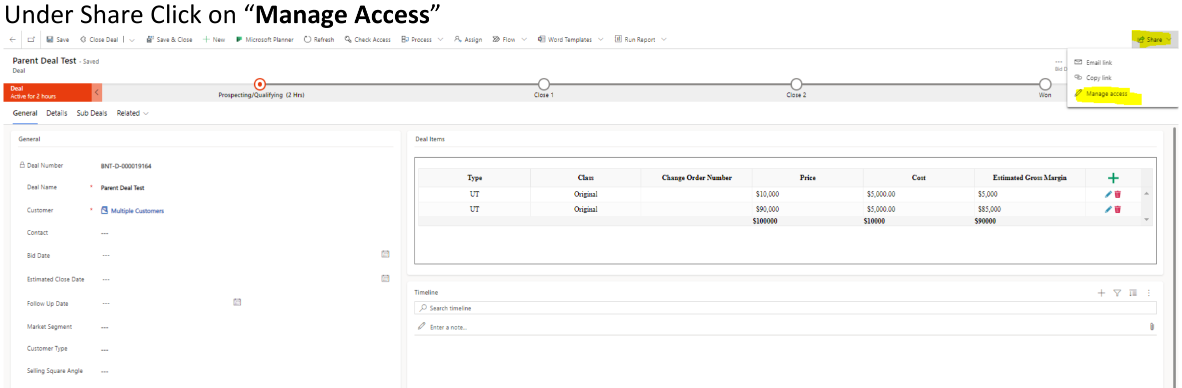
Collaborating on Deals

In Microsoft Dynamics 365, you can share/unshare a deal record with other users or teams. This feature enables collaboration and ensures that necessary individuals or teams have access to specific deal records.

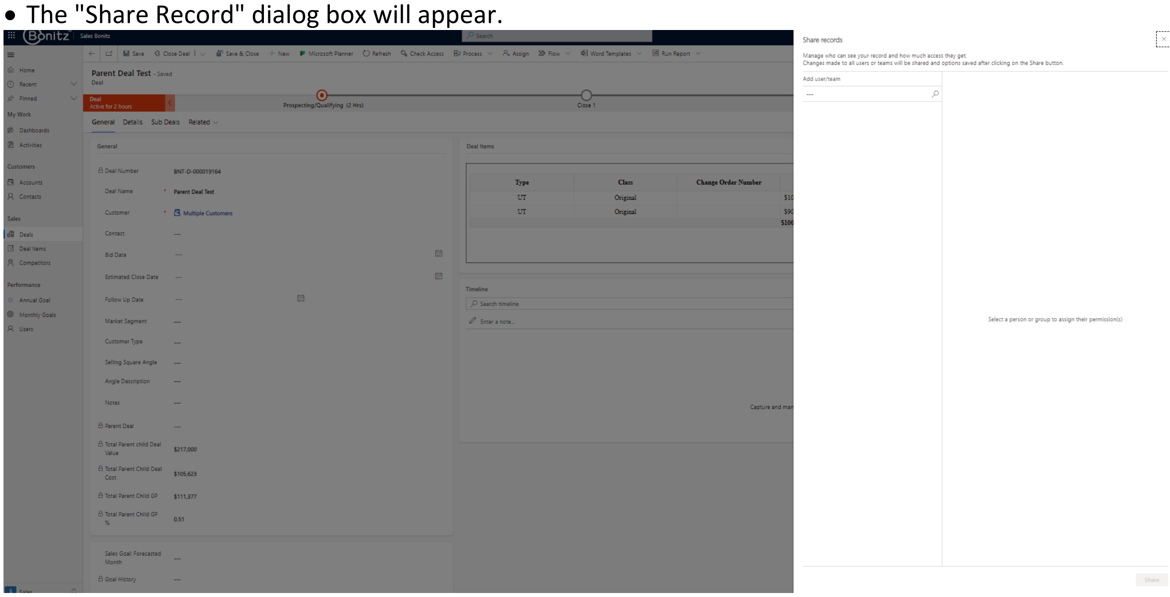
Sharing a Deal

Here are the steps to share a deal record:

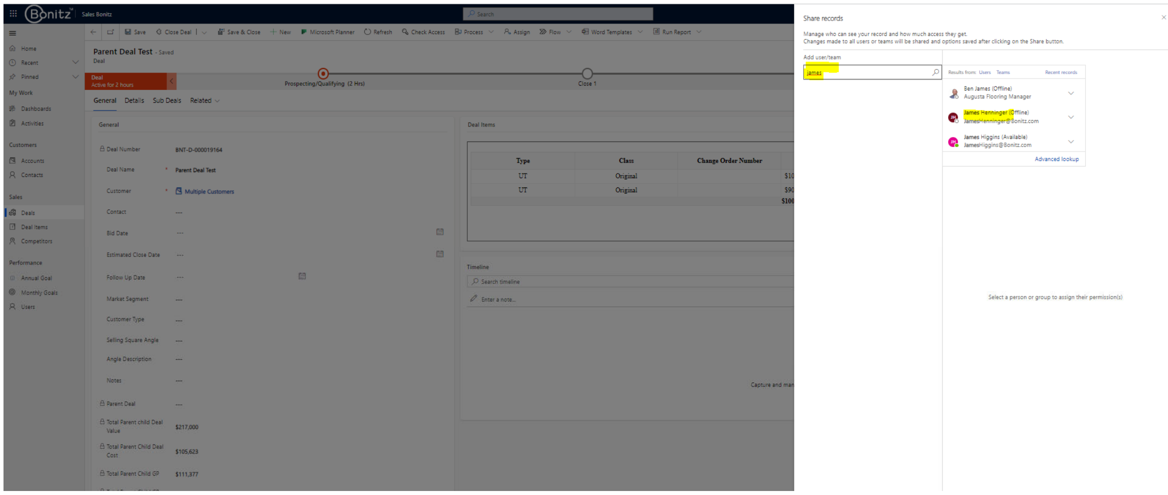
- Open the deal record you wish to share.
- Once the deal record is open, click on “**Share**” button on top right corner of the screen. Under Share Click on “**Manage Access**”



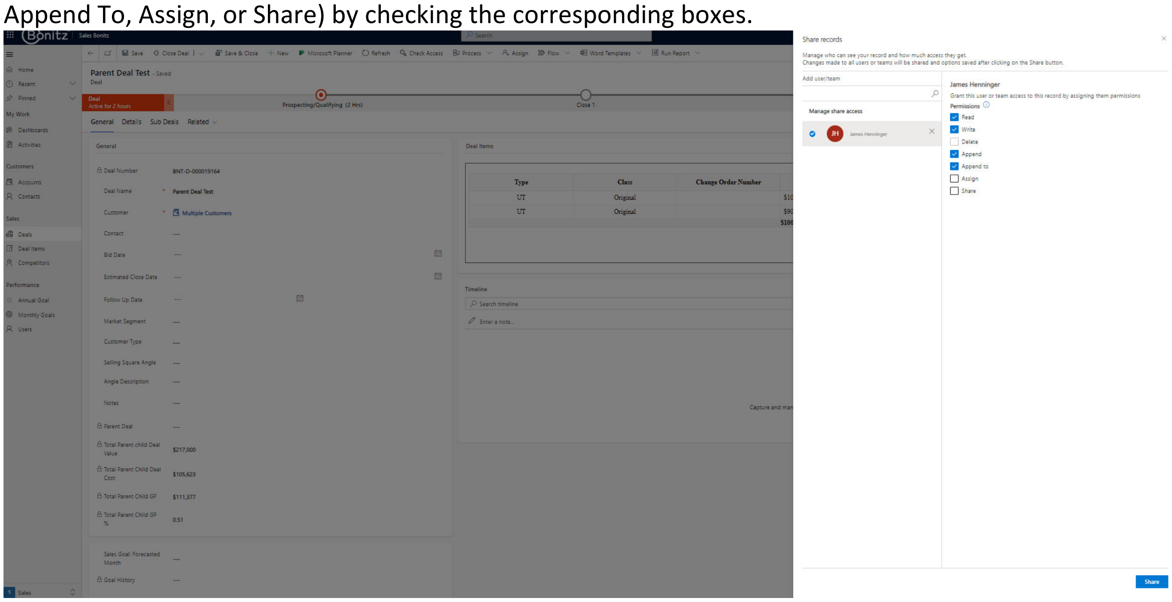
- The "Share Record" dialog box will appear.



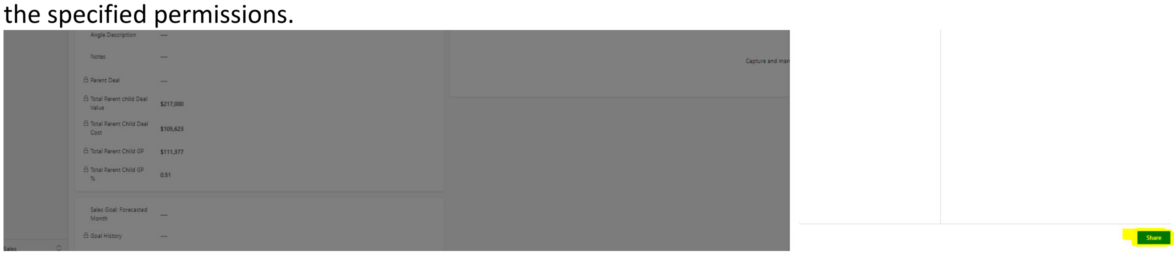
- In the "Add User/Team" section, type the name of the user or team you want to share the record with, and select them from the drop-down list.



