Paciolan

Your tickets, your way.

Paciolan CRM

Software User Guide

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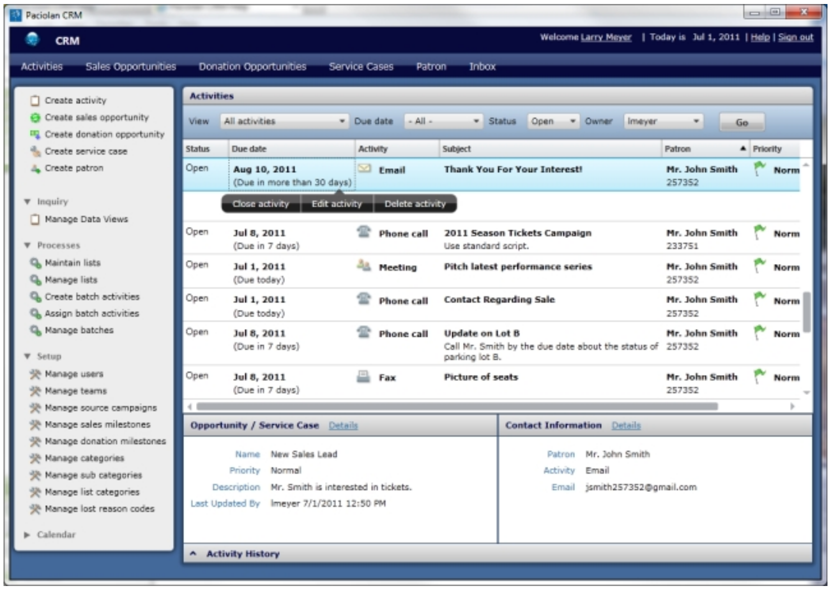
Chapter 1 Welcome to Paciolan CRM

Paciolan Customer Relationship Management (CRM) standardizes and streamlines the processes used to contact your customers. To accomplish this, Paciolan CRM supplies your sales and solicitations staff with the information needed to best support patrons and donors.



This makes CRM the ideal product to increase outbound ticketing sales, grow fundraising revenues, and manage patron relationships. CRM also helps you better understand your fans or donors, while providing easier patron management by editing and managing all customer interactions and information in one place.

Product features

The main features of CRM 1.0 include:

- Contact management to record and schedule communication to and from your fans or donors.
- Opportunity management to track sales and donation opportunities.
- Operator management to create and assign sales and donation opportunities, as well as review status and progress of operators against milestones.
- Service case management to track customer service issues as they are reported.
- Real time integration with our ticketing and fund development systems. This integration eliminates the need to switch back and forth between ticketing or fundraising systems to get information like order history, attendance history, or donation and pledge history.
- Integration with Microsoft Outlook to facilitate communication between staff and customers or donors.
- Reporting to view contact, opportunity, activity, and service case CRM data.

Paciolan still supports the interfaces previously developed for the general purpose CRM systems, including Microsoft CRM and SalesForce. However, Paciolan CRM is integrated with the core Paciolan products, so the overall cost of using our CRM product is significantly less than installing a third party CRM system.

Getting Started

The Paciolan CRM Software User's Guide is divided into the following sections:

This section...	Shows you how to do this...
Operations	• Search for patrons and add notes for them in the Patron Summary • Work with CRM opportunities, service cases, and activities • Use Integrated Outlook to work with email messages in the CRM Inbox
Data Views	• Create and run CRM data views • Export data views to MS Excel
User Management	• Create CRM users • Set up the user hierarchy • Set user permissions • Disable user access
CRM Form Options	• Create CRM user teams • Create milestones and campaigns • Create service case categories • Create lost reason codes • Create categories to organize patron lists • Modify Patron Detail option selections
Bulk Processing	• Import and modify patron lists • Create batches of opportunities and activities • Assign and schedule the batches

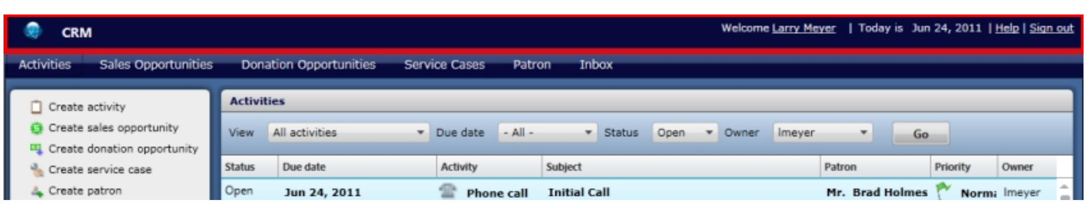
Navigating in CRM

The CRM user interface (UI) has been designed to allow easy and intuitive navigation to the various functions of the application. The basic navigational areas of the CRM UI include:

- A global navigation bar
- A main navigation bar
- A left navigation pane
- A work area used to display CRM hubs

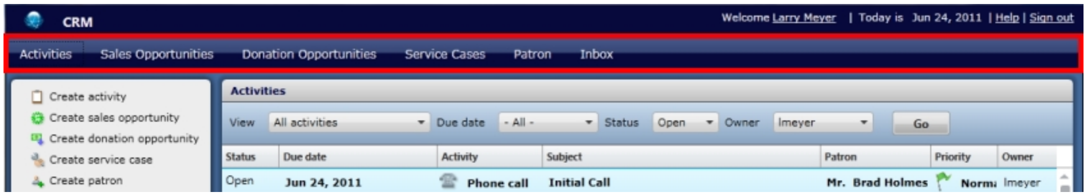
Global navigation bar

Use the global navigation bar to access CRM's session level functions. These include session information, user name display, password change, current date, the online CRM Help system, and sign out.



Main navigation bar

Click the buttons in the main navigation bar to display the CRM hubs in the work area. The Activities, Sales Opportunities, Donation Opportunities, Service Cases, and Patron buttons on the navigation bar are used to display these hubs. The Inbox button displays the CRM Inbox.

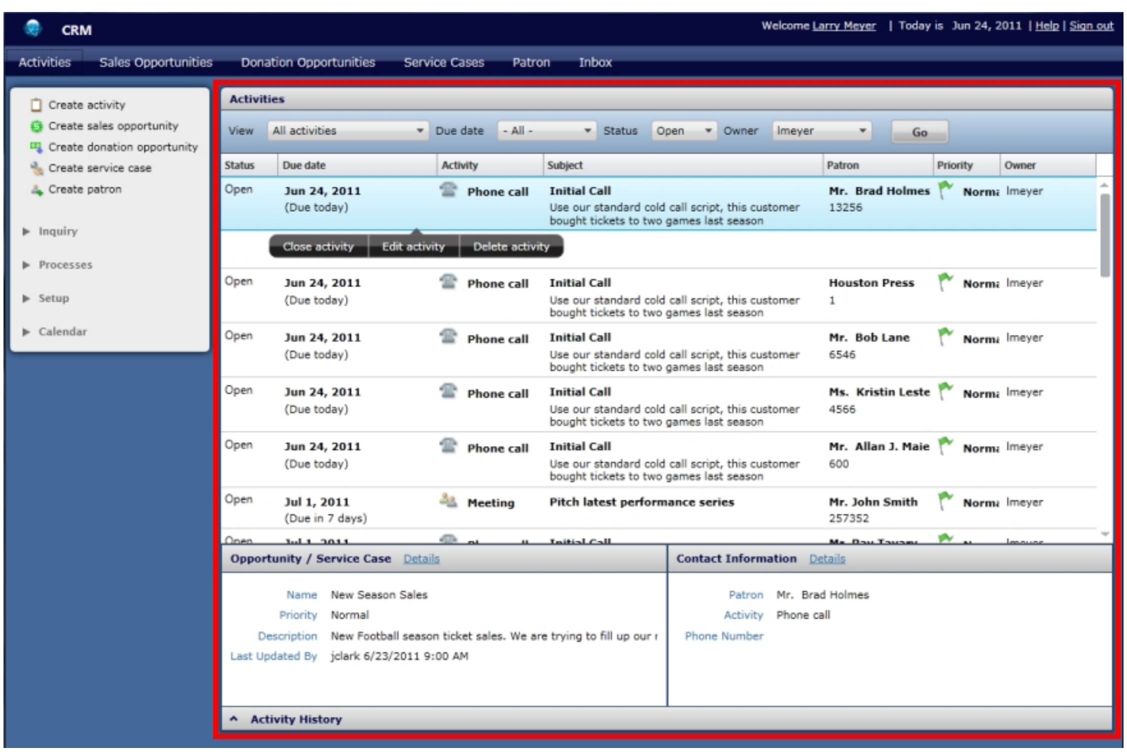


Left navigation pane

Use the left navigation pane to quickly create activities, opportunities, service cases, and patrons. Also use this pane to access inquiry, process, and setup functions, as well as a reference-only calendar.

Work area

This area is used to display the Activities, Sales Opportunities, Donation Opportunities, Service Cases, and Patron hubs, as well as the CRM Inbox. Switch between hubs and the Inbox by clicking the buttons in the main navigation bar.



Configuration Requirements

Client PCs used to run CRM 1.0 must meet the following hardware and software configuration requirements.

Supported architectures

x86

x64

Processor minimum

Intel Core Duo 2.3GHz (or equivalent)

RAM minimum

x86 - 1 GB

x64 - 2 GB

RAM Recommended

x86 - 2 GB

x64 - 4 GB

Disk space Minimum

x86 - 50 GB

x64 - 50 GB

Video card

DirectX 10 graphics device with Windows Display Driver Model (WDDM) 1.0 or higher

Internet access

Standard outgoing ports (80/443) must be allowed to Paciolan.com and Microsoft.com

Supported operating systems

Windows XP - Service Pack 3

Windows Vista - Service Pack 1 or later

Windows 7 - All Editions

Chapter 2 Operations Overview

This section is intended for the sales, fund development, and service representatives in your organization to help them use CRM in their daily work flow. This facilitates these users to direct and track their communications with patrons. To accomplish this, CRM includes items that represent user activities, sales and donation opportunities, service cases, email messages, and user notes.

The CRM interface is also integrated with your back office patron database, so users can view and update patron records at any time. In addition, if your organization uses MS Outlook, CRM can be integrated with the basic email and calendar functions.

