



CRM User Training Manual

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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**.



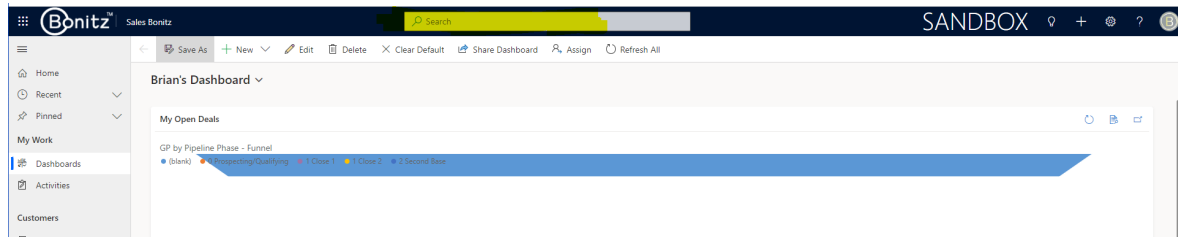
Dataverse search

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.

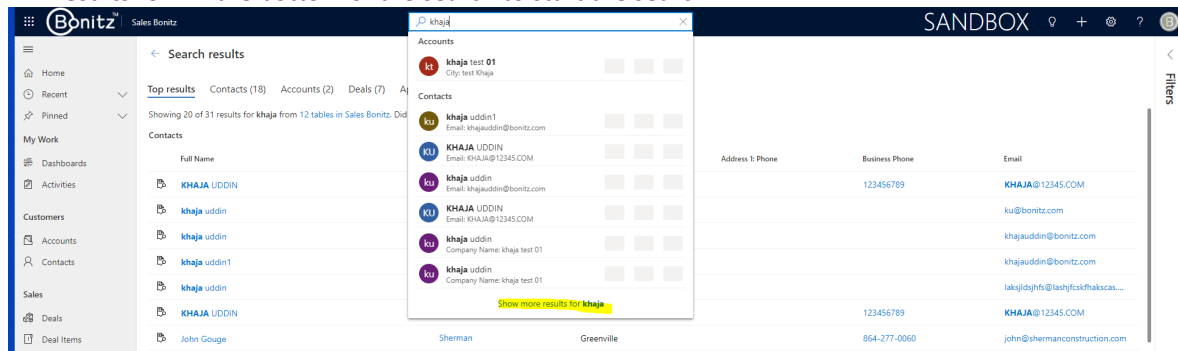
Here is a step-by-step guide on how to use Dataverse Search:

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

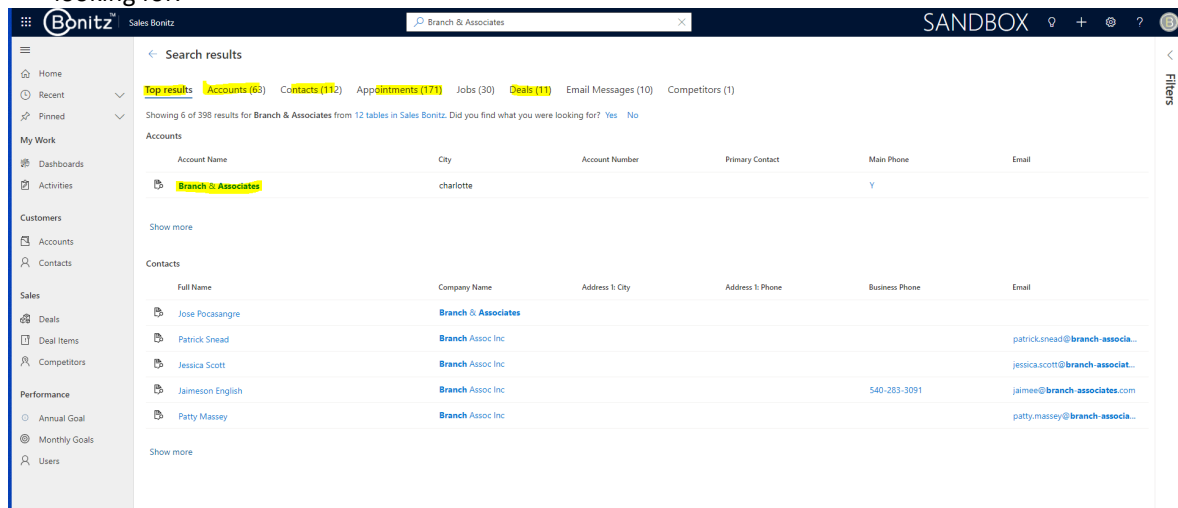
- The Dataverse search box is located at the top of the application you are working with.



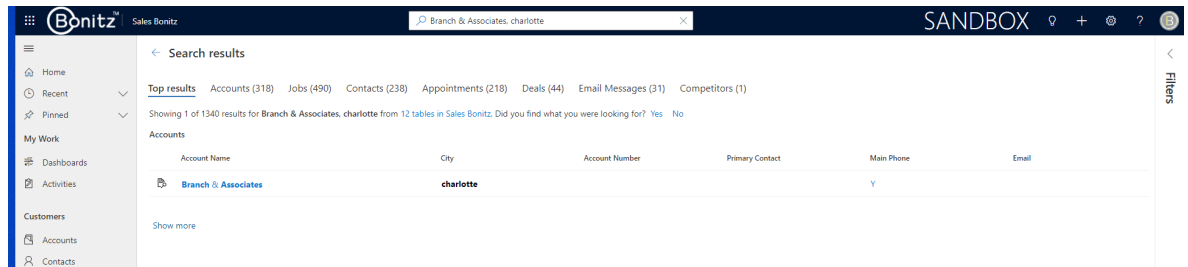
- Type in the keywords or phrases related to the data you're trying to find in the Accounts, Contacts, or Deals. The search box also supports wildcard characters for more advanced searches. For example, if you're looking for a specific account, you could enter the name of the account, the account number, 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:



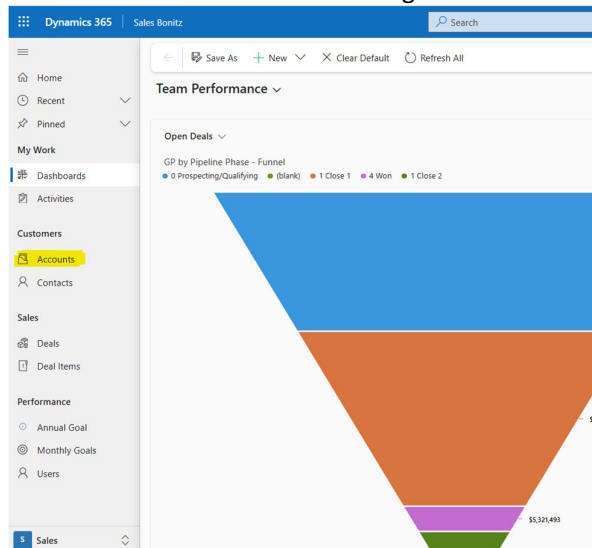
Note: Remember, the efficiency of Dataverse Search depends on the quality of your search terms. Use specific and relevant keywords to increase the accuracy of your search results.

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.

Sales Bonitz SANDB

Search

Home Recent Pinned My Work Dashboards Activities Customers Accounts Contacts Sales Deals Deal Items Competitors Performance Annual Goal Monthly Goals Users

My Active Accounts

Account Name	Relationship Type	Parent Account	Main Phone	City	ZIP/Postal Code	Open Deals
Abbeville County Schools				Abbeville		
Aiken Mitchell	General Contractor			Greenville		
Alston Construction	General Contractor			Atlanta	30326	
Anderson First Baptist				Anderson		
Anderson School District 5	End User		864-260-8000	Anderson	20622	
Becknell Industrial				La Grange		
BMW Motorcycle Owners of America	End User		864-438-0962	Greenville	29601	
Brinkmann Constructors	General Contractor		636-537-9700	Chesterfield	63005	
Caine Halter YMCA				Greenville	29607	
Carmel Contractors	General Contractor			Charlotte	28273	
Carrol Daniel Construction				Greenville		
Cely Construction	General Contractor		864-269-8900	Greenville	29611	
Clemson Presbyterian Church	End User		864-654-4772	Clemson	29631	
Franklin Park Church	End User		864-722-2120	Greenville	29601	

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.

Sales Bonitz Search

Home Recent Pinned My Work Dashboards Activities Customers Accounts Contacts Sales Deals Deal Items Competitors Performance Annual Goal Monthly Goals Users

New Account

Summary

ACCOUNT INFORMATION

Account Name * ---

Relationship Type * ---

Address Street * ---
 Address Street: Example: 123 Concord Blvd/Lane/Ave/Street/Drive, Suite 123

City * ---
 City: Example: Charlotte

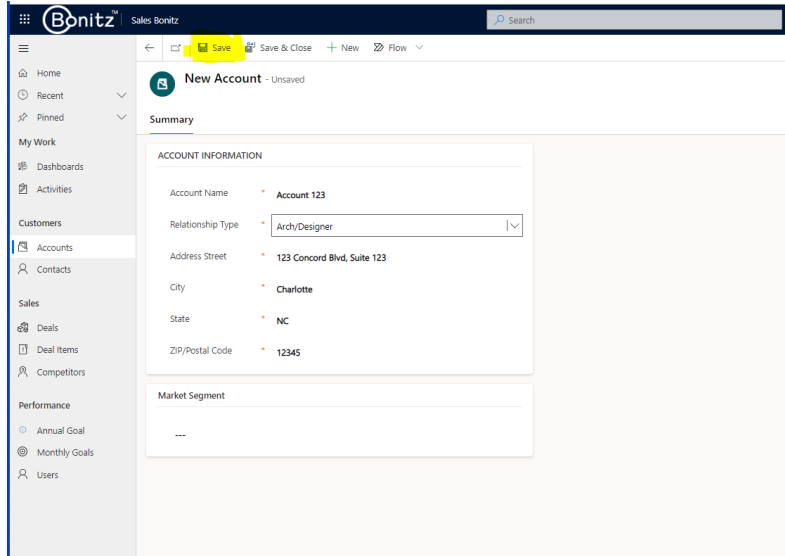
State * ---
 State: Example: NC

ZIP/Postal Code * ---
 ZIP/Postal Code: Example: 28027

Market Segment

3. Optionally, fill in Market segment field.

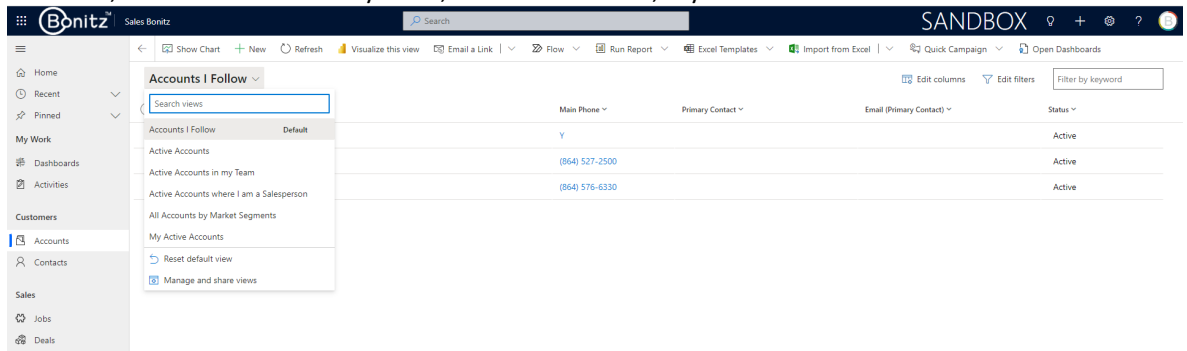
4. Save the account by clicking on the Save button in the command bar.



Managing Existing Accounts

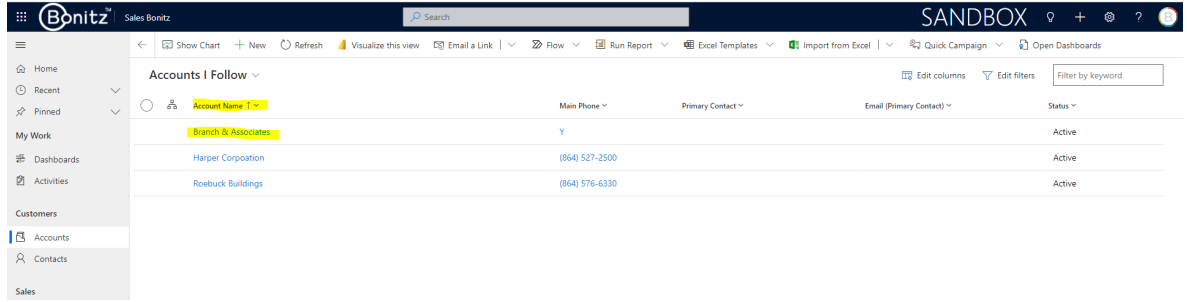
Once an account is created, users can manage it by:

- 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.



Search views	Main Phone	Primary Contact	Email (Primary Contact)	Status
Accounts I Follow	Y			Active
Active Accounts	(864) 527-2500			Active
Active Accounts in my Team	(864) 576-6330			Active
Active Accounts where I am a Salesperson				
All Accounts by Market Segments				
My Active Accounts				
Reset default view				
Manage and share views				

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



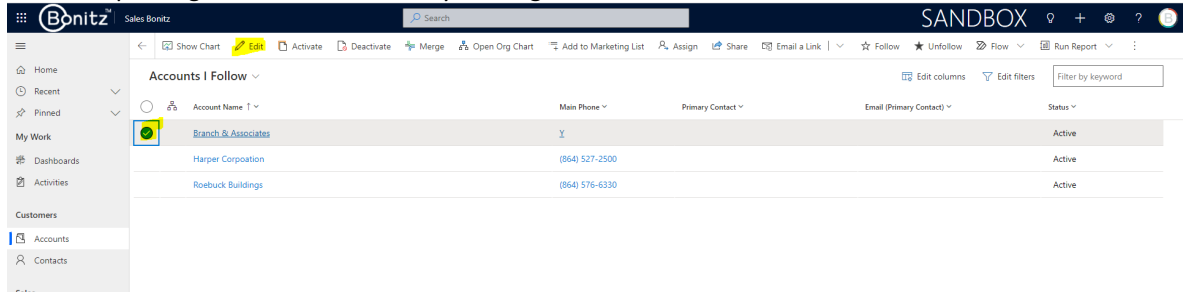
Sales Bonitz | **SANDBOX**

Search

Accounts I Follow

Account Name	Main Phone	Primary Contact	Email (Primary Contact)	Status
Branch & Associates	Y			Active
Harper Corporation	(864) 527-2500			Active
Roebuck Buildings	(864) 576-6330			Active

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



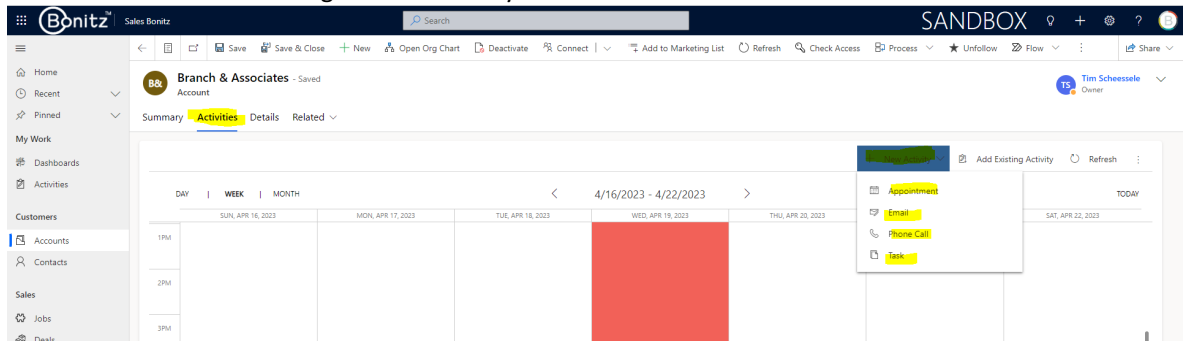
Sales Bonitz | **SANDBOX**

Search

Accounts I Follow

Account Name	Main Phone	Primary Contact	Email (Primary Contact)	Status
Branch & Associates	Y			Active
Harper Corporation	(864) 527-2500			Active
Roebuck Buildings	(864) 576-6330			Active