- After adding a user or team, set the desired permissions (Read, Write, Delete, Append, Append To, Assign, or Share) by checking the corresponding boxes.



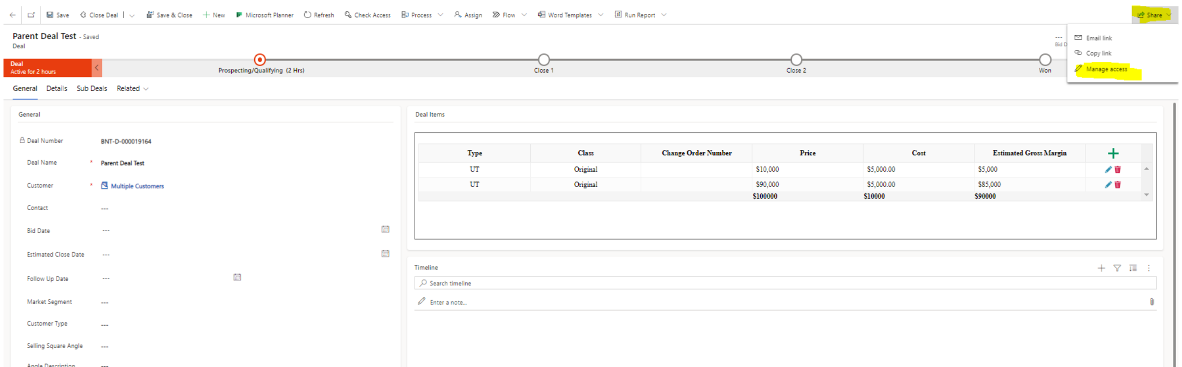
- Click on the "Share" button to share the deal record with the selected users or teams with the specified permissions.



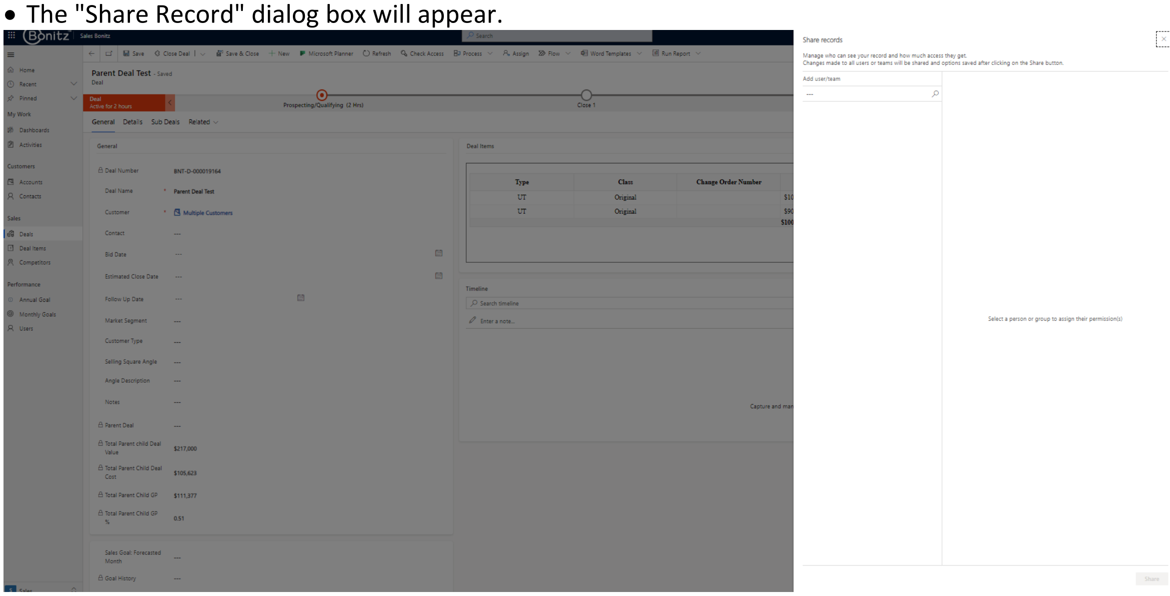
Unsharing a Deal

If you no longer wish to share a deal record with a certain user or team, you can follow these steps to remove their access.

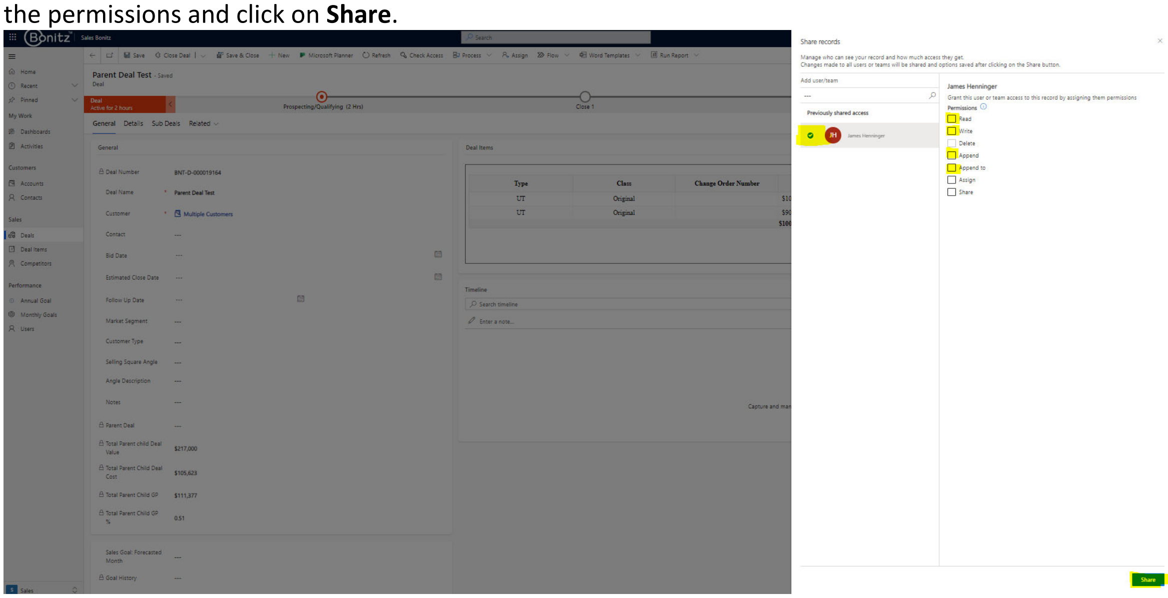
- Select the deal record you wish to unshare.



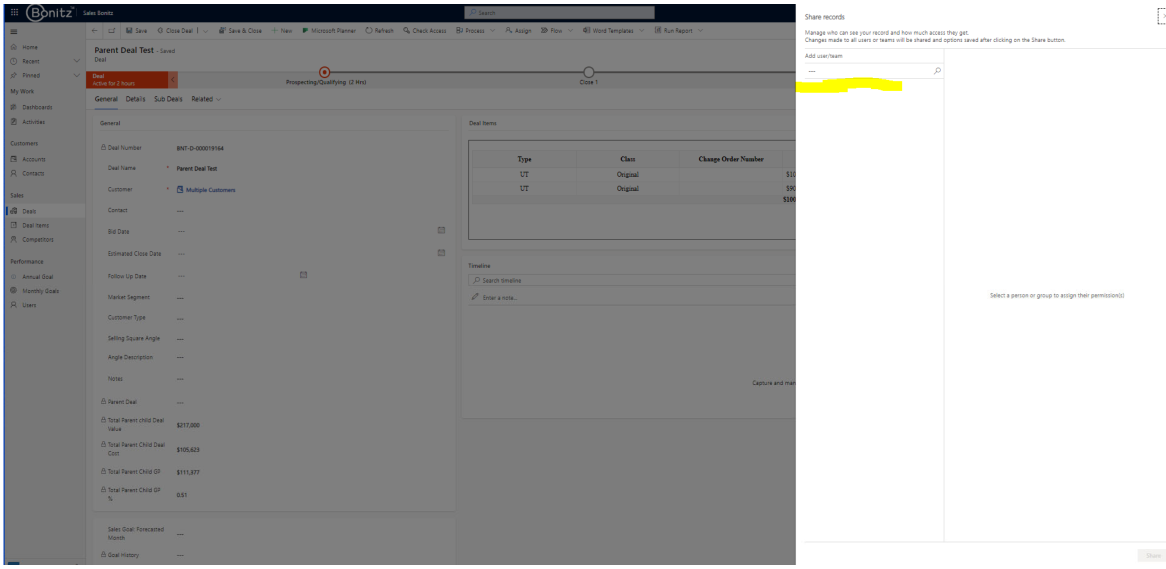
- The "Share Record" dialog box will appear.