The CRM operations features are described in the following sections:

- Signing in and out of CRM
- Working with Activities
- Working with Opportunities
- Working with Service Cases
- Working with Patrons
- Using Integrated Outlook
- Using CRM Notes

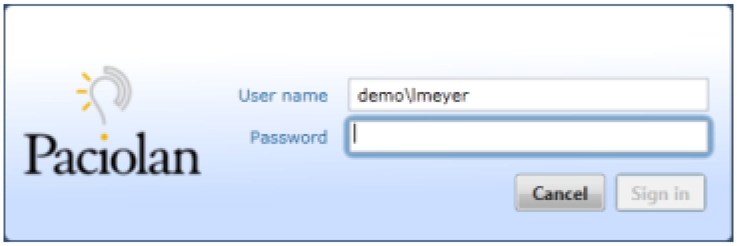
CRM Sign In/Sign Out

Your network administrator will supply you with a seller ID/user name pair and a password to access the CRM client application. Both a seller ID and a user name are required for sign in, because they determine the data accounts and patron management policies that are available to you during sign in. If you don't know your seller ID, user name, or password, see your system administrator.

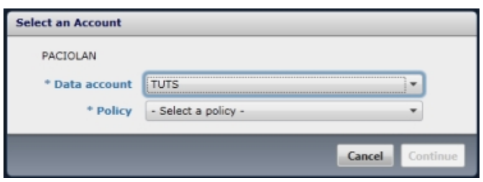
Note: Your session will time-out after 60 minutes and any unsaved data will be lost. You will be required to sign in again to continue working in CRM.

To sign in to CRM

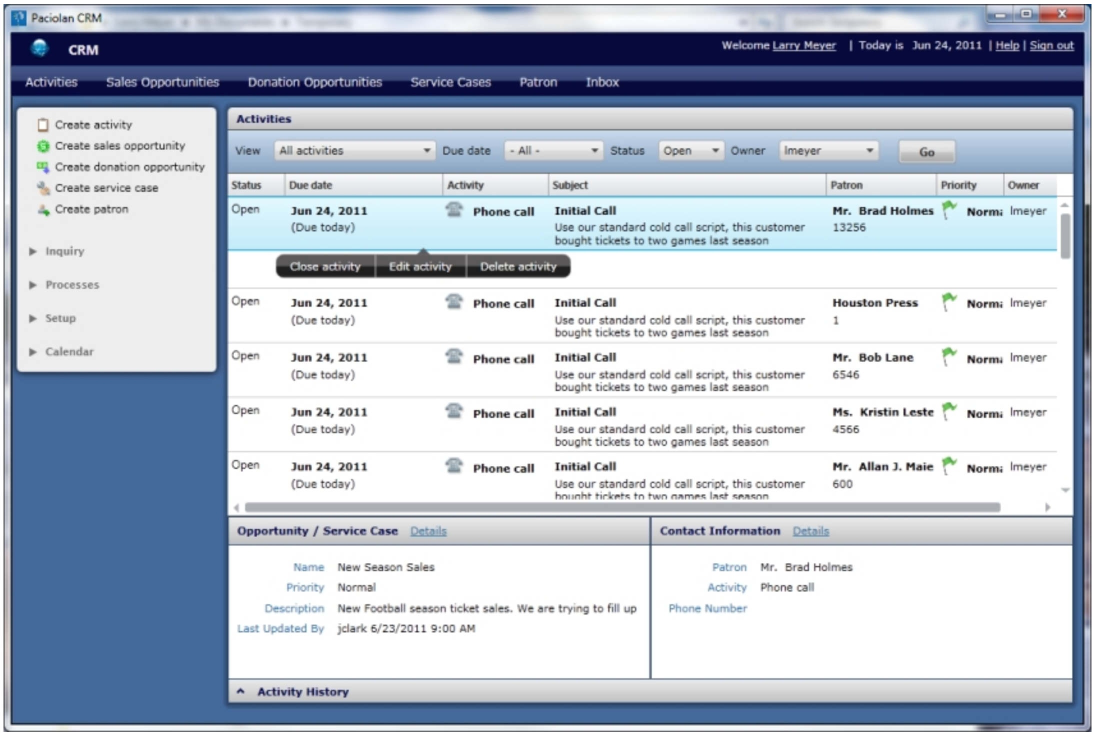
1. Open the CRM client application. There will most likely be a shortcut for the client on your Windows desktop. Once you've opened the client, CRM displays the sign in form.



2. In **User name**, enter your seller ID\user name pair, and then enter your password in **Password**. Make sure to use a back slash (\) between the seller ID and your user name.
3. Click the **Sign In** button. CRM displays the Select an Account form. If you only have access to one data account with one patron policy, CRM automatically selects them and displays the Activities form.

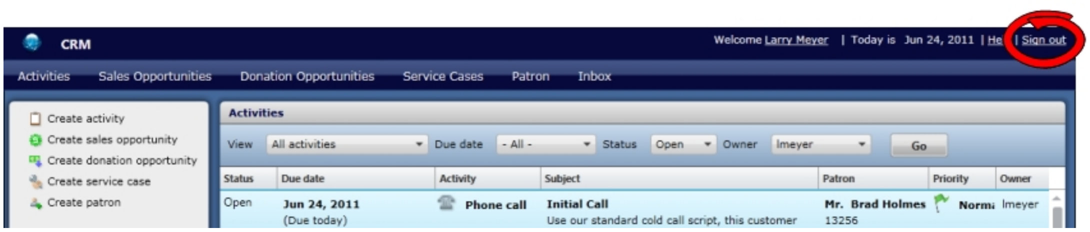


4. If you have access to more than one data account or policy, select the data account and policy, and then click the **Continue** button. CRM displays the Activities form.



To sign out of CRM

In the global navigation bar, click the **Sign Out** link. The CRM application closes.

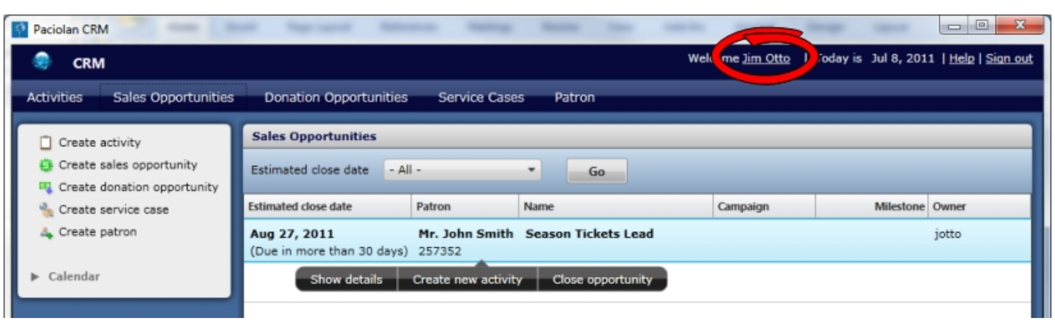


Changing Your Password

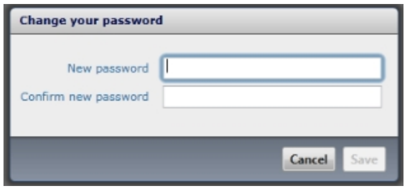
You can change your CRM user sign in password at any time. Your new password will be required the next time you sign in to CRM.

To change your password

1. In the global navigation bar, click your name link.



CRM displays the Change your password dialog box.



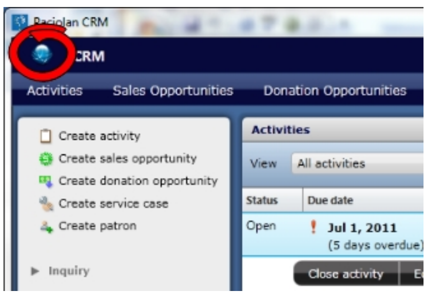
2. Enter your new password in the **New password** and **Confirm new password** fields, and then click the **Save** button.

Viewing Session Information

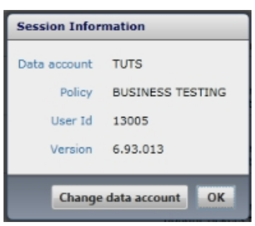
Once you have signed in to CRM, you can view Session Information at any time. Session Information includes the data account and patron management policy CRM is accessing. Session Information also includes the ID of the currently logged in user, as well as the tRes application version your organization is using. If you have more than one data account or patron policy, you can also switch to different ones from Session Information without signing out of CRM.

To view Session Information

1. In the global navigation bar, click the globe icon.



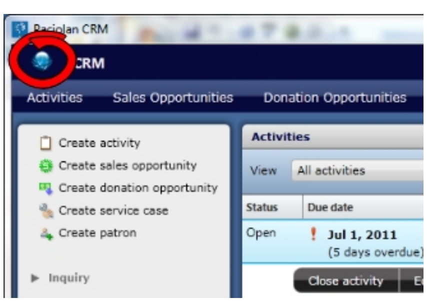
CRM displays Session Information.



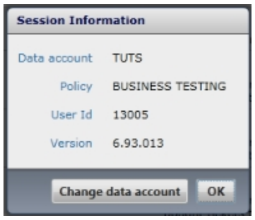
2. To return to the current CRM session from Session Information, click the **OK** button.

To change the data account or patron management policy without signing out of CRM

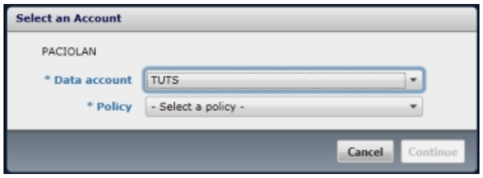
1. In the global navigation bar, click the globe icon.



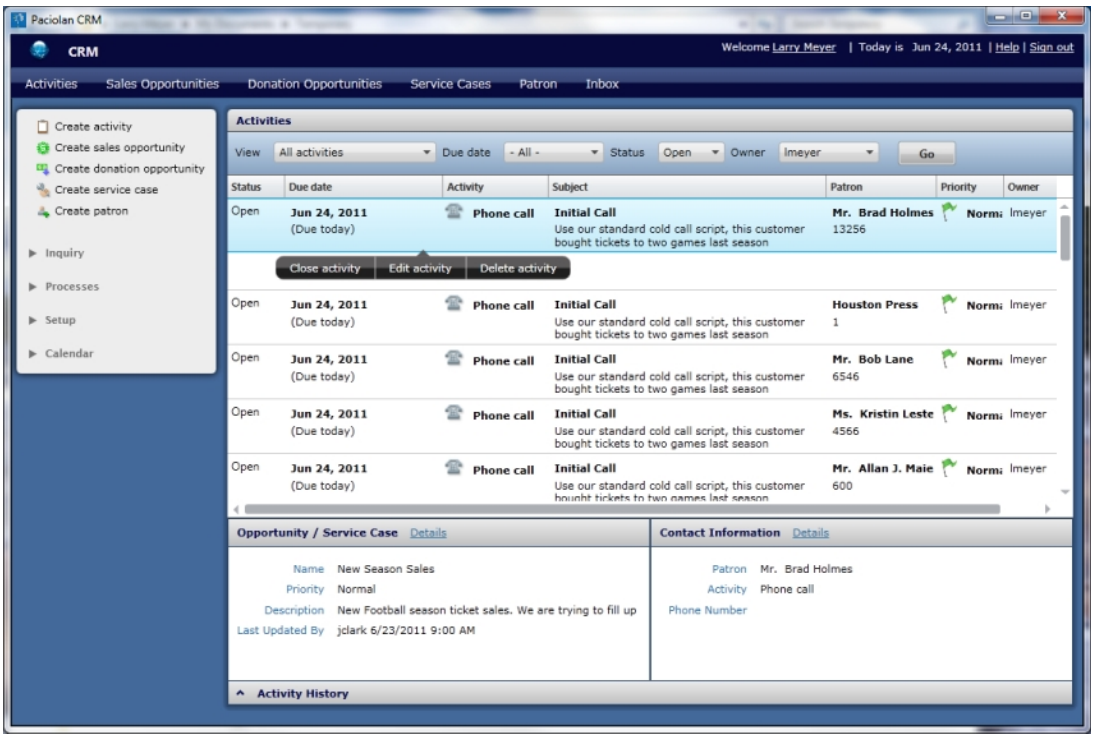
CRM displays Session Information.



