



# **User Training Manual**

## **CRM Optimization Project**

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<b>Date</b>	<b>06-05-23</b>
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**Revision Sheet**

<b>Date</b>	<b>Author</b>	<b>Version</b>	<b>Change reference</b>
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

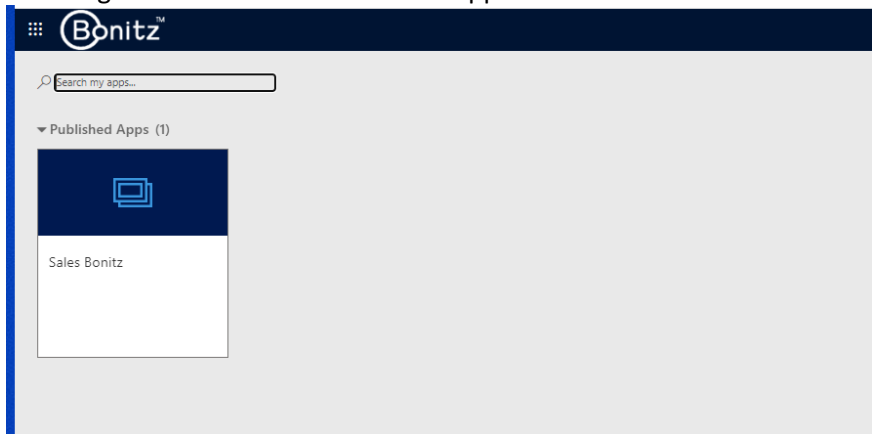
## Introduction

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.

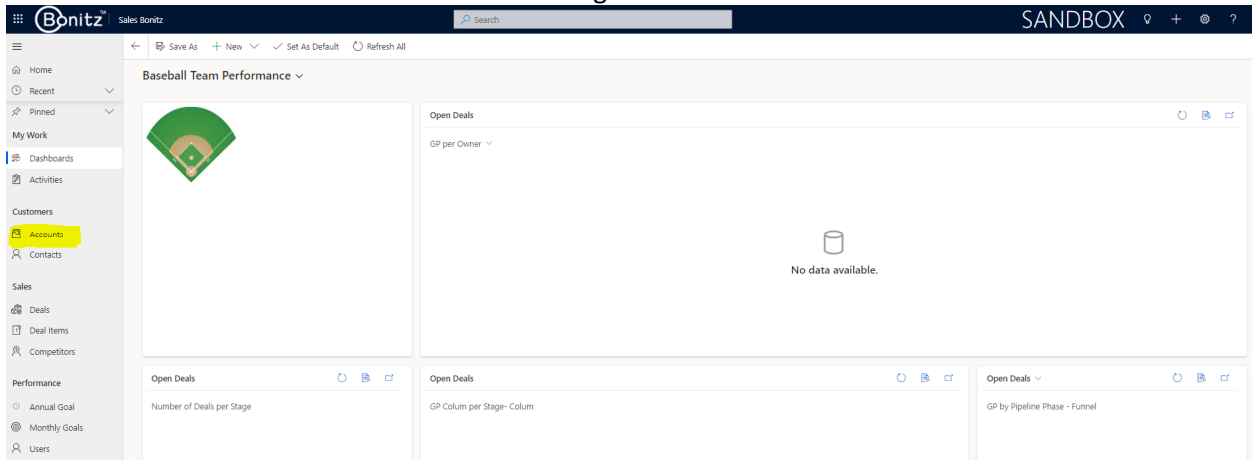
## Account

### Creating a New Account

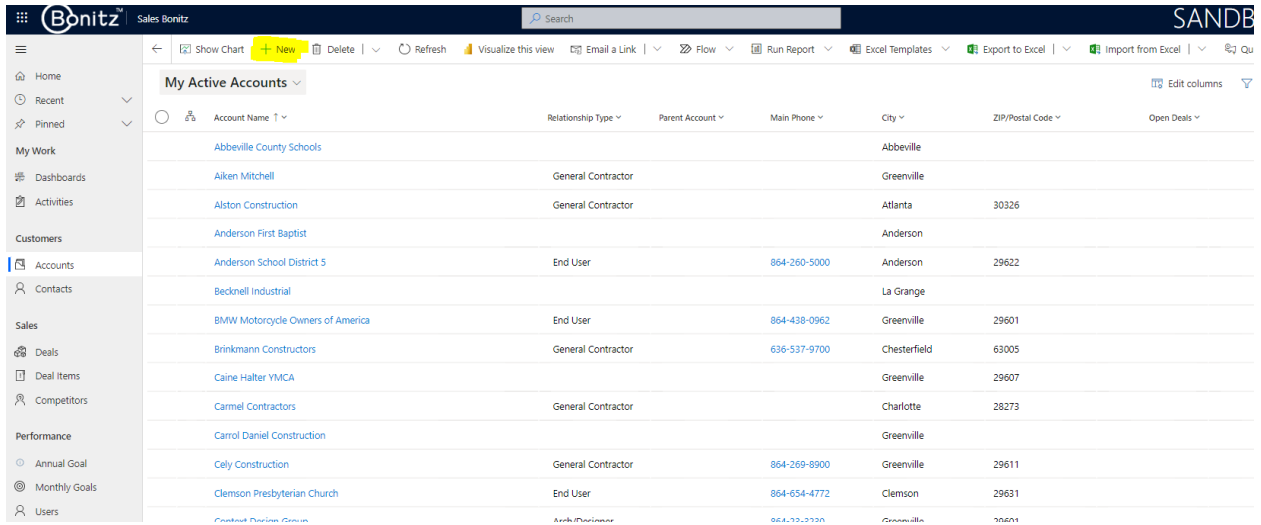
1. Navigate to the Accounts entity by clicking on the app launcher icon in the top left corner and selecting **Sales Bonitz** from the list of apps.



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



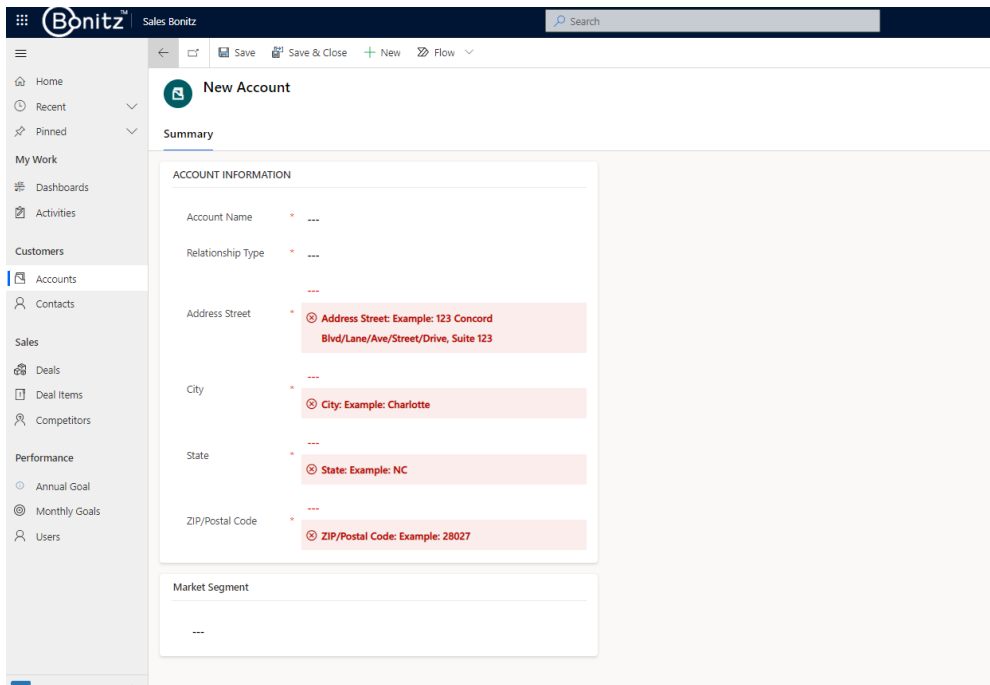
3. Click on the New button in the command bar at the top of the screen to open a new account form.



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		864-260-5000	Anderson	29622	
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	
Contract Design Group	Arch/Designer		864-75-2320	Greenville	29601	

4. 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.



**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

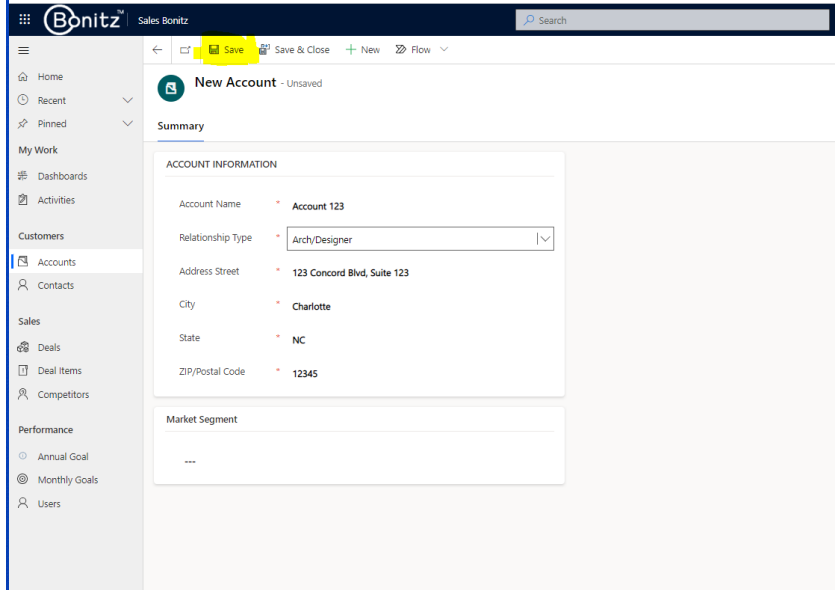
State \* ---  
 ⓧ State: Example: NC

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

Market Segment  
 ---

5. Optionally, fill in Market segment field.

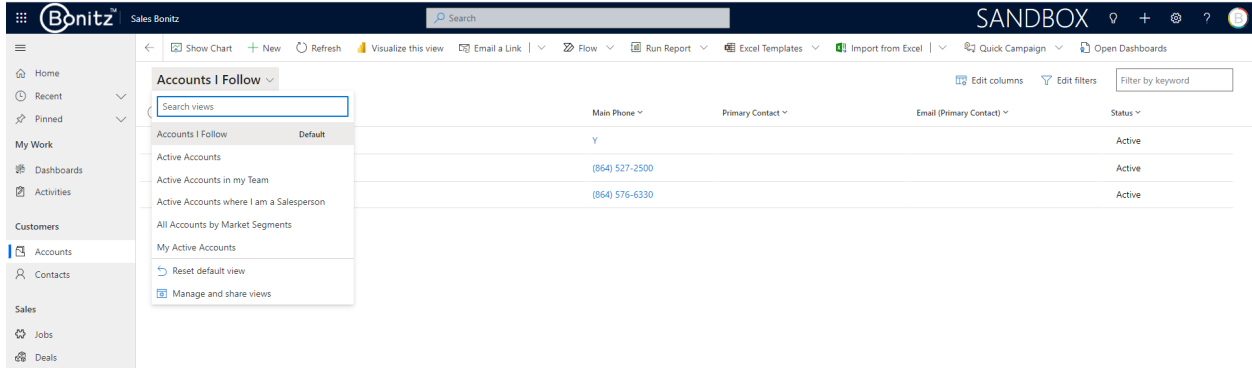
6. Save the account by clicking on the Save button in the command bar.



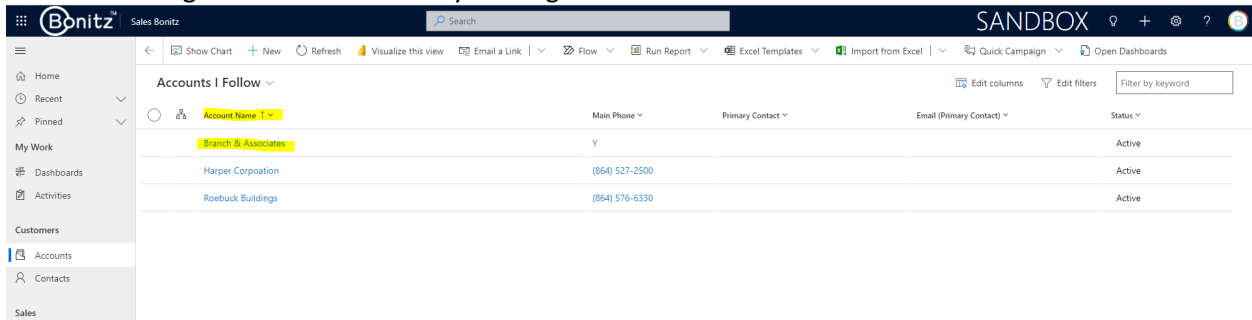
## Managing Existing Accounts

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

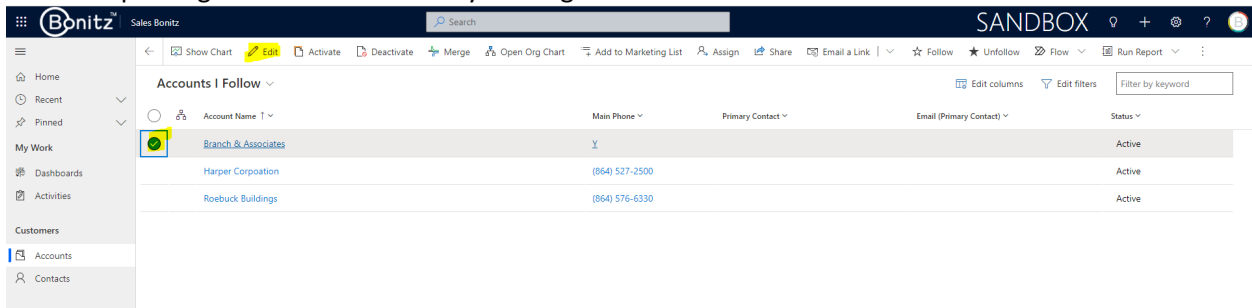
- Viewing the Account in different views based on different filter criterias such as Active Accounts, Active Accounts in my team, Accounts I follow, My active Accounts etc.



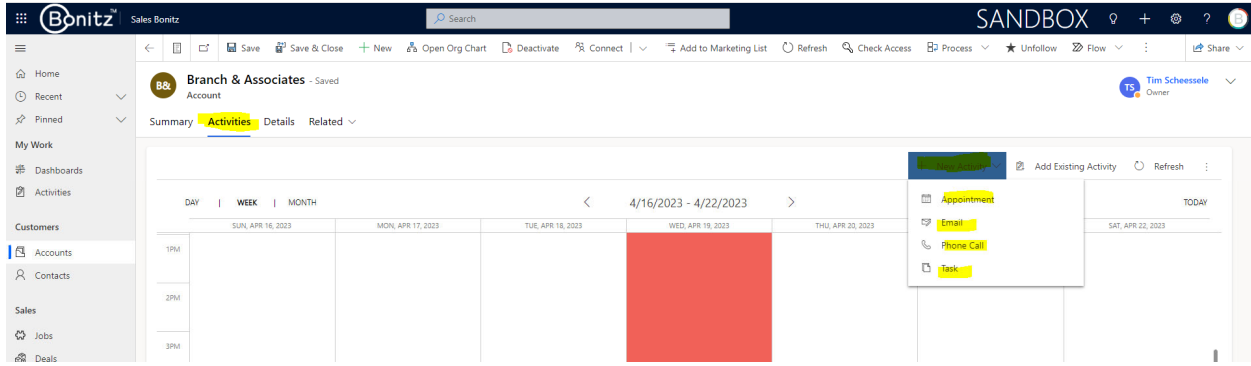
- Viewing the account details by clicking on the account name in the account list view.