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



Sales Bonitz | **SANDBOX**

Search

Branch & Associates - Saved

Summary | **Activities** | Details | Related

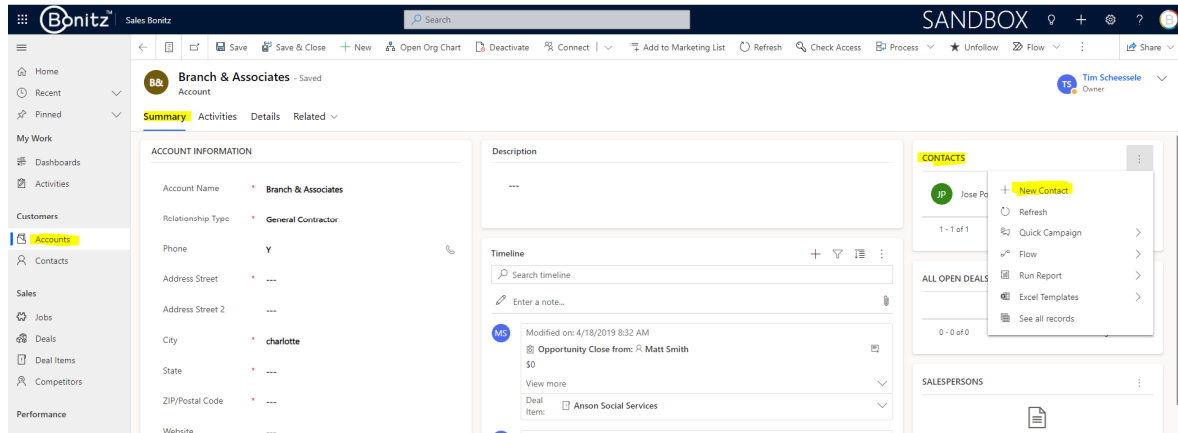
4/16/2023 - 4/22/2023

DAY | WEEK | MONTH

1PM | 2PM | 3PM

APPOINTMENT | Email | Phone Call | Task

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

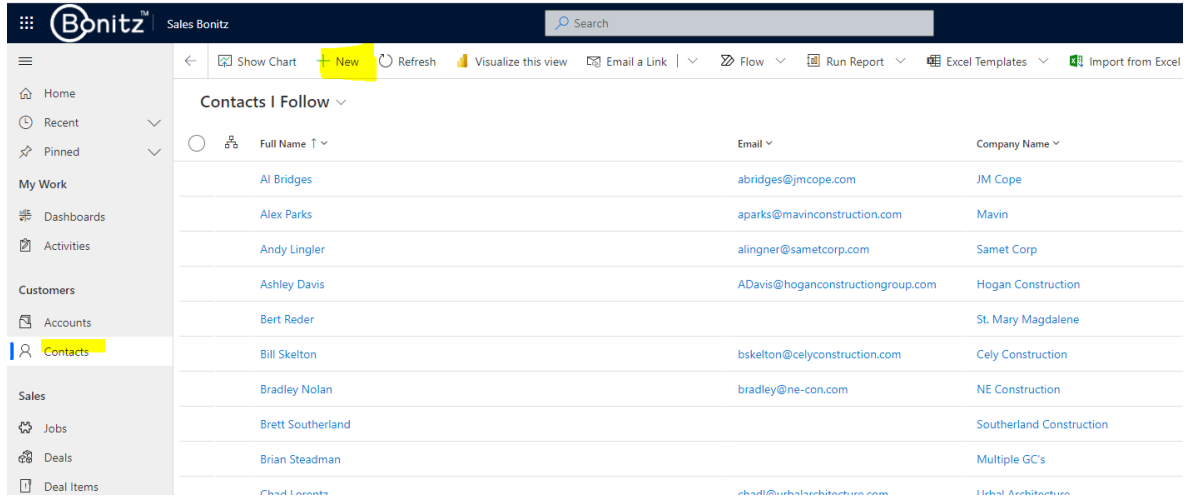


Contact

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.

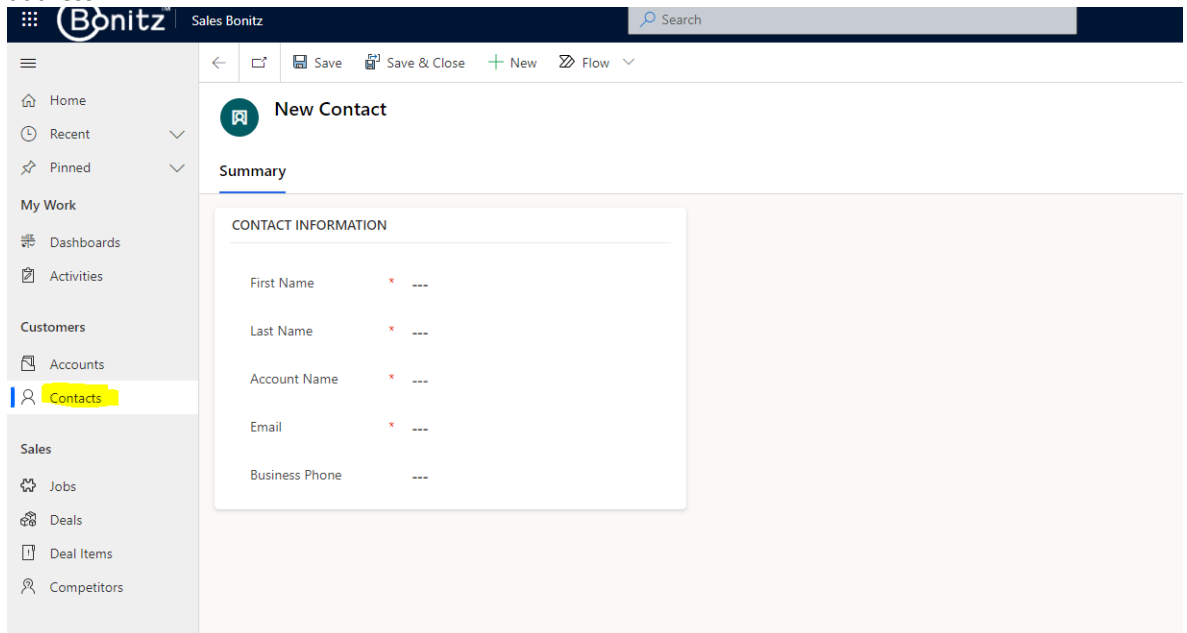
- Click on Contacts from the left-hand navigation menu.



Full Name	Email	Company Name
Al Bridges	abridges@jmcope.com	JM Cope
Alex Parks	aparks@mavinconstruction.com	Mavin
Andy Lingler	alingner@sametcorp.com	Samet Corp
Ashley Davis	ADavis@hoganconstructiongroup.com	Hogan Construction
Bert Reder		St. Mary Magdalene
Bill Skelton	bskelton@celyconstruction.com	Cely Construction
Bradley Nolan	bradley@ne-con.com	NE Construction
Brett Southerland		Southerland Construction
Brian Steadman		Multiple GC's
Chad Everett	chad@bushstarchitecture.com	Bushst Architecture

- 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.



New Contact

Summary

CONTACT INFORMATION

First Name * ---

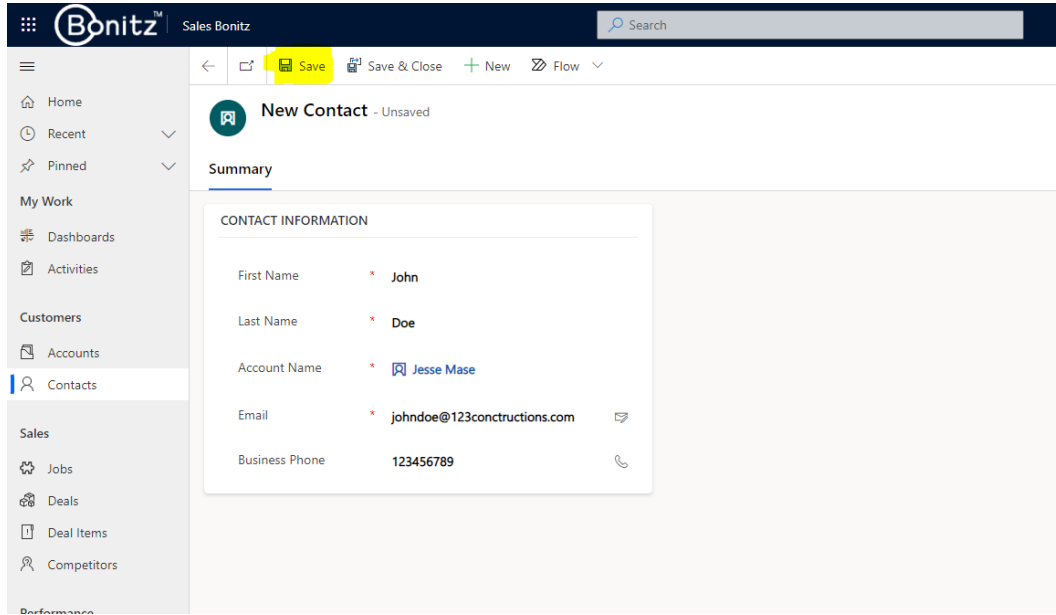
Last Name * ---

Account Name * ---

Email * ---

Business Phone ---

- 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.



Sales Bonitz Search

Save Save & Close New Flow

New Contact - Unsaved

Summary

CONTACT INFORMATION

First Name * John

Last Name * Doe

Account Name * Jesse Mase

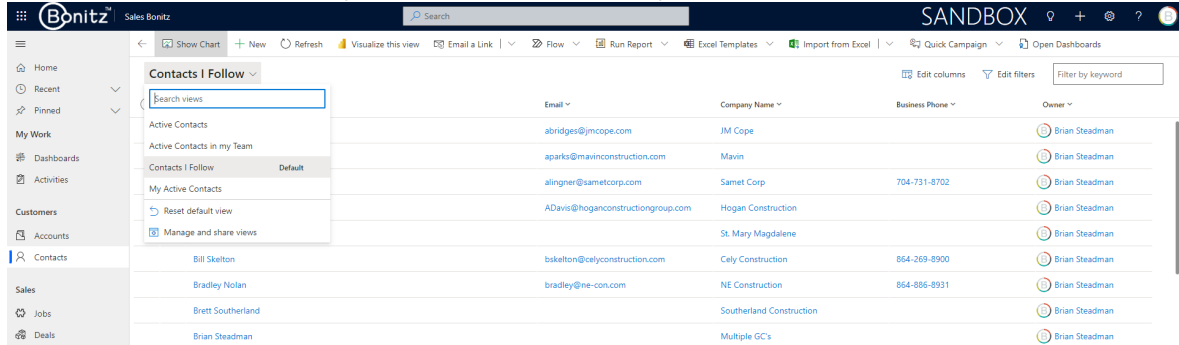
Email * johndoe@123constructions.com

Business Phone 123456789

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.

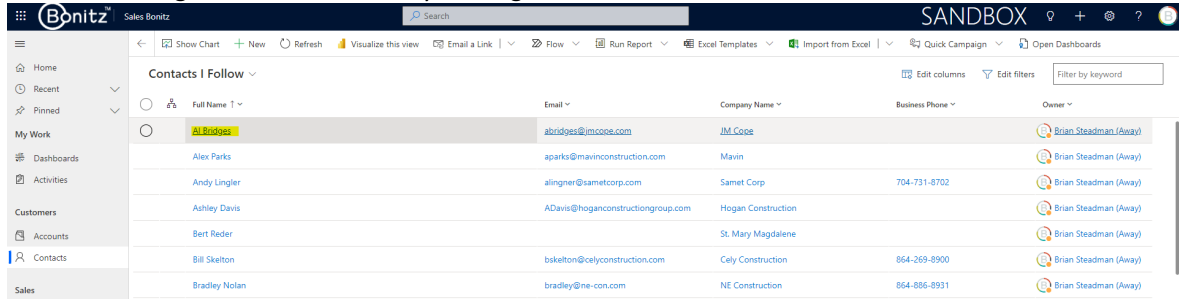


Sales Bonitz Search **SANDBOX**

Contacts I Follow

Email	Company Name	Business Phone	Owner
abridges@jmcpe.com	JM Cope		Brian Steadman
aparks@mavinconstruction.com	Mavin		Brian Steadman
alingner@sametcorp.com	Samet Corp	704-731-8702	Brian Steadman
ADavis@hoganconstructiongroup.com	Hogan Construction		Brian Steadman
	St. Mary Magdalene		Brian Steadman
bskelton@celyconstruction.com	Cely Construction	864-269-8900	Brian Steadman
bradley@ne-con.com	NE Construction	864-886-8931	Brian Steadman
	Southerland Construction		Brian Steadman
	Multiple GC's		Brian Steadman

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



Sales Bonitz Search **SANDBOX**

Contacts I Follow

Full Name	Email	Company Name	Business Phone	Owner
Alex Parks	abridges@jmcpe.com	JM Cope		Brian Steadman (Away)
Alex Parks	aparks@mavinconstruction.com	Mavin		Brian Steadman (Away)
Andy Lingner	alingner@sametcorp.com	Samet Corp	704-731-8702	Brian Steadman (Away)
Ashley Davis	ADavis@hoganconstructiongroup.com	Hogan Construction		Brian Steadman (Away)
Bert Rader		St. Mary Magdalene		Brian Steadman (Away)
Bill Skelton	bskelton@celyconstruction.com	Cely Construction	864-269-8900	Brian Steadman (Away)
Bradley Nolan	bradley@ne-con.com	NE Construction	864-886-8931	Brian Steadman (Away)

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

Bonitz Sales Bonitz SANDBOX

Search

Home Recent Pinned My Work Dashboards Activities Customers Accounts **Contacts** Sales

Contacts I Follow

Full Name	Email	Company Name	Business Phone	Owner
Al Bridges	abridges@jmcope.com	JM Cope		Brian Steadman (Away)
Alex Parks	aparks@maevinconstruction.com	Mavin		Brian Steadman (Away)
Andy Lingner	alingner@sametcorp.com	Samet Corp	704-731-8702	Brian Steadman (Away)
Ashley Davis	ADavis@hoganconstructiongroup.com	Hogan Construction		Brian Steadman (Away)
Bert Reder		St. Mary Magdalene		Brian Steadman (Away)
Bill Skelton	bskelton@celyconstruction.com	Cely Construction	864-269-8900	Brian Steadman (Away)
Bradley Nolan	bradley@ne-con.com	NE Construction	864-886-8931	Brian Steadman (Away)

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

Bonitz Sales Bonitz SANDBOX

Home Recent Pinned My Work Dashboards Activities Customers Accounts **Contacts** Sales

Al Bridges - Saved Contact

Summary **Activities** Details Related

+ New Activity

Appointment
Email
Phone Call
Task

No data available

0 of 0 Page 1

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

Bonitz Sales Bonitz SANDBOX

Home Recent Pinned My Work Dashboards Activities Customers Accounts **Contacts** Sales

Al Bridges - Saved Contact

Summary **Activities** Details Related

CONTACT INFORMATION

First Name: Al
Last Name: Bridges
Nickname: ---
Job Title: Estimator
Account Name: 1x1 Design
Email: abridges@jmcope.com
Business Phone: ---
Mobile Phone: 803-329-3250

Account

Address 1: Street 1: 221 Pickens Street
Address 1: Street 2: ---
Address 1: City: Columbia
State: SC
Address 1: ZIP/Postal Code: 29205
Phone: (803) 834-4048

Connections

Connected To: --- Role (To): --- Description: ---
No data available.