- Find the user or team you wish to unshare the record with. Select the name and uncheck all the permissions and click on **Share**.



- Confirm the action if prompted. The user or team will no longer have access to the shared deal record.



Note: You can share/unshare a deal with multiple users or teams by repeating the above steps.

Parent-Child Deals (One Bonitz with Specialty Projects)

Microsoft Dynamics 365 allows users to add and manage Parent-Child deals. This feature enables the user to create a hierarchical structure of deals for one bonitz projects and change orders, maintaining the relationships between different deals, and streamlining deal management processes.
Example of Parent and child deal
Note: The owner of the parent deal will need to share the parent deal with the other PCs before they can add a child deal(**See page 24 to see how to share a deal**)

Moving forward, all projects with specialty scopes must use a Parent / Child deal structure.

- **Parent Deal** = main lead and core products
- **Child Deal(s)** = each specialty scope

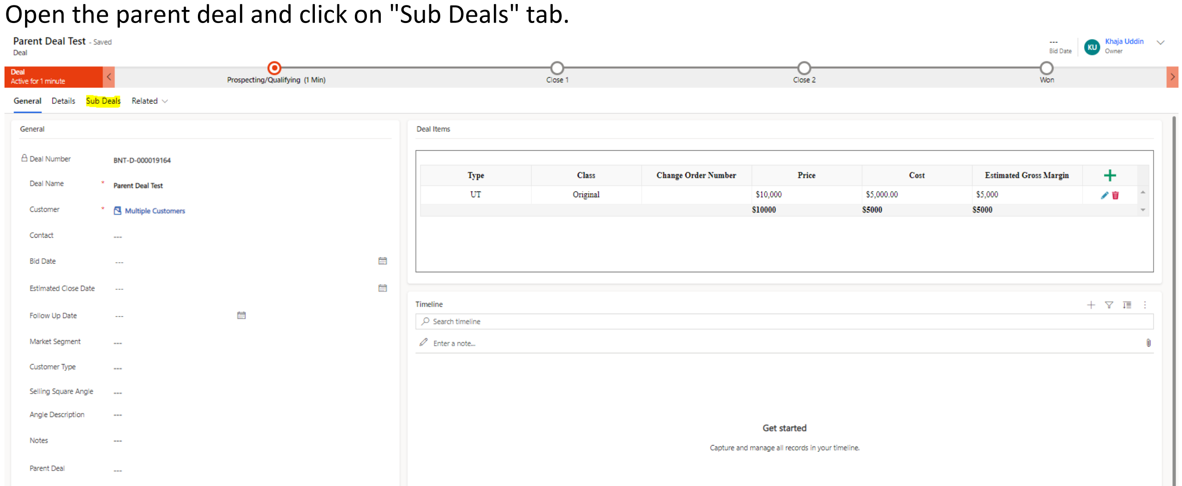
Example:

- Parent: Project A1 / PC: Billy Bob / Core: HT, LVT, CPT
- Child 1: Project A1 / Specialist: James Henninger / RAF
- Child 2: Project A1 / Specialist: Matthew Watson / TRZ
- Child 3: Project A1 / Specialist: Pete Baker / COAT

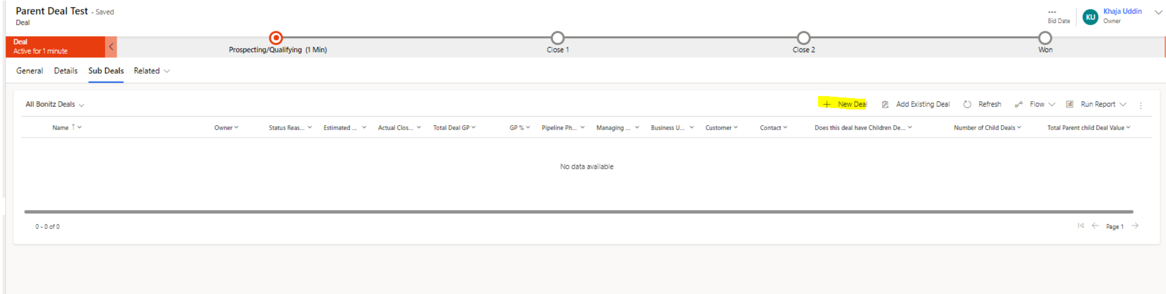
This ensures accurate win/loss tracking and reporting. Do not delete deal items—close all as Won or Lost.
Parent Deal holds overall strategy, competitive info, GC, and project intel.
Child Deals hold scope-specific details.
Add Business developer to BDM field (if BDM is involved).

Adding a Child Deal

- Open the parent deal and click on "Sub Deals" tab.

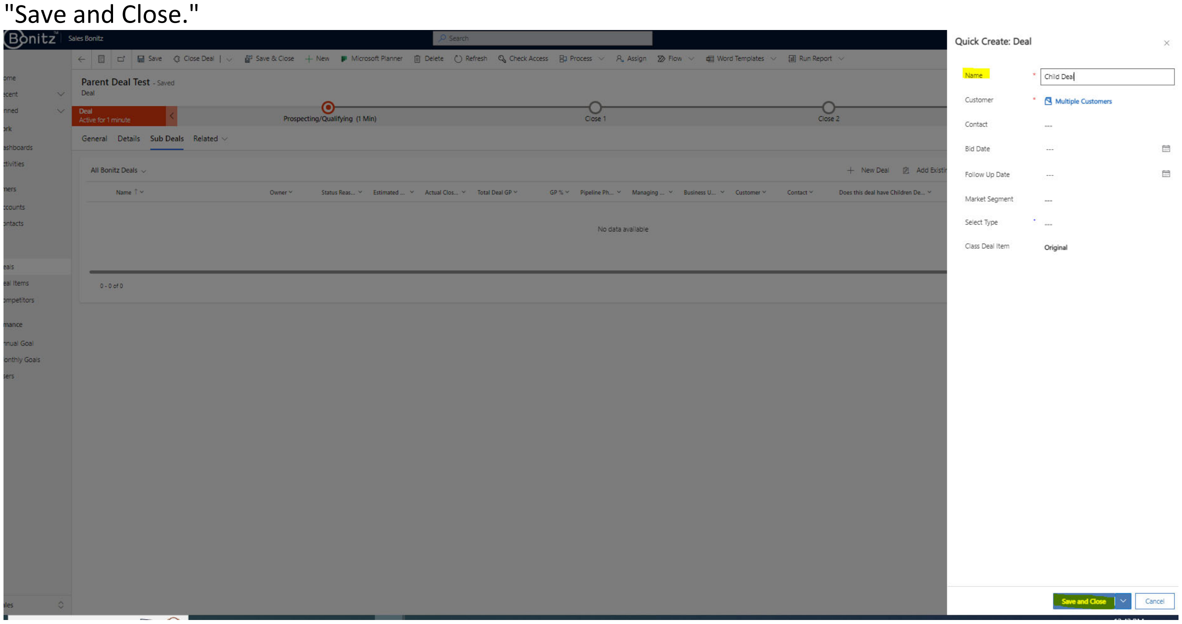


- On the click "Sub Deals" tab, click on "New Deal" to **create a new Child Deal**. Alternatively, you can **add an existing Child Deal** from the Deal(s) you have already created.



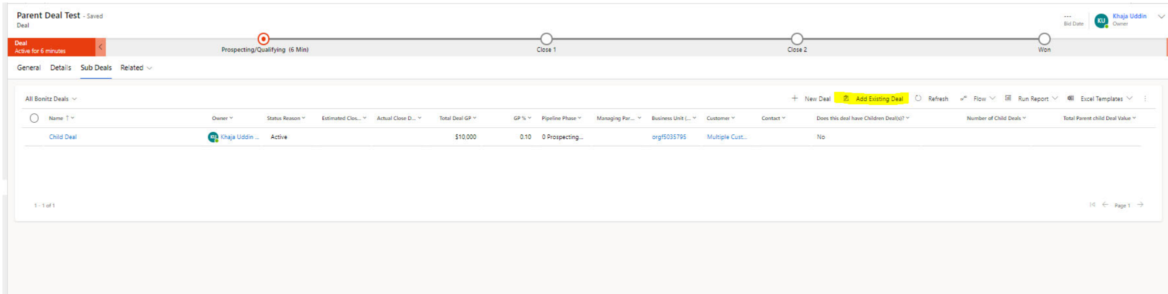
Create a New Child Deal

- To create a new Child Deal, enter the Child Deal name in the new deal window, then click on "Save and Close."