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

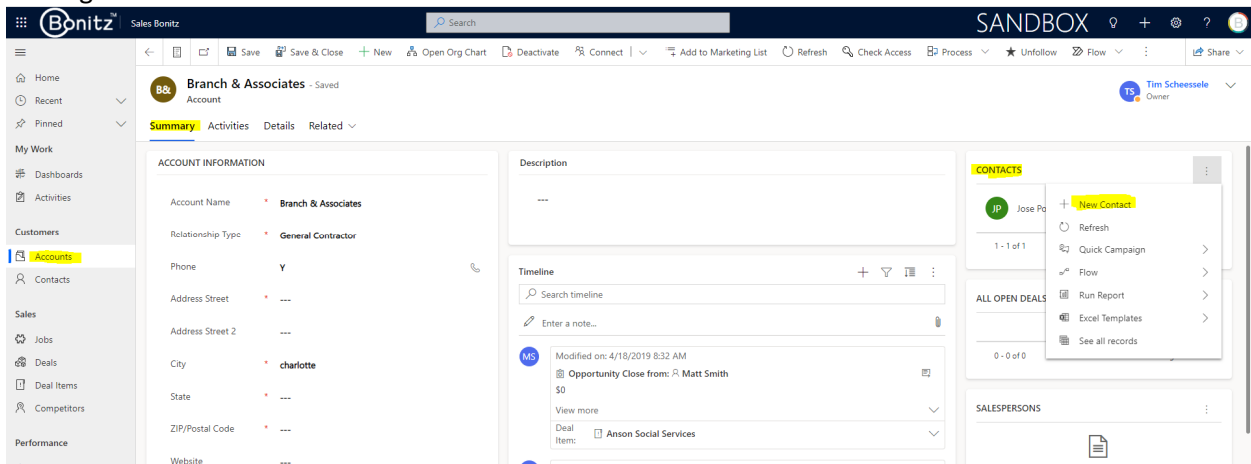


- Adding activities to the account such as tasks, appointments, and phone calls by clicking on the Activities tab and clicking on New Activity.



The screenshot shows the Bonitz CRM interface for the account 'Branch & Associates'. The top navigation bar includes 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Jobs', and 'Deals'. The 'Accounts' tab is selected. The main view is a calendar for the week of 4/16/2023 to 4/22/2023. A red block is visible on Wednesday, 4/19/2023. A dropdown menu is open over the calendar, showing options: Appointment, Email, Phone Call, and Task. The user 'Tim Scheessele' is logged in as the owner.

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



The screenshot shows the Bonitz CRM interface for the account 'Branch & Associates'. The top navigation bar is the same as in the previous screenshot. The 'Contacts' tab is selected. The main view is divided into three sections: 'ACCOUNT INFORMATION', 'Description', and 'CONTACTS'. The 'ACCOUNT INFORMATION' section shows details for 'Branch & Associates', including 'Relationship Type: General Contractor', 'Phone: Y', 'Address Street', 'Address Street 2', 'City: charlotte', 'State', 'ZIP/Postal Code', and 'Website'. The 'Description' section is empty. The 'CONTACTS' section shows a list of contacts, with a '+ New Contact' button highlighted. A dropdown menu is open over the 'New Contact' button, showing options: Refresh, Quick Campaign, Flow, Run Report, Excel Templates, and See all records. The user 'Tim Scheessele' is logged in as the owner.



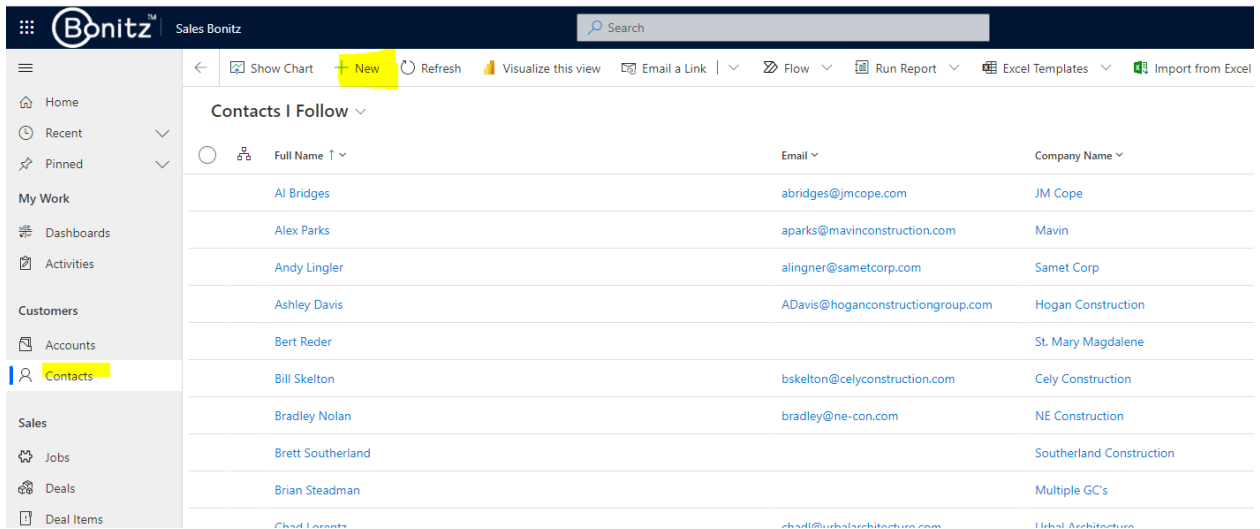
## Contact

### Creating a New Contact

- Navigate to the Contacts by clicking on the app launcher icon in the top left corner and selecting Sales Bonitz from the list of apps.

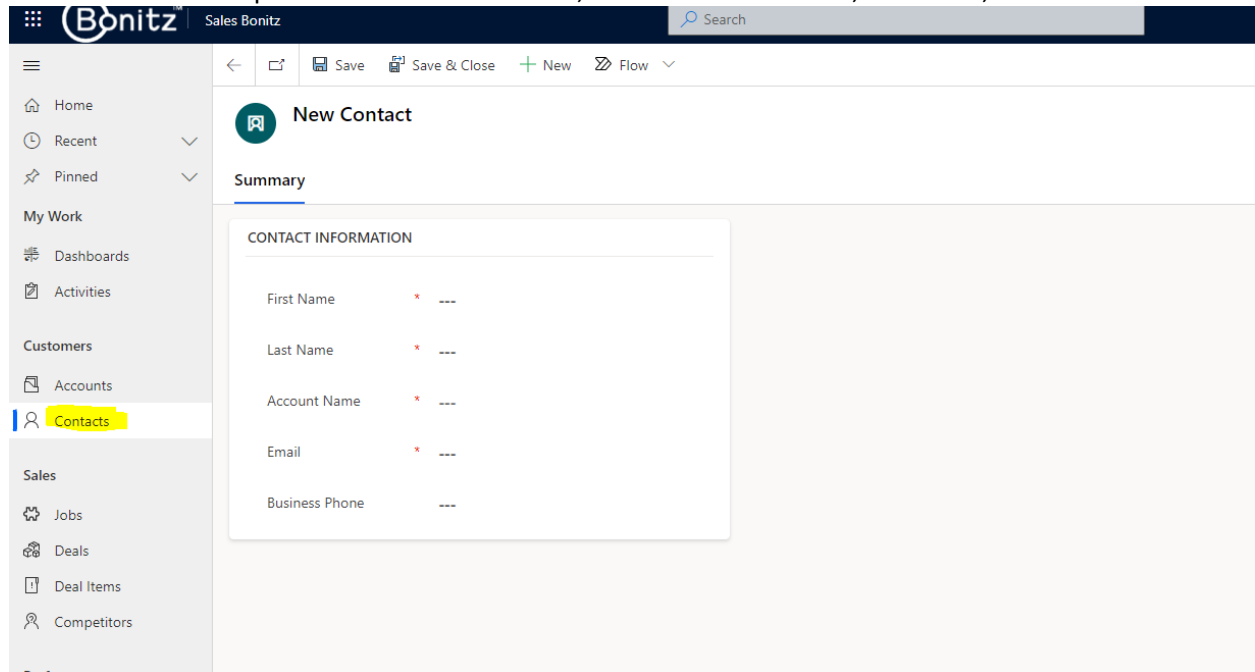


- Click on Contacts from the left-hand navigation menu.



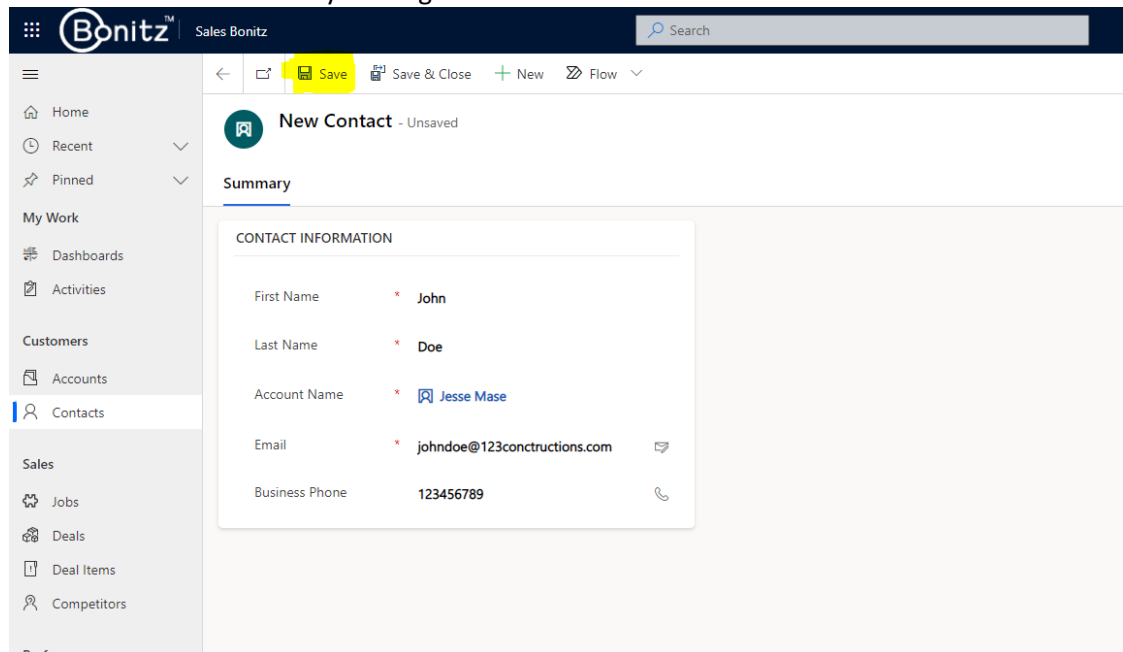
- Click on the New button in the command bar at the top of the screen to open a new contact form.

- 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.

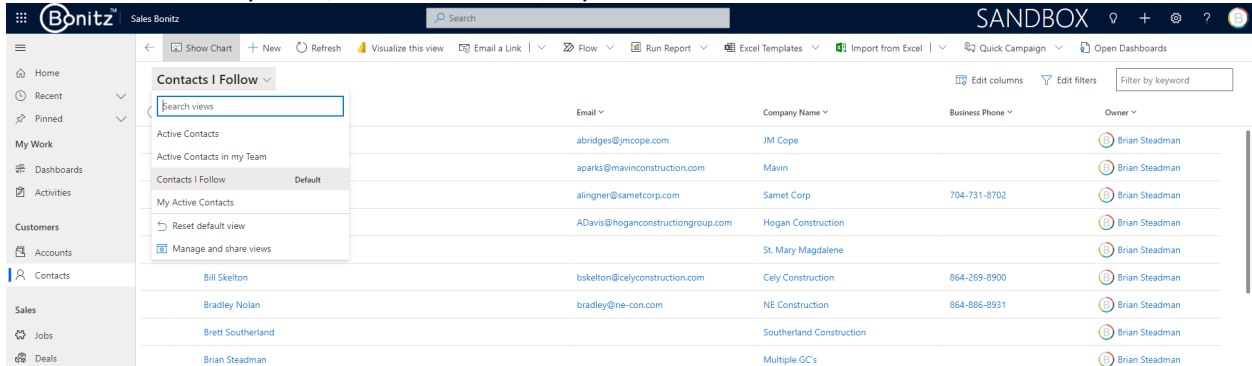
- Save the contact by clicking on the Save button in the command bar.



## Managing existing Contacts

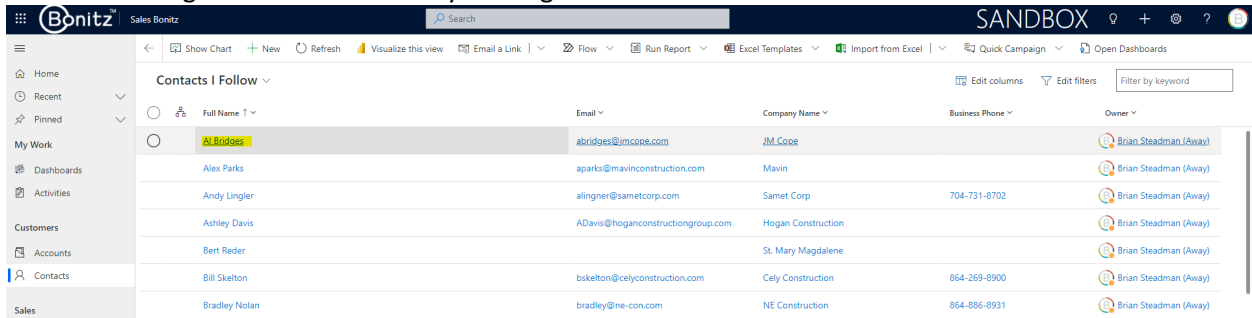
Once a contact is created, users can manage it by:

- 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.