Salespersons

Team Member 1: ---
No data available

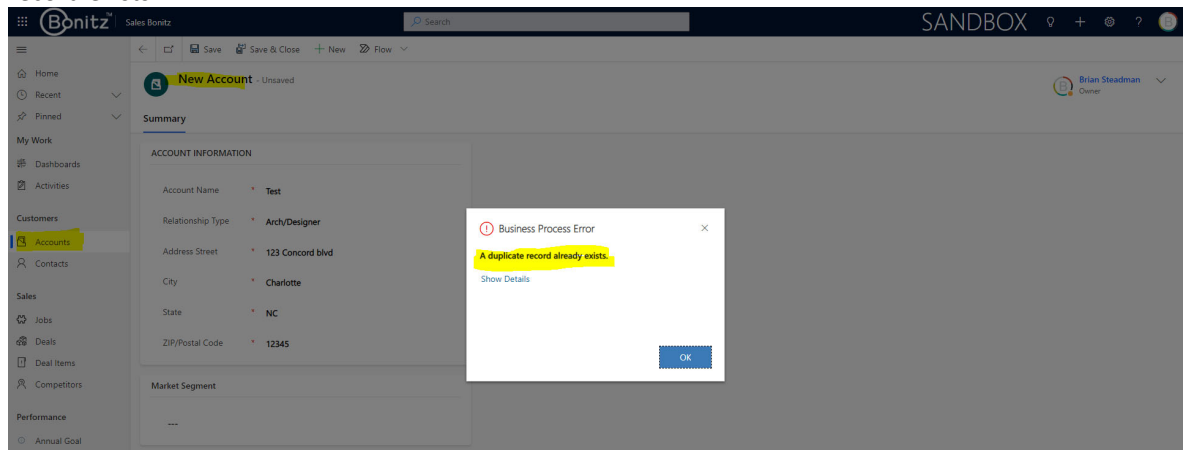
Duplicates Detection in CRM

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:

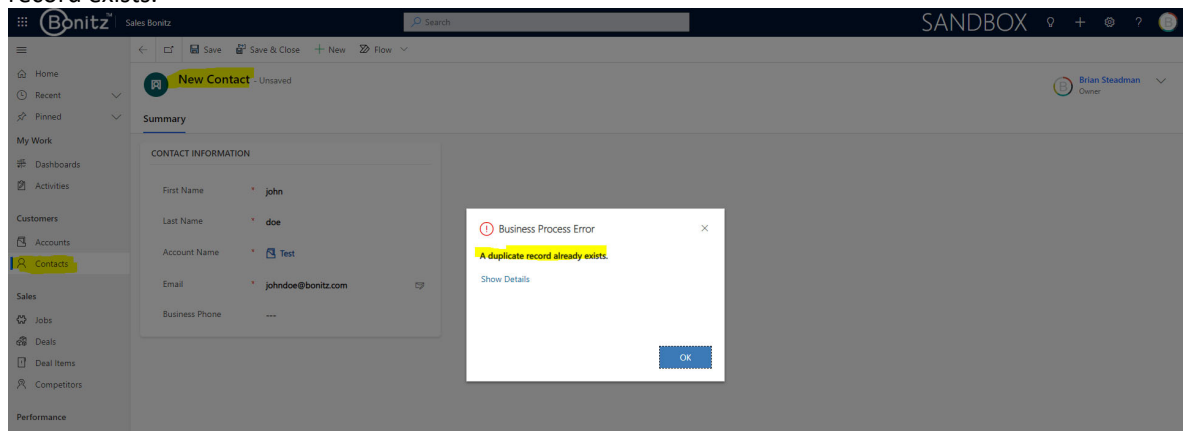
1. Navigate to the Accounts tab in the navigation menu.
2. Click on the New button to create a new account.
3. Fill out the required fields and ensure that the address fields are unique.
4. Click on the Save button.
5. If the plugin detects a duplicate record, a notification will appear indicating that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

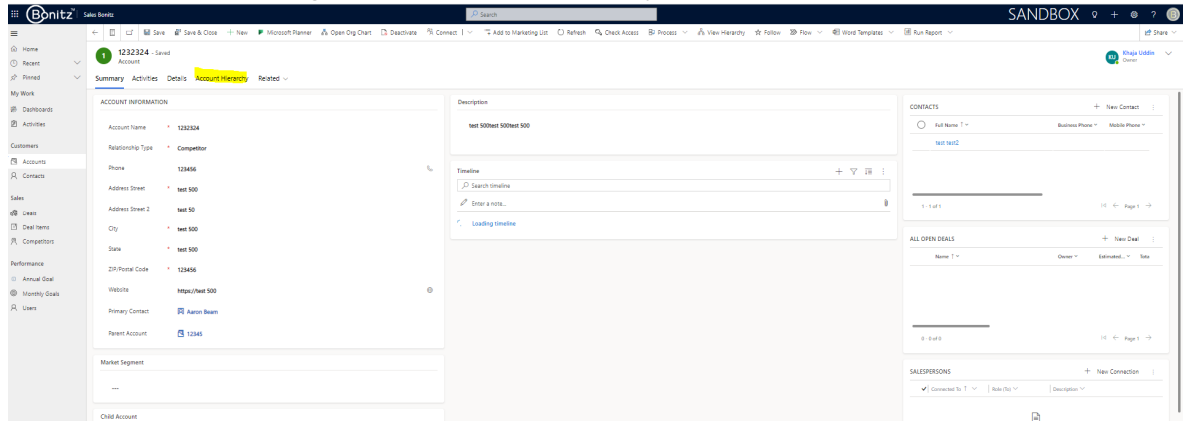
1. Navigate to the Contacts tab in the navigation menu.
2. Click on the New button to create a new contact.
3. Fill out the required fields and ensure that the first name, last name, and email fields are unique.
4. Click on the Save button.
5. If the plugin detects a duplicate record, a notification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



Parent/Child Account - Contacts Hierarchy

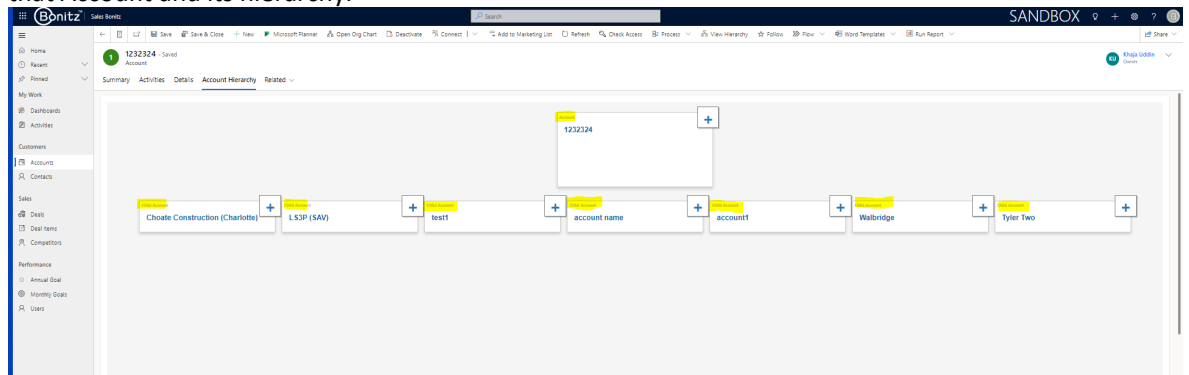
The hierarchy allows you to visualize the relationships between a parent account and its child accounts. It also lists out all contacts related to each account. Here are the steps to navigate this feature.

- 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.

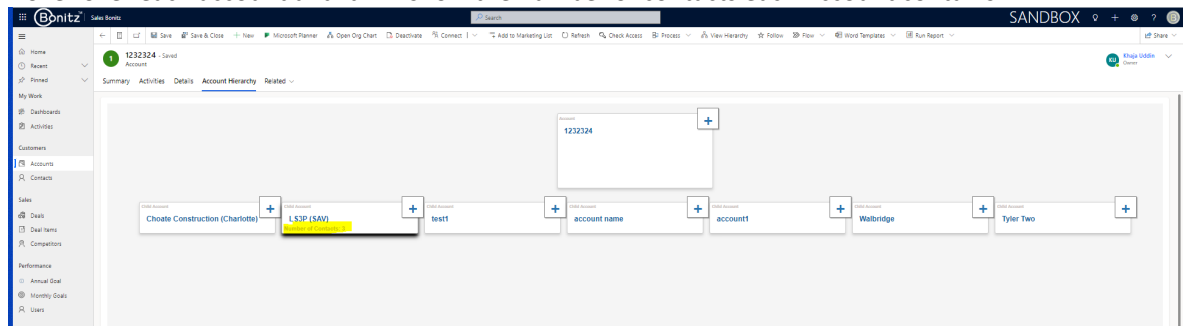


Navigating the Account Hierarchy

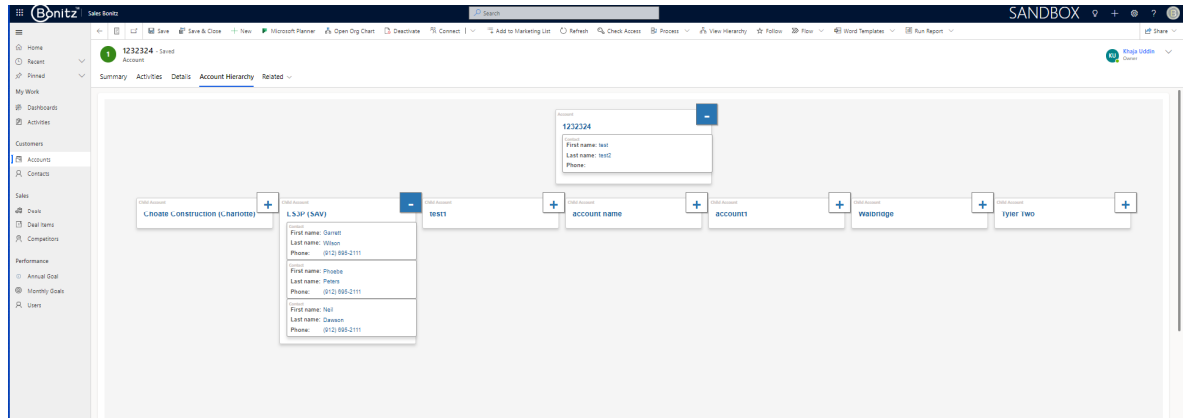
- The "Account Hierarchy" tab will display the Parent Account (the current account) and any associated Child Accounts. If there are no Child accounts for that Account, it will just display that Account and its hierarchy.



- 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.



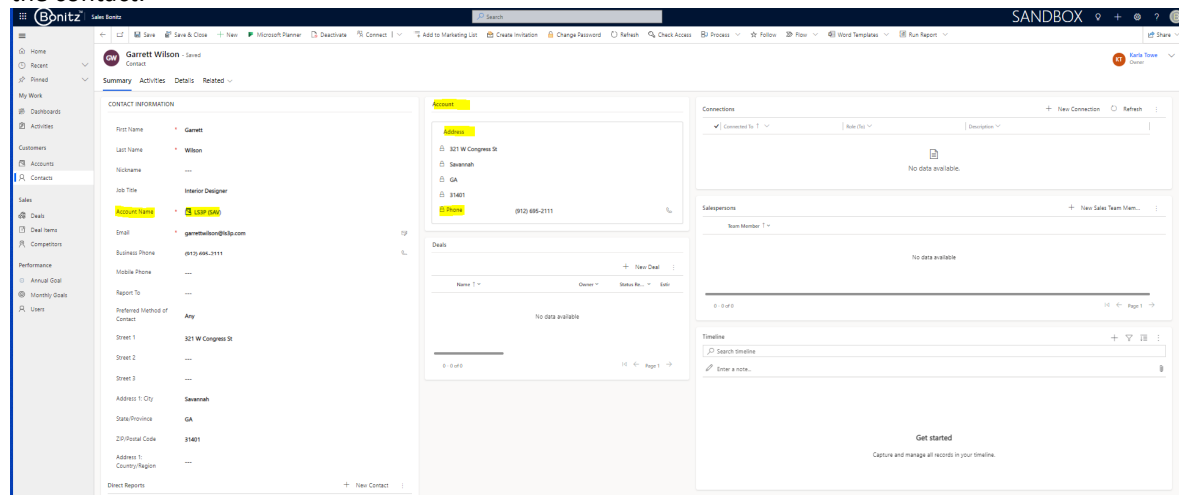
Accessing Accounts and Contacts from the Hierarchy

- 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

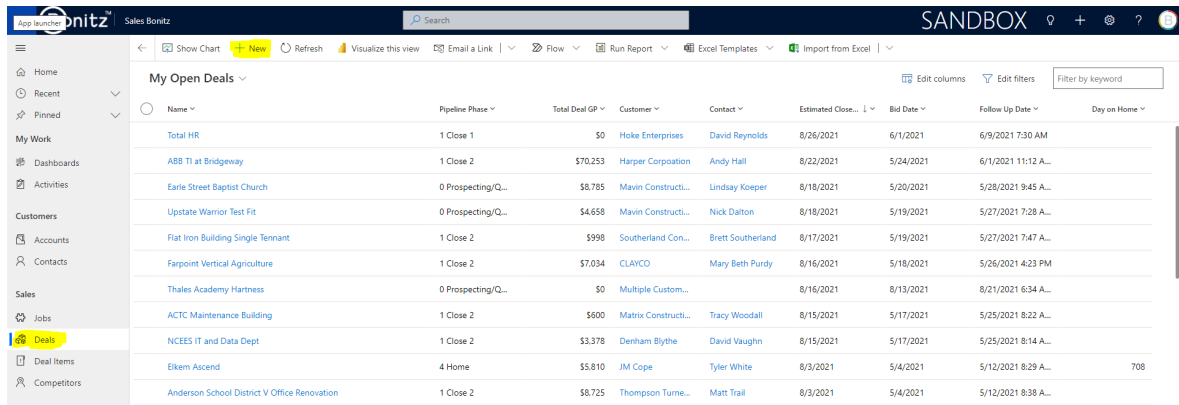
The user can manage deals by: Creating a deal, Viewing the list of deals in the Sales Bonitz, Filtering deals by various criteria such as stage, owner, etc., Updating the details of the deal, Moving the deal from one stage to another, adding notes to the deal, Adding activities such as tasks, appointments, 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:

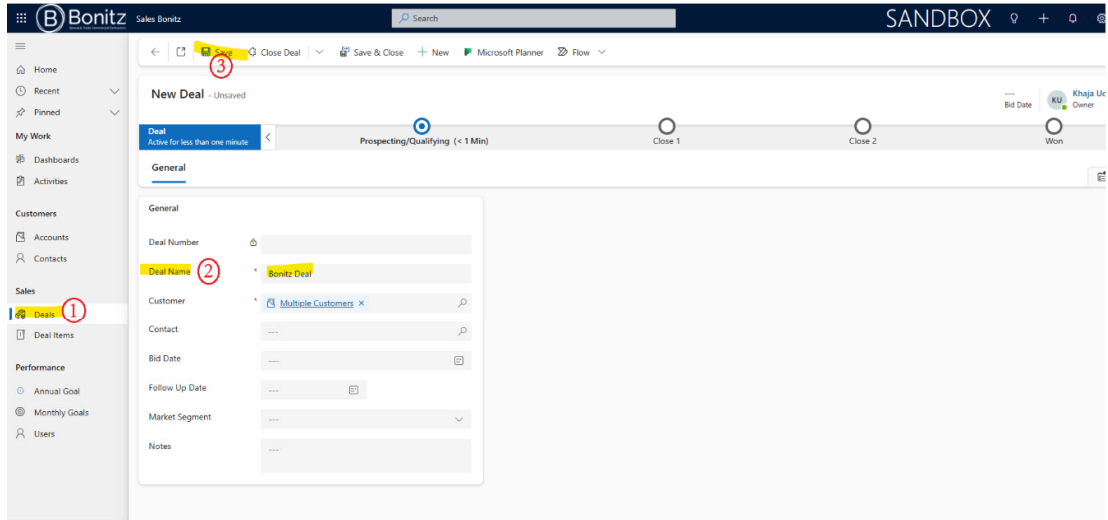
- Search by multiple possible project names Business development may have started one

- Click on the Deals

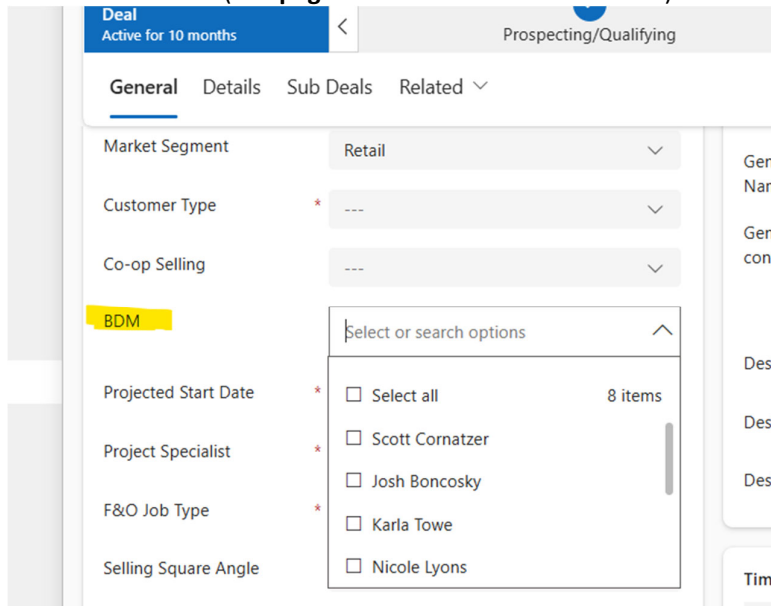


Name	Pipeline Phase	Total Deal GP	Customer	Contact	Estimated Close	Bid Date	Follow Up Date	Day on Home
Total HR	1 Close 1	\$0	Hoke Enterprises	David Reynolds	8/26/2021	6/1/2021	6/9/2021 7:30 AM	
ABB TI at Bridgeway	1 Close 2	\$70,253	Harper Corporation	Andy Hall	8/22/2021	5/24/2021	6/1/2021 11:12 A...	
Earle Street Baptist Church	0 Prospecting/Q...	\$8,785	Mavin Construct...	Lindsay Koeper	8/18/2021	5/20/2021	5/28/2021 9:45 A...	
Upstate Warrior Test Fit	0 Prospecting/Q...	\$4,658	Mavin Construct...	Nick Dalton	8/18/2021	5/19/2021	5/27/2021 7:28 A...	
Flat Iron Building Single Tennant	1 Close 2	\$998	Southerland Con...	Brett Southerland	8/17/2021	5/19/2021	5/27/2021 7:47 A...	
Farpoint Vertical Agriculture	1 Close 2	\$7,034	CLAYCO	Mary Beth Purdy	8/16/2021	5/18/2021	5/26/2021 4:23 PM	
Thales Academy Hartness	0 Prospecting/Q...	\$0	Multiple Custom...		8/16/2021	8/13/2021	8/21/2021 6:34 A...	
ACTC Maintenance Building	1 Close 2	\$600	Matrix Construct...	Tracy Woodall	8/15/2021	5/17/2021	5/25/2021 8:22 A...	
NCEES IT and Data Dept	1 Close 2	\$3,378	Denham Blythe	David Vaughn	8/15/2021	5/17/2021	5/25/2021 8:14 A...	
Ekem Ascend	4 Home	\$5,810	JM Cope	Tyler White	8/3/2021	5/4/2021	5/12/2021 8:29 A...	708
Anderson School District V Office Renovation	1 Close 2	\$8,725	Thompson Turne...	Matt Trail	8/3/2021	5/4/2021	5/12/2021 8:38 A...	