2. Click the **Change data account** button. CRM displays the Select an Account dialog box.



3. Select the data account and policy, and then click the **Continue** button. CRM changes the data account and patron management policy and then redisplays the Activities form.



Working with Activities

In CRM, an item representing an activity is created whenever there is actual or potential communication between a CRM operator and a patron. Activities represent tasks that operators have either completed or must yet complete. Activity types include phone calls, email messages, fax transmissions, letter mailings, meetings, and other activities. These activities are assigned to CRM operators and then either closed immediately or updated as the tasks are performed. The assignment, updating, and closing of each activity is recorded by CRM.

CRM activities are created and assigned in one of the following ways:

- Manually in response to an incoming customer communication.
- As part of the creation of an opportunity or service case.

- As a follow-up at the completion of another activity.
- As the result of a batch process.

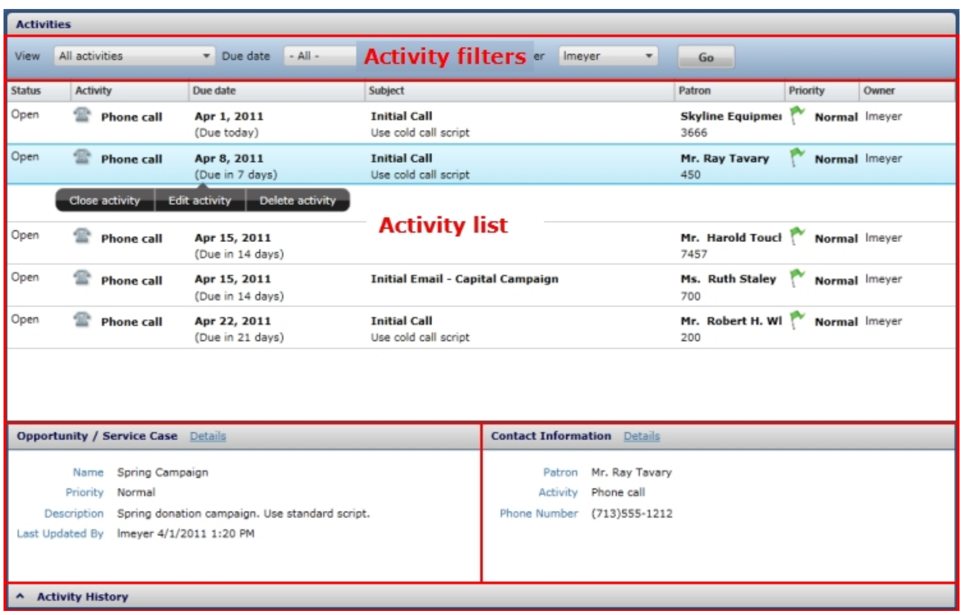
Activities can exist as standalone entities or be associated with a sales/donation opportunity or a service case. Both supervisors and subordinates can manually create activities. However, the bulk creation of activities or opportunities with associated activities can only be done by managers or system administrators.

When working with activities, you can do the following:

- Navigate the Activities hub
- Filter the Activity List
- View activity details
- Manually create activities
- Select patrons for activities
- Edit activities
- Close activities
- Delete activities

Navigating the Activities Hub

The Activities hub is the central place for working with activities in CRM. From this hub you can create, edit, close, and delete activities, as well as view the activity history. You can also view the opportunities, service cases, and contact information associated with each activity. The Activities hub is comprised of the following parts:



Activity filters

Use the drop-down settings in the activity filters area to display the list of activities you want. Once you've set the filters, click the **Go** button to display the subset of activities. The following filters are available:

- View. This field filters activities by whether they are standalone or are associated with sales opportunities, donation opportunities, or service cases. You can also choose to view only new activities. An activity is new if you are the owner and you haven't yet modified it.

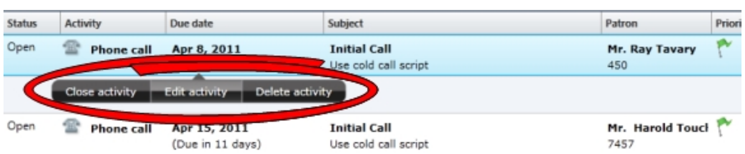
- Due date. This field filters activities based on whether they are overdue or are due today, tomorrow, within 7 days, or within 30 days.
- Status. This field filters activities by open or closed status. You can only view deleted activities using data views.
- Owner. The field filters activities by owner. You can only view your own activities or of those your subordinates, so this setting is only available to supervisors.

If no activities meet the filter combination you set, the activity table is empty and CRM displays the message "There are no activities that match the search criteria. Please try again." For more information about activity filters, see Filtering the Activity List.

Activity list

The activities displayed in the activity list are determined by the current operator and the filter settings. By default, all open activities that are owned by the current operator are displayed. In the list, each row represents an activity. Click an activity row to access the actions that you can perform on that activity. Possible actions include:

- Close activity. This action is only available for open activities. For information, see Closing Activities.
- Edit activity. This action is only available for open activities. For information, see Updating Activities.
- Delete activity. This action is available for both open and closed activities. For information, see Deleting Activities.
- Show details. This action is only available for closed activities. For information, see Viewing Activity Details.



When you click an activity, CRM also displays information related to the activity in the Opportunity/Service Case and Contact Information panes.

Each list column contain the same type of information for each activity in the list. The default columns include the following:

- Status. Activity statuses include Open, Closed, and Deleted. Deleted activities are not displayed in the activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during activity creation. See Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from oldest to furthest out date.
- Subject. Displays the subject and a short description for each activity. The sort is by the subject name.
- Patron. The name of the patron for which the activity was created. The sort is by last name then first name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

You can sort the activities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many activities in the list to display in the list area, a scroll bar appears on the right side of the list.

Opportunity / Service Case pane

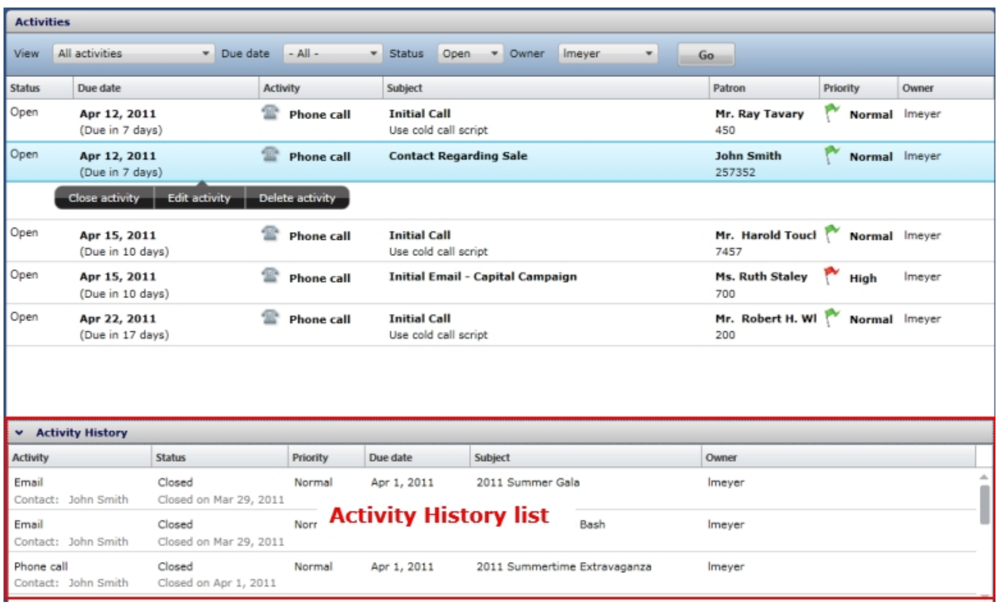
This pane displays summary information about the donation opportunity, sales opportunity, or service case that is associated with the selected activity. You can click the Details link to display the edit form for an opportunity or service case. For standalone activities, the pane displays without any information. For information about opportunities and service cases, see Working with Opportunities and Working with Service Cases.

Contact Information pane

This pane displays summary information about the patron who is assigned to be the contact person for the activity. You can click the Details link to display and edit the patron's profile. For information about patrons in CRM, see Working with Patrons.

Activity History list

The Activity History list displays the activities associated with the patron who is assigned to be the contact person for the activity that is selected in the Activity list. Deleted activities are not included. By default, the Activity History list is minimized. Click the bar to expand the list. When expanded, the list displays in place of the Opportunity / Service Case and Contact Information panes.



To view the details of an activity in the Activity History list, double-click the activity row. CRM will display the Edit Activity form for open activities and the View Activity form for closed activities.

You can sort the activities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many activities in the list to display in the list area, a scroll bar appears on the right side of the list.