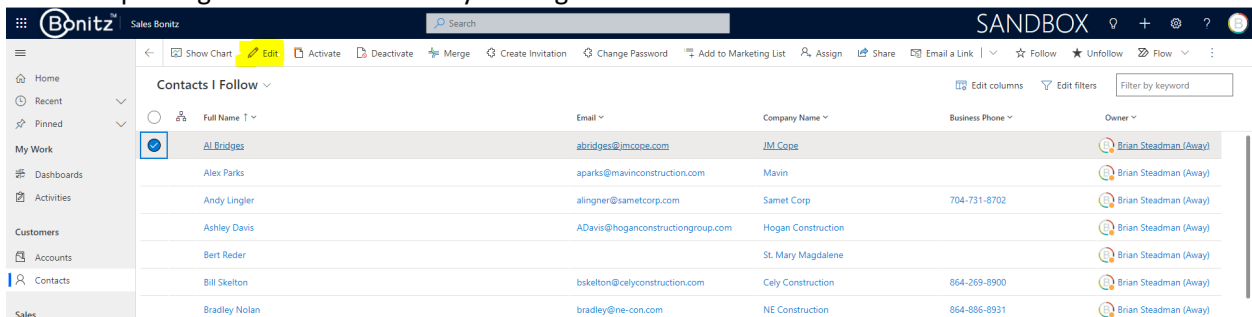
Full Name	Email	Company Name	Business Phone	Owner
Bill Skelton	bskelton@celyconstruction.com	Cely Construction	864-269-8900	Brian Steadman
Bradley Nolan	bradley@ne-con.com	NE Construction	864-886-8931	Brian Steadman
Brett Southerland		Southerland Construction		Brian Steadman
Brian Steadman		Multiple GC's		Brian Steadman

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



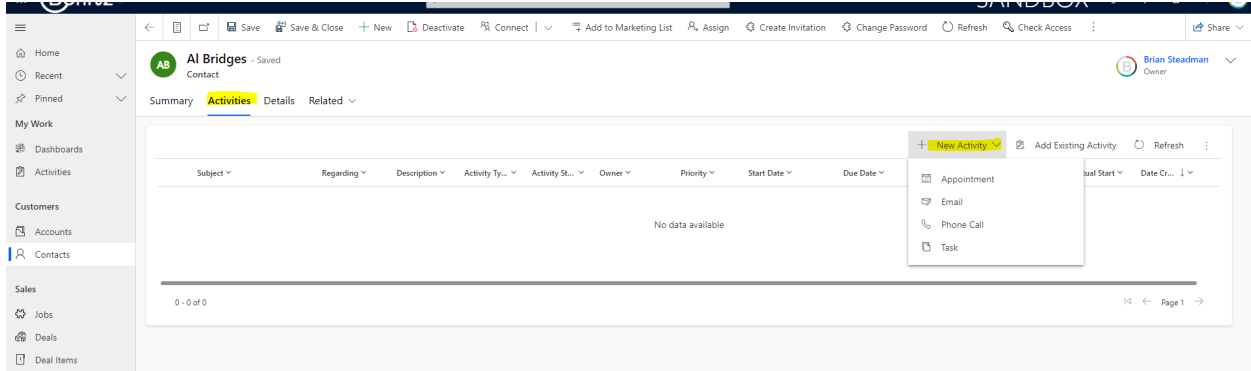
Full Name	Email	Company Name	Business Phone	Owner
Alex Parks	aparks@mavinconstruction.com	Mavin		Brian Steadman (Away)
Andy Lingler	alingner@sametcorp.com	Samet Corp	704-731-8702	Brian Steadman (Away)
Ashley Davis	ADavis@hoganconstructiongroup.com	Hogan Construction		Brian Steadman (Away)
Bert Reder		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)

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

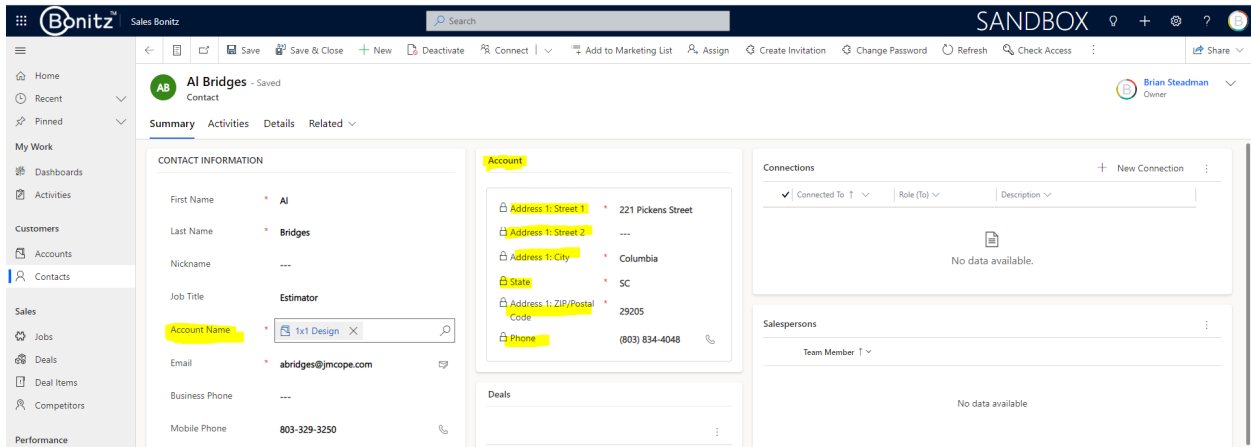


Full Name	Email	Company Name	Business Phone	Owner
Alex Parks	aparks@mavinconstruction.com	Mavin		Brian Steadman (Away)
Andy Lingler	alingner@sametcorp.com	Samet Corp	704-731-8702	Brian Steadman (Away)
Ashley Davis	ADavis@hoganconstructiongroup.com	Hogan Construction		Brian Steadman (Away)
Bert Reder		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.



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



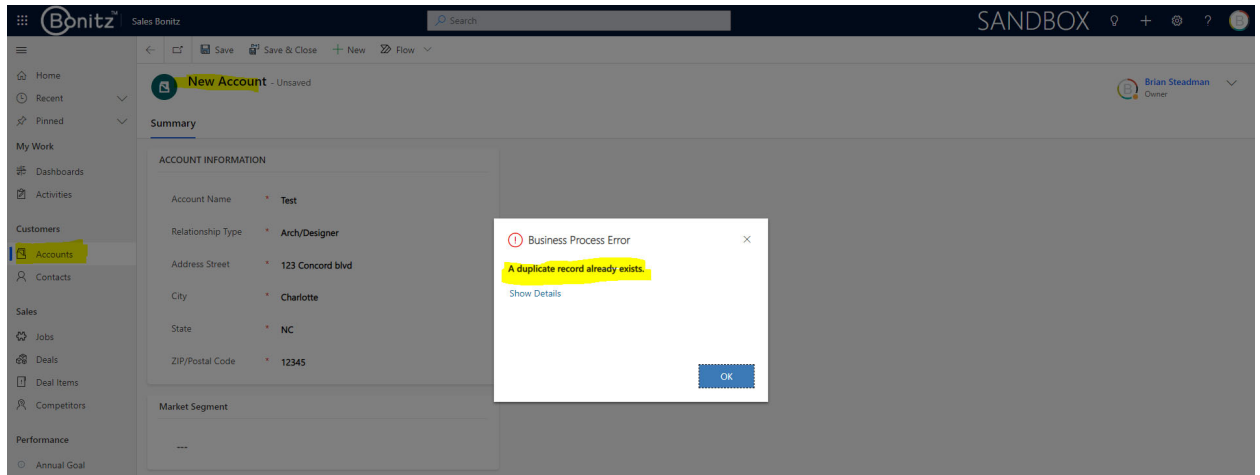
## Duplicates Detection in CRM

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:

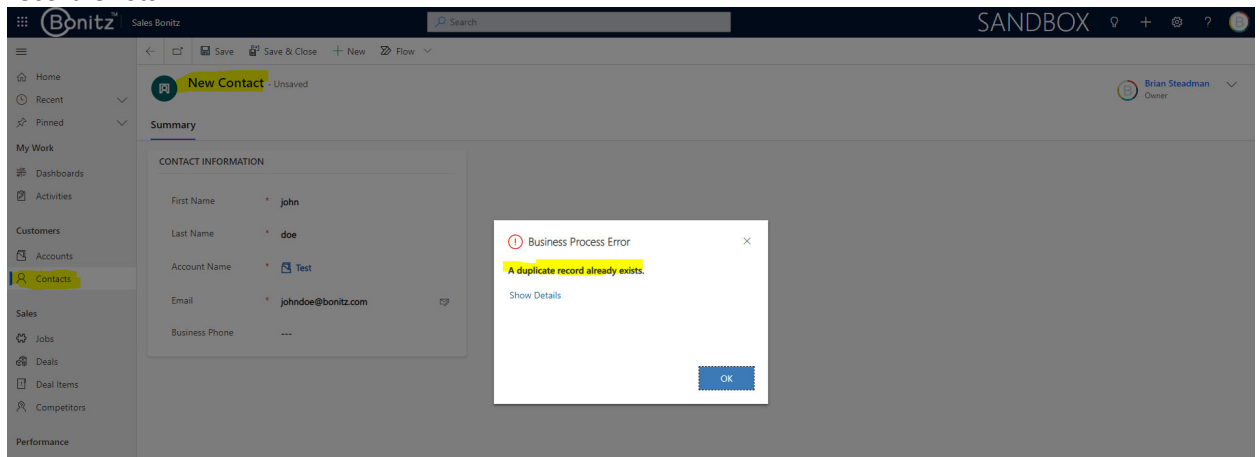
1. Navigate to the Accounts tab in the navigation menu.
2. Click on the New button to create a new account.
3. Fill out the required fields and ensure that the address fields are unique.
4. Click on the Save button.
5. If the plugin detects a duplicate record, a notification will appear indicating that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

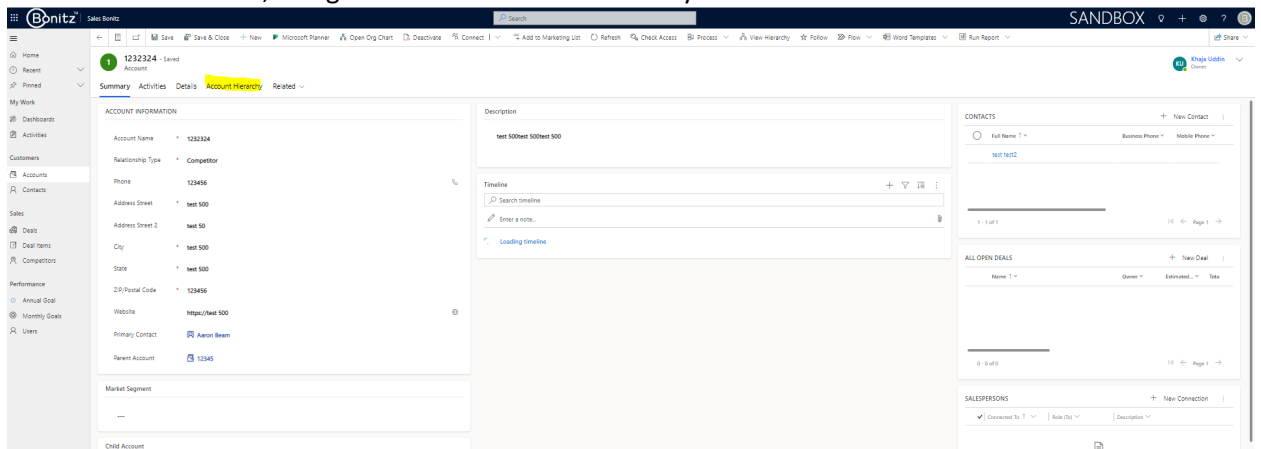
The hierarchy allows you to visualize the relationships between a parent account and its child accounts. It also lists out all contacts related to each account. Here are the steps to navigate this feature.

### Accessing the Account Hierarchy Tab

- From the main dashboard, navigate to the "Sales Bonitz" app, then select "Accounts."

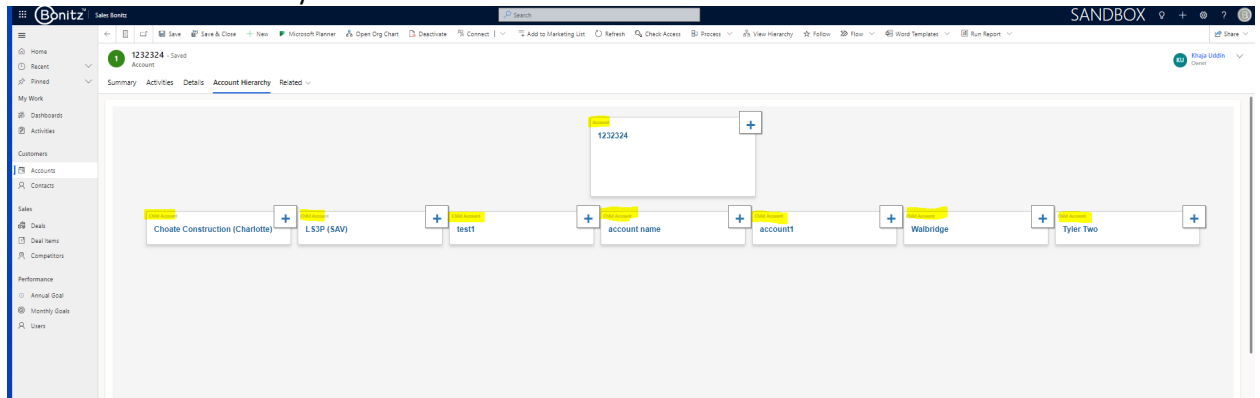


- A list of all the accounts will be displayed. Click on the account you wish to explore.
- In the account record, navigate to the "Account Hierarchy" tab.

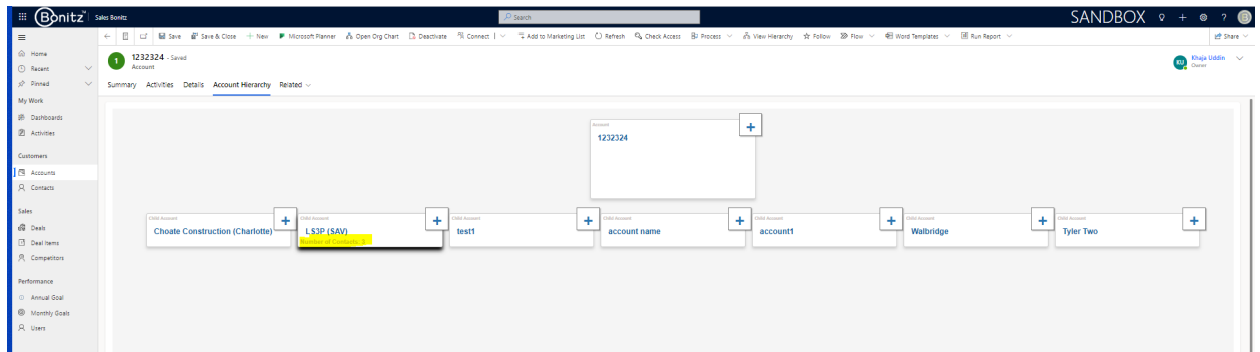


## Navigating the Account Hierarchy

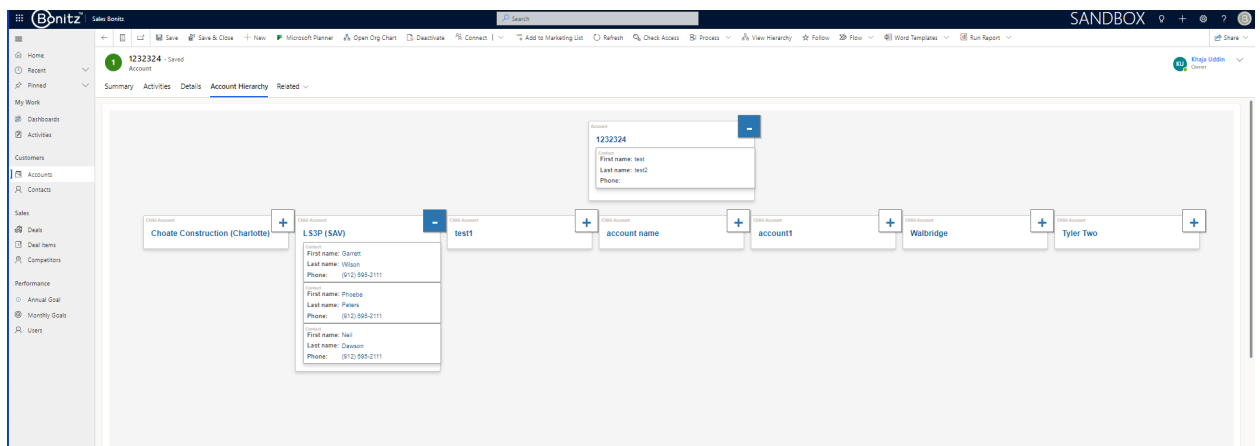
- The "Account Hierarchy" tab will display the Parent Account (the current account) and any associated Child Accounts. If there are no Child accounts for that Account, it will just display that Account and its hierarchy.



- 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.