- 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 appropriate abbreviations at the end. Ex – Lobby – ASH
 - Asheville, NC – AVL
 - Myrtle Beach SC / Wilmington NC– MBW
 - Savannah GA – SAV
 - Atlanta GA – ATL
 - Richmond, VA – RIC
 - Birmingham, AL – BHM
 - 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)



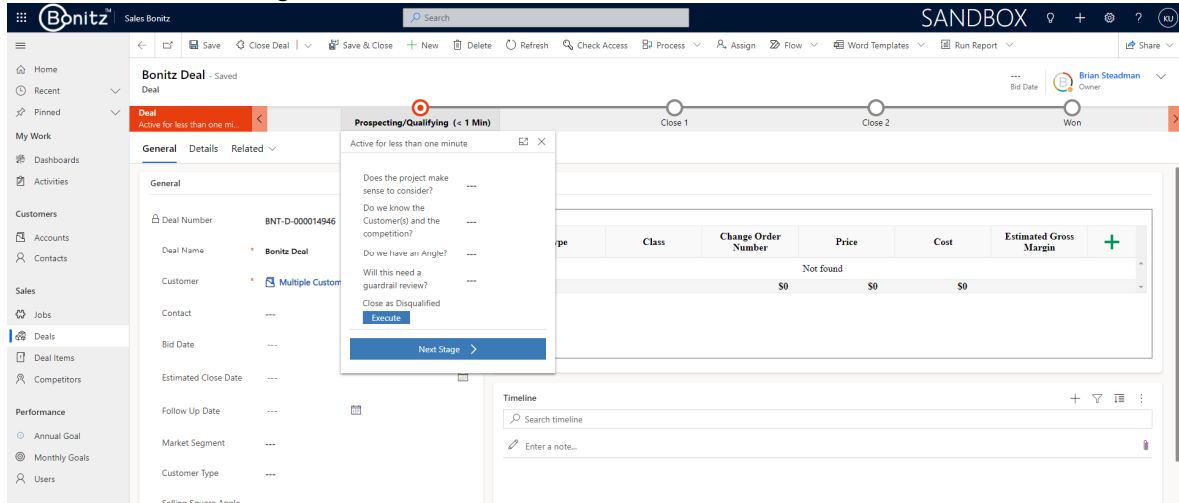
Deal Stages/Sales Process

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?



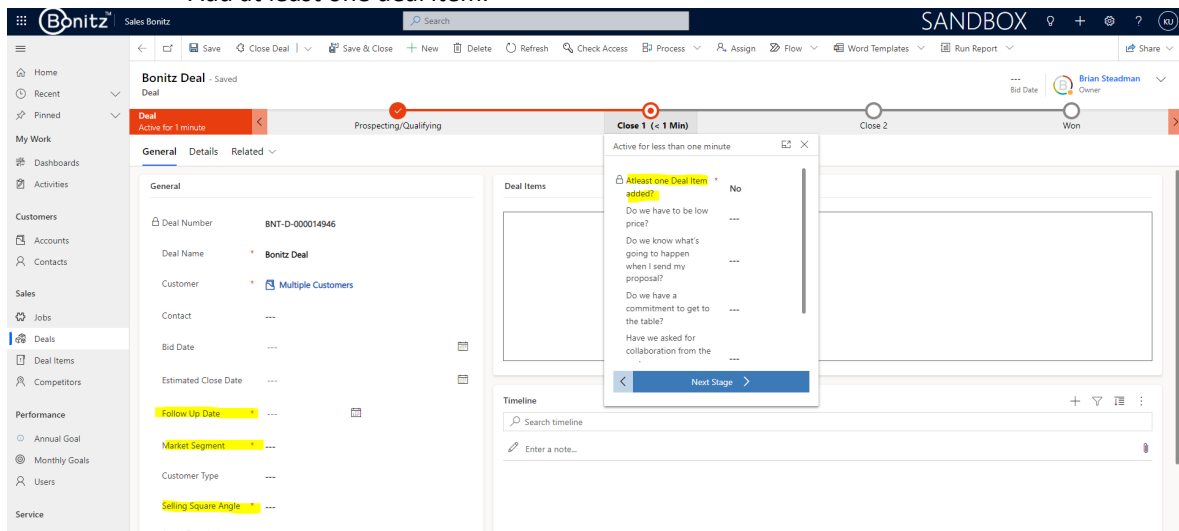
The screenshot shows the Bonitz CRM interface. The top navigation bar includes 'Sales Bonitz', a search bar, and a 'SANDBOX' label. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Jobs, Deals, Deal Items, Competitors, Performance, Annual Goal, Monthly Goals, and Users. The main content area displays a 'Bonitz Deal - Saved' with a progress bar showing stages: Deal, Prospecting/Qualifying (< 1 Min), Close 1, Close 2, and Won. A modal window is open over the 'Prospecting/Qualifying' stage, containing a checklist of questions and an 'Execute' button. The 'Deal' stage is active for less than one minute. The 'Deal' stage details show a Deal Number of BNT-D-000014946, Deal Name of Bonitz Deal, Customer of Multiple Customers, and other fields like Bid Date, Estimated Close Date, Follow Up Date, Market Segment, and Customer Type.

- 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

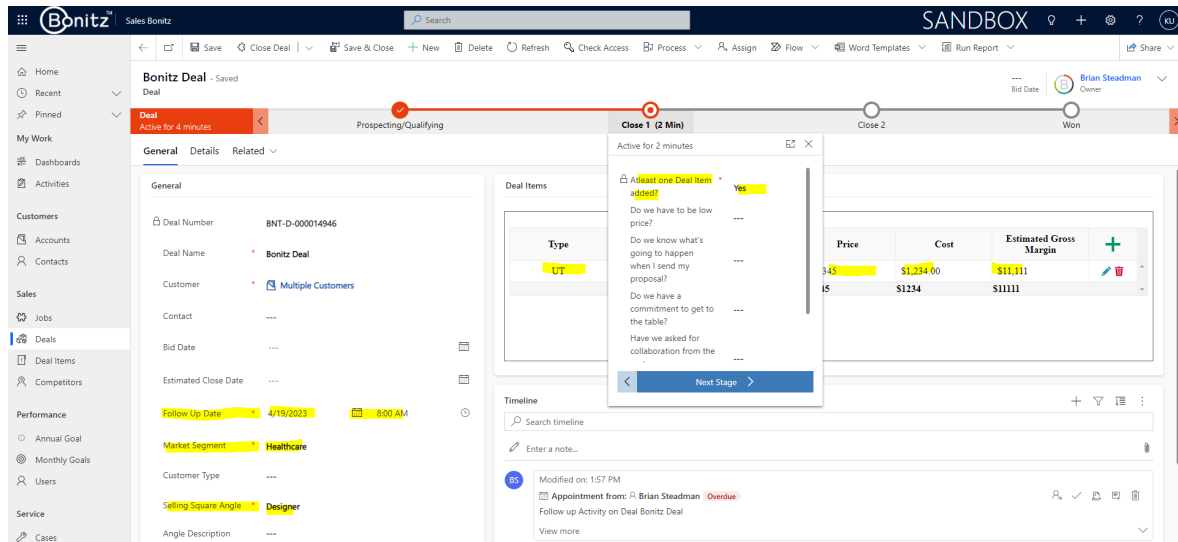
In the Close 1 stage, the user needs to perform the following tasks:

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



The screenshot shows the Bonitz CRM interface. The top navigation bar includes 'Sales Bonitz', a search bar, and a 'SANDBOX' label. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Jobs, Deals, Deal Items, Competitors, Performance, Annual Goal, Monthly Goals, and Users. The main content area displays a 'Bonitz Deal - Saved' with a progress bar showing stages: Deal, Prospecting/Qualifying, Close 1 (< 1 Min), Close 2, and Won. A modal window is open over the 'Close 1' stage, containing a checklist of questions and a 'Next Stage' button. The 'Close 1' stage is active for less than one minute. The 'Deal' stage details show a Deal Number of BNT-D-000014946, Deal Name of Bonitz Deal, Customer of Multiple Customers, and other fields like Bid Date, Estimated Close Date, Follow Up Date, Market Segment, and Customer Type. The 'Deal Items' section is visible, showing a table with columns for 'Deal Item' and 'Status'.

- 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**.



Bonitz Deal - Saved
Deal

Deal Active for 4 minutes

Prospecting/Qualifying

Close 1 (2 Min)

Active for 2 minutes

Deal Items

Type

UT

Questions to be answered:

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

Next Stage

Timeline

Search timeline

Enter a note...

Modified on: 1:57 PM

Appointment from: Brian Steadman

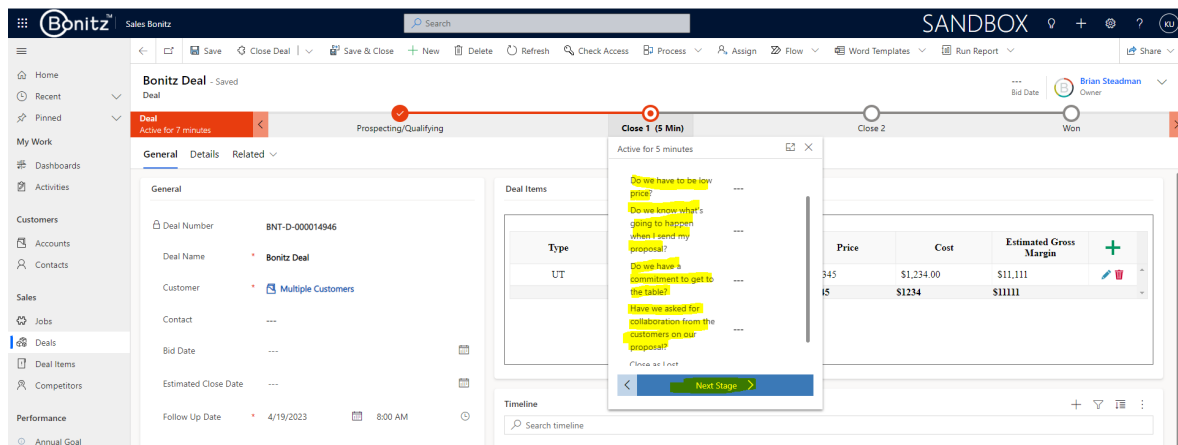
Follow up Activity on Deal Bonitz Deal

View more

Price	Cost	Estimated Gross Margin
345	\$1,234.00	\$11,111
15	\$1234	\$11111

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?



Bonitz Deal - Saved
Deal

Deal Active for 7 minutes

Prospecting/Qualifying

Close 1 (5 Min)

Active for 5 minutes

Deal Items

Type

UT

Questions to be answered:

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

Next Stage

Timeline

Search timeline

Enter a note...

Modified on: 1:57 PM

Appointment from: Brian Steadman

Follow up Activity on Deal Bonitz Deal

View more

Price	Cost	Estimated Gross Margin
345	\$1,234.00	\$11,111
15	\$1234	\$11111

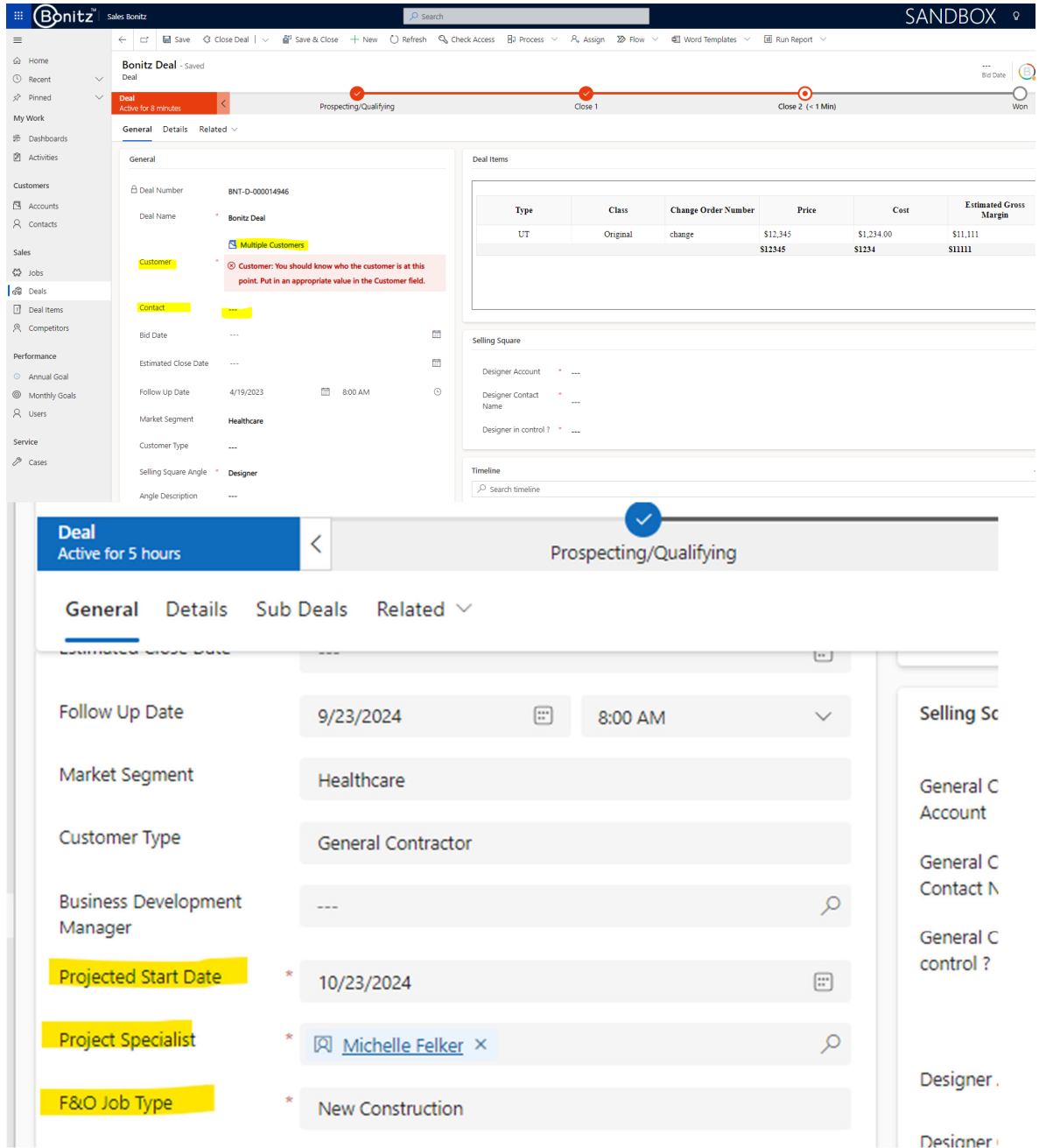
- Once these tasks are completed, the user can move the deal to the Close 2 stage by clicking Next Stage.

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



Bonitz Deal - Saved

Deal Active for 8 minutes

Prospecting/Qualifying

Close 1

Close 2 (< 1 Min)

Won

General

Deal Number: BNT-D-000014946

Deal Name: Bonitz Deal

Customer: Multiple Customers

Contact: [Redacted]

Bid Date: ---

Estimated Close Date: ---

Follow Up Date: 4/19/2023 8:00 AM

Market Segment: Healthcare

Customer Type: ---

Selling Square Angle: Designer

Angle Description: ---

Deal Items

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin
UT	Original	change	\$12,345	\$1,234.00	\$11,111
			\$12345	\$1234	\$11111

Selling Square

Designer Account: ---

Designer Contact Name: ---

Designer in control?: ---

Timeline

Search timeline

Deal Active for 5 hours

Prospecting/Qualifying

General Details Sub Deals Related

Follow Up Date: 9/23/2024 8:00 AM

Market Segment: Healthcare

Customer Type: General Contractor

Business Development Manager: ---

Projected Start Date: 10/23/2024

Project Specialist: Michelle Felker

F&O Job Type: New Construction

Selling Square

General Contractor Account

General Contractor Contact Name

General Contractor in control?