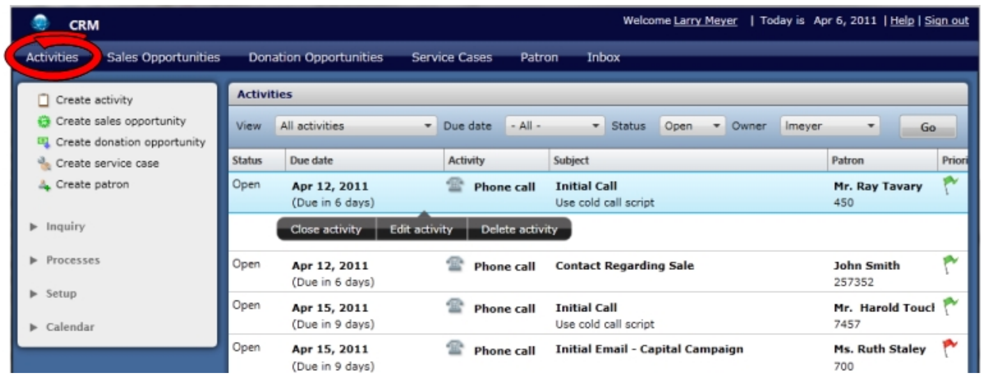
Filtering the Activity List

By default, the activity list displays all open activities that are owned by the currently signed in operator. However, you can display a different list of activities using the following filters:

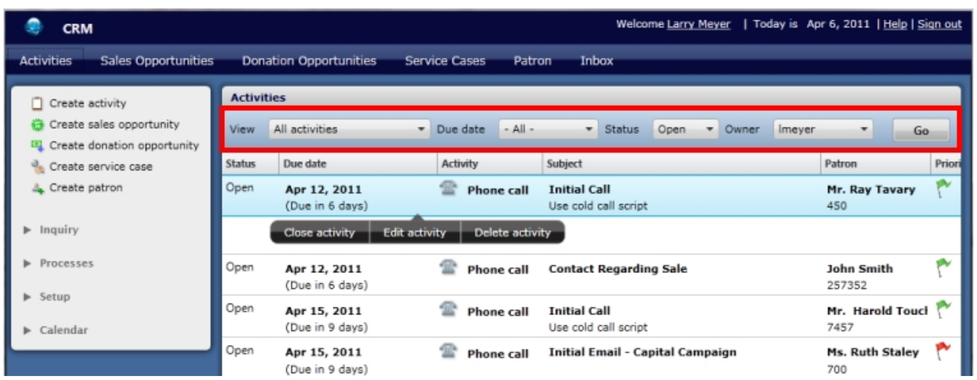
- View. This field filters activities by whether they are standalone or are associated with sales opportunities, donation opportunities, or service cases. You can also choose to view only new activities. An activity is new if you are the owner and you haven't yet modified it.
- Due date. This field filters activities based on whether they are overdue or are due today, tomorrow, within 7 days, or within 30 days.
- Status. This field filters activities by open or closed status. You can only view deleted activities using data views.
- Owner. The field filters activities by owner. You can only view your own activities or of those your subordinates, so this setting is only available to supervisors.

To filter the Activity list

1. In the main navigation bar, click **Activities**. CRM displays the Activities hub.



2. Set the activity filters to display the activities you want, and then click **Go**.



CRM displays the filtered list of activities.

Viewing Activity Details

Once an activity has been created and assigned to you or one of your subordinates, you can view its details at any time. This includes both open and closed activities. The exception is that you cannot view the details of deleted activities. Some reasons you might want to view activity details include:

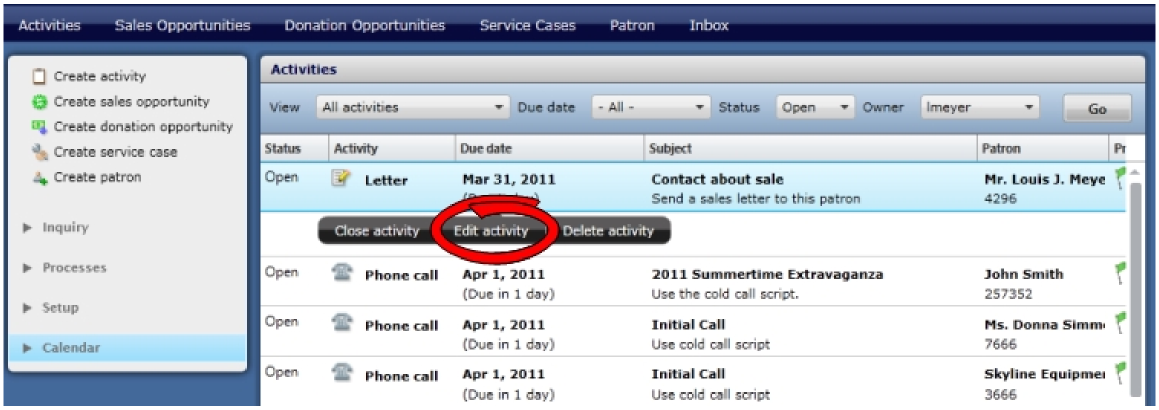
- You have been assigned an activity and want to see the details of the open activity.
- You are a supervisor and you want to check the progress your subordinates are making on their activities.
- You are working on an activity and want to see the activity history for the patron.
- You have closed an activity, but you want to go back and see what was done.

- You want to see the details of an activity that was used to win or resolve an opportunity or service case.

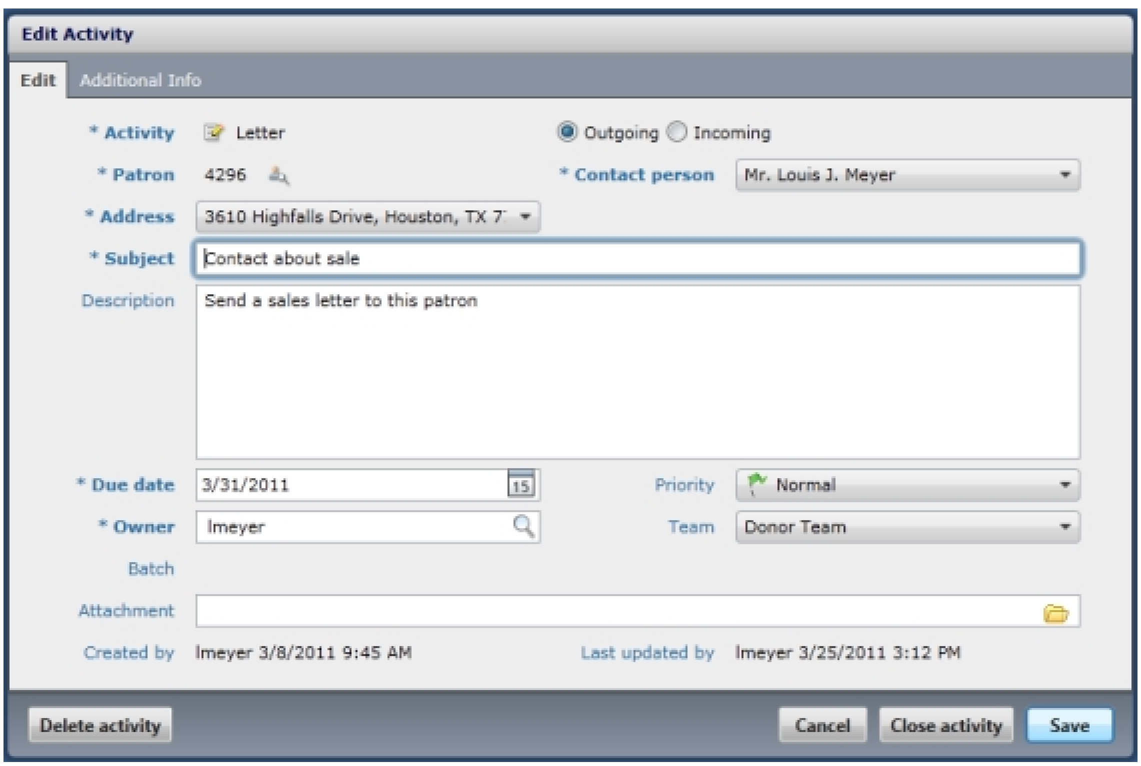
Viewing activities associated with opportunities or service cases is part of Working with Sales Opportunities, Working with Donation Opportunities, or Working with Service Cases.

To view an open activity from the activity list

1. On the Activities hub, click the activity, and then click **Edit activity**. If the activity you want to view is not in the list, try Filtering the Activity List.

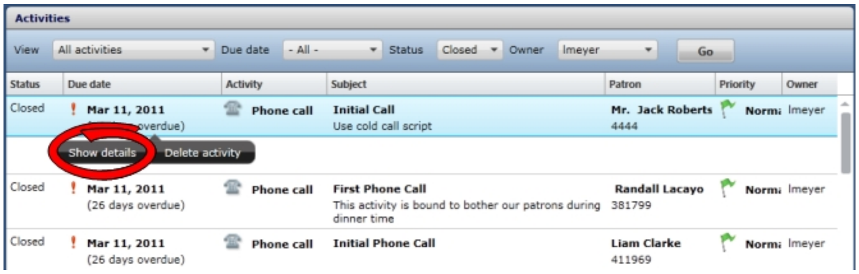


CRM displays the Edit Activity form.

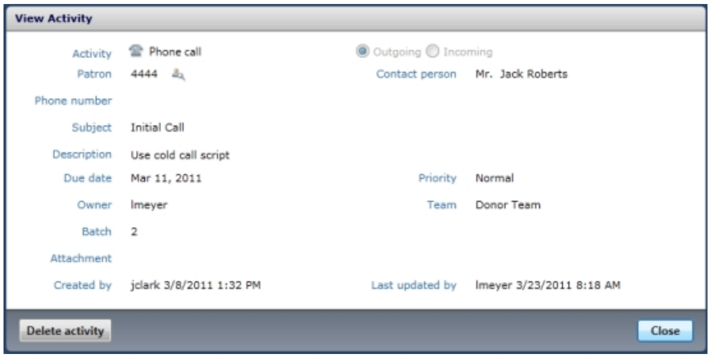


To view a closed activity from the activity list

1. Display closed activities by Filtering the Activity List.
2. Select the activity, and then click **Show details**.

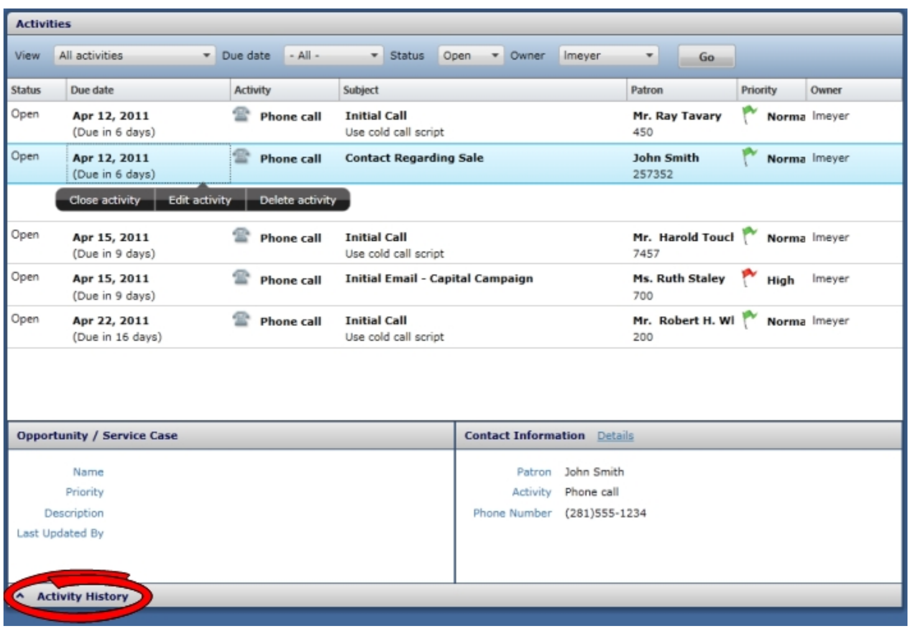


CRM displays the View Activity form.