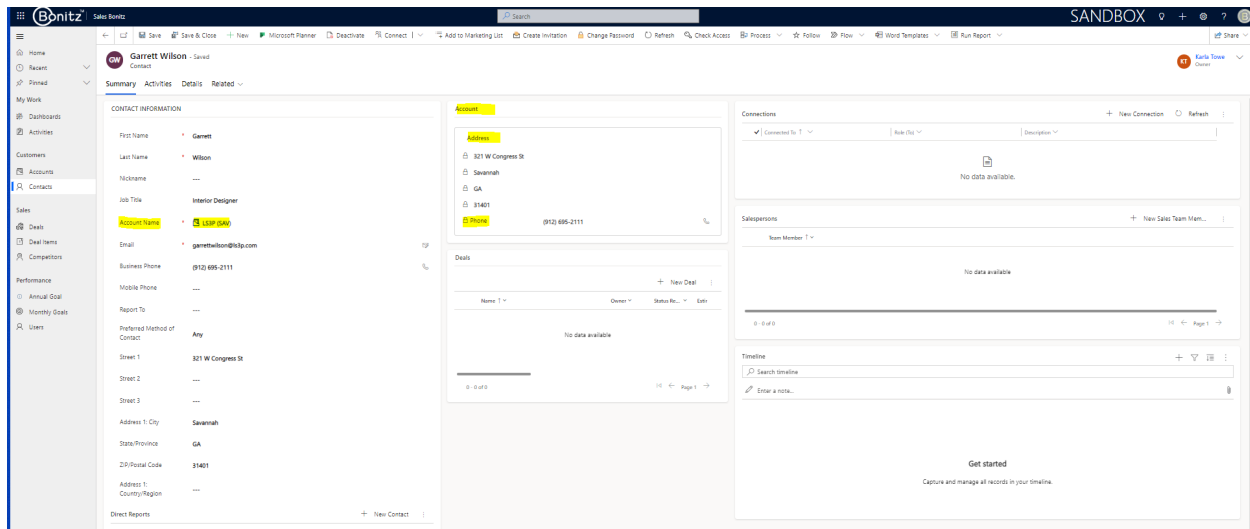


- To open a contact, click on any contact name listed under the parent or child account. The system will redirect you to the selected contact's detailed view.

**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.

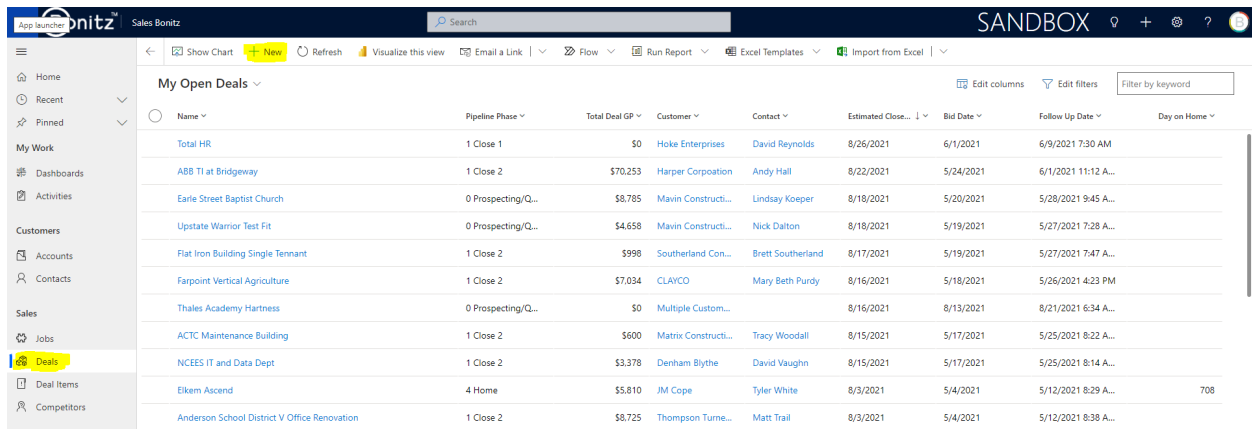
### Creating a New Deal

To create a new deal, follow these steps:

- Click on the Sales Bonitz from the navigation menu.



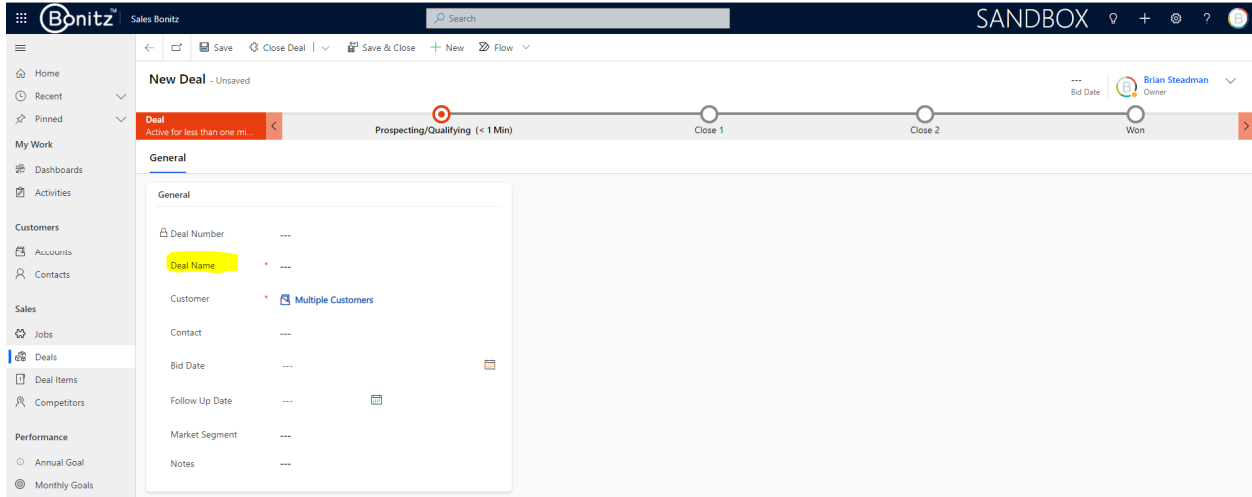
- Click on the Deals



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 Harness	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	\$3,376	Denham Blythe	David Vaughn	8/15/2021	5/17/2021	5/25/2021 8:14 A...	
Elkem 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...	

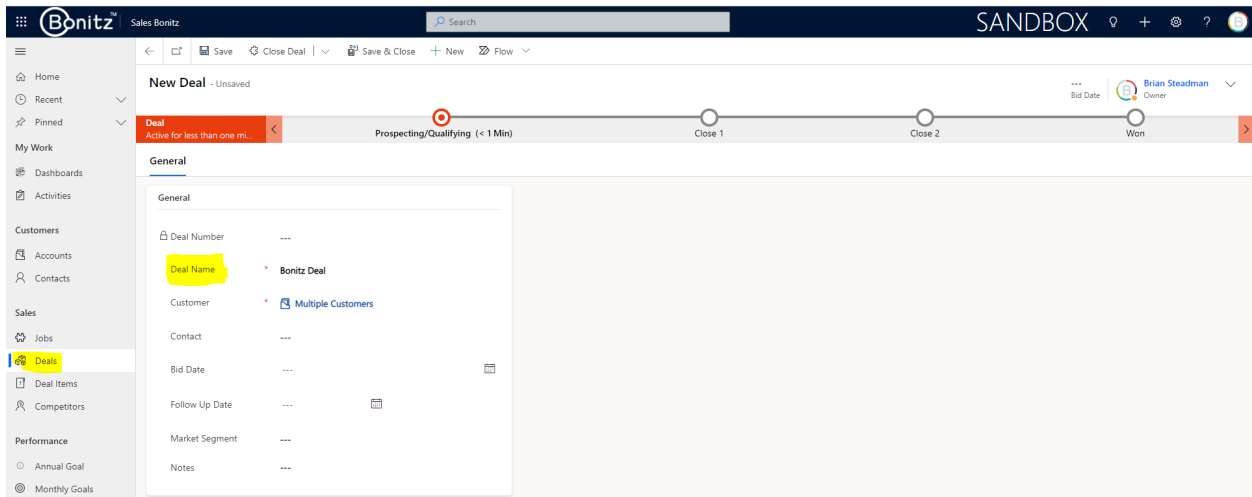
- Click on the New Deal button.

- 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.



The screenshot shows the 'New Deal' form in the 'Prospecting/Qualifying (< 1 Min)' stage. The 'Deal Name' field is highlighted in yellow and is currently empty. The 'Customer' field is set to 'Multiple Customers'. Other fields include Deal Number, Contact, Bid Date, Follow Up Date, Market Segment, and Notes.

- Click on Save to save the deal.



The screenshot shows the 'New Deal' form in the 'Prospecting/Qualifying (< 1 Min)' stage. The 'Deal Name' field is highlighted in yellow and now contains the text 'Bonitz Deal'. The 'Customer' field remains 'Multiple Customers'. Other fields include Deal Number, Contact, Bid Date, Follow Up Date, Market Segment, and Notes.

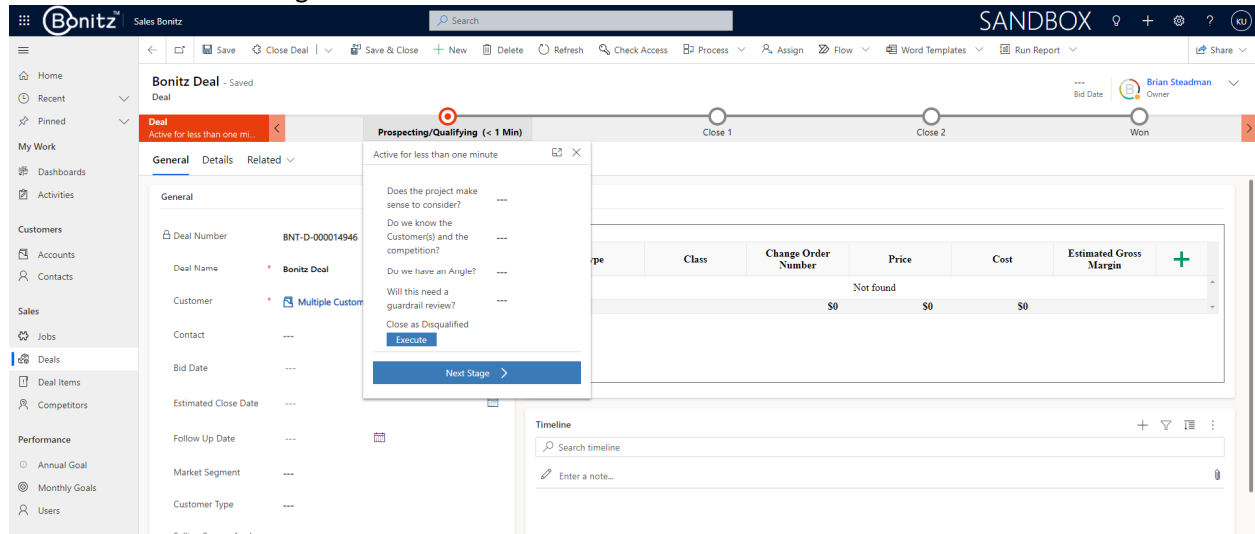
## Deal Stages/Sales Process

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 needs to check the following questions:

- Does the project make sense to consider? - Not required – for coaching purposes
- 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. At the top, there's a navigation bar with 'Sales Bonitz' and a search bar. Below it, a breadcrumb trail shows 'Deal' and 'Prospecting/Qualifying (< 1 Min)'. A modal window is open with the following questions:

- 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?

Below the questions are two buttons: 'Close as Disqualified' and 'Execute'. A 'Next Stage >' button is also visible at the bottom of the modal. In the background, a table with columns 'Type', 'Class', 'Change Order Number', 'Price', 'Cost', and 'Estimated Gross Margin' is partially visible, showing a row with 'Not found' and '\$0' values.

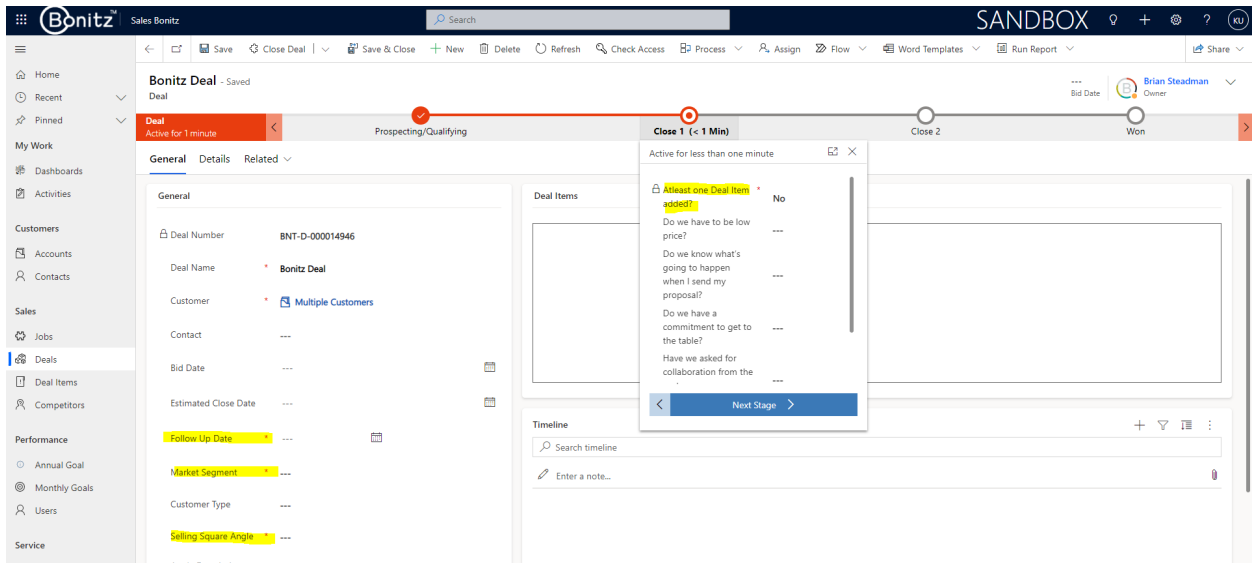
- The user will click on **Next stage** to move to **Close 1** stage.

**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

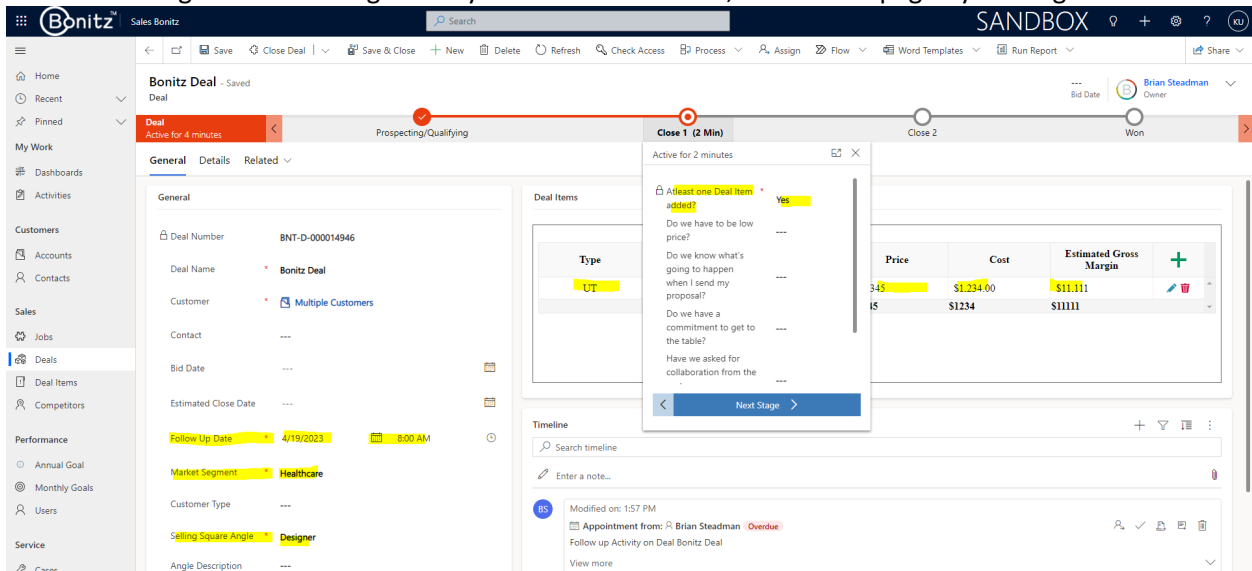
In the Close 1 stage, the user needs to perform the following tasks:

- 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 for a deal named 'Bonitz Deal' (ID: BNT-D-000014946). The deal is in the 'Close 1 (< 1 Min)' stage. A modal window is open, displaying the 'At least one Deal Item' flag, which is currently set to 'No'. Below the flag, there are several questions related to the deal item, such as 'Do we have to be low price?' and 'Do we know what's going to happen when I send my proposal?'. The 'Follow Up Date' field is highlighted in yellow and is currently empty. The 'Market Segment' field is also highlighted in yellow and is currently empty. The 'Selling Square Angle' field is highlighted in yellow and is currently empty.