Designer

Designer

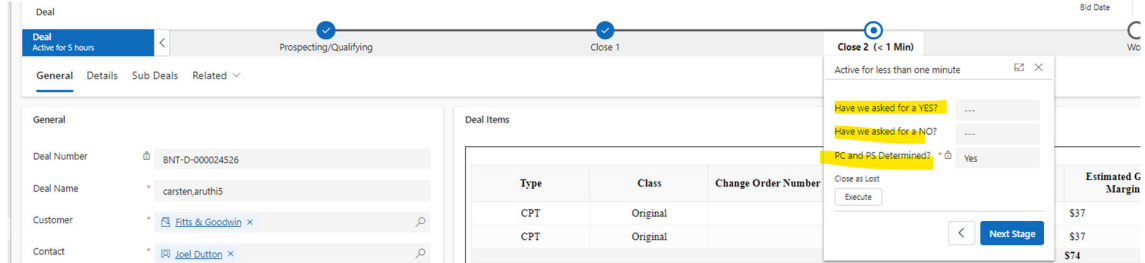
Before moving to **Won** stage, the user may check the following questions:

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**.

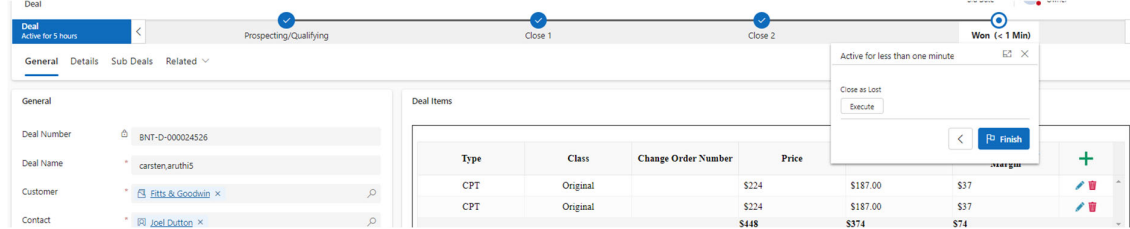
Note: If the deal is lost at this stage, the user will click the Close as Disqualified “**Execute**” button on the stage.

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

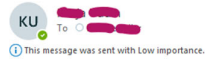
This is the final stage of the sales process.



Type	Class	Change Order Number	Price	Margin
CPT	Original		\$224	\$187.00
CPT	Original		\$224	\$187.00
		\$448	\$374	\$74

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)



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

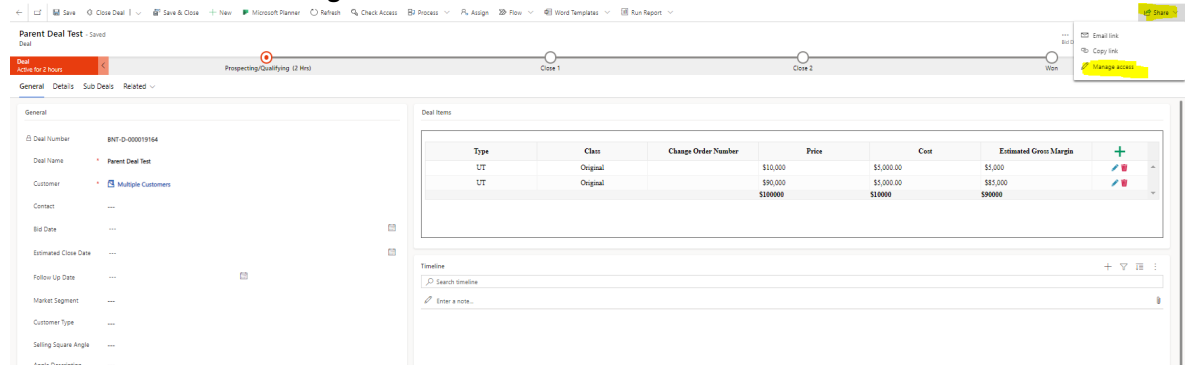
In Microsoft Dynamics 365, you can share/unshare a deal record with other users or teams. This feature enables collaboration and ensures that necessary individuals or teams have access to specific deal records.

Sharing a Deal

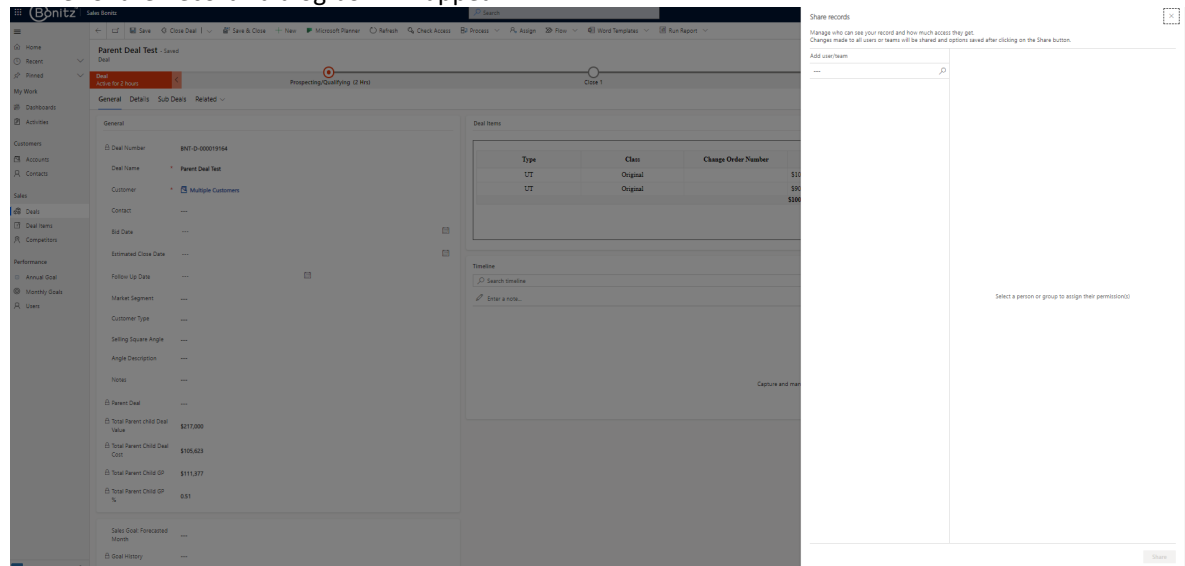
Here are the steps to share a deal record:

- 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.

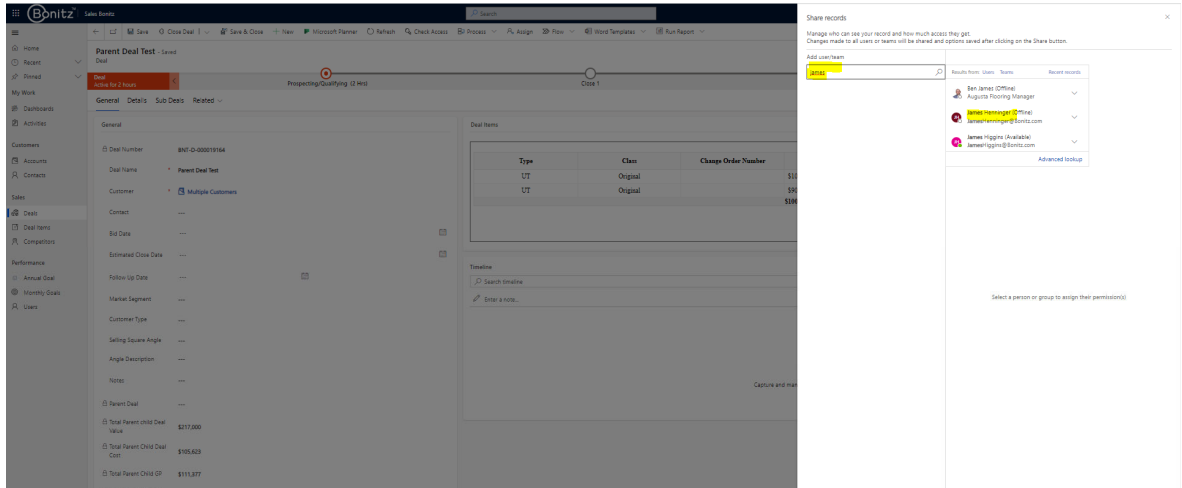
Under Share Click on **“Manage Access”**



- The "Share Record" dialog box will appear.

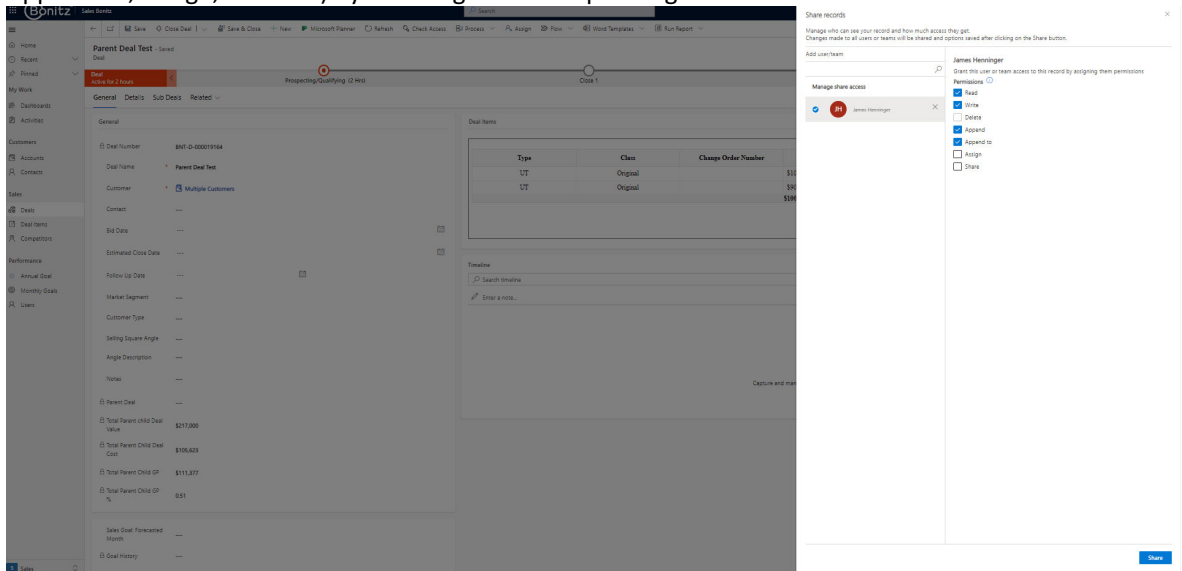


- In the "Add User/Team" section, type the name of the user or team you want to share the record with, and select them from the drop-down list.



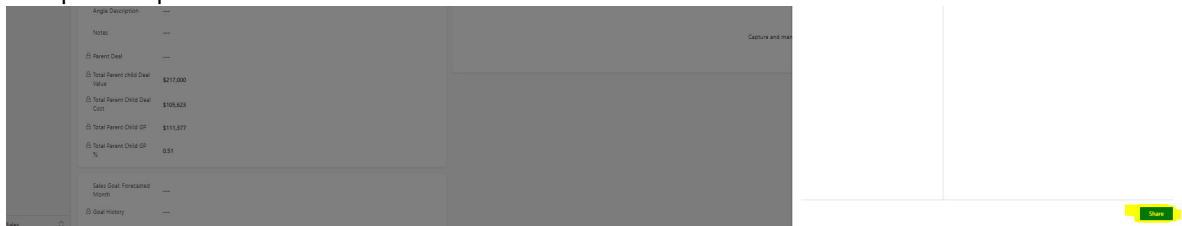
The screenshot shows the Bonitz software interface with the 'Share records' dialog box open. The dialog box contains a search bar, a list of users and teams, and a 'Share' button highlighted in yellow. The background shows the 'Parent Deal Test' record with various fields and a table of deal items.

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



The screenshot shows the Bonitz software interface with the 'Share records' dialog box open. The 'Share' button is highlighted in yellow. The dialog box shows the 'Permissions' section with checkboxes for Read, Write, Delete, Append, Append To, Assign, and Share. The 'Share' checkbox is checked.

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

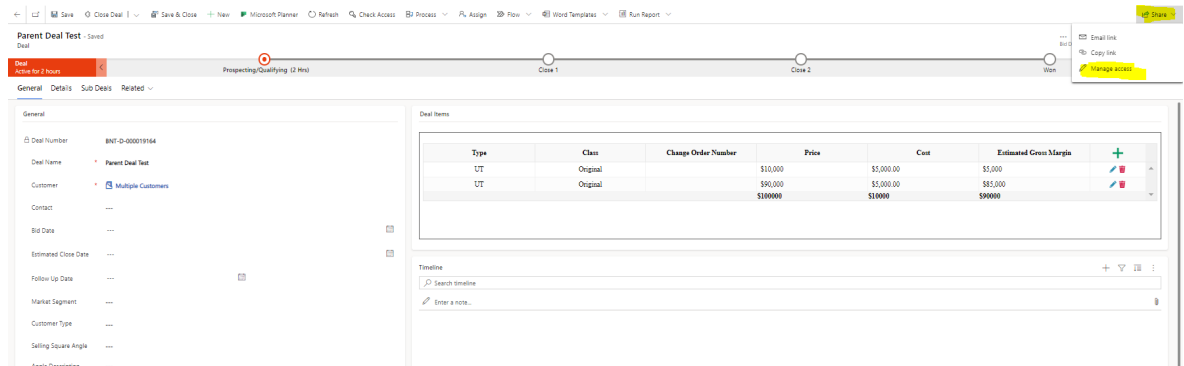


The screenshot shows the Bonitz software interface with the 'Share records' dialog box open. The 'Share' button is highlighted in yellow. The dialog box shows the 'Permissions' section with checkboxes for Read, Write, Delete, Append, Append To, Assign, and Share. The 'Share' checkbox is checked.

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.



Parent Deal Test - Saved Deal

Deal: Active for 2 hours

Prospecting/Qualifying (12 Hrs)

General Details Sub Deals Related

Deal Number: BNT-D-000019164

Deal Name: Parent Deal Test

Customer: Multiple Customers

Contact: ---

Bid Date: ---

Estimated Close Date: ---

Follow Up Date: ---

Market Segment: ---

Customer Type: ---

Selling Square Angle: ---

Angle Description: ---

Notes: ---

Deal Items

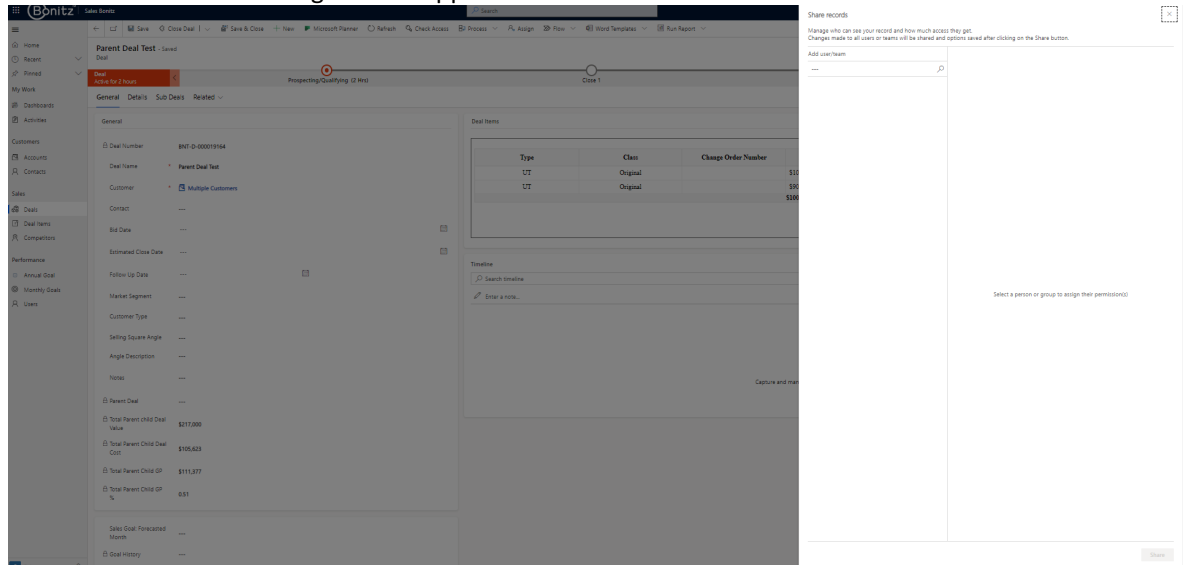
Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin
LT	Original		\$10,000	\$5,000.00	\$5,000
LT	Original		\$90,000	\$5,000.00	\$85,000
			\$100,000	\$10,000	\$90,000

Timeline

Search timeline

Enter a note...