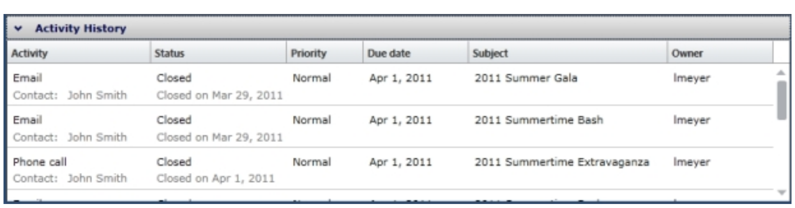


To view an activity from the history of the patron in the currently selected activity

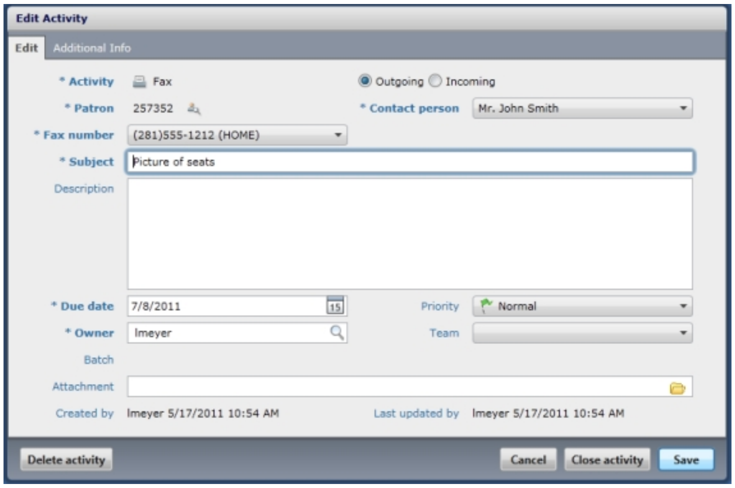
1. On the Activities hub, click the activity, and then click **Activity History**. If the activity whose history you want to view is not in the list, try Filtering the Activity List.



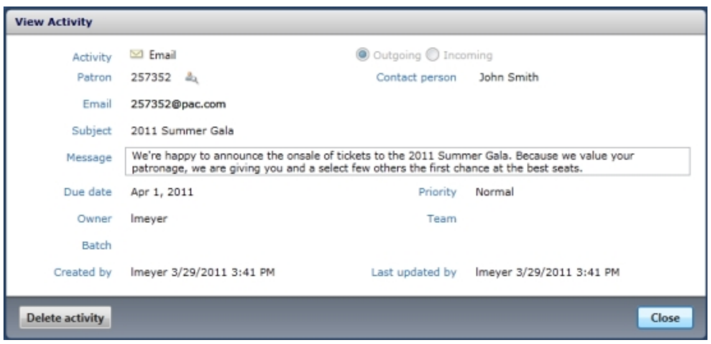
CRM displays the Activity History list.



2. Double-click the activity you want to view. If the activity is open, CRM displays the Edit Activity form.



If the activity is closed, CRM displays the View Activity form.



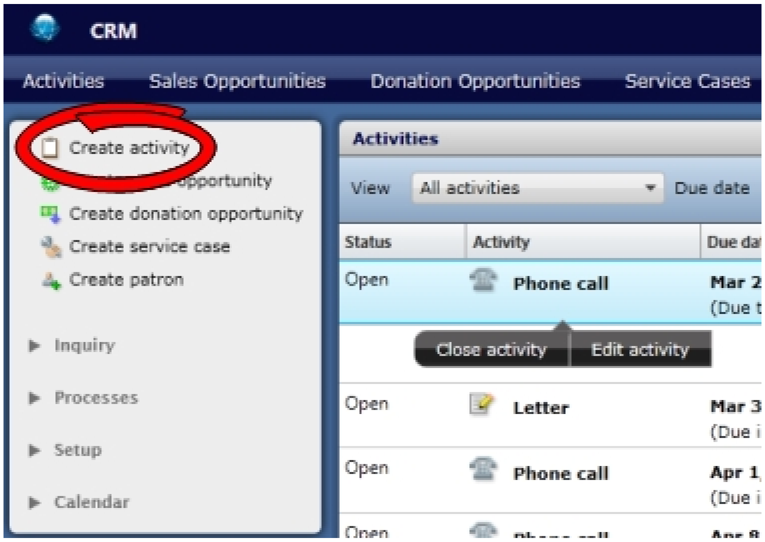
Manually Creating Activities

A CRM activity should be created whenever there is communication between the CRM operator and a patron. This topic describes standalone, manual activity creation. A typical use of manual activity creation is for incoming communications from patrons, when the communication is not related to an existing opportunity or service case. Activities are also manually created to track follow-up tasks when closing other activities.

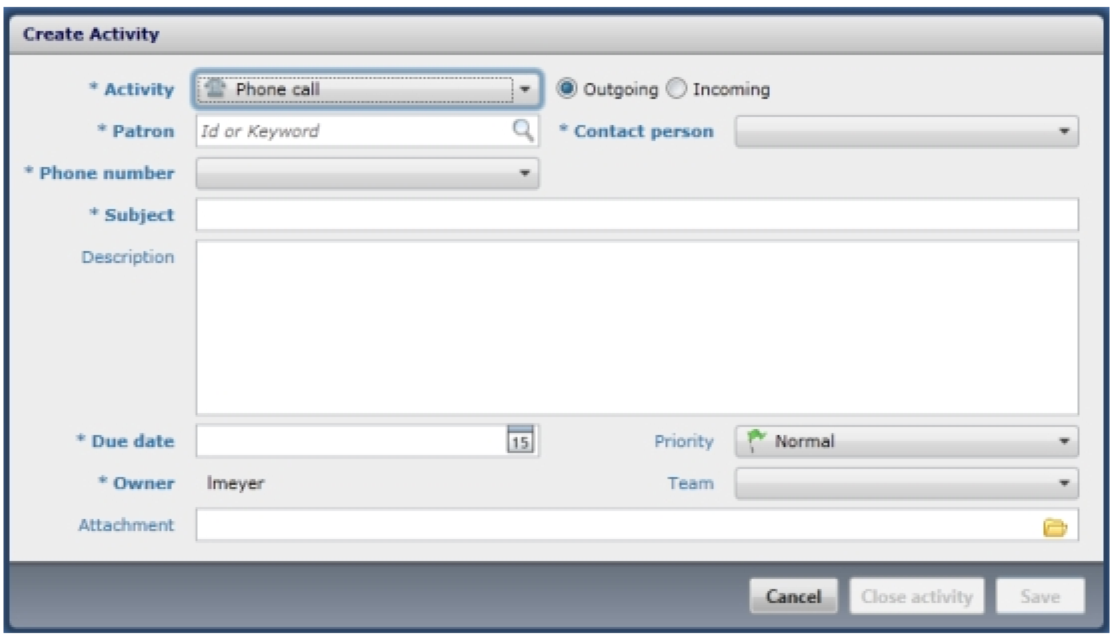
Note: Activities are also created as part of manual opportunity and service case creation. However, if you need to create a large number of similar activities and opportunities quickly, you should use batch creation instead of a manual procedure.

To manually create an activity

1. In the navigation pane, click **Create Activity**.



CRM displays the Create Activity form in the work area.



2. From the **Activity** drop-down list, select the type of activity that you want to create. The required and optional fields on the form change based on the activity type.
3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form. Because the group of fields displayed varies by activity type, the table lists the fields in alphabetical order.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in

Field	Usage Information
	other fields on this form, the information you entered will be kept.
Add meeting to Outlook calendar	(Outlook integration only) For a Meeting activity, select this option to add the meeting to your Outlook calendar. Your entry in the **Location** field will be automatically added to the **Location** field in the Outlook meeting. However, conference rooms with addresses in Outlook will not be added to the meeting. If a patron has an email address, you can also choose to send a meeting invitation to the patron's email account. If the patron has Outlook or another email application that supports Outlook meeting invitations, the patron can then add the meeting to an email integrated calendar. Depending on the Outlook integration of the patron's email application, you may also receive a confirmation email when the meeting invitation is accepted. See Using Integrated MS Outlook for more information.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to an activity. File size cannot exceed 2MB. If you want to add an attachment an email activity, you need to edit the email in Outlook and add the attachment there before sending. For more information, see Opening CRM Inbox Items in Outlook.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) Enter a detailed description of the activity.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Edit in Outlook	(Outlook integration only) Save the email or meeting activity in CRM and open the email or meeting in Outlook. You can then edit the item as you normally would.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and

Field	Usage Information
	time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting. The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Patron	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. An activity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an activity. This is because CRM assumes the activity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click to save the activity and return to the previous form. If you want to create

Field	Usage Information
	a follow-up activity, click the **Close Activity** button instead. The **Save** button is enabled only if all required fields have valid entries.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

4. Do one of the following:
   - For Phone Call, Fax, Letter, Meeting, or Other activities, click **Save**.
   - For an Email activity, click **Send Email**. CRM prompts you to either return to the Activities hub or create a follow-up activity. To create a follow-up activity, select **Create follow-up activity**, and then click **OK**. Once you click **OK**, CRM closes the activity you just completed. CRM displays the Create Activity form. The form displays with the patron information from the original email activity, and you can then repeat this procedure to create a new activity.

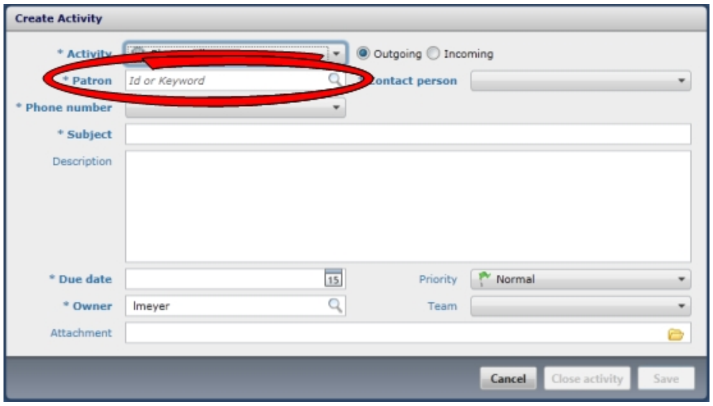
Selecting Patrons During Activity Creation

As part of manually creating an activity, you need to select the patron for which you are creating the activity. To select a patron you can use a known patron Id number, a keyword, or the integrated Patron Lookup. Except for its integration into the activity creation process, the Patron Lookup works just like the Patron Search form on the Patron hub.