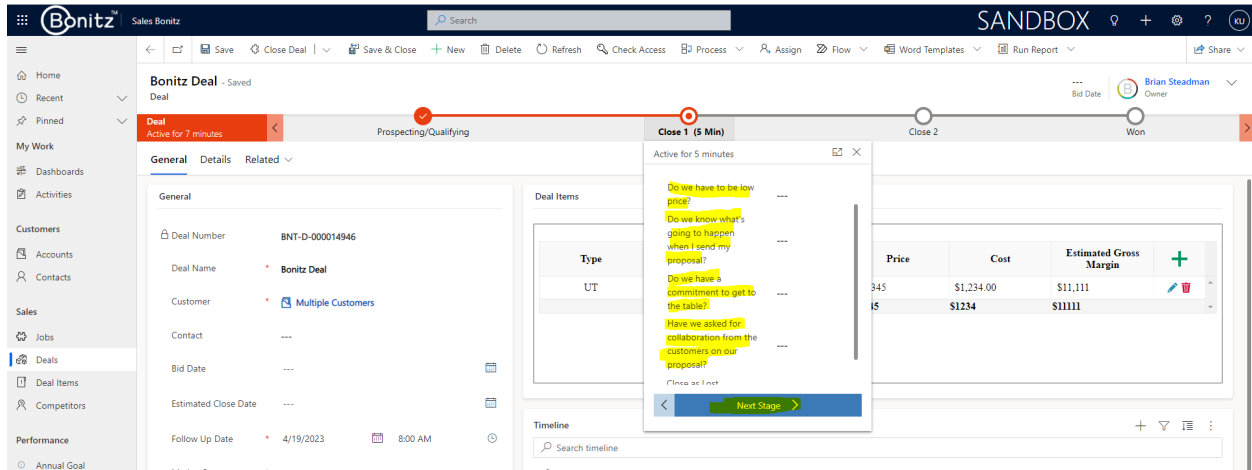
- Once the Deal item is added, the flag “At least one deal item added?” will change to Yes.
- Note: If the flag does not change after you add the deal item, refresh the page by clicking Refresh.



The screenshot shows the Bonitz CRM interface for the same deal, now in the 'Close 1 (2 Min)' stage. The 'At least one Deal Item' flag has changed to 'Yes'. The 'Follow Up Date' field is now populated with '4/19/2023' at '8:00 AM'. The 'Market Segment' field is now populated with 'Healthcare'. The 'Selling Square Angle' field is now populated with 'Designer'. A table with columns 'Price', 'Cost', and 'Estimated Gross Margin' is visible, showing values: Price \$45, Cost \$1,234.00, and Estimated Gross Margin \$11.11. The 'At least one Deal Item' flag is highlighted in yellow.

Before moving to close 2 stage, the user needs to check the following questions:

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?



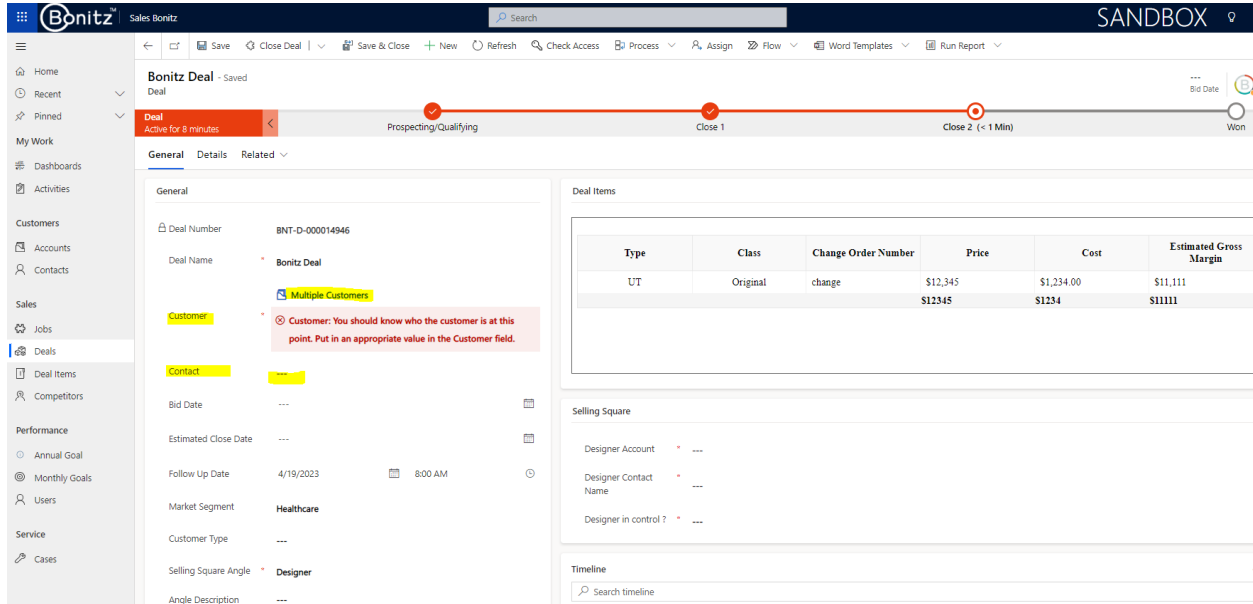
- Once these tasks are completed, the user can move the deal to the Close 2 stage by clicking Next Stage.

**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:

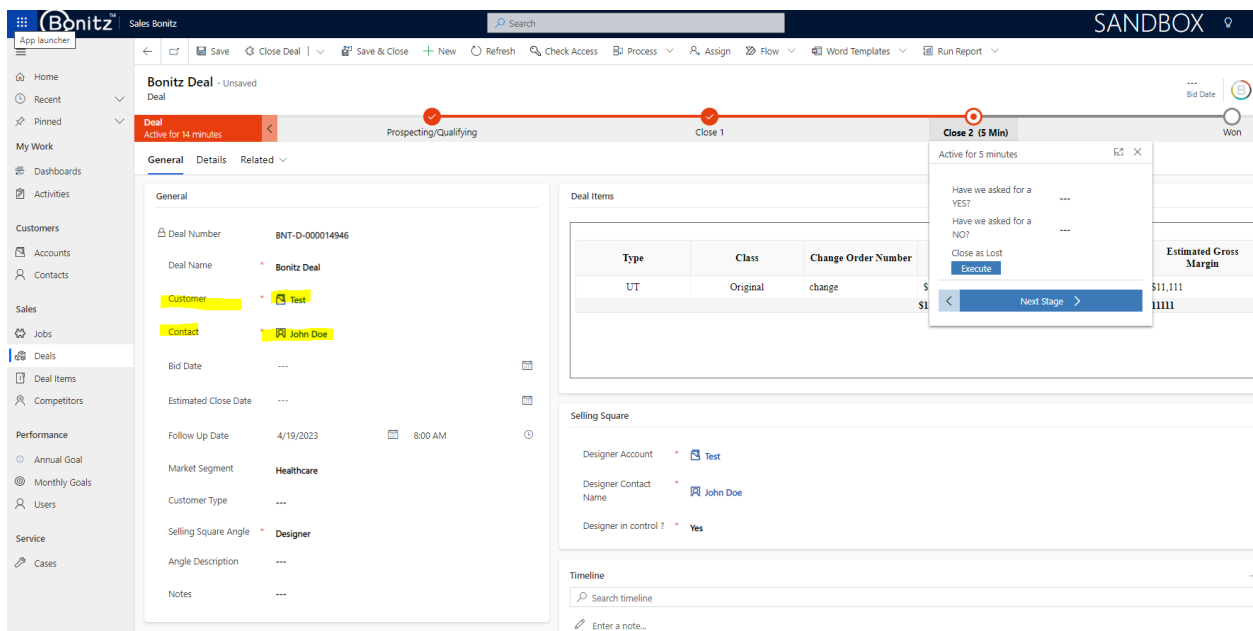
- Fill in the required fields.
  - Customer
  - Contact



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

Before moving to **Won** stage, the user needs to 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



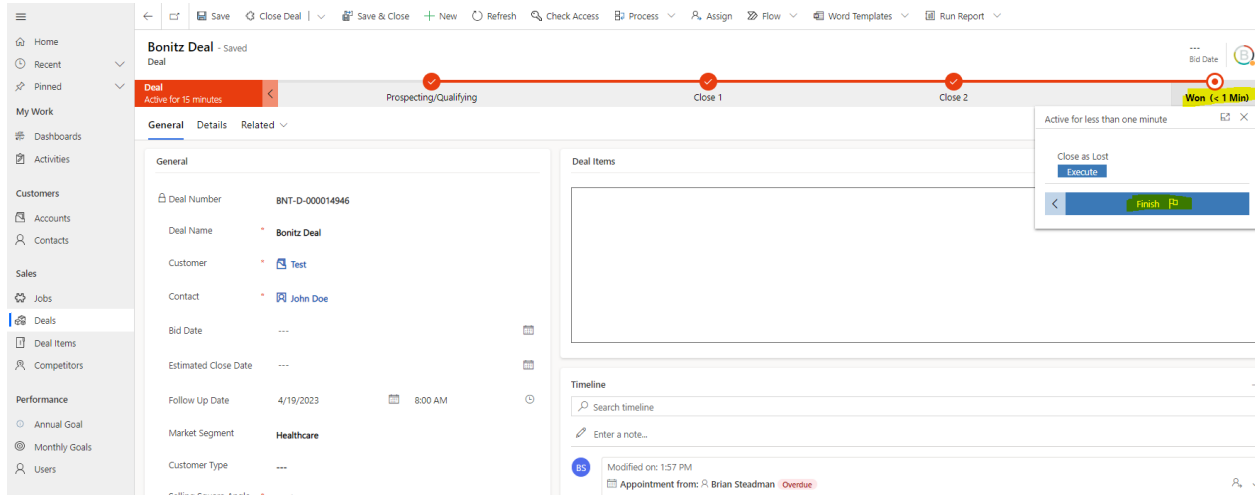
Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin
UT	Original	change	\$12,345	\$1,234.00	\$11,111
			\$12345	\$1234	\$11111

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.

### Won Stage

This is the final stage of the sales process. The user can click on Finish to complete the deal or Close as lost to close the deal as lost.



The screenshot displays the Bonitz CRM interface for a deal titled "Bonitz Deal". The deal is currently in the "Won (< 1 Min)" stage, which is highlighted in yellow. The sales process flow is shown as a horizontal line with four stages: "Prospecting/Qualifying", "Close 1", "Close 2", and "Won (< 1 Min)". A "Close as Lost" dialog box is open, showing "Execute" and "Finish" buttons. The deal details include Deal Number BNT-D-000014946, Deal Name Bonitz Deal, Customer Test, and Contact John Doe. The timeline shows an appointment from Brian Steadman on 4/19/2023 at 8:00 AM.

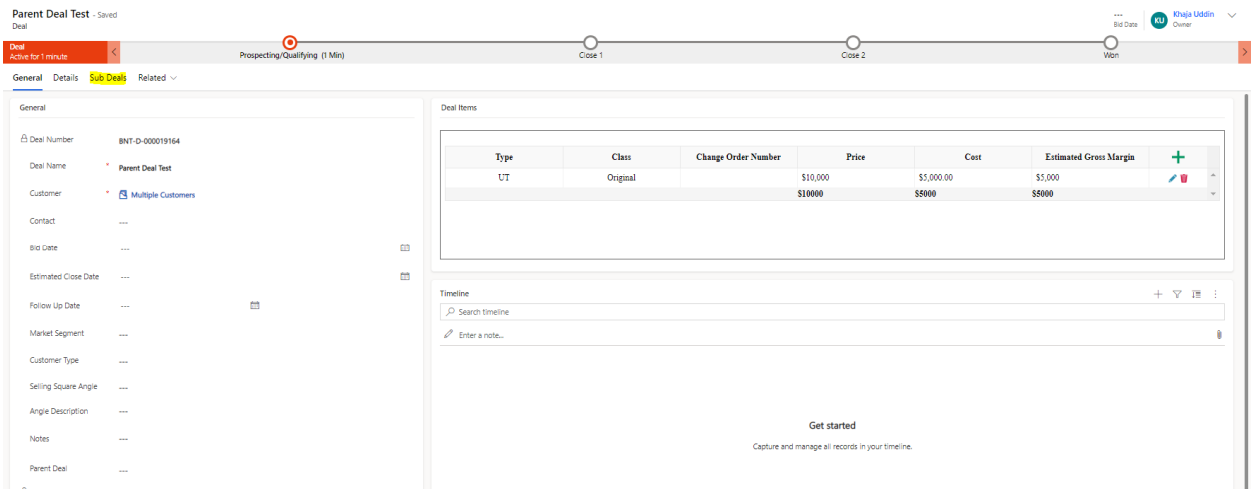


## Parent-Child Deals

Microsoft Dynamics 365 allows users to add and manage Parent-Child deals. This feature enables the user to create a hierarchical structure of deals, maintaining the relationships between different deals, and streamlining deal management processes.

### Adding a Child Deal

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

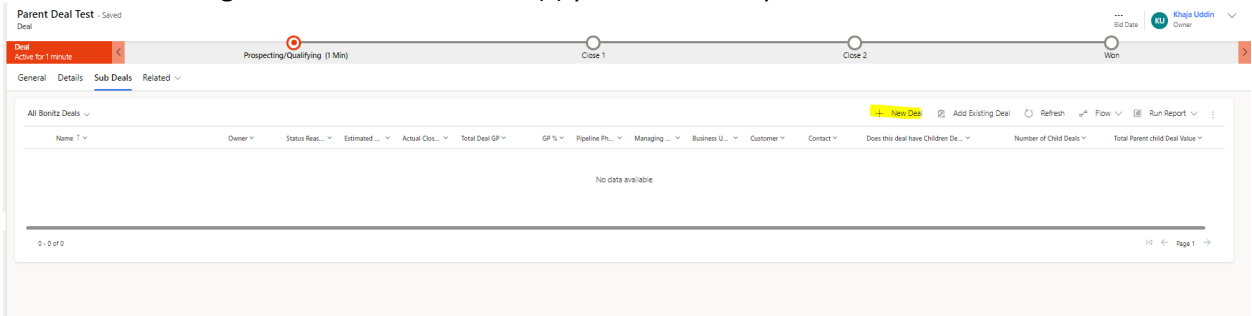


The screenshot shows the 'Parent Deal Test' interface in Microsoft Dynamics 365. The 'Sub Deals' tab is selected, displaying a table of deal items. The table has columns for Type, Class, Change Order Number, Price, Cost, and Estimated Gross Margin. A single row is visible with the following data:

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

Below the table is a 'Timeline' section with a search bar and a note entry field. A 'Get started' message is displayed at the bottom of the timeline area.