- The "Share Record" dialog box will appear.



Share records

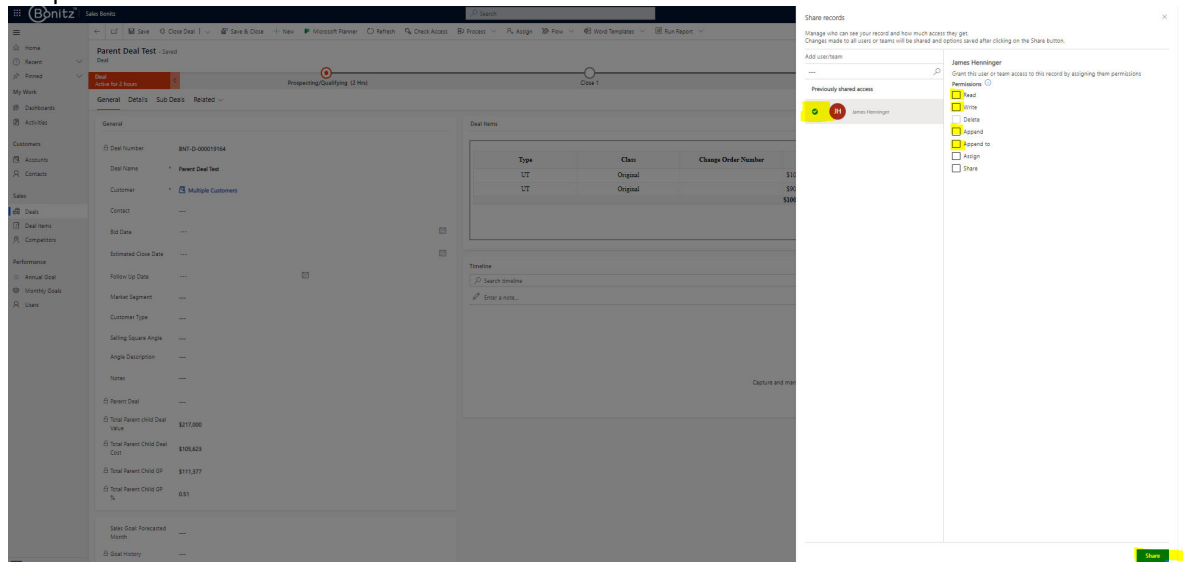
Manage who can see your record and how much access they get. Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team

Select a person or group to assign their permissions

Share

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



Share records

Manage who can see your record and how much access they get. Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team

Previously shared access

James Henninger

Permissions

Read

Edit

Delete

Assign

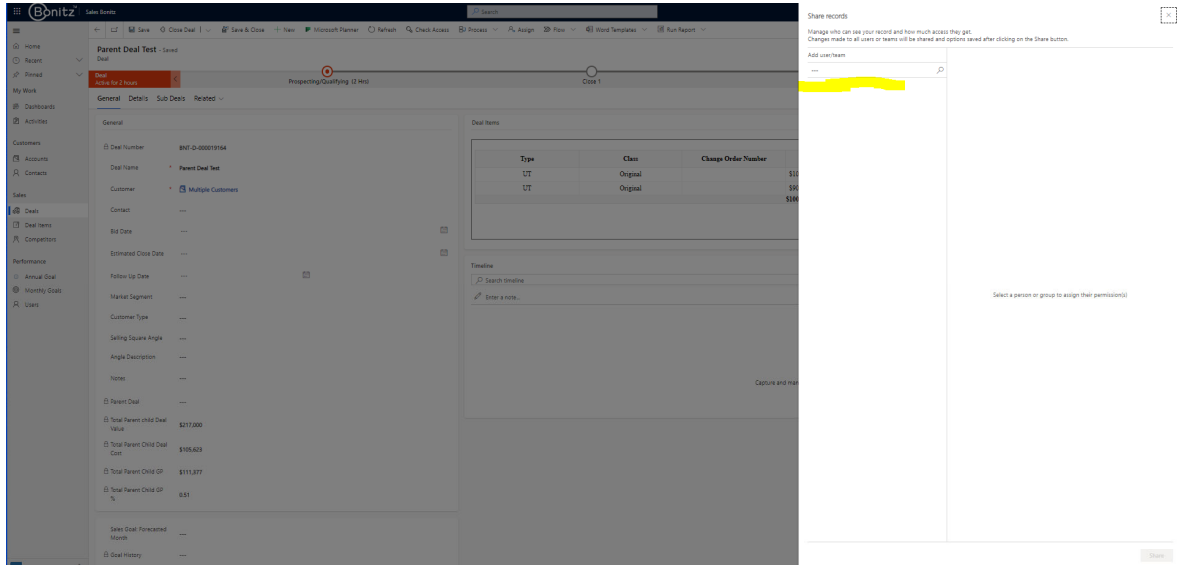
Respond to

Assign

Share

Share

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



Parent Deal Test - Saved

Deal: **Parent Deal Test** | Status: **Prospecting/Qualifying (2 Wks)** | Class: **Class 1**

General | Details | Sub Deals | Related

General

- Deal Number: B907-D-0000791564
- Deal Name: Parent Deal Test
- Customer: Multiple Customers
- Contact: ---
- Bid Date: ---
- Estimated Close Date: ---
- Follow Up Date: ---
- Market Segment: ---
- Customer Type: ---
- Selling Square Area: ---
- Angle Description: ---
- Notes: ---
- Parent Deal: ---
- Total Parent Child Deal Value: \$217,000
- Total Parent Child Deal Cost: \$106,609
- Total Parent Child GP: \$110,391
- Total Parent Child GP %: 50.9
- Order Deal Forecasted Month: ---
- Deal History: ---

Deal Items

Type	Class	Change Order Number	
UT	Original		\$0
UT	Original		\$0
UT	Original		\$0

Timeline

- ☐ Search timeline
- ☐ Enter a note...

Share records

Manage who can see your record and how much access they get.
Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team

Select a person or group to assign their permission(s)

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.

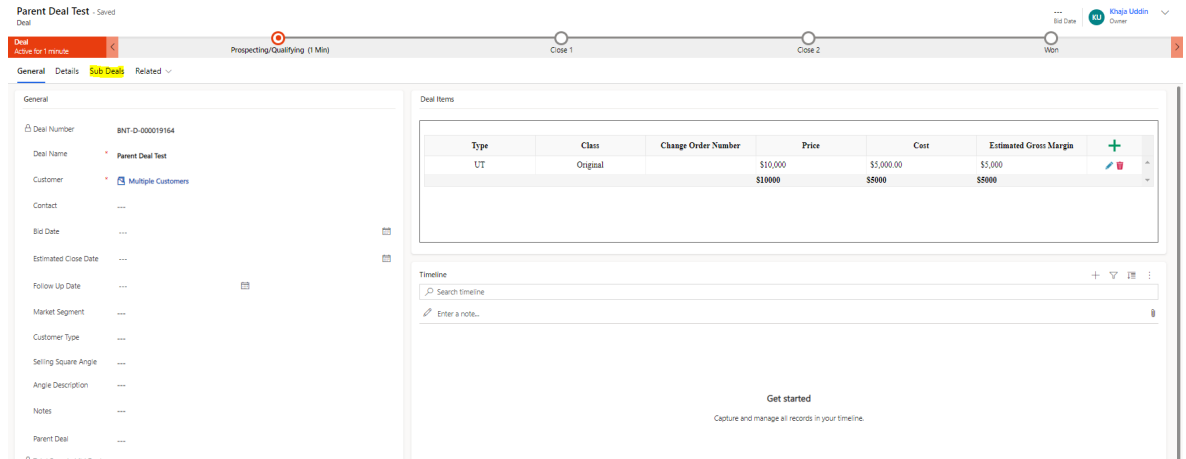
Parent Deal holds overall strategy, competitive info, GC, and project intel.

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.



Parent Deal Test - Saved
Deal

Deal Active for 1 minute | Prospecting/Qualifying (1 Min) | Close 1 | Close 2 | Won

General Details **Sub Deals** Related

General

Deal Number: BNT-D-000019164

Deal Name: Parent Deal Test

Customer: Multiple Customers

Contact: ---

Bid Date: ---

Estimated Close Date: ---

Follow Up Date: ---

Market Segment: ---

Customer Type: ---

Selling Square Angle: ---

Angle Description: ---

Notes: ---

Parent Deal: ---

Deal Items

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin
UT	Original		\$10,000	\$5,000.00	\$5,000
			\$10000	\$5000	\$5000

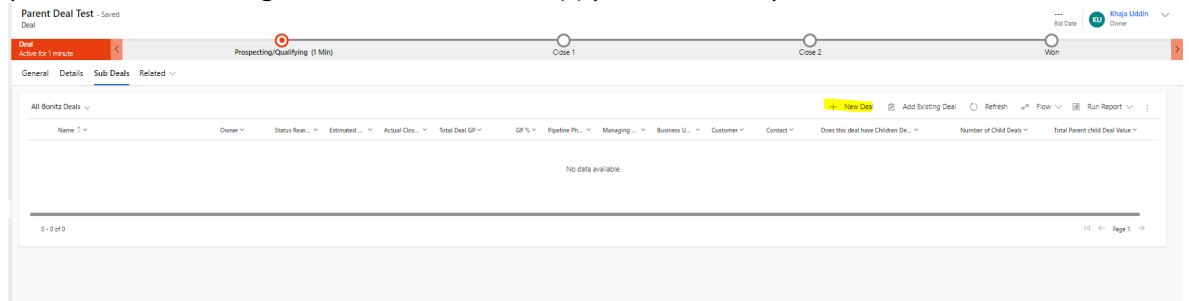
Timeline

Search timeline

Enter a note...

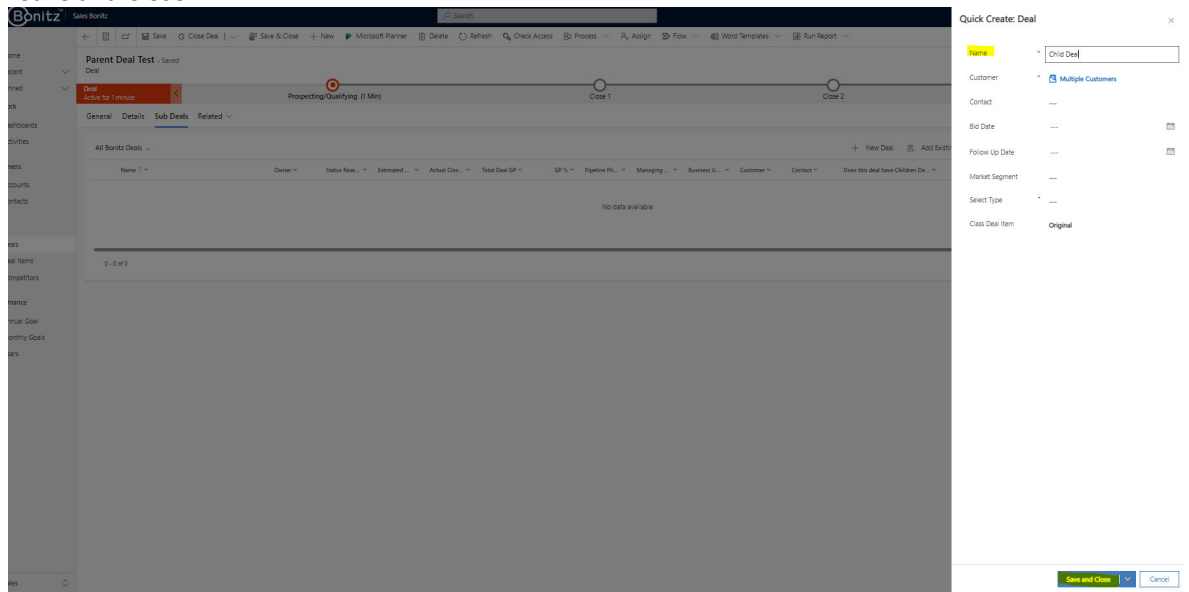
Get started
Capture and manage all records in your timeline.

- 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.

- Sales Summary**

Home | Recent | Pinned | My Work | Dashboards | Activities

Parent Deal Test - Saved

Deal
Child Test & Estimate
Prospecting/Qualifying (3 Min)

Close 1
Close 2

General | Details | Sub Deals | Related

All Built Deals

Name	Owner	Status Reason	Estimated Clos.	Actual Clos.	Total Deal \$F	\$F %	Pipeline Phase	Managing Par.	Business Unit	Customer	Contact	Does this deal have Children Deal(s)?	Number of Ch
Child Deal	Lynke Laddin	Active			\$10,000	0.0%	In Progressing...	mrg201796	Multiple Cus...		N/A	No	

1 / 1

Lookups Records

Search record

101 | Dashboard | Create X

Show more records

Details

 - 1 Bridgeport Ave
1/6/2019 1:31 PM
 - 100 Elm Center Suite 228
12/15/2021 10:42 AM
 - 100 Geneva Suite 107D
11/17/2021 9:42 PM
 - 100 W Ind - Interior Project
10/20/2021 10:01 AM
 - 1001 Tuckermans - Planning
11/4/2022 2:53 PM
 - 101 N. TRON JERIC SUITES
10/20/2021 9:51 AM
 - 102 BATEVILLE RD UNIT
12/17/2023 9:49 AM
 - 1030 W Richardson
11/20/2022 1:16 PM
 - 1084 Ong
10/28/2022 12:41 PM
 - 1157 KILPATRICK DR.
10/14/2022 12:57 PM
 - 1128 Naughten Phyll
1/6/2019 1:31 PM
 - 121 Elm Center Suite 110
10/19/2021 10:47 AM
 - 128 Hogan
10/1/2019 9:17 PM
 - 130 Commerce Suite B
11/10/2021 2:58 PM
 - 135 N Church Street
10/19/2020 9:28 AM
 - 1400 Dorell Springs-3rd Floor
11/20/2021 8:05 AM
 - 1421 Oak Street
12/15/2021 6:33 AM
 - 1415 Old Waverley-3rd floor
11/10/2021 10:47 AM

New Deal Advanced lookup

Add Cancel

- Parent Deal Test** - Saved

Deal

Deal value for 1 hour

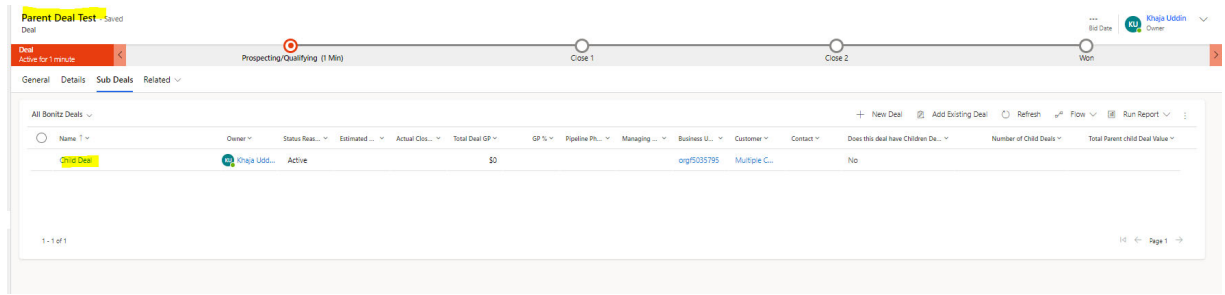
Prospect/Qualify (0 Hrs) | Close 1 | Close 2 | Won

General | Details | **Sub Deals** | Related

Name	Status	Estimated Close	Actual Close	Total Deal GP	GP %	Pipeline Phase	Managing Rep.	Business Unit	Customer	Contact	Does this deal have Children Dealt?	Number of Child Deals	Total Parent Child Deal Value
150 E Woodlands Industrial Co	Active	11/18/2020		\$11,377	0.07	1 Close 2	Richa Barbour	Ranigh	Dick Whaley	Dick Whaley	Yes	1	\$17,000
Child Deal	Active			\$10,000	0.10	0 Prospecting		org5036785	Multiple Cus...		No		

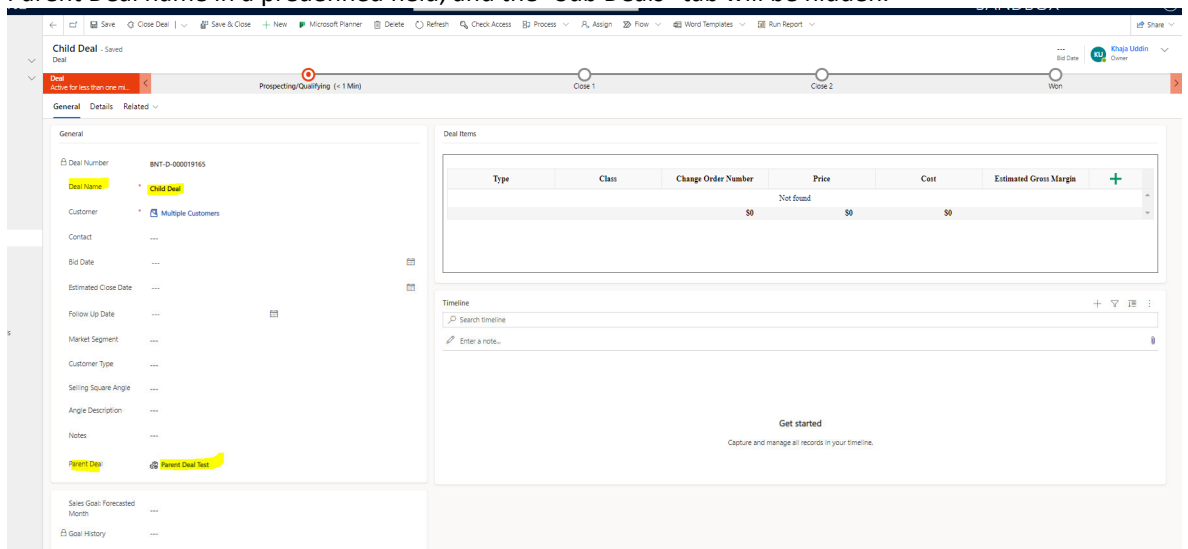
1 - 2 of 2

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



The screenshot shows the 'Parent Deal Test' interface. At the top, there's a timeline with stages: 'Prospecting/Qualifying (1 Min)', 'Close 1', 'Close 2', and 'Won'. Below the timeline, there's a table of child deals. The table has columns: Name, Owner, Status, Estimated, Actual Close, Total Deal GP, GP %, Pipeline PH, Managing, Business U, Customer, Contact, Does this deal have Children De..., Number of Child Deals, and Total Parent child Deal Value. One child deal is listed with the name 'Child Deal' and owner 'Khaja Uddin'.