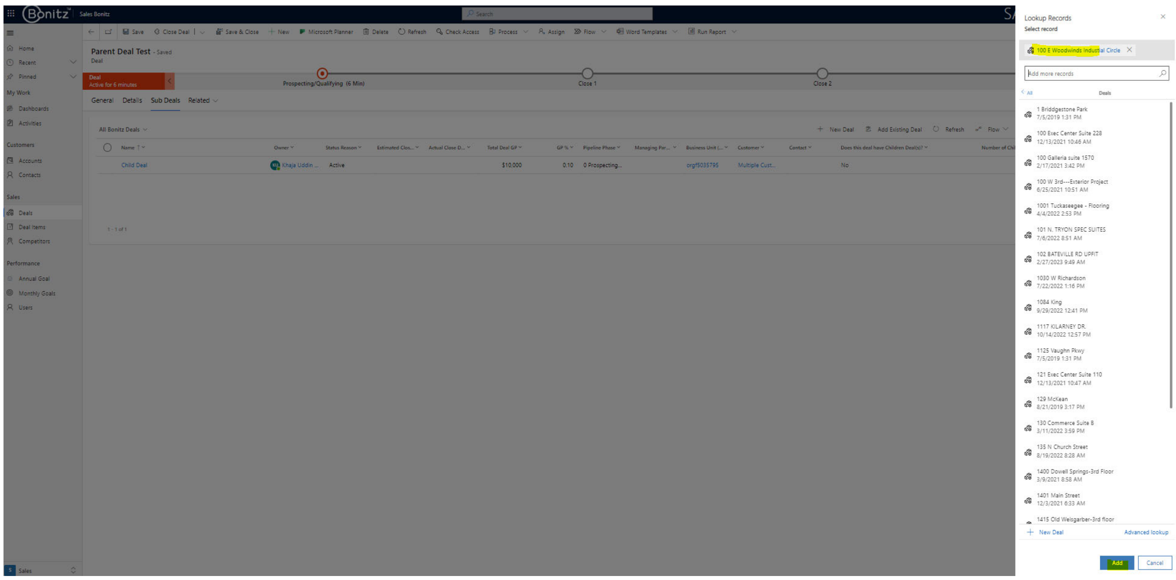


Add an Existing Deal as Child Deal

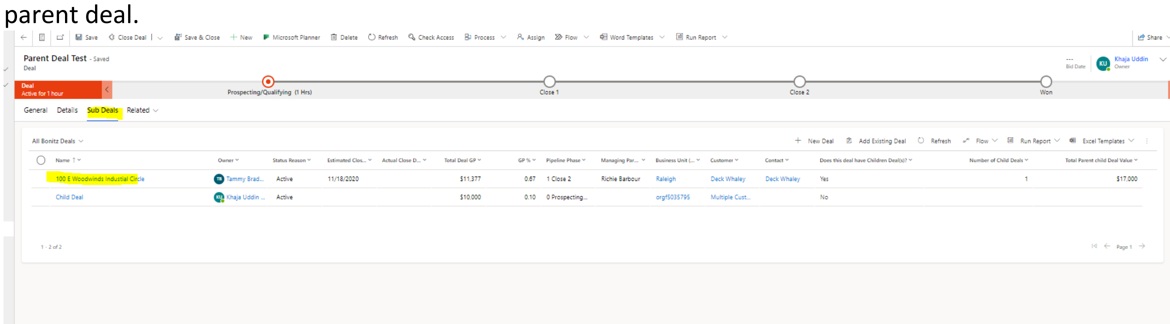
- Click on the "Add Existing Deal" button.



- A lookup window will appear with a list of existing deals. Select the deal that you want to associate as a child deal and click "Add."

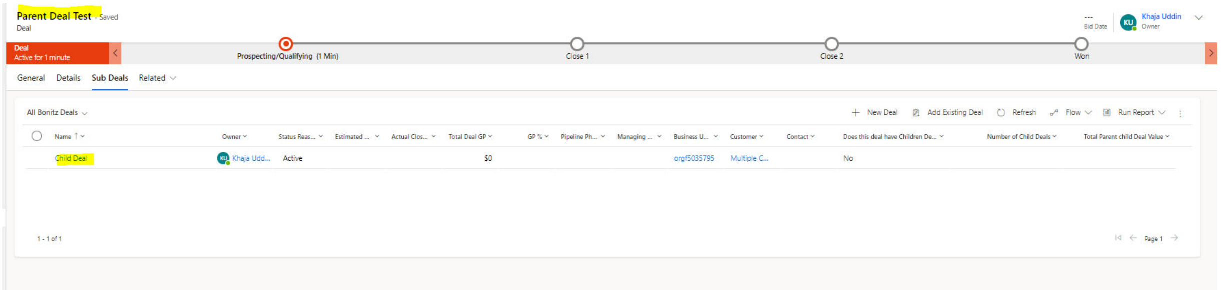


- The selected deal will now appear in the list of child deals under the "Sub Deals" tab of the parent deal.

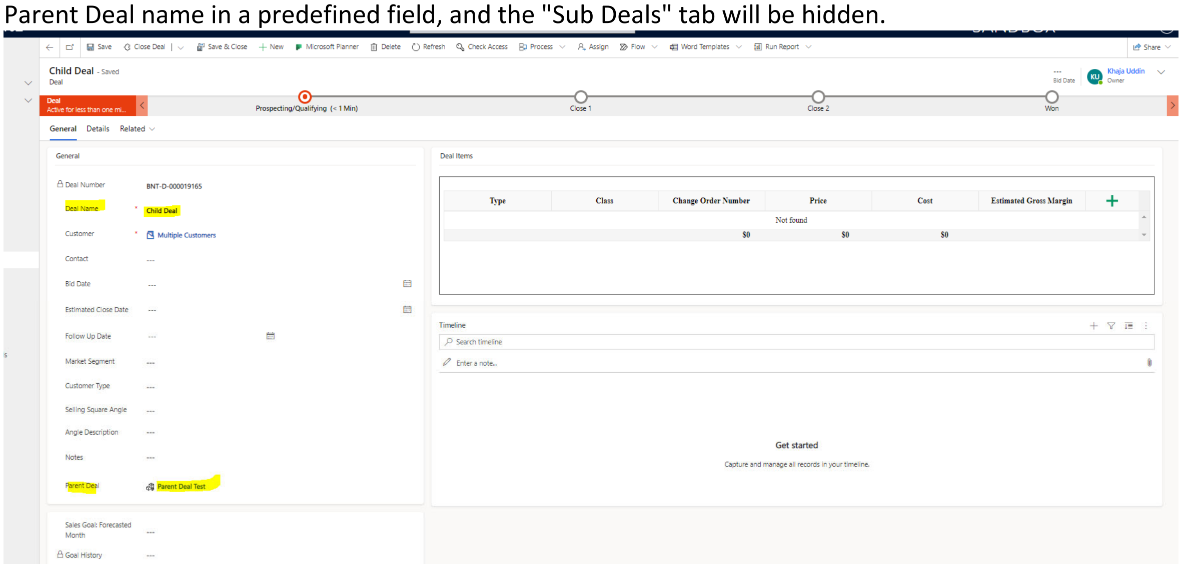


Note: Remember, a deal that is already associated as a child deal or already has child deals cannot be associated as a child deal to another deal.

- The "Sub Deals" tab will display the list of all Child Deals associated with the parent.



- To view a Child Deal, click on its name in the list. The opened Child Deal will display the Parent Deal name in a predefined field, and the "Sub Deals" tab will be hidden.



Note: Add Business developer to BDM field (if BDM is involved)

Parent Child Deal values and Calculations

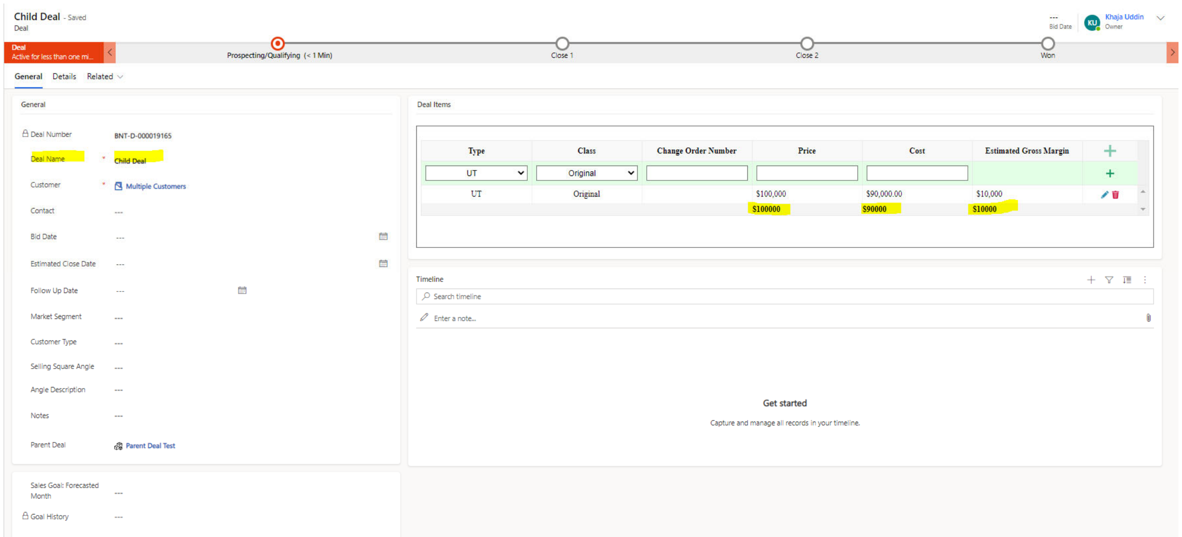
When a deal item is added to a Parent Deal or a Child Deal, the system will automatically calculate and update the following fields on the Parent Deal:

- Total Parent-Child Deal Value
- Total Parent-Child Deal Cost
- Total Parent-Child GP (Gross Profit)
- Total Parent-Child GP% (Gross Profit Percentage)

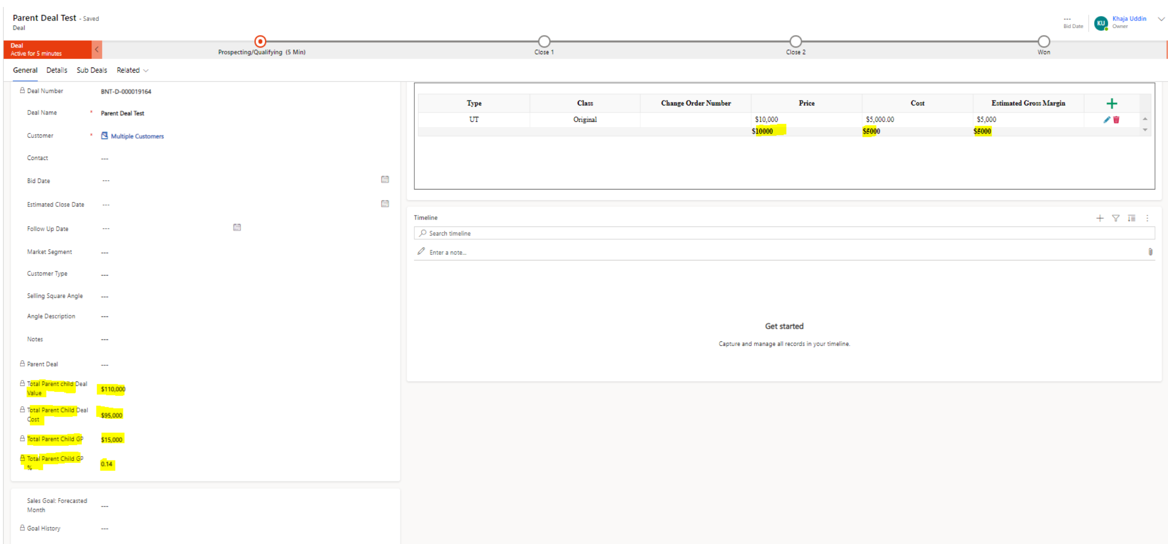
These fields capture the aggregated financial figures of all the Child Deals under a particular Parent Deal, providing a comprehensive financial overview.

Note: Users cannot add Child Deals to a Deal that already has a Parent Deal. This restriction is set to maintain the hierarchical structure of the deals and avoid potential conflicts.

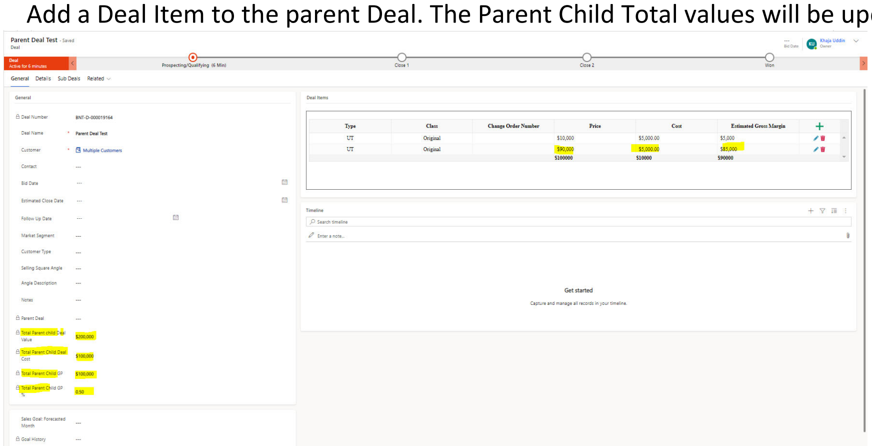
- Add a Deal Item to the Child Deal



- The Parent Child Total values will be reflected on the Parent Deal.



- Add a Deal Item to the parent Deal. The Parent Child Total values will be updated instantly.



Power apps for phones (Logging in on phones)

“Power Apps” app puts the power of CRM in the palm of your hand. It provides a consistent, user-friendly interface that allows you to easily access and manage your CRM environments, both production and non-production, directly from your smartphone.

Below steps will help you on how to download the Dynamics 365 for Phones app onto your Android or iPhone device, and how to access specific apps such as "Sales Bonitz" in your CE Bonitz Production (production) and Bonitz UAT (non-production) environments.

Note:
Keep in mind that switching between environments should be done with caution to ensure data security and integrity. Always remember to sign out of one environment before switching to another.

For Android Devices:

Step 1: Download the Power Apps App

1. Open the Google Play Store on your Android device.
2. In the search bar, type "Power Apps" and press enter.
3. Select the Power Apps app from the results.
4. Tap Install to download and install the app.

Step 2: Access the Production App (**CE Bonitz Production**)

1. Open the Power Apps app.
2. On the Home screen, scroll until you find “**Sales Bonitz**” again.
3. Under the app name, confirm the environment reads:
   CE Bonitz Production (Production)
4. Tap the app to open it.

For iPhone:

Step 1: Download the Power Apps App

1. Open the App Store on your iPhone.
2. In the search bar, type “Power Apps” and press enter.
3. Select the Power Apps app from the results.
4. Tap Get to download and install the app.

Step 2: Access the Production App (CE Bonitz Production Environment)

1. On the Power Apps home screen, find “Sales Bonitz” app.
2. Verify the environment name under the app:
   CE Bonitz Production (Production)
3. Tap the app to open it.

Views in CRM

Views are predefined lists of records in Dynamics 365 that help users quickly access and manage Deals and Deal Items. Each view displays a specific set of records and columns based on business needs and user roles.
Users can switch between available views to focus on relevant information, track deal progress, review customer details, and manage opportunities more efficiently.

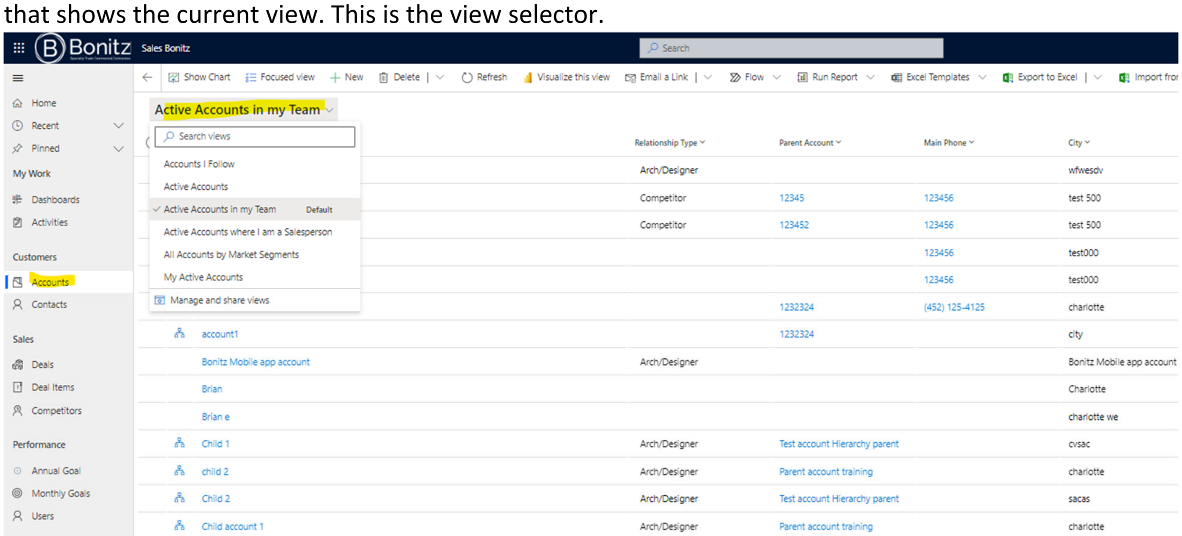
Regional Director of Sales / Director of Sales Views now display the following columns: Owner, BDM, Co-Op Selling, Name, Customer, Total Deal GP, Pipeline Phase, Business Unit, Created On, and Modified On. These fields provide leadership with visibility into deal ownership, collaboration, profitability, business unit alignment, and record activity.