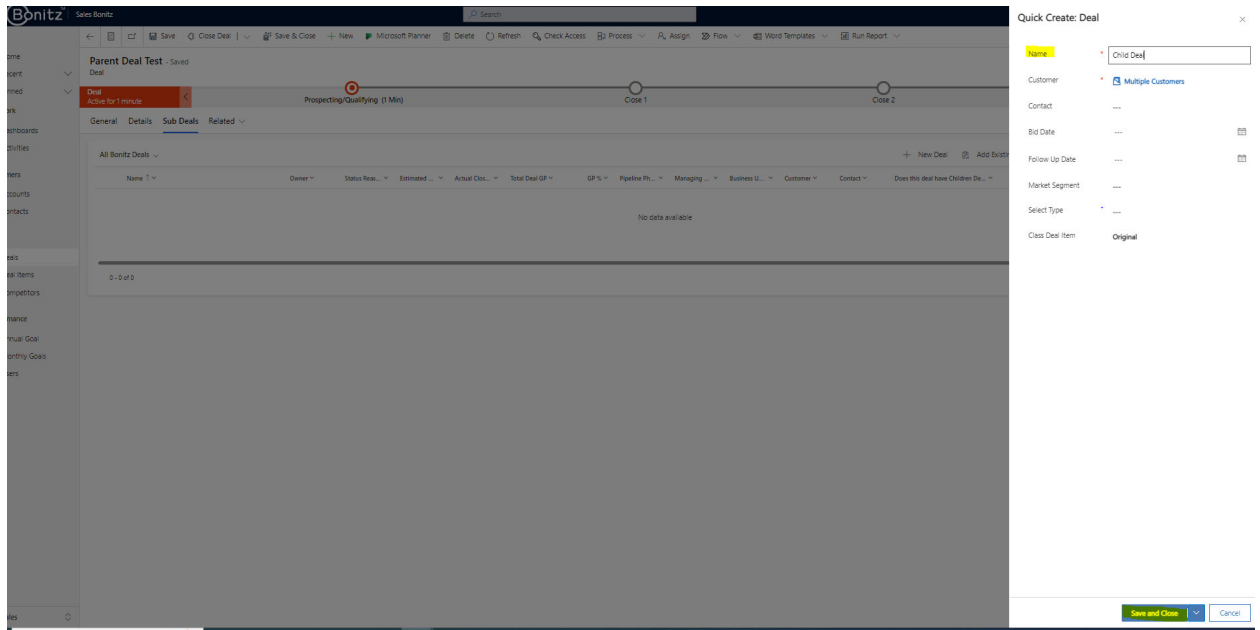
- On the click "Sub Deals" tab, click on "New Deal" to create a new Child Deal. Alternatively, you can add an existing Child Deal from the Deal(s) you have already created.



The screenshot shows the 'Parent Deal Test' interface in Microsoft Dynamics 365, specifically the 'Sub Deals' tab. The interface displays a table of child deals. The table has columns for Name, Owner, Status, Estimated, Actual Clos, 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. The table is currently empty, showing 'No data available'.

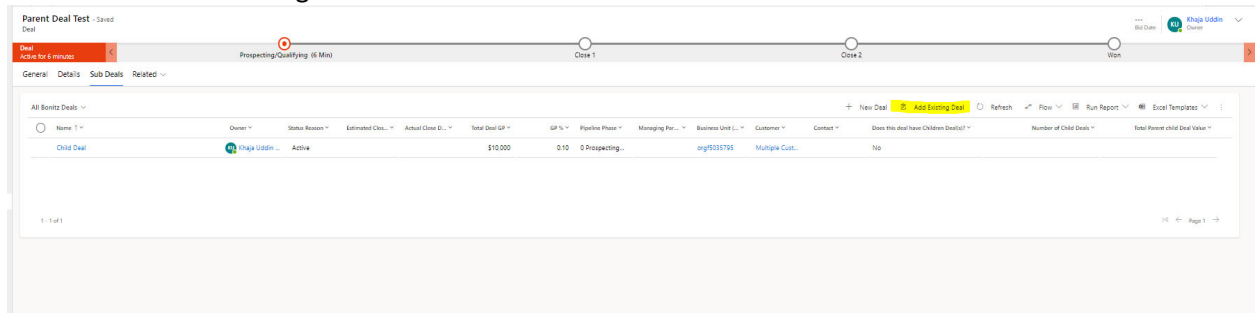
## Create a New Child Deal

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

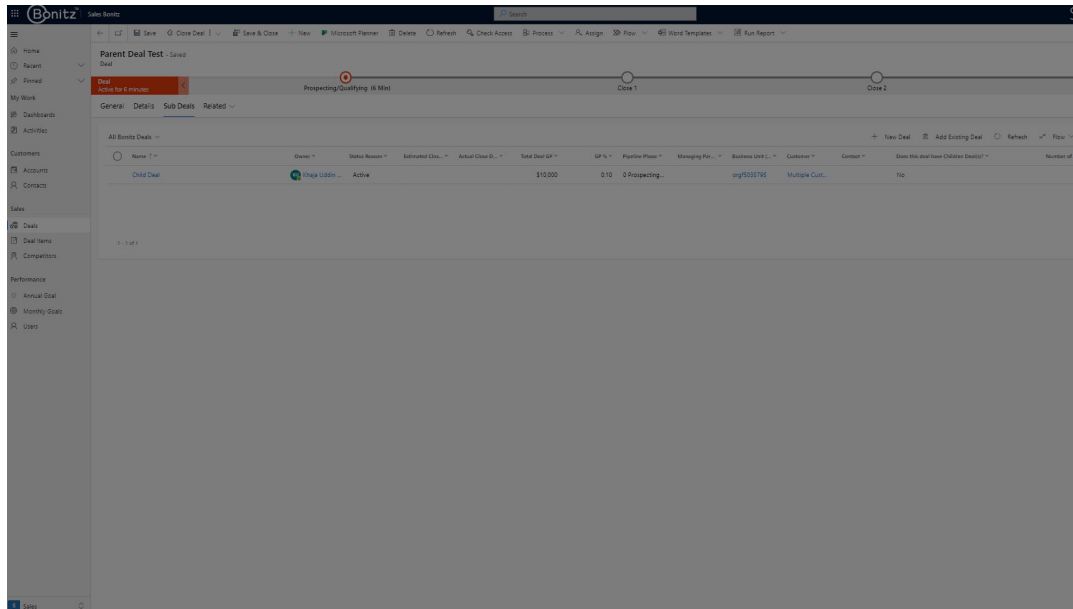


## Add an Existing Deal as Child Deal

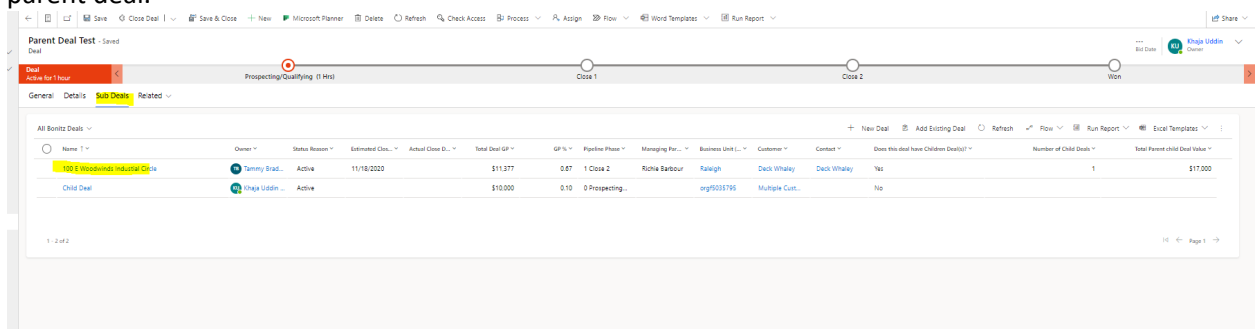
- Click on the "Add Existing Deal" button.



- 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."

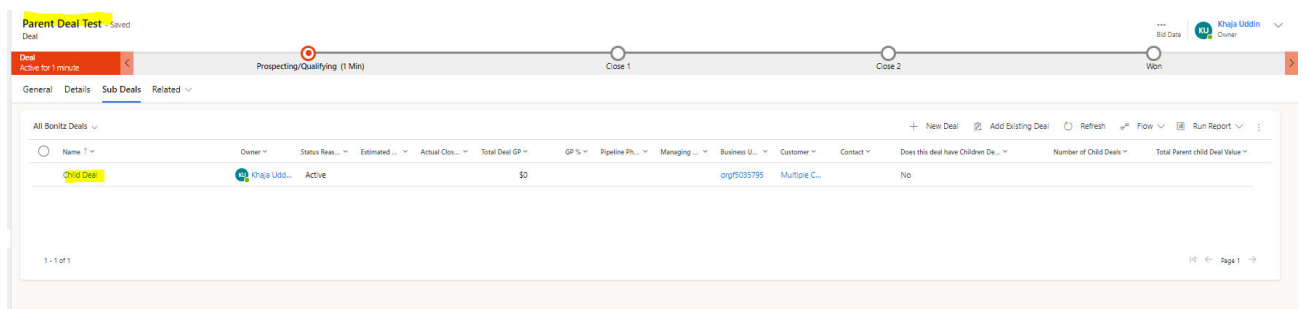


- The selected deal will now appear in the list of child deals under the "Sub Deals" tab of the parent deal.

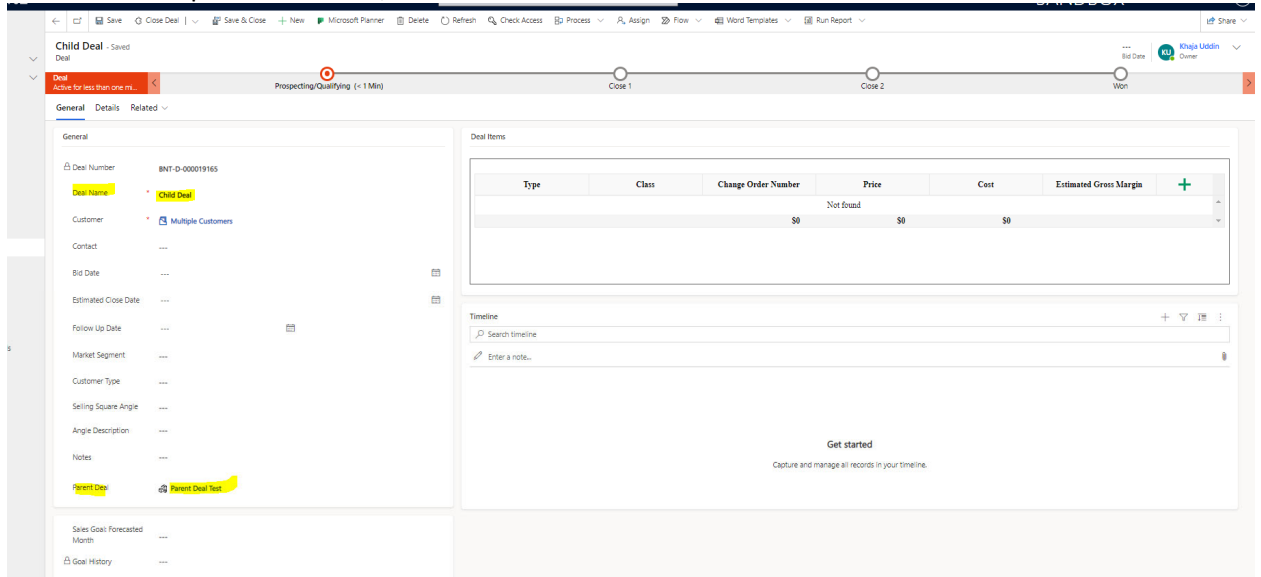


**Note:** Remember, a deal that is already associated as a child deal or already has child deals cannot be associated as a child deal to another deal.

- 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.



The screenshot displays the Bonitz CRM interface for a Child Deal. The top navigation bar includes options like Save, Close Deal, and New. The main content area is divided into several sections:

- General:** Contains fields for 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 (None), and Goal History.
- Deal Items:** A table with columns: Type, Class, Change Order Number, Price, Cost, Estimated Gross Margin, and a plus sign icon. The table is currently empty, showing "Not found" for Price, Cost, and Estimated Gross Margin.
- Timeline:** A section for tracking deal progress, featuring a search bar and a note entry field. It includes a "Get started" message: "Capture and manage all records in your timeline."

### Parent Child Deal values and Calculations

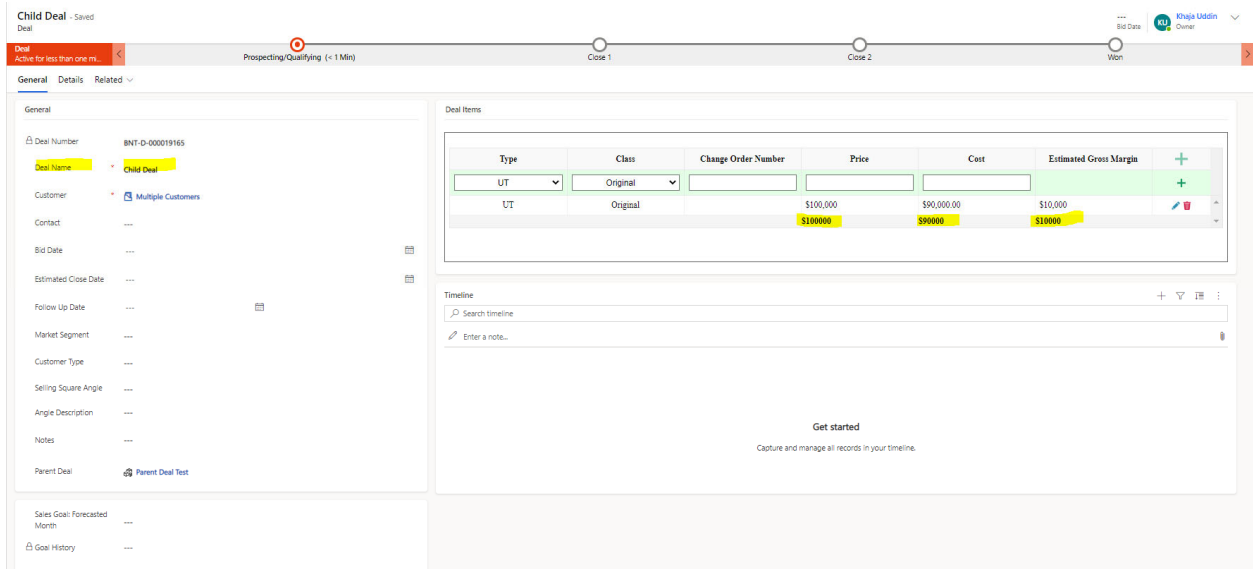
When a deal item is added to a Parent Deal or a Child Deal, the system will automatically calculate and update the following fields on the Parent Deal:

- 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 screenshot displays the 'Child Deal' record for Deal Number BNT-D-000019165. The deal is currently in the 'Prospecting/Qualifying' stage. The 'Deal Items' table is as follows:

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

The interface also shows a 'Timeline' section with a search bar and a note entry field. The 'Parent Deal' field is set to 'Parent Deal Test'.

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

Parent Deal Test - Saved

Deal

Deal Activity for 5 Minutes

Prospecting/Qualifying (5 Mini)

Close 1 Close 2 Work

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: ...

Parent Deal

Total Parent Child Deal Value: \$110,000

Total Parent Child Deal Cost: \$50,000

Total Parent Child GP: \$15,000

Total Parent Child GP %: 6.36

Sales Goal Forecast Month: ...

Goal History: ...

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin	
LT	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.

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

Parent Deal Test - Saved

Deal

Deal Activity for 5 Minutes

Prospecting/Qualifying (6 Mini)

Close 1 Close 2 Work

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: ...

Parent Deal

Total Parent Child Deal Value: \$200,000

Total Parent Child Deal Cost: \$100,000

Total Parent Child GP: \$100,000

Total Parent Child GP %: 6.50

Sales Goal Forecast Month: ...

Goal History: ...