- 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.



The screenshot shows the 'Child Deal Test' interface. It features a timeline at the top with stages: 'Prospecting/Qualifying (< 1 Min)', 'Close 1', 'Close 2', and 'Won'. Below the timeline, there's a 'General' tab with fields for Deal Number, Deal Name (set to 'Child Deal'), Customer (set to 'Multiple Customers'), Contact, Bid Date, Estimated Close Date, Follow Up Date, Market Segment, Customer Type, Selling Square Angle, Angle Description, Notes, Sales Goal Forecasted Month, and Goal History. To the right, there's a 'Deal Items' table with columns: Type, Class, Change Order Number, Price, Cost, and Estimated Gross Margin. Below this, there's a 'Timeline' section with a search bar and a note field.

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

Child Deal - Saved

Deal: Active for less than one m...

Prospecting/Qualifying (< 1 Min)

Close 1 Close 2 Won

General Details Related

General

Deal Number: BNT-D-000019165

Deal Name: Child Deal

Customer: Multiple Customers

Contact: ...

Bid Date: ...

Estimated Close Date: ...

Follow Up Date: ...

Market Segment: ...

Customer Type: ...

Selling Square Angle: ...

Angle Description: ...

Notes: ...

Parent Deal: Parent Deal Test

Sales Goal Forecasted Month: ...

Goal History: ...

Deal Items

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin	
UT	Original		\$100,000	\$90,000.00	\$10,000	+
UT	Original		\$100000	\$99999	\$10000	

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

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

Parent Deal Test - Saved

Deal: Active for 1 minutes

Prospecting/Qualifying (6 Min)

Close 1 Close 2 Won

General Details Sub Deals Related

General

Deal Number: BNT-D-000019164

Deal Name: Parent Deal Test

Customer: Multiple Customers

Contact: ...

Bid Date: ...

Estimated Close Date: ...

Follow Up Date: ...

Market Segment: ...

Customer Type: ...

Selling Square Angle: ...

Angle Description: ...

Notes: ...

Parent Deal: ...

Sub Deals

- Deal Parent Child Deal: \$115,000
- Deal Parent Child Deal: \$10,000
- Deal Parent Child Deal: \$10,000
- Deal Parent Child Deal: \$10,000

Sales Goal Forecasted Month: ...

Goal History: ...

Deal Items

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin	
UT	Original		\$10,000	\$5,000.00	\$5,000	+
UT	Original		\$10000	\$5000	\$5000	

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

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

Parent Deal Test - Saved

Deal: Active for 1 minutes

Prospecting/Qualifying (6 Min)

Close 1 Close 2 Won

General Details Sub Deals Related

General

Deal Number: BNT-D-000019164

Deal Name: Parent Deal Test

Customer: Multiple Customers

Contact: ...

Bid Date: ...

Estimated Close Date: ...

Follow Up Date: ...

Market Segment: ...

Customer Type: ...

Selling Square Angle: ...

Angle Description: ...

Notes: ...

Parent Deal: ...

Sub Deals

- Deal Parent Child Deal: \$115,000
- Deal Parent Child Deal: \$10,000
- Deal Parent Child Deal: \$10,000
- Deal Parent Child Deal: \$10,000

Sales Goal Forecasted Month: ...

Goal History: ...

Deal Items

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin	
UT	Original		\$10,000	\$5,000.00	\$5,000	+
UT	Original		\$10000	\$5000	\$5000	

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

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.

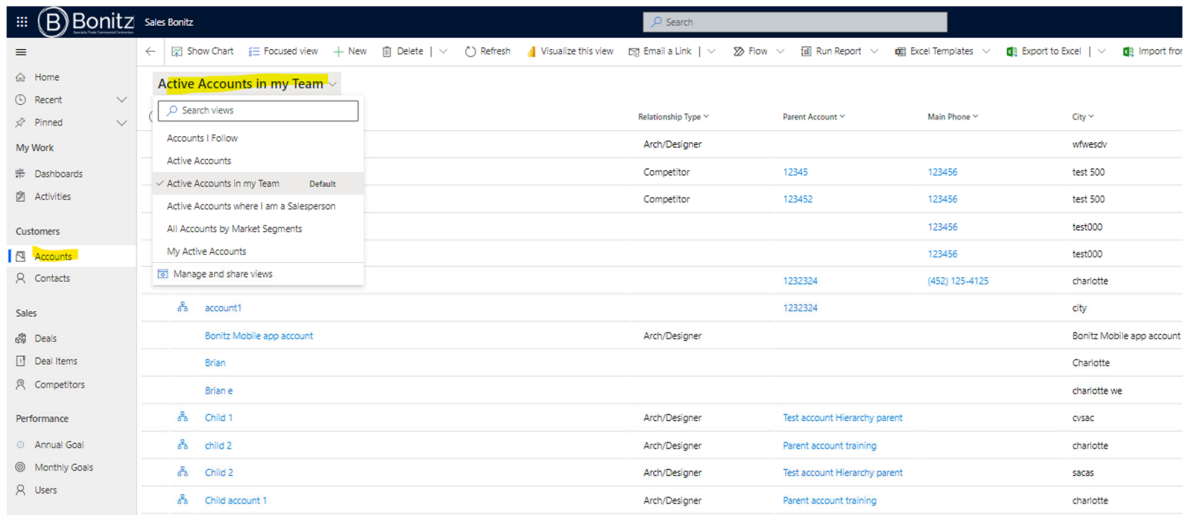
Project Consultant Views now display the following columns: Deal Name, BDM, Co-Op Selling, Total Bid Gross Profit, Pipeline Phase, Customer Bid Date, Customer Follow-Up Date, and Contact. These fields help Project Consultants track opportunity details, estimated profitability, pipeline status, customer 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:

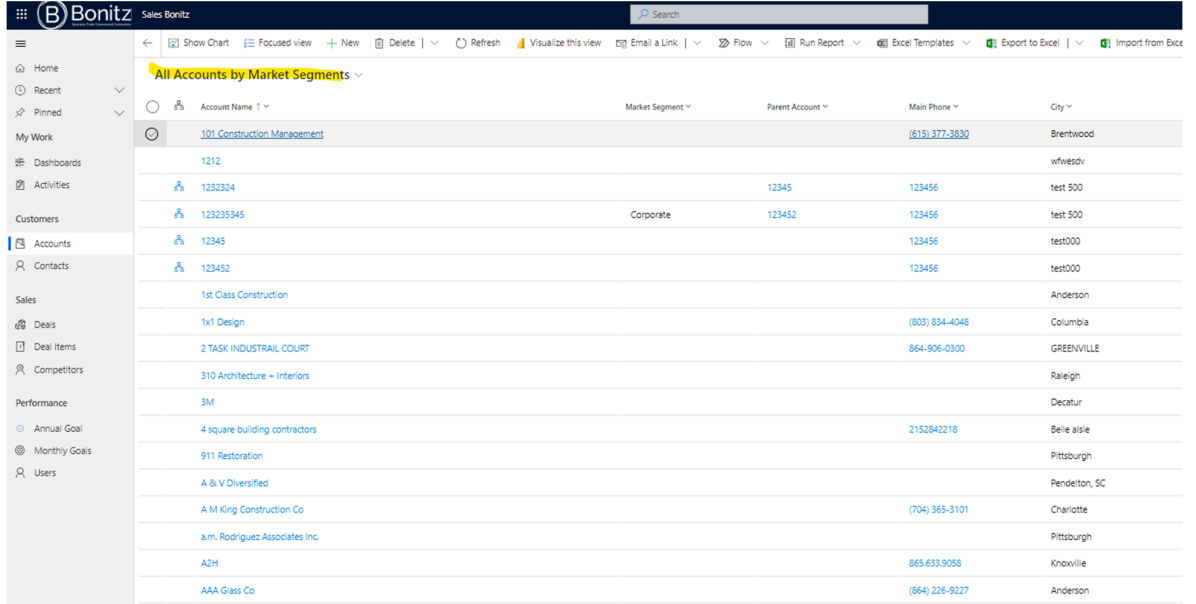
- **Access the View Selector:** Select the desired entity (such as Accounts or Contacts or Deals) from the left-hand navigation menu. At the top of the screen, click on the drop-down menu that shows the current view. This is the view selector.



The screenshot shows the Dynamics 365 CRM interface. On the left, the navigation pane is visible with 'Accounts' selected. The main area displays a table of accounts. A dropdown menu is open, showing the current view 'Active Accounts in my Team' and several other view options: 'Accounts I Follow', 'Active Accounts', 'Active Accounts in my Team' (which is highlighted and marked as 'Default'), 'Active Accounts where I am a Salesperson', 'All Accounts by Market Segments', and 'My Active Accounts'. Below the dropdown, there is a 'Manage and share views' link. The table below the dropdown lists various accounts with columns for Relationship Type, Parent Account, Main Phone, and City.

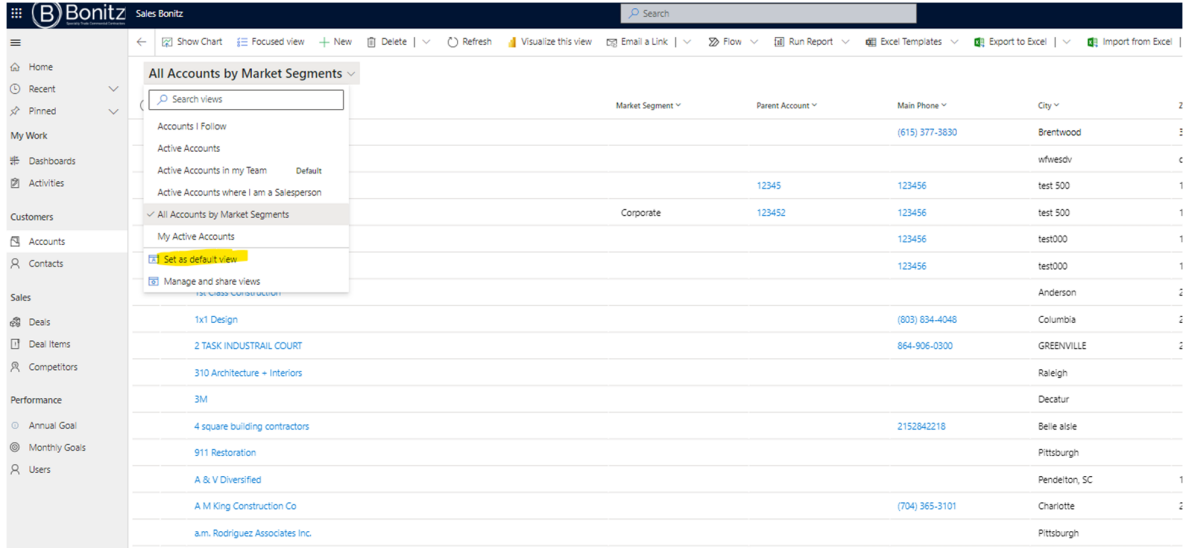
Relationship Type	Parent Account	Main Phone	City
Arch/Designer		123456	wfvesdv
Competitor	12345	123456	test 500
Competitor	123452	123456	test 500
		123456	test000
		123456	test000
	1232324	(452) 125-4125	charlotte
	1232324		city
Arch/Designer			Bonitz Mobile app account
			Charlotte
			charlotte we
Arch/Designer	Test account Hierarchy parent		cvsac
Arch/Designer	Parent account training		charlotte
Arch/Designer	Test account Hierarchy parent		sacac
Arch/Designer	Parent account training		charlotte

- **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.



Account Name	Market Segment	Parent Account	Main Phone	City
101 Construction Management			(615) 377-3830	Brentwood
1212				wfvesdv
1232324		12345	123456	test 500
123235345	Corporate	123452	123456	test 500
12345			123456	test000
123452			123456	test000
1st Class Construction				Anderson
1x1 Design			(803) 834-4048	Columbia
2 TASK INDUSTRIAL COURT			864-906-0300	GREENVILLE
310 Architecture - Interiors				Raleigh
3M				Decatur
4 square building contractors			2152842218	Belie alsie
911 Restoration				Pittsburgh
A & V Diversified				Pendleton, SC
A M King Construction Co			(704) 365-3101	Charlotte
a.m. Rodriguez Associates Inc.				Pittsburgh
A2H			865.633.9058	Knorrville
AAA Glass Co			(864) 226-9227	Anderson

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

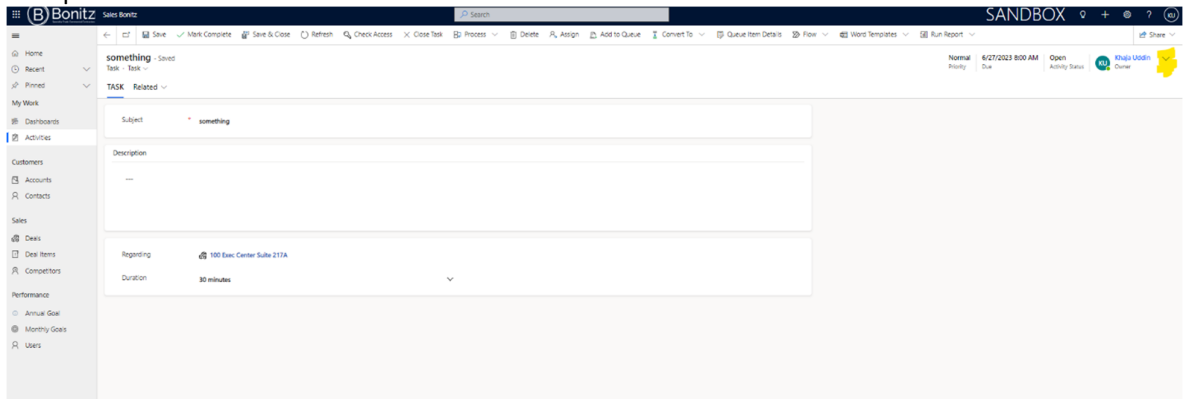


Account Name	Market Segment	Parent Account	Main Phone	City
101 Construction Management			(615) 377-3830	Brentwood
1212				wfvesdv
1232324		12345	123456	test 500
123235345	Corporate	123452	123456	test 500
12345			123456	test000
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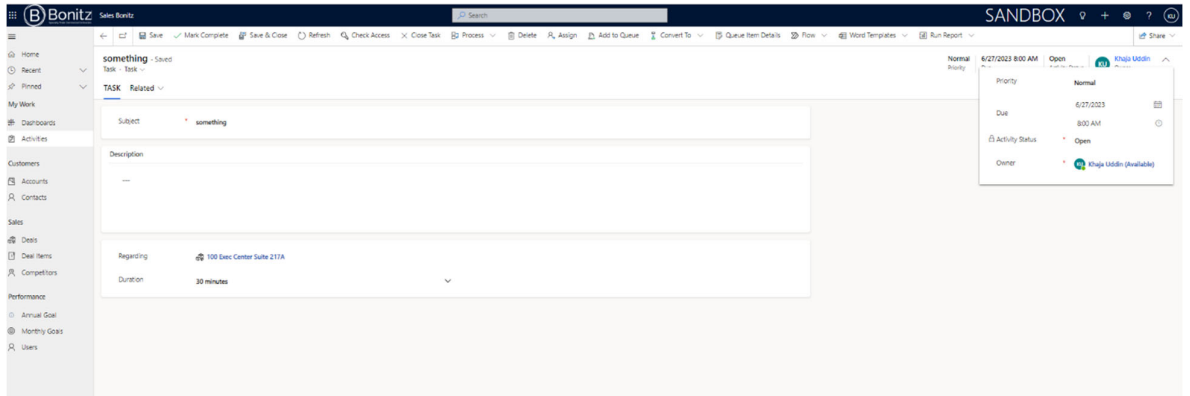
- **Confirm the Selection:** Dynamics 365/CRM will remember the last view you selected for an entity the next time you navigate to that entity. Confirm your new default view by navigating away from the entity and then returning to it. You should see the view you selected as the default view.