Project Consultant Views now display the following columns: Deal Name, BDM, Co-Op Selling, Total Bid Gross Profit, Pipeline Phase, Customer Bid Date, Customer Follow-Up Date, and Contact. These fields help Project Consultants track opportunity details, estimated profitability, pipeline status, customer engagement dates, and key contact information.
These updates were implemented to ensure each user group has quick access to the information most relevant to managing and monitoring sales opportunities.

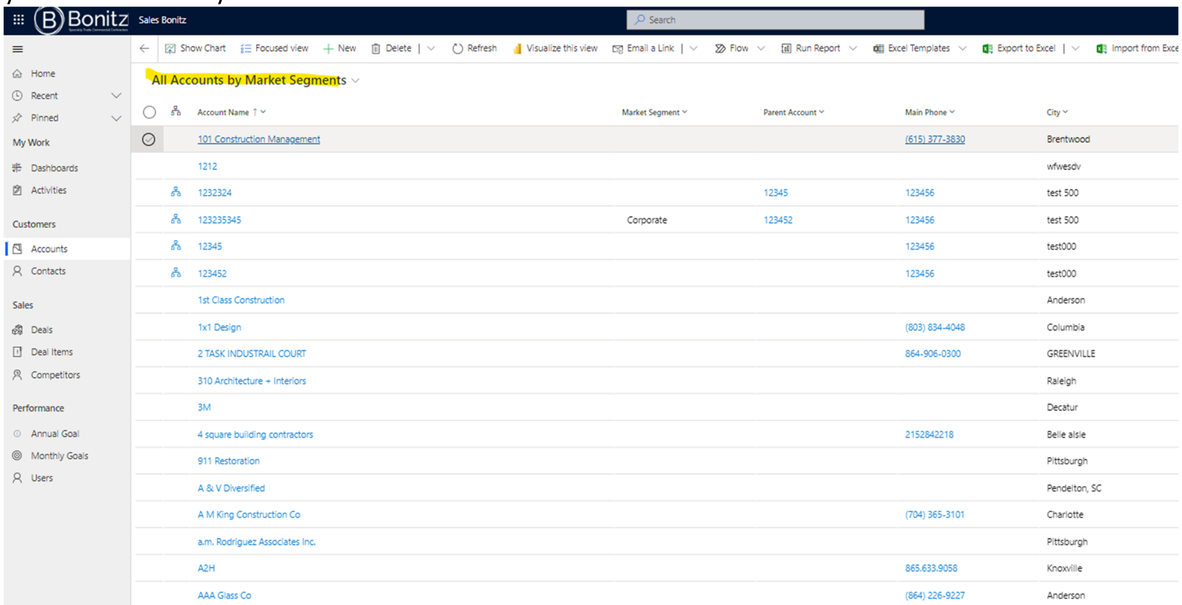
Setting a Default View

Dynamics 365/CRM organizes data in different views to provide a structured and meaningful way of looking at your records. Setting a default view can help you quickly access the information most relevant to you each time you log in. Follow the steps below to set a default view in Dynamics 365:

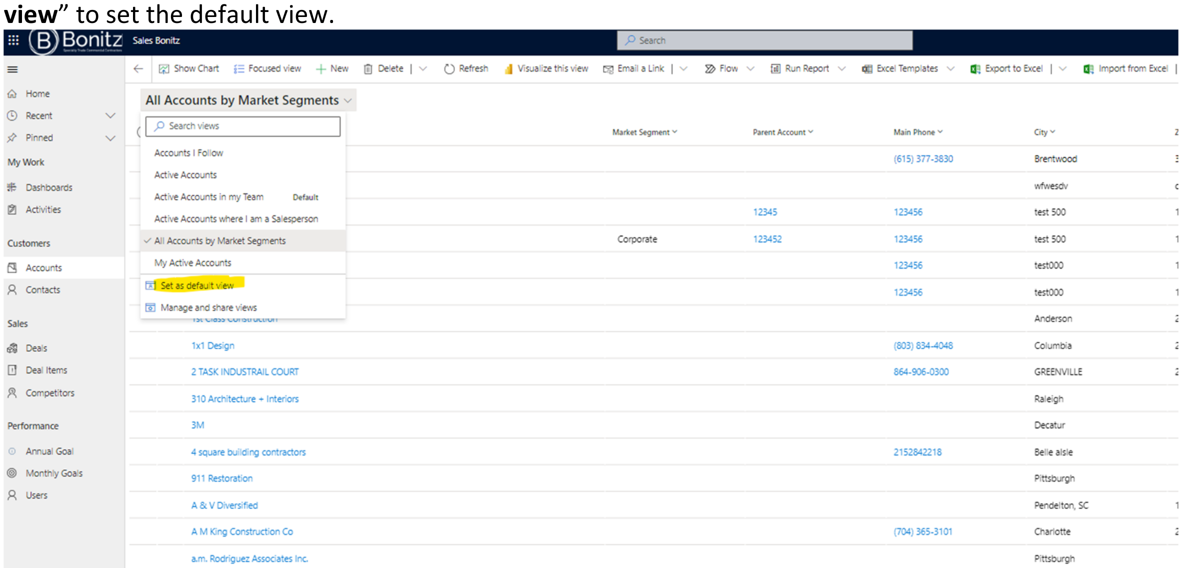
- **Access the View Selector**: Select the desired entity (such as Accounts or Contacts or Deals) from the left-hand navigation menu. At the top of the screen, click on the drop-down menu that shows the current view. This is the view selector.



- **Select the View**: In the view selector, navigate to the area that contains the view you want to set as default. Areas could include 'My Views', 'Public Views', or others. Click on the view you want to set as your default.



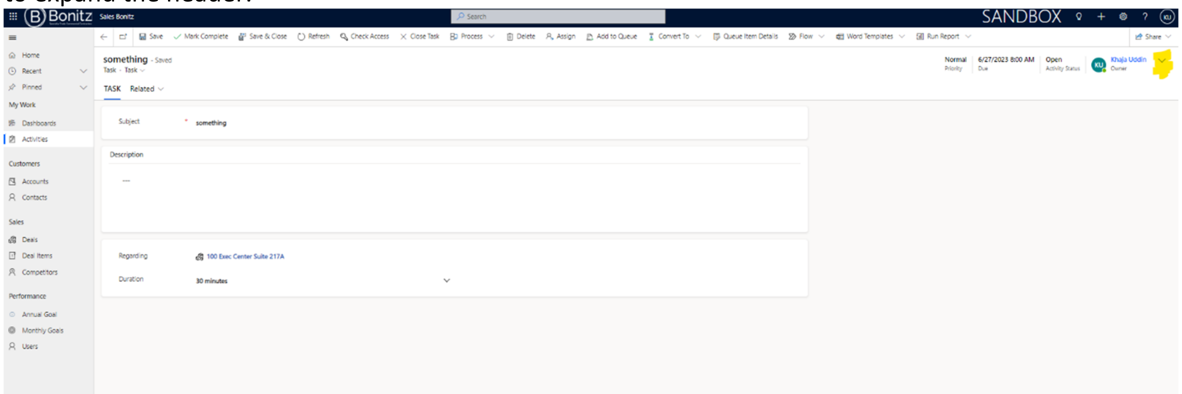
- **Set the selected view as default view**: Click on the View selector and click on "**Set as Default view**" to set the default view.

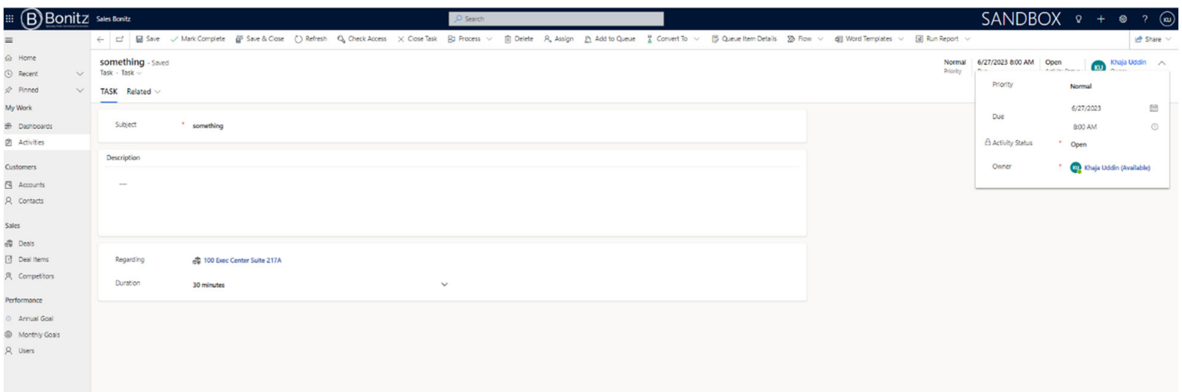


- **Confirm the Selection**: Dynamics 365/CRM will remember the last view you selected for an entity the next time you navigate to that entity. Confirm your new default view by navigating away from the entity and then returning to it. You should see the view you selected as the default view.