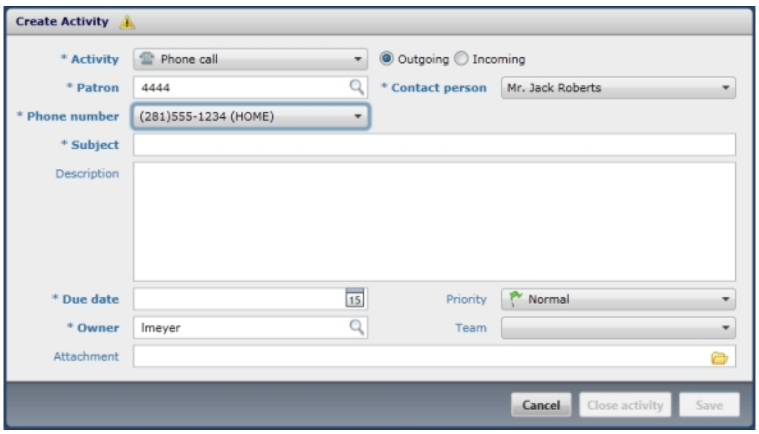
When using the Patron Lookup, you can search for a patron using the patron's name, Id, keywords, phone numbers, or email addresses. If the patron is an organization, you can search by the organization name. Once you locate the patron, you can assign the patron to the activity you are creating.

To select a patron using the patron Id number

1. On the Create Activity form in the **Patron** field, enter the patron Id number, and then click the magnifying glass icon .

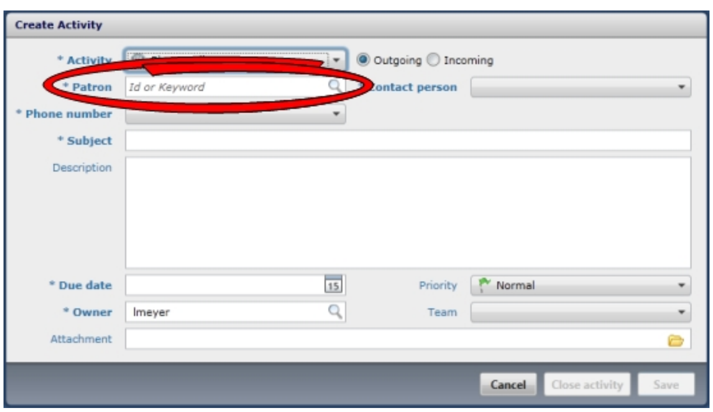


If the patron Id number is valid, CRM populates the Create Activity form with the patron's information. If the patron Id is invalid, CRM displays the Patron Lookup. In this case, use the procedure to select a patron using the Patron Lookup search below.

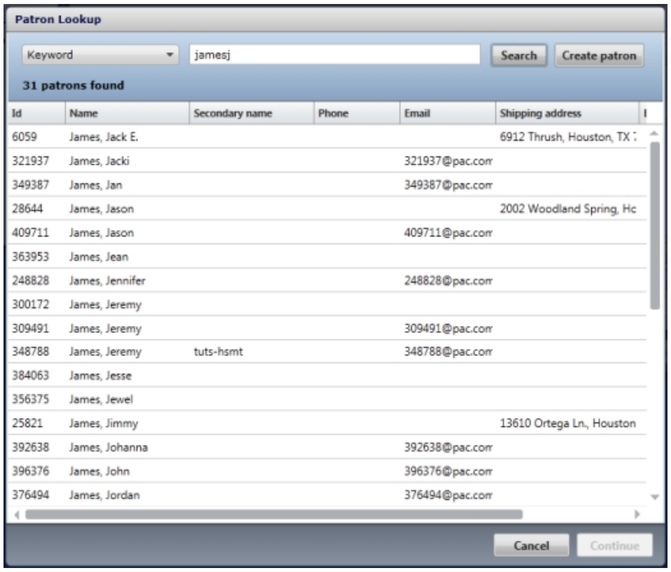


To select a patron using a patron keyword

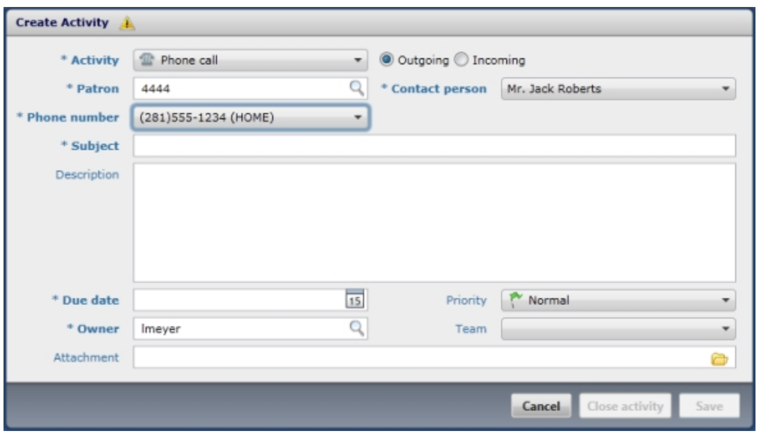
1. On the Create Activity form in the **Patron** field, enter the keyword, and then click the magnifying glass icon .



If only one patron record contains the keyword, CRM populates the Create Activity form with the patron's information. If more than one patron record uses the keyword, CRM displays the Patron Lookup with the matching patron records in the search results.

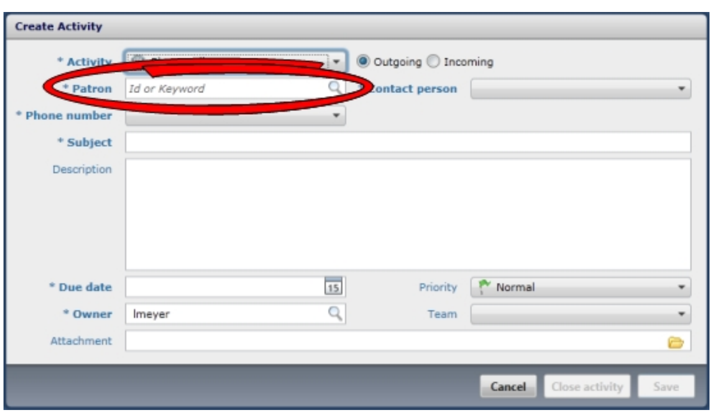


2. Locate the patron for which you are creating the activity. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
3. Double-click the patron's row. CRM redisplays the Create Activity form populated with the patron's information.



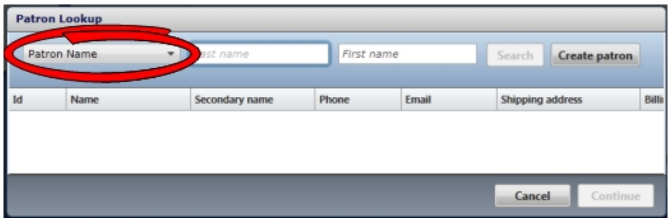
To select a patron using the Patron Lookup search

1. On the Create Activity form in the **Patron** field, click the magnifying glass icon .



CRM displays the Patron Lookup.

2. Select the search mode from the drop-down list.

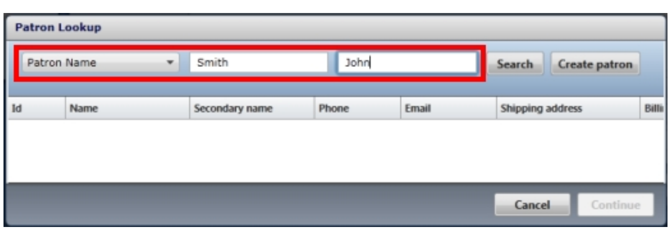


3. Based on the search mode, enter the appropriate alphanumeric characters in the text boxes.

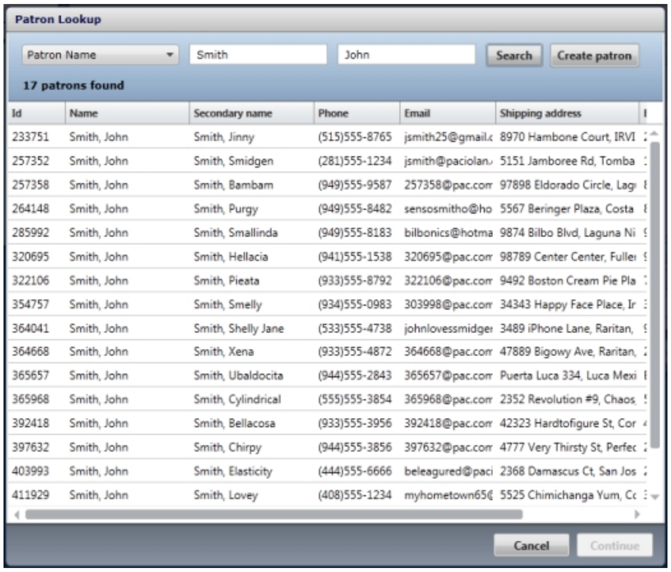
   See a table that describes the acceptable entries for each search mode.

Search mode	Acceptable entries
Patron name	Any alphanumeric In the second text box, you can use the asterisk (*) wildcard as long as the first character is a letter. For example, if you want to find the first name John, you can enter J*, Jo*, or Joh* . You cannot use *ohn. You also cannot use wild-cards for last names in the first text box.
Patron Id	Any alphanumeric
Keyword	Any alphanumeric. The search will return patron records with partial keyword matches.
Phone number	Any alphanumeric
Email address	Must be a valid email address format. For example, name@example.com
Organization name	Any alphanumeric

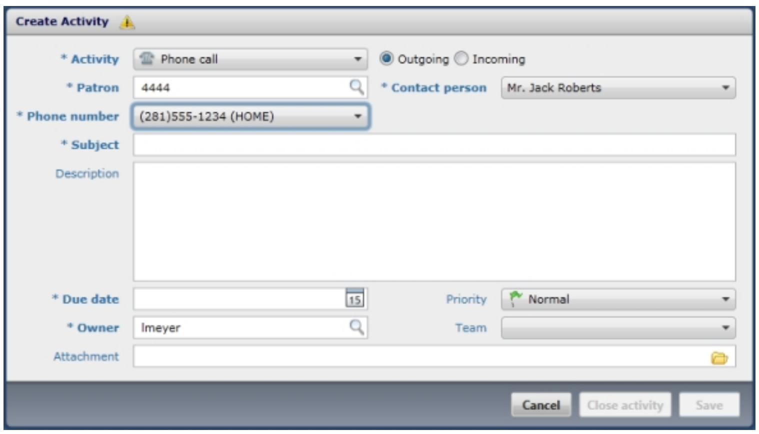
   The image below shows the Patron Name search mode, which has two required text boxes.