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.

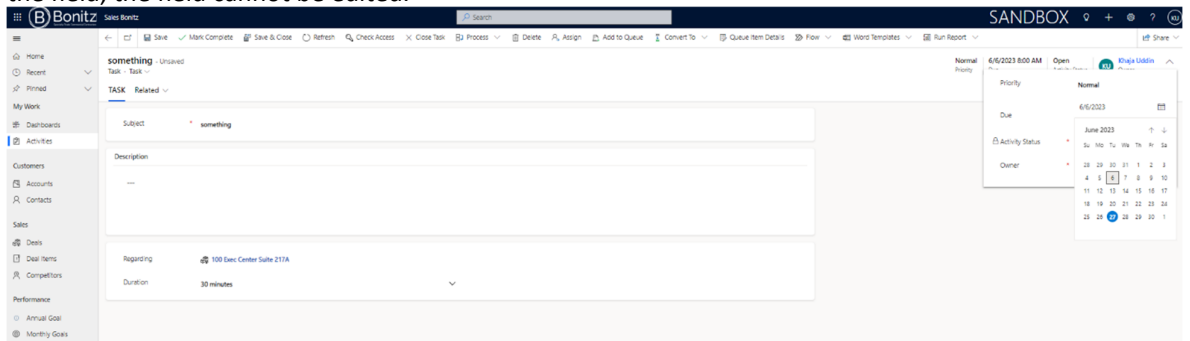


The screenshot shows the Bonitz task form interface. The header section is expanded, displaying fields for Subject, Description, Regarding, and Duration. The Subject field contains the text "something". The Description field is empty. The Regarding field shows "100 East Center Suite 217A". The Duration field shows "30 minutes". The form is titled "something - Saved" and "Task - Task". The top right corner shows the user "Khaja Uddin" and the date "6/27/2023 8:00 AM".



This screenshot is similar to the previous one, but with a dropdown menu open on the right side of the header. The dropdown menu shows the following options: Priority (Normal), Due (6/27/2023), Activity Status (Open), and Owner (Khaja Uddin (available)). The form fields and title remain the same as in the previous screenshot.

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.



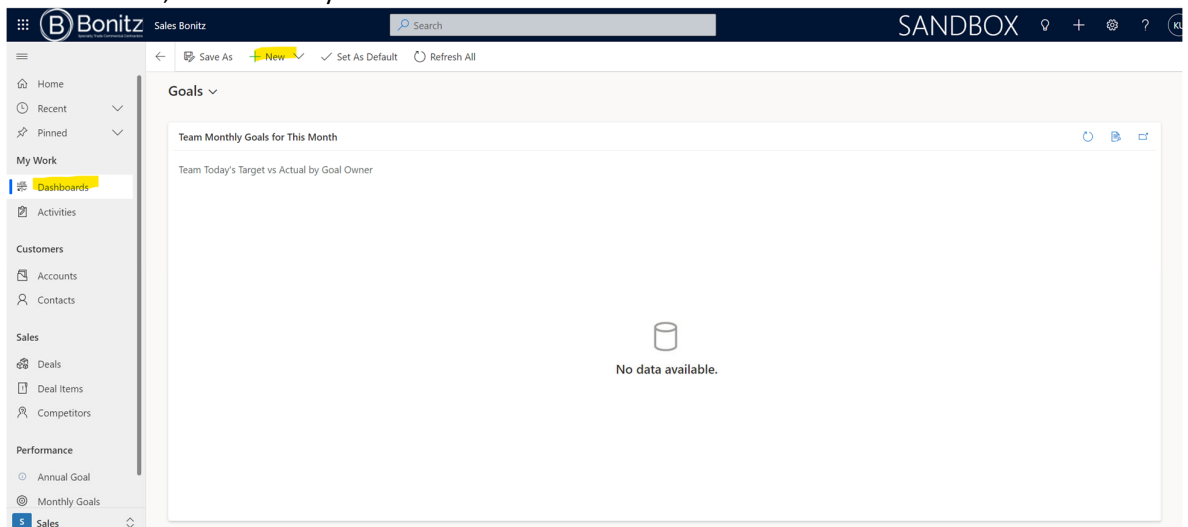
This screenshot shows the Bonitz task form with the dropdown menu open, displaying a calendar view for June 2023. The calendar shows the dates from Sunday to Saturday, with the 6th of June highlighted. The form fields and title remain the same as in the previous screenshots.

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.

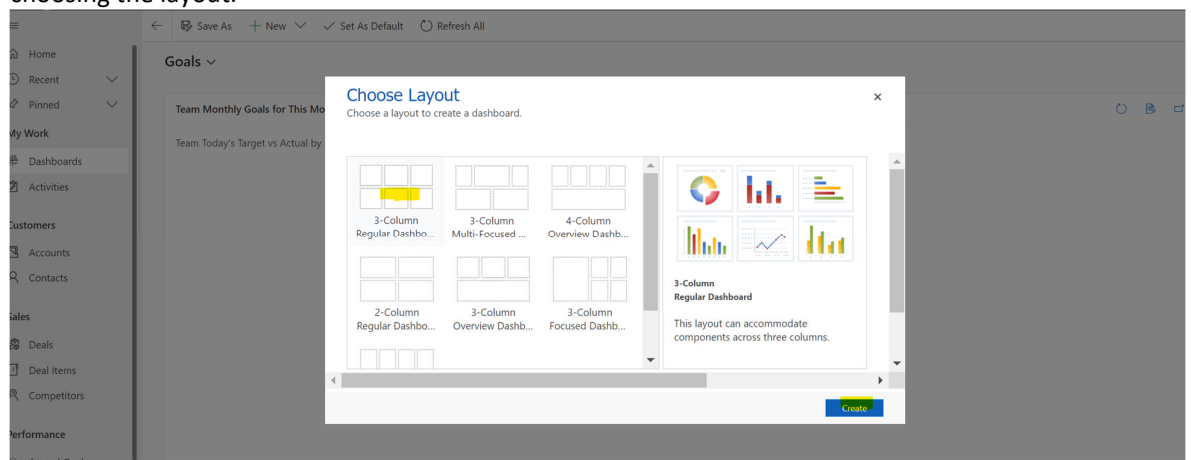
Creating a Personal Dashboard

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.

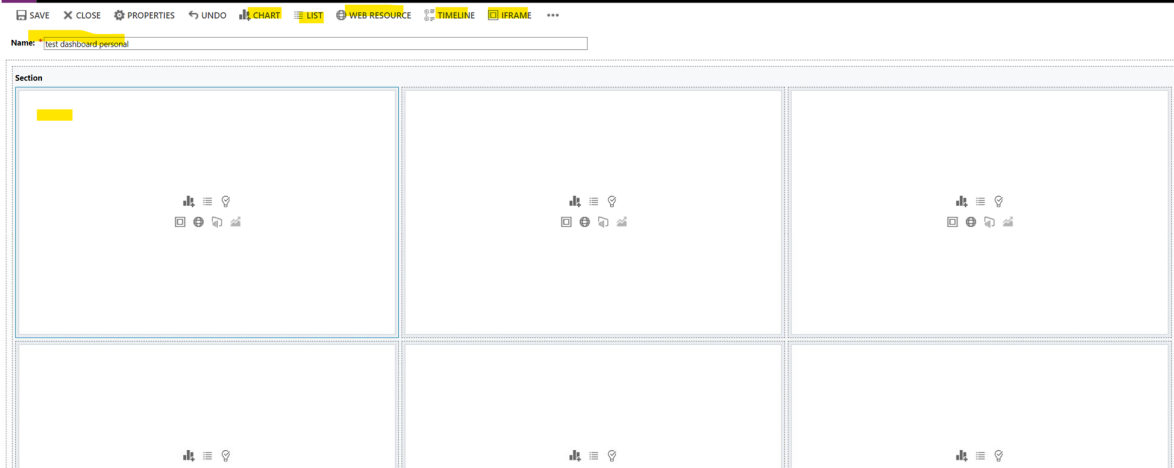


3. **Choose a Layout:** Choose a layout for the dashboard. The layout determines how the components (charts, lists, etc.) will be arranged on the dashboard. Click Create after choosing the layout.



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:

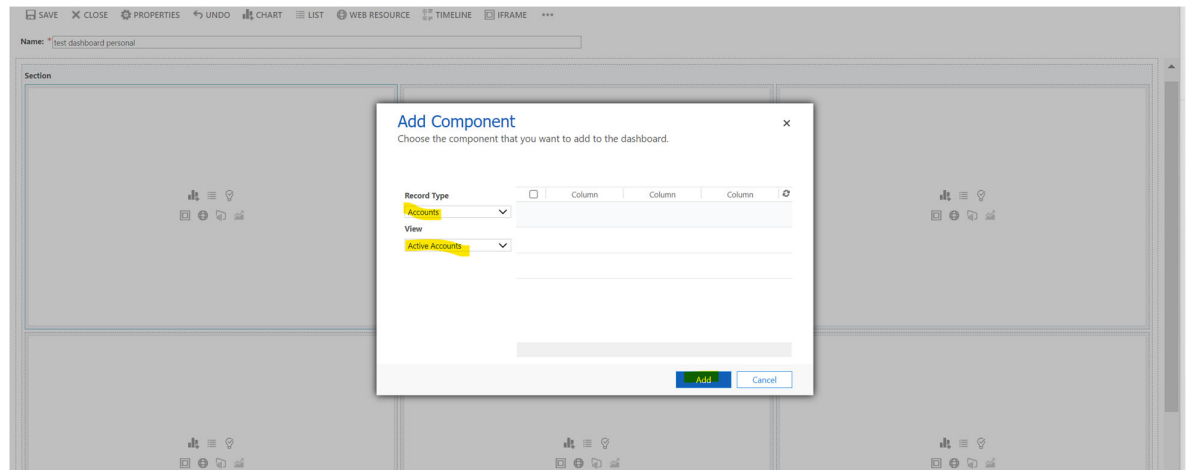
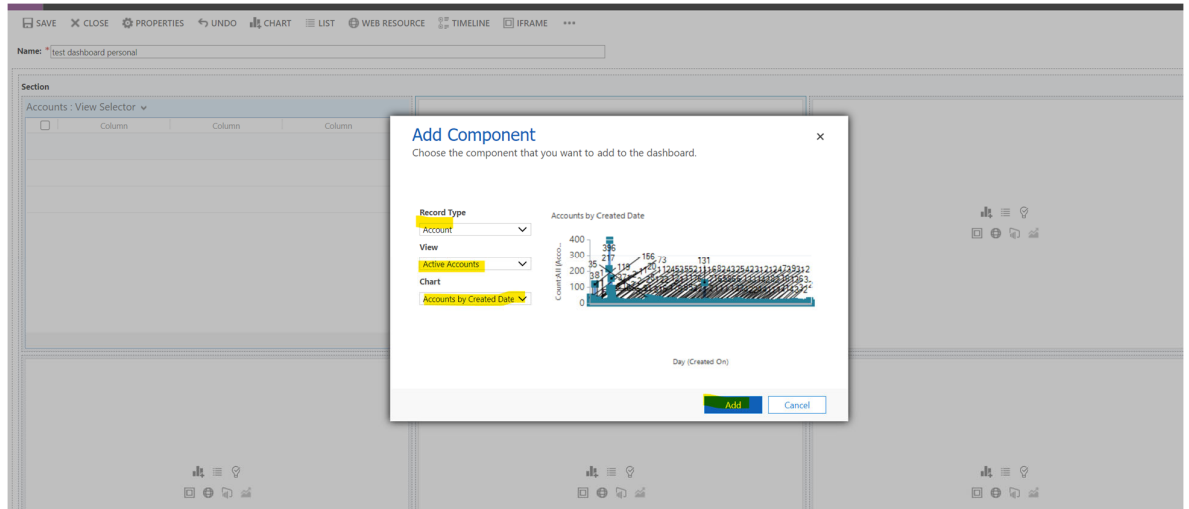
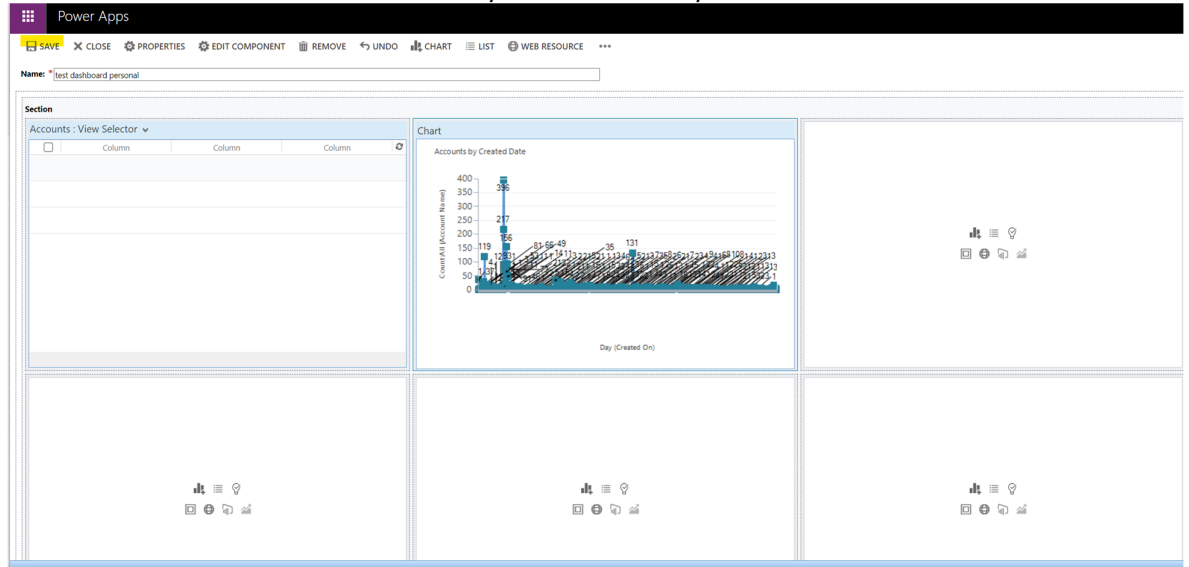


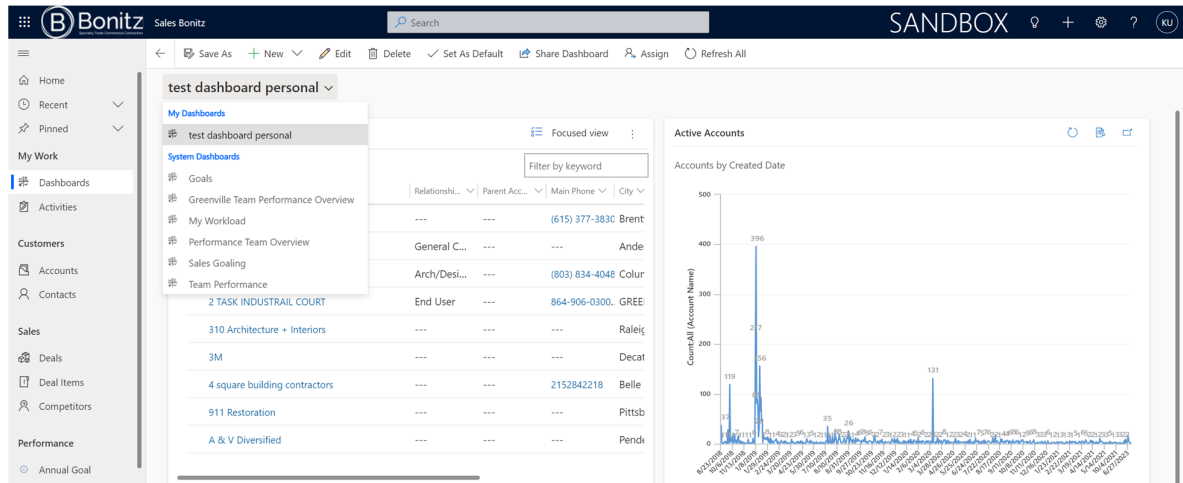
Chart:



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.