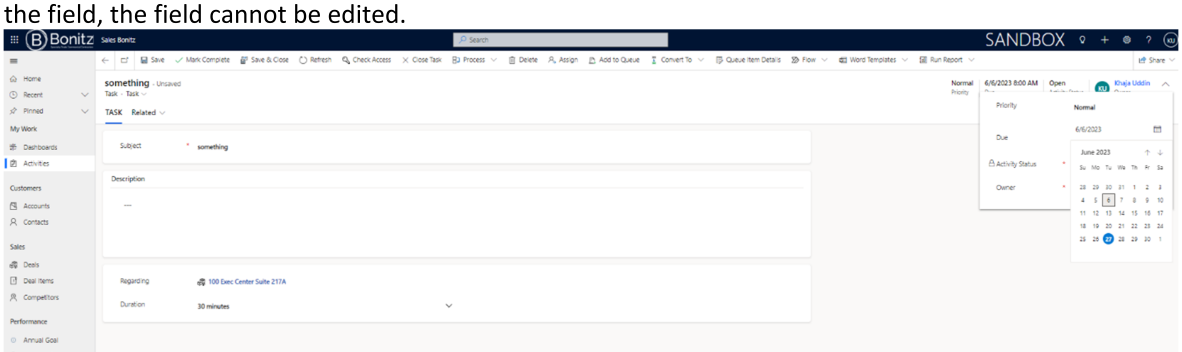
View/update fields in header of the form:

1. Open the record.
2. **Access Fields on header**: On the top-right corner of the form, click on the downward arrow to expand the header.





3. **Edit/update a Field**: Locate the field and click on it to make it editable. If a lock is visible on the field, the field cannot be edited.



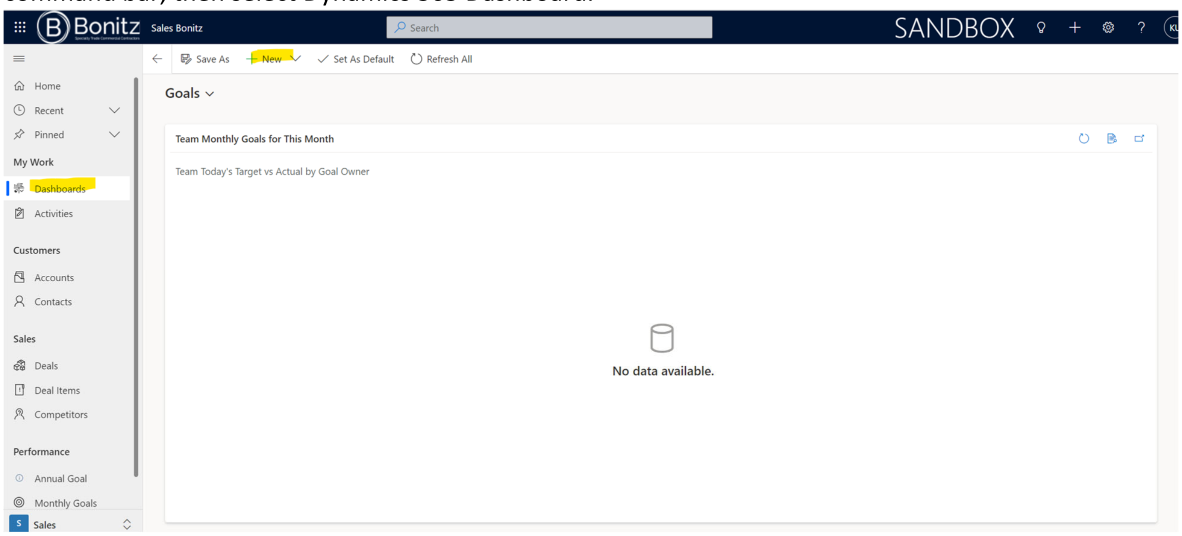
4. **Save Changes**: Click on the "Save" button to save the changes made.
5. **Optional - Verify the Update**: You might want to double-check that the field has been updated successfully by looking at the field again.

Creating a Personal Dashboard

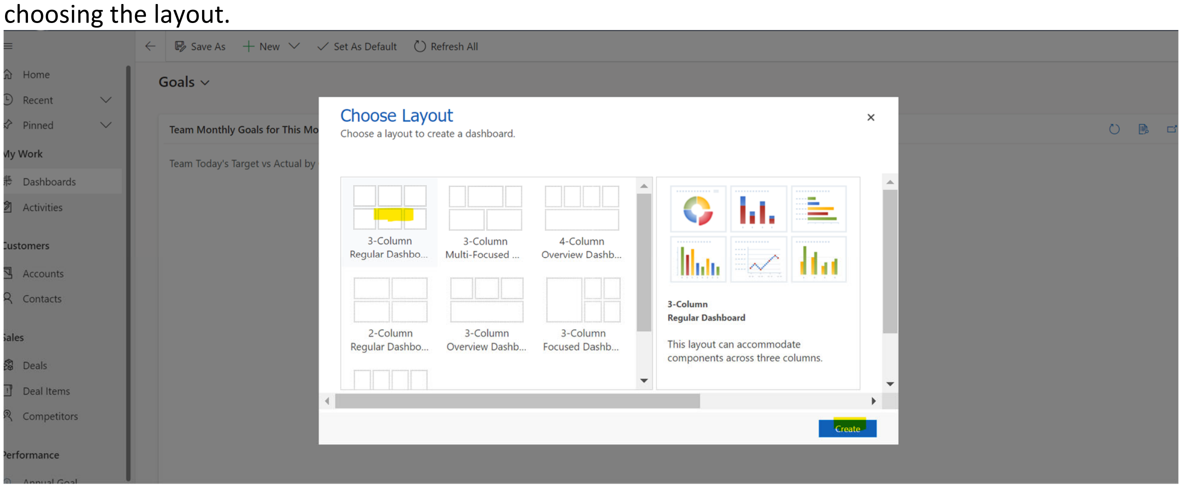
Dashboards are a powerful feature in D365 that allow users to visualize and analyze data from different entities. Creating a personal dashboard involves arranging components on a canvas to create a visual representation of data that meets the user's needs. Here are the steps to create a personal dashboard:

1. **Navigate to the Dashboard**: Click on the app launcher icon in the top left corner and select Sales Bonitz from the list of apps. On the left-hand navigation menu, click on Dashboards.

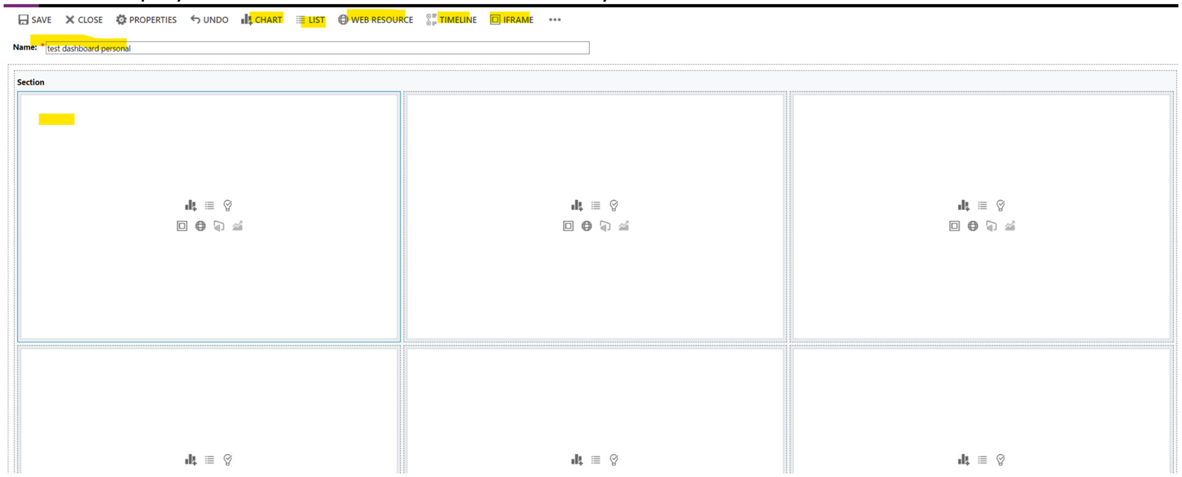
2. **Create a New Dashboard**: On the top of the screen, click on the New button in the command bar, then select Dynamics 365 Dashboard.



3. **Choose a Layout**: Choose a layout for the dashboard. The layout determines how the components (charts, lists, etc.) will be arranged on the dashboard. Click Create after choosing the layout.



4. **Add Components**: Name your dashboard and Select a section, and click on the component to add components to the dashboard. There are several types of components that you can add to a dashboard, including:
 - Charts: Visual representations of data in the form of bar charts, pie charts, line graphs, etc.
 - Lists: Displays a list of records from a certain entity.



4. **Configure Components**: After adding a component, you need to configure it by selecting the entity it should pull data from, the view (if it's a list), and the chart (if it's a chart). For example, if you're adding a chart for Accounts, you would select Accounts as the entity and then select the specific chart you want to display.