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	
			\$100000	\$100000	\$00000	

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

## 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

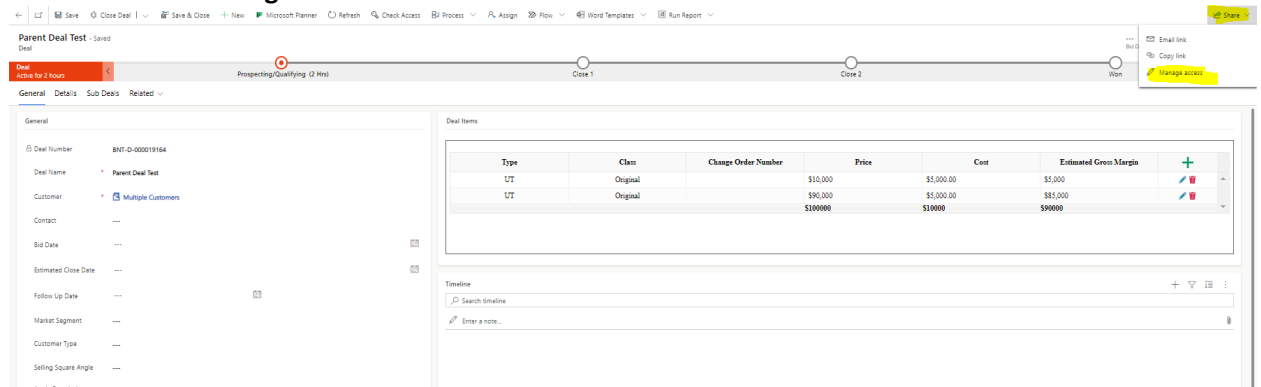
Here are the steps to share a deal record:

#### Accessing the Deal

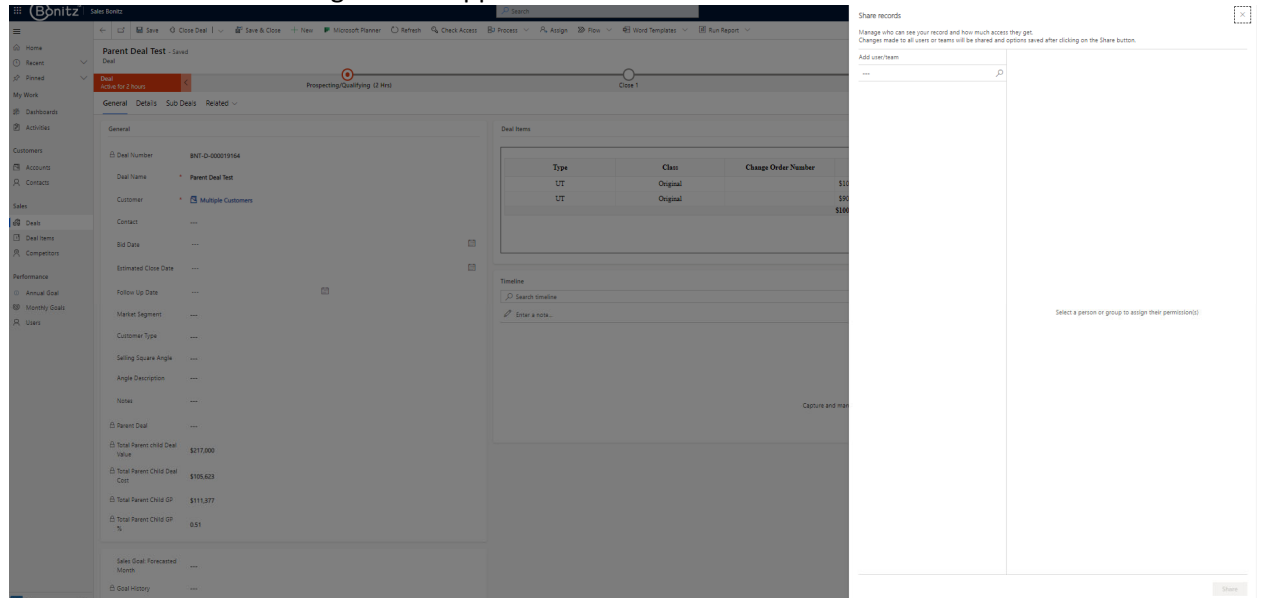
- From the main dashboard, navigate to the "Sales Bonitz" app, then select "Deals."
- A list of all the deal records will be displayed. Select the deal record you wish to share.

#### Sharing the Deal

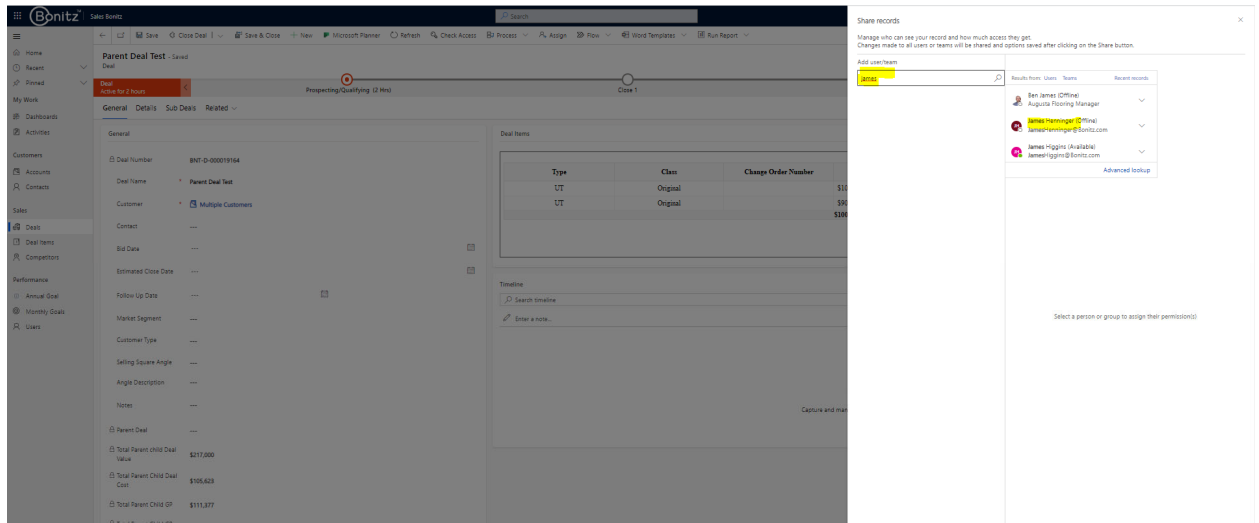
- Once the deal record is open, click on **"Share"** button on top right corner of the screen. Under Share Click on **"Manage Access"**



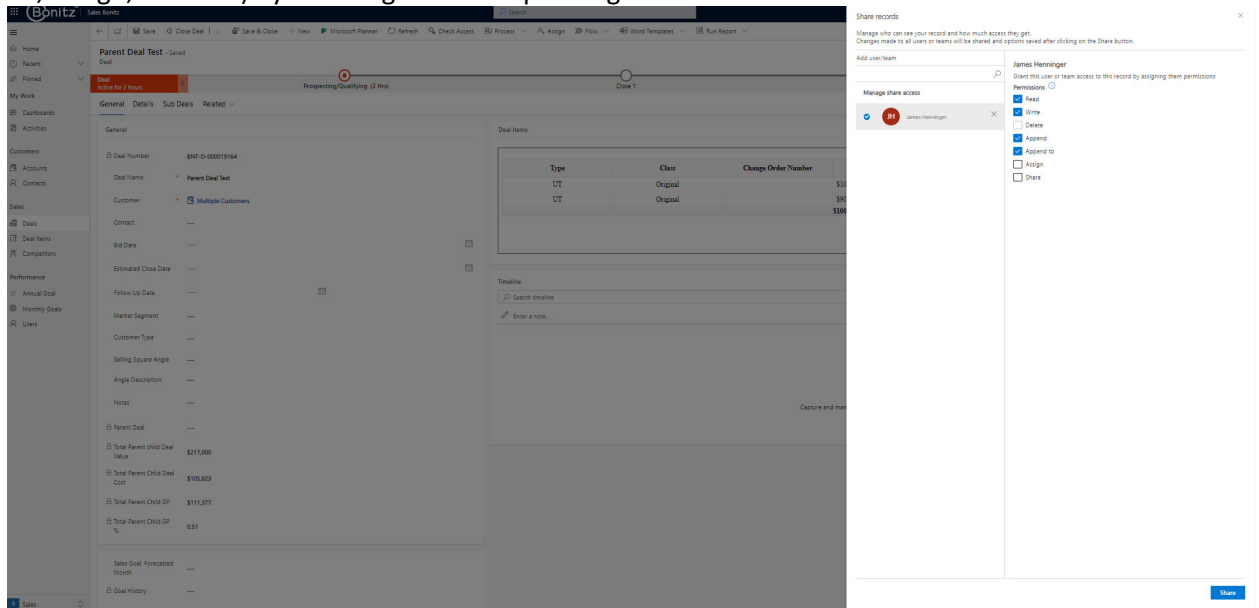
- The "Share Record" dialog box will appear.



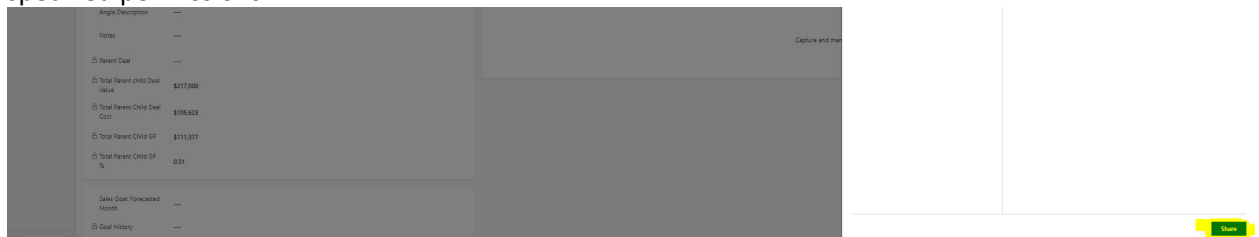
- In the "Add User/Team" section, type the name of the user or team you want to share the record with, and select them from the drop-down list.



- After adding a user or team, set the desired permissions (Read, Write, Delete, Append 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.





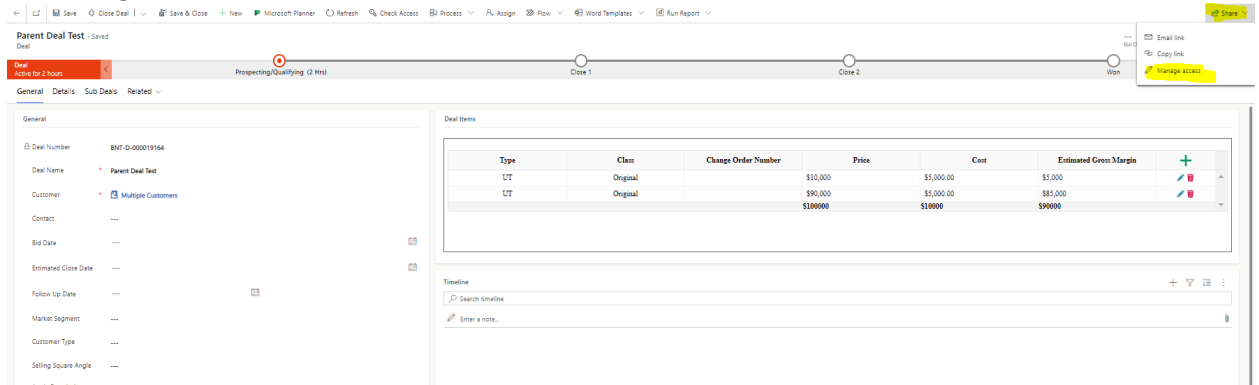
## Unsharing a Deal

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.

### Accessing the Shared Deal

- From the main dashboard, navigate to the "Sales Bonitz" app, then select "Deals."
- A list of all the deal records will be displayed. Select the deal record you wish to unshare.

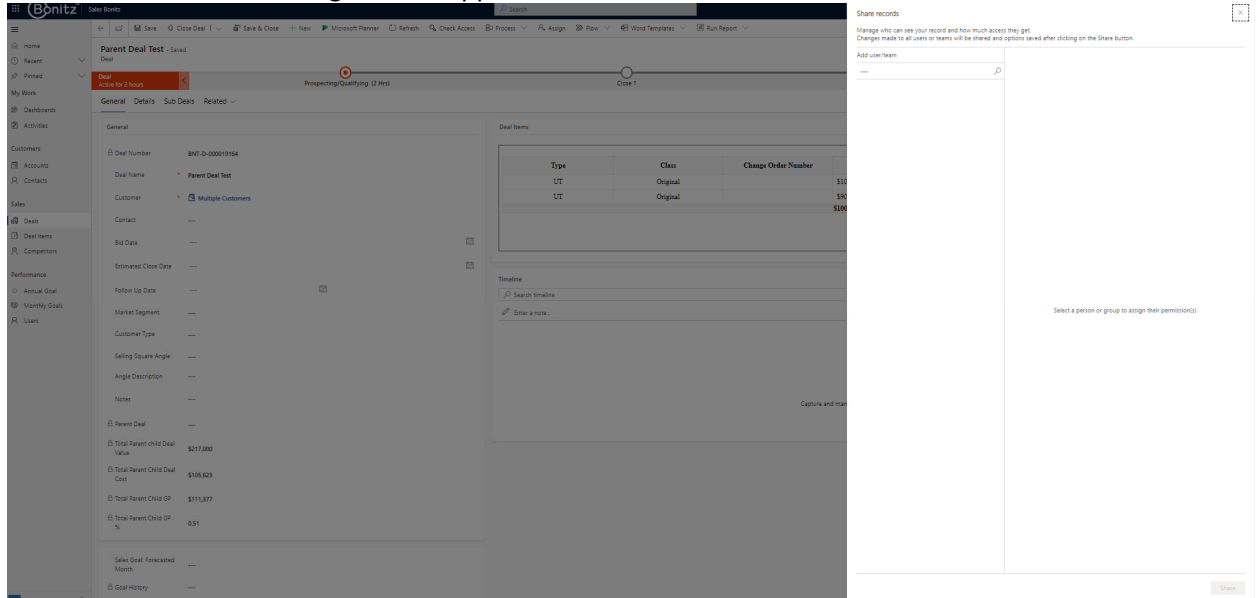
## Unsharing the Deal



The screenshot shows the Bonitz CRM interface for a deal record titled "Parent Deal Test". The deal is in the "Prospecting/Qualifying (2 Hrs)" stage. The "Deal Items" table is displayed with the following data:

Type	Class	Change Order Number	Price	Cost	Estimated Gross Margin	
LIT	Original		\$10,000	\$5,000.00	\$5,000	+
LIT	Original		\$90,000	\$5,000.00	\$85,000	+
			<b>\$100000</b>	<b>\$10000</b>	<b>\$90000</b>	

- The "Share Record" dialog box will appear.



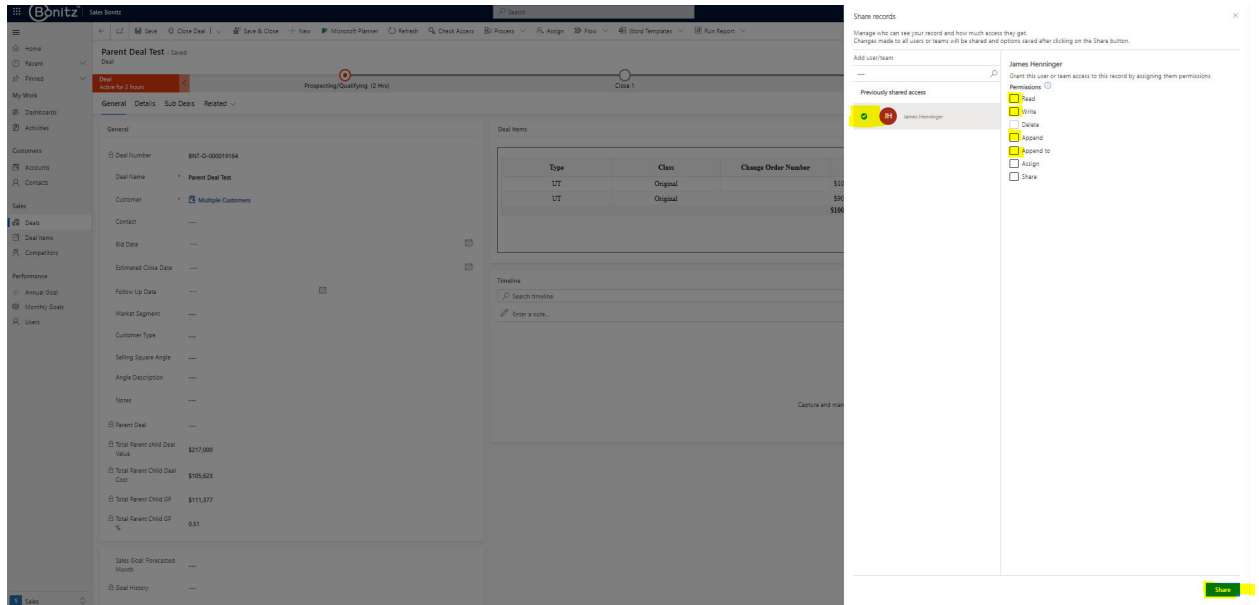
The screenshot shows the Bonitz CRM interface with the "Share records" dialog box open. The dialog box contains the following text:

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!