4. Click the **Search** button. CRM displays the search results. If no patrons match the search criteria, CRM displays a message to that effect.



5. Locate the patron for which you are creating the activity. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
6. Double-click the patron's row. CRM redisplays the Create Activity form populated with the patron's information.

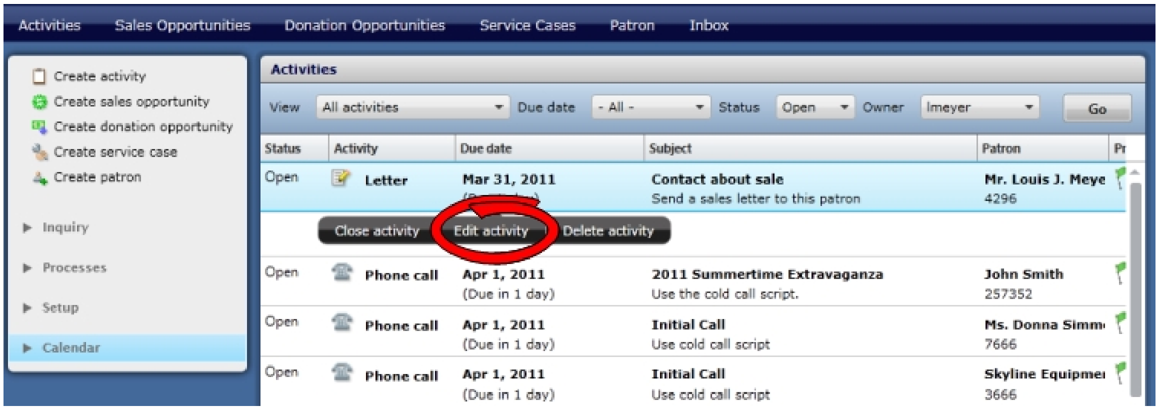


Editing Activities

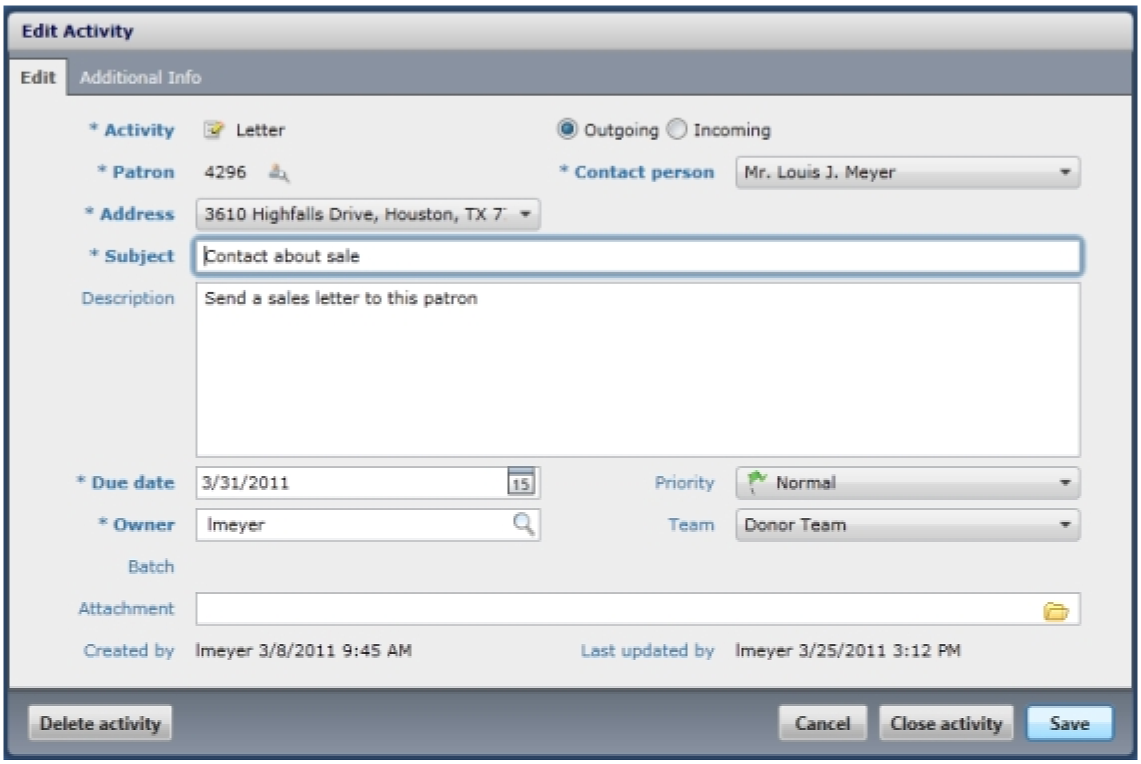
Activities for which you or your subordinates are the owner are displayed on the Activities hub. These activities may have been assigned an owner during manual activity creation or as a result of the bulk creation of activities or opportunities. When an activity is assigned to you as owner, the goal is to complete the task that the opportunity represents and then close the activity. If the activity is associated with a sales or donation opportunity, closing an activity will be a step towards winning or losing that opportunity. If the activity is assigned as the result of the creation of a service case, the goal is to resolve the issue that the case represents by completing the associated task.

To edit an assigned activity

1. On the Activities hub, click the activity, and then click **Edit activity**.



CRM displays the Edit Activity form.



2. Update the field values. Fields with an asterisk are required.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Add meeting to Outlook calendar	(Outlook integration only) For a Meeting activity, select this option to add the meeting to your Outlook calendar. Your entry in the **Location** field will be automatically added to the **Location** field in the Outlook meeting. However, conference rooms with addresses in Outlook will not be added to the meeting.

Field	Usage Information
	If a patron has an email address, you can also choose to send a meeting invitation to the patron's email account. If the patron has Outlook or another email application that supports Outlook meeting invitations, the patron can then add the meeting to an email integrated calendar. Depending on the Outlook integration of the patron's email application, you may also receive a confirmation email when the meeting invitation is accepted. See Using Integrated MS Outlook for more information.
Additional Info	Click this tab to see the associated opportunity/service case, a table with the activity history of the opportunity/service case, and the contact information of the patron that is associated with the opportunity/service case.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to an activity. File size cannot exceed 2MB. If you want to add an attachment an email activity, you need to edit the email in Outlook and add the attachment there before sending. For more information, see Opening CRM Inbox Items in Outlook.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the patron record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) Enter a detailed description of the activity.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Edit in Outlook	(Outlook integration only) Save the email or meeting activity in CRM and open the email or meeting in Outlook. You can then edit the item as you normally would.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.

Field	Usage Information
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting. The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Patron	The **Patron** field is static and the lookup is unavailable on the Edit Activity form.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the activity. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click to save the activity and return to the previous form. If you want to create a follow-up activity, click the **Close Activity** button instead. The **Save** button is enabled only if all required fields have valid entries.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.

Field	Usage Information
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

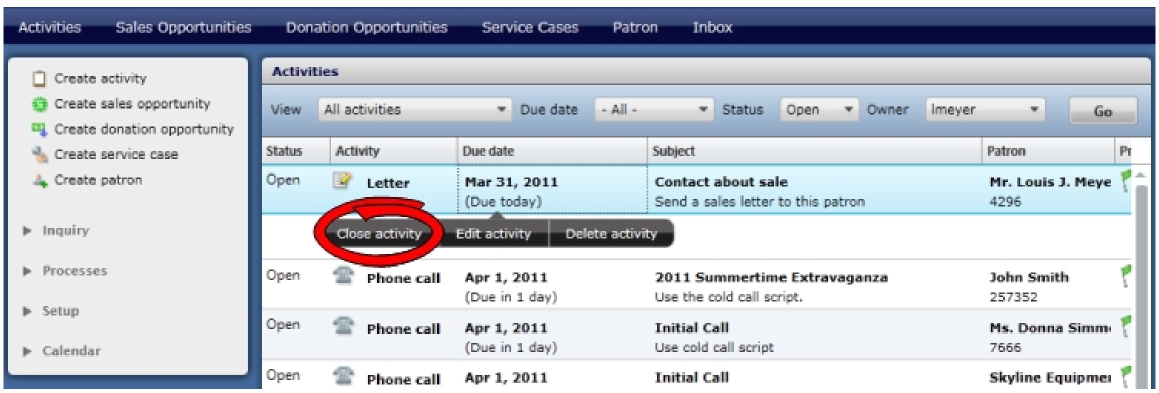
3. Click **Save**. CRM displays the Activities hub.

Closing Activities

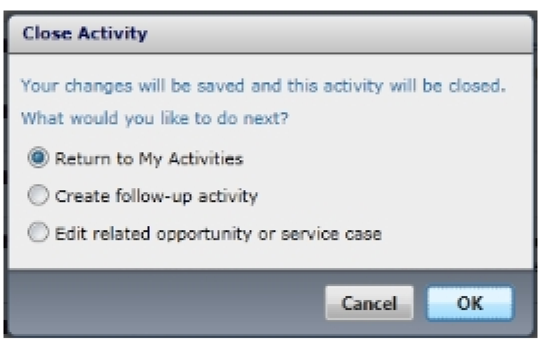
When you complete the task assigned to you in an activity, you need to change the status from open to closed. If CRM is integrated with MS Outlook, email activities are closed automatically when you send them. The rest of the activity types must be closed manually when the task is completed.

To close an activity

1. On the Activities hub, click the activity, and then click **Close activity**.



CRM displays the Close Activity dialog, which asks you what you want to do next.



2. Select one of the options:

   - **Return to My Activities**. This will close the activity and display the Activities hub.
   - **Create follow-up activity**. This will close the activity and display the Create Activity form. You can use this from to create another activity for the same patron. For instructions, see Manually Creating Activities.
   - **Edit related opportunity or service case**. CRM will only display this option if the activity is part of an opportunity or service case. This option will not display when closing standalone activities. If you select this option, CRM will close the activity and display the

opportunity or service case. See Working with Opportunities or Working with Service Cases.

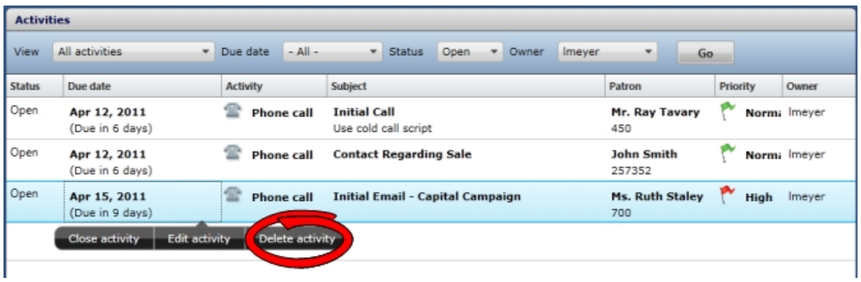
3. Click **OK**. CRM displays the form corresponding to the option you selected above.

Deleting Activities

You can delete your own or your subordinates' open or closed activities when they become unnecessary. When you delete activities, they are no longer visible in the Activity hub and will not be in the results generated by data views. Deleting an activity does not delete or change the service case or opportunity for which it was created.

To delete an open activity from the Activities hub

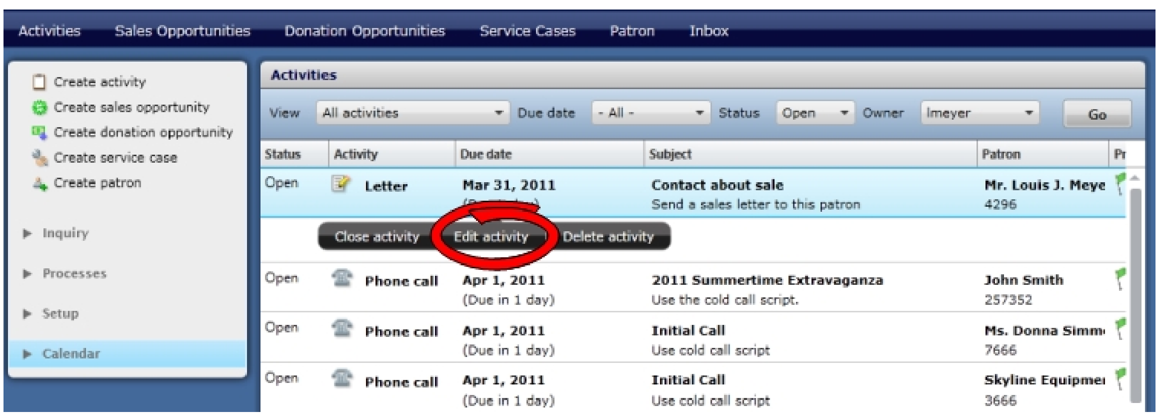
1. Select the activity, and then click **Delete activity**.



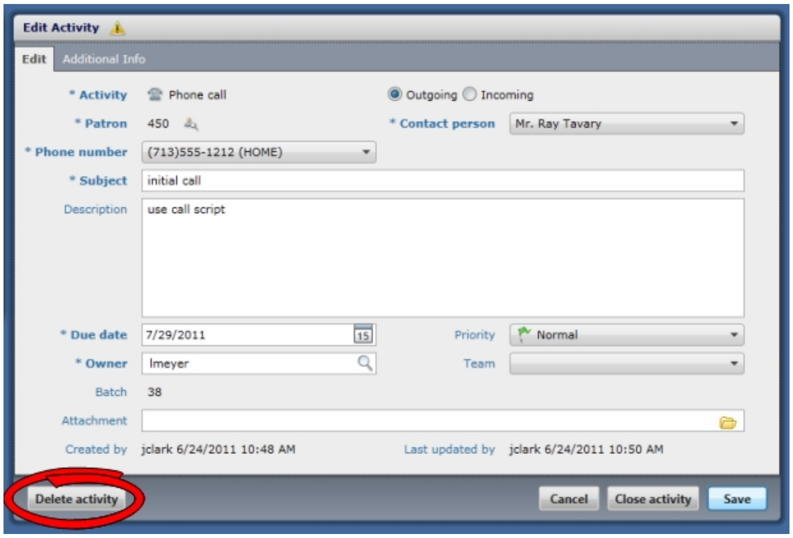
2. When the Attention dialog form displays, click **OK**. CRM redisplays the Activities list without the deleted activity.

To delete an open activity during editing

1. Select the activity, and then click **Edit activity**.



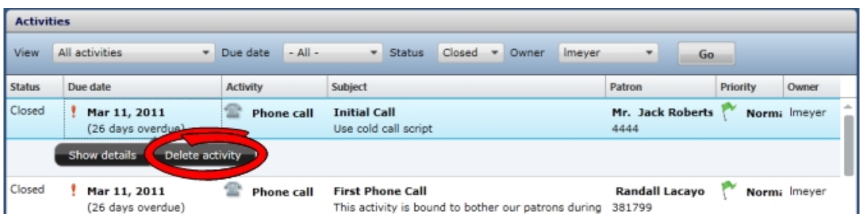
CRM displays the Edit Activity form.



2. Click **Delete activity**. CRM redisplays the Activities list without the deleted activity.

To delete a closed activity from the Activities hub

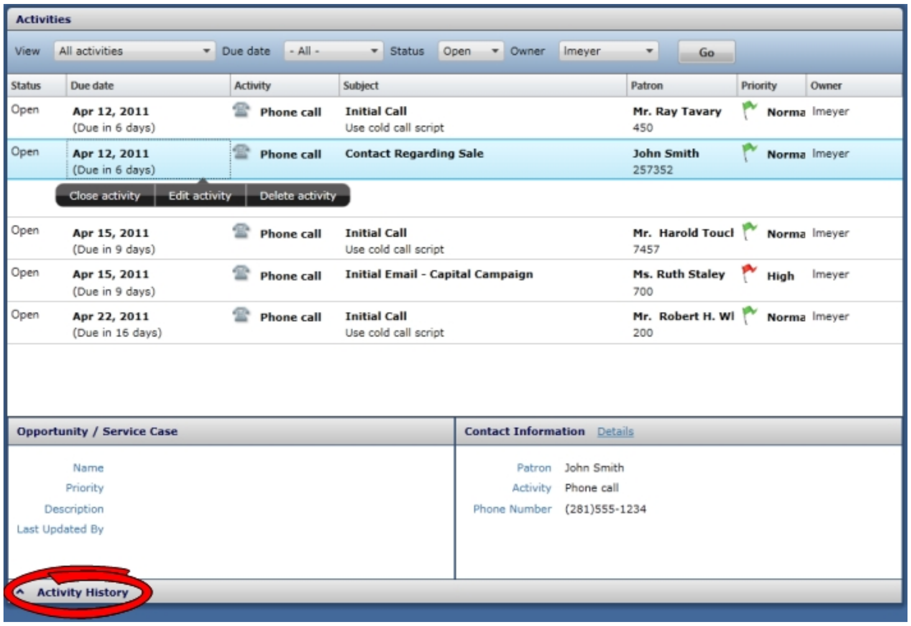
1. Display the closed activity by Filtering the Activity List.
2. Select the closed activity, and then click **Delete activity**.



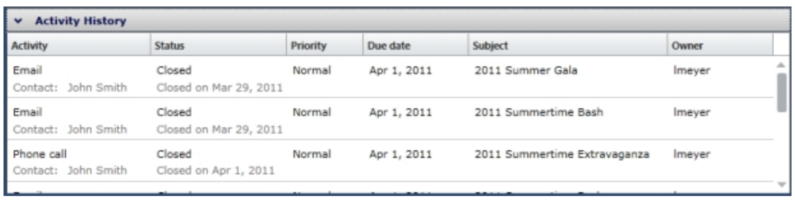
3. When the Attention dialog form displays, click **OK**. CRM redisplays the Activities list without the deleted activity.

To delete an activity from the Activity History list

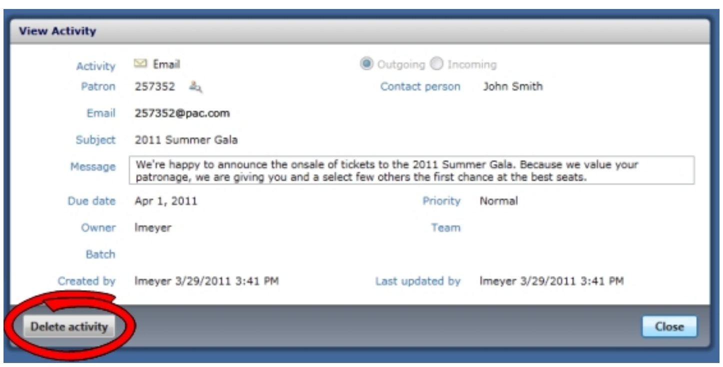
1. On the Activities hub, click the activity, and then click **Activity History**. If the activity whose history you want to view is not in the list, try Filtering the Activity List.



CRM displays the Activity History list.



2. Double-click the activity you want to delete. CRM displays the View Activity form.



3. Click **Delete activity**.
4. When the Attention dialog form displays, click **OK**. CRM redisplays the Activities list.

Working with Opportunities

A CRM opportunity is a software representation of a real-life opportunity to sell tickets or solicit a donation. Salespersons and solicitors can use CRM opportunities to facilitate and keep track of what they do to win these real-life opportunities. Managers can use opportunities to track the progress and gauge the effectiveness of their salespersons and solicitors.

To facilitate both ticketing and fund raising, CRM includes separate opportunity representations for both sales and donations. CRM sales opportunities and donation opportunities differ only by some of data that is used to generate and develop them. Sales and donation opportunities are represented and used in CRM in basically the same way.

- Working with Sales Opportunities
- Working with Donation Opportunities

Service cases are represented similarly in CRM as well. For more information, see Working with Service Cases.

Working with Sales Opportunities

A sales opportunity represents a potential sale for your organization. CRM opportunities are created to represent each of these real-world opportunities. Creating a CRM opportunity allows you to track all activities, communication, and patron information related to a potential sale. Supervisors create these sales opportunities in CRM and then assign them to sales representatives. This assignment process can be done one opportunity at a time or in bulk. For information about bulk processing opportunities, see Creating Opportunities in Bulk.

Sales representatives must take concrete steps to win sales opportunities. In CRM these steps are represented by activities. A CRM opportunity always has an activity associated with it, so that sales representatives know the next step toward winning the opportunity. As each activity is completed, a representative can create another activity or close the opportunity. For more information about CRM activities, see Working with Activities.

While representatives are working on opportunities, they can also update patron information, change estimated close dates, add attachments, and edit opportunity information. When opportunities are closed, they are marked won or lost. Sales representatives must have the correct CRM permissions to sales data to work with opportunities.