List:

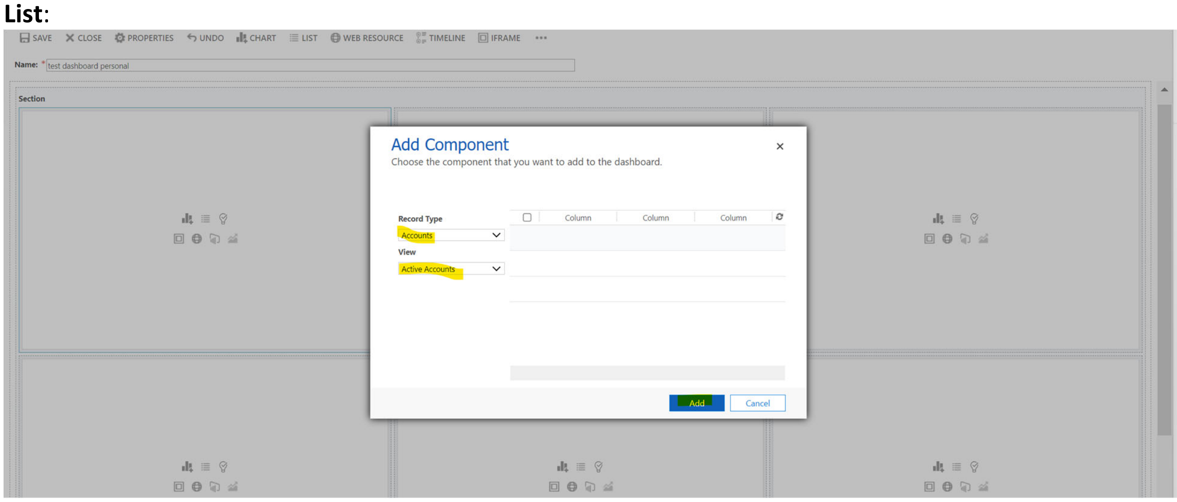
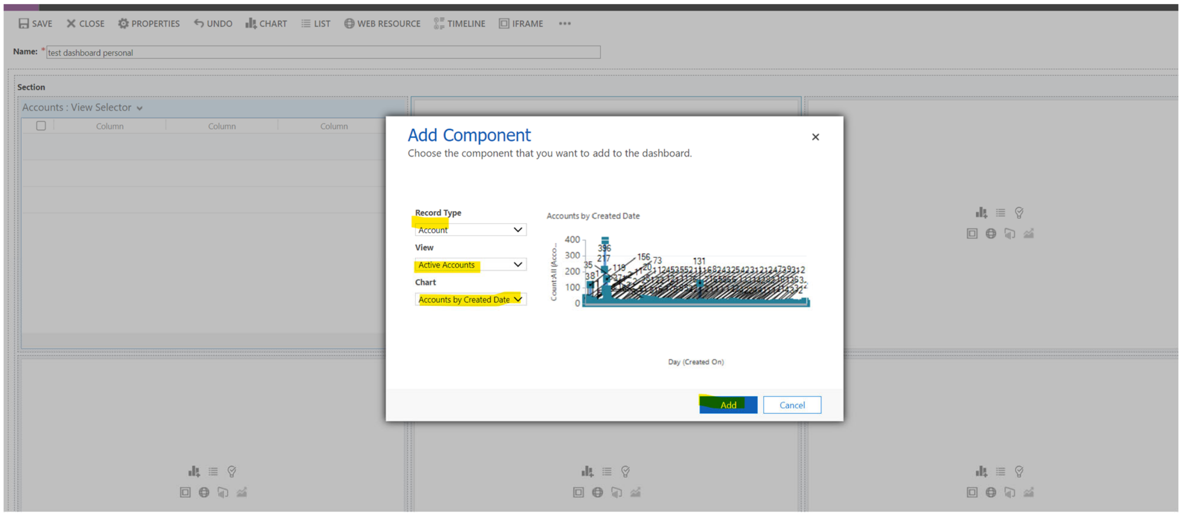
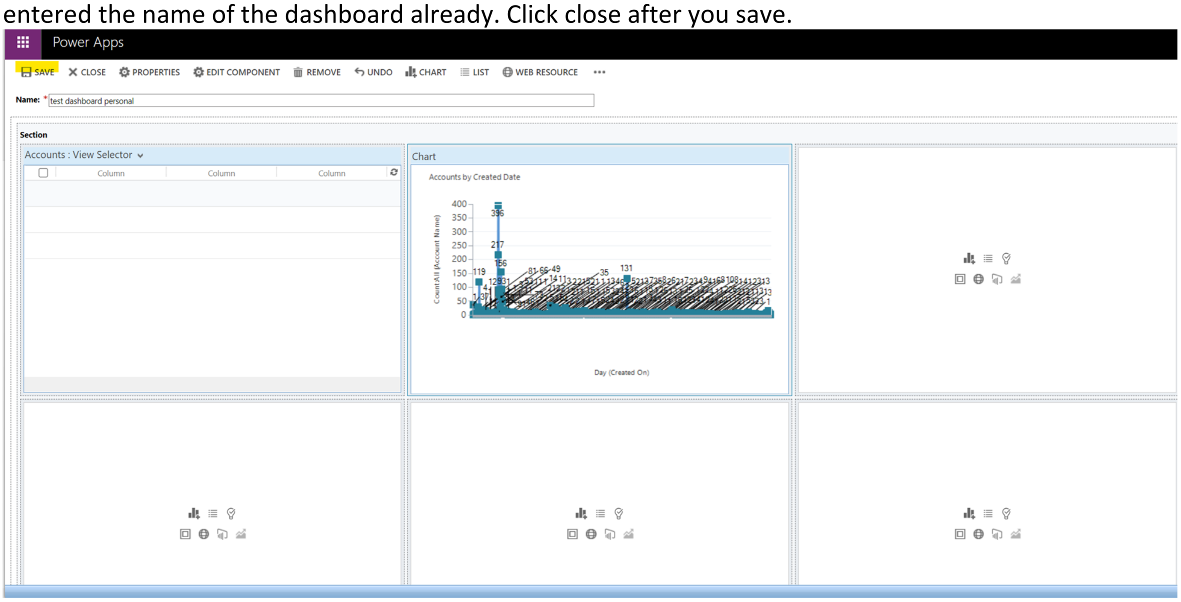


Chart:

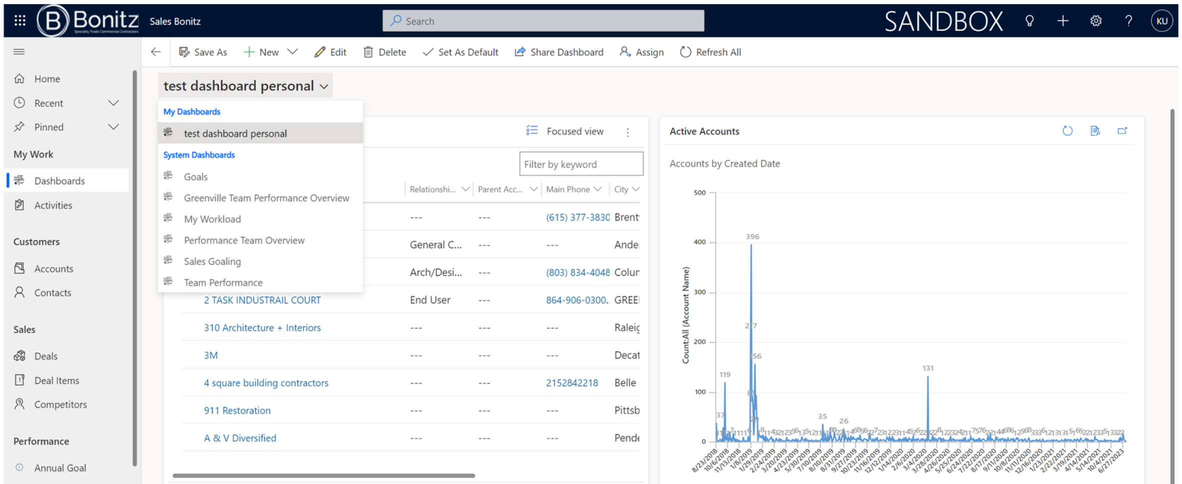


6. **Arrange Components**: After adding and configuring the components, arrange them as desired on the layout. You can drag and drop components to different sections of the layout.

6. **Save the Dashboard**: Once you're satisfied with the dashboard, click on the Save button in the command bar. You'll be prompted to enter a name for the dashboard if you have not entered the name of the dashboard already. Click close after you save.



8. **View the Dashboard**: The dashboard will be available in the Dashboards area. You can select it from the drop-down list to view it.



Remember, the data displayed on the dashboard will be updated in real time as the underlying data changes. You can also manually refresh the dashboard to see the most current data.

This is a personal dashboard, so only you will be able to see and edit it. If you want to share the dashboard with others, you need to publish it.