- 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

James Henninger

Grant this user or team access to this record by assigning them permissions

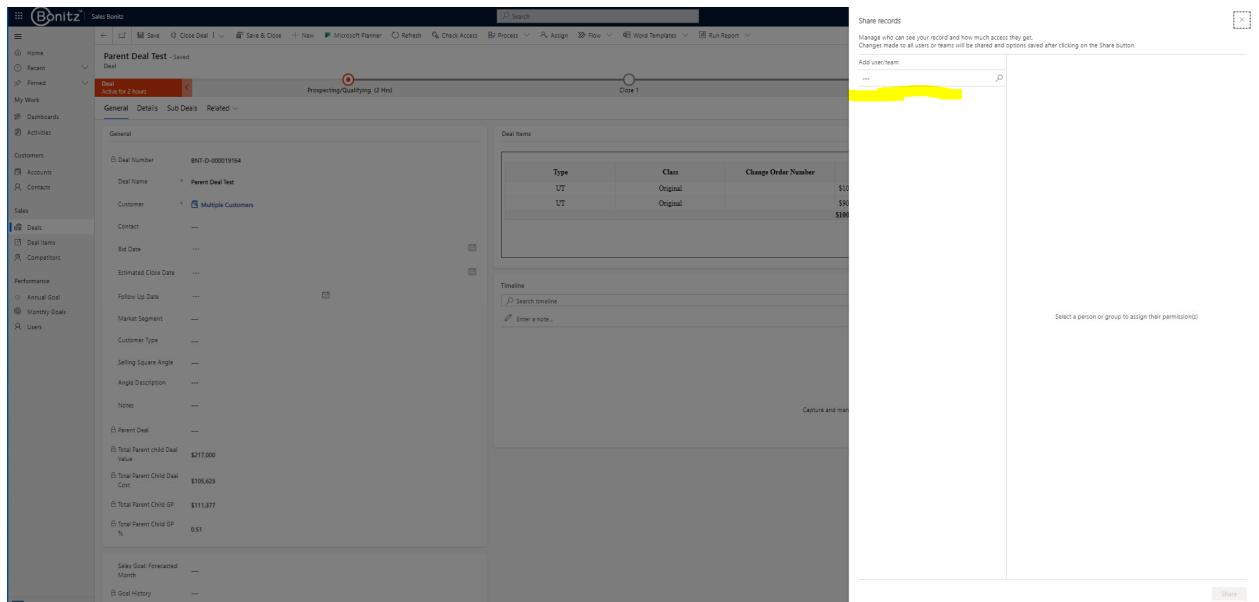
Permissions

Previously shared access

- Read
- Write
- Delete
- Append
- Append to
- Assign
- Share

Share

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



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

Search

Select a person or group to assign their permissions()

Share

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

## 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.

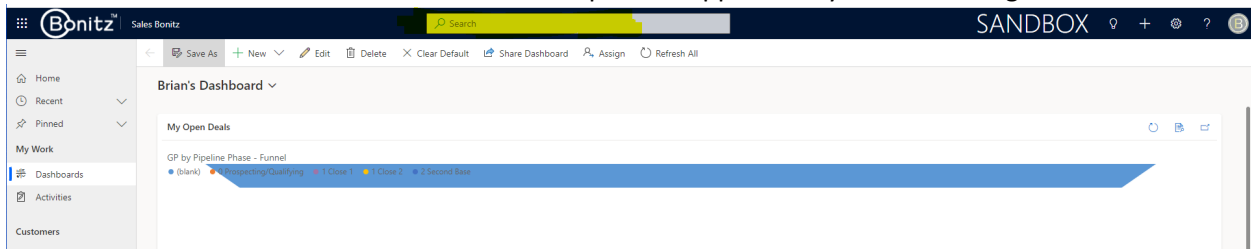
Here is a step-by-step guide on how to use Dataverse Search:

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

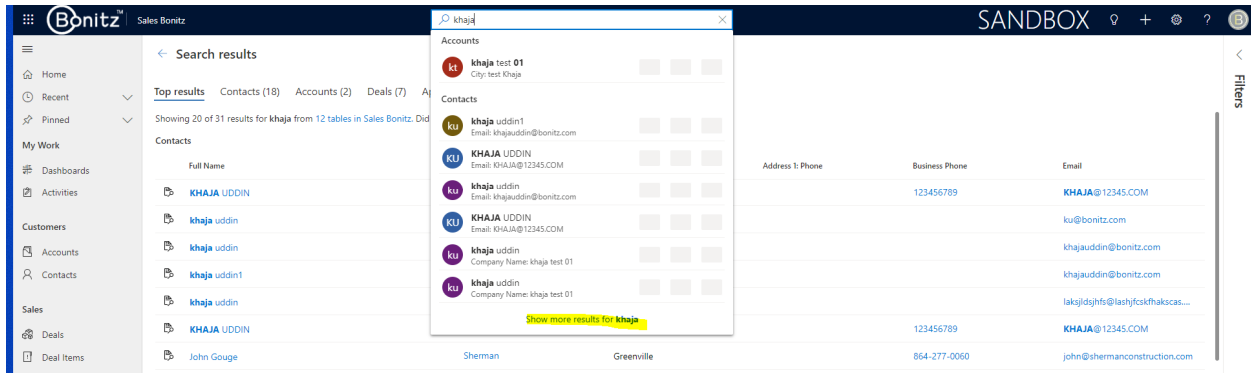
- Navigate to **Sales Bonitz** from the list of apps.



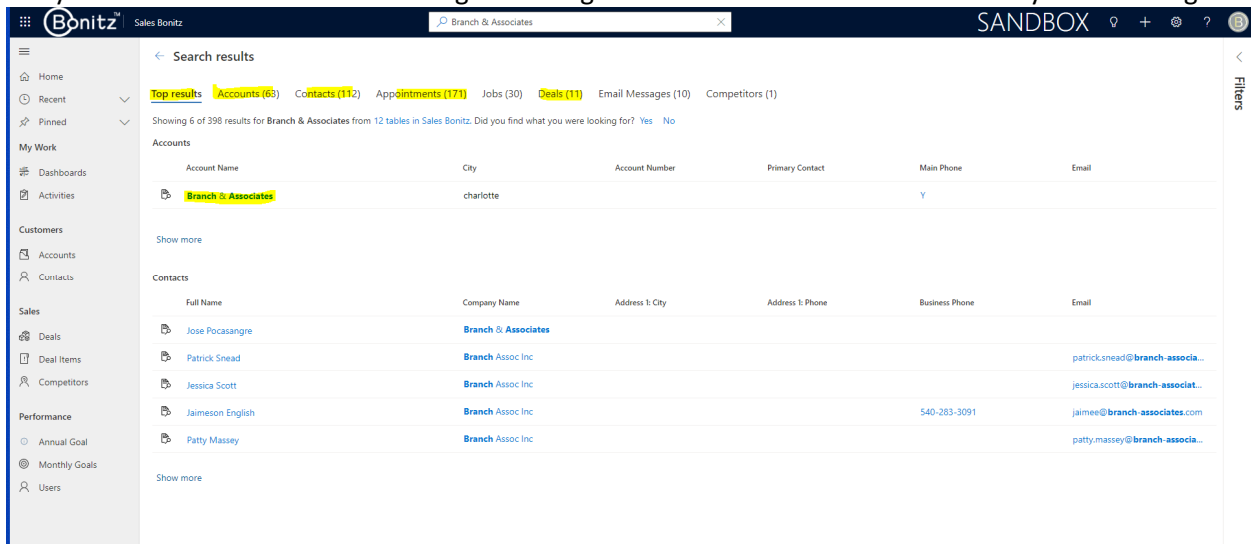
- The Dataverse search box is located at the top of the application you are working with.



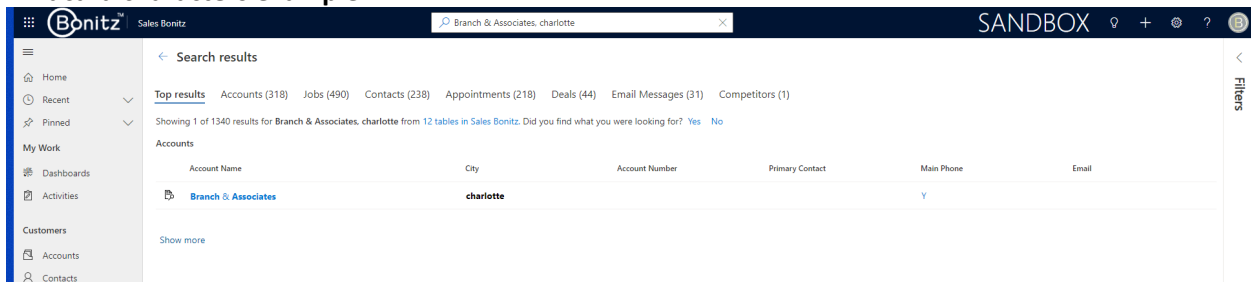
- Type in the keywords or phrases related to the data you're trying to find in the Accounts, Contacts, or Deals. The search box also supports wildcard characters for more advanced searches. For example, if you're looking for a specific account, you could enter the name of the account, the account number,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

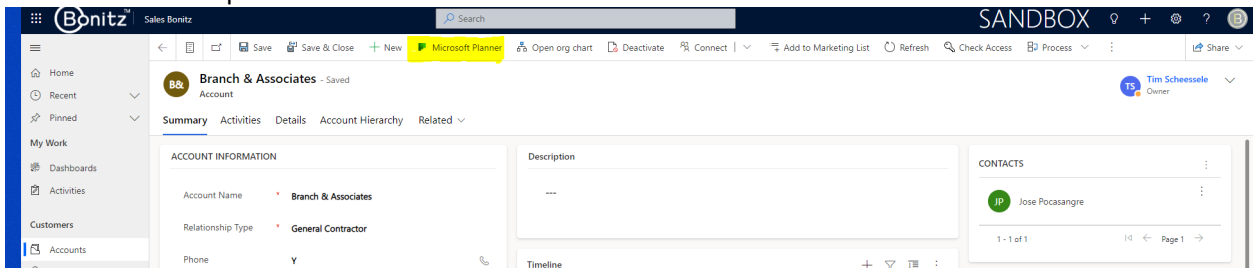
## Microsoft planner

When using Microsoft Dynamics 365, you can navigate to Microsoft Planner by clicking a button within the D365 application. This feature has been added as a button on a form associated with a records such as an Account, Contact, or Deal.

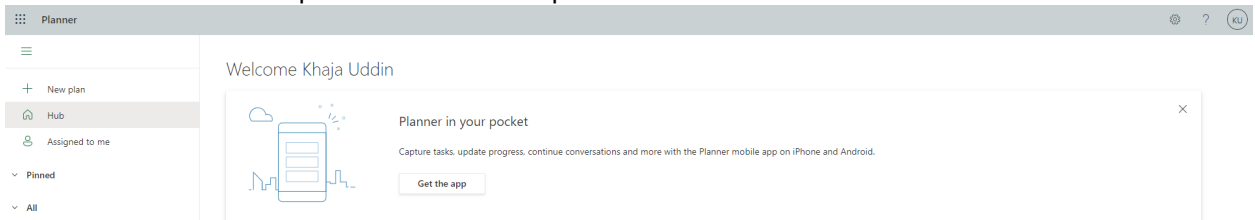
- Navigate to **Sales Bonitz** from the list of apps.



- Go to Account/Contact/Deal record from the left side navigation.
- Open any record.
- Click on Microsoft planner button.



- A browser window will open with a microsoft planner.



## Dynamics 365 for Phones

Microsoft Dynamics 365 for Phones puts the power of Dynamics 365 in the palm of your hand. It provides a consistent, user-friendly interface that allows you to easily access and manage your Microsoft Dynamics 365 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 Bonitz INC (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 App

- Open the Google Play Store on your Android device.
- In the search bar, type "Dynamics 365 for Phones" and press enter.
- Click on the app in the search results.
- Click on the "Install" button to download and install the app.

#### Step 2: Access Non-Production App "Sales Bonitz" (Bonitz UAT Environment)

- Open the Dynamics 365 for Phones app on your device.
- Sign in with your Microsoft account credentials.
- On the home screen, click on the hamburger menu (three horizontal lines) at the top-left corner.
- From the dropdown, select "Non-Production Apps". This will show a list of non-production apps you have access to.
- Locate and select the "Sales Bonitz" app associated with the "Bonitz UAT" environment.

#### Step 3: Access Production App "Sales Bonitz" (Bonitz INC Environment)

- Open the Dynamics 365 for Phones app on your device.
- Sign in with your Microsoft account credentials.
- On the home screen, click on the hamburger menu (three horizontal lines) at the top-left corner.
- From the dropdown, select "Apps". This will show a list of production apps you have access to.
- Locate and select the "Sales Bonitz" app associated with the "Bonitz INC" environment.

**Step 4: Switch Between Apps** To switch between apps, go back to the home screen, click on the hamburger menu, and follow the steps under "Access Non-Production App" or "Access Production App," depending on which app you want to switch to.

**For iPhone:**

**Step 1: Download the App**

- Open the App Store on your iPhone.
- In the search bar, type "Dynamics 365 for Phones" and press enter.
- Click on the app in the search results.
- Click on the "Get" or "Download" button to download and install the app.

**Step 2: Access Non-Production App "Sales Bonitz" (Bonitz UAT Environment)**

- Open the Dynamics 365 for Phones app on your device.
- Sign in with your Microsoft account credentials.
- On the home screen, click on the hamburger menu (three horizontal lines) at the top-left corner.
- From the dropdown, select "Non-Production Apps". This will show a list of non-production apps you have access to.
- Locate and select the "Sales Bonitz" app associated with the "Bonitz UAT" environment.

**Step 3: Access Production App "Sales Bonitz" (Bonitz INC Environment)**

- Open the Dynamics 365 for Phones app on your device.
- Sign in with your Microsoft account credentials.
- On the home screen, click on the hamburger menu (three horizontal lines) at the top-left corner.
- From the dropdown, select "Apps". This will show a list of production apps you have access to.
- Locate and select the "Sales Bonitz" app associated with the "Bonitz INC" environment.

**Step 4: Switch Between Apps** To switch between apps, go back to the home screen, click on the hamburger menu, and follow the steps under "Access Non-Production App" or "Access Production App," depending on which app you want to switch to.

### **Sign Out:**

#### **Step 1: Open the Dynamics 365 for Phones App**

- Navigate to the Dynamics 365 for Phones app on your device and open it.

#### **Step 2: Open the Side Menu**

- On the home screen of the app, click on the hamburger menu (three horizontal lines) at the top-left corner.

#### **Step 3: Navigate to Settings**

- In the side menu that appears, scroll down and select "Settings".

#### **Step 4: Sign Out**

- In the "Settings" menu, find and select the "Sign out" option.
- Confirm your decision to sign out in the prompt that appears.

After signing out, you will be returned to the initial sign-in screen of the Dynamics 365 for Phones app. Remember to always sign out when you wish to switch between environments to ensure data security and integrity.

Note: The exact sign-out steps may vary slightly based on your app version and device. If you can't find the "Sign out" option in the "Settings" menu, look for a profile icon, your username, or another indicator of account settings where the sign-out option might be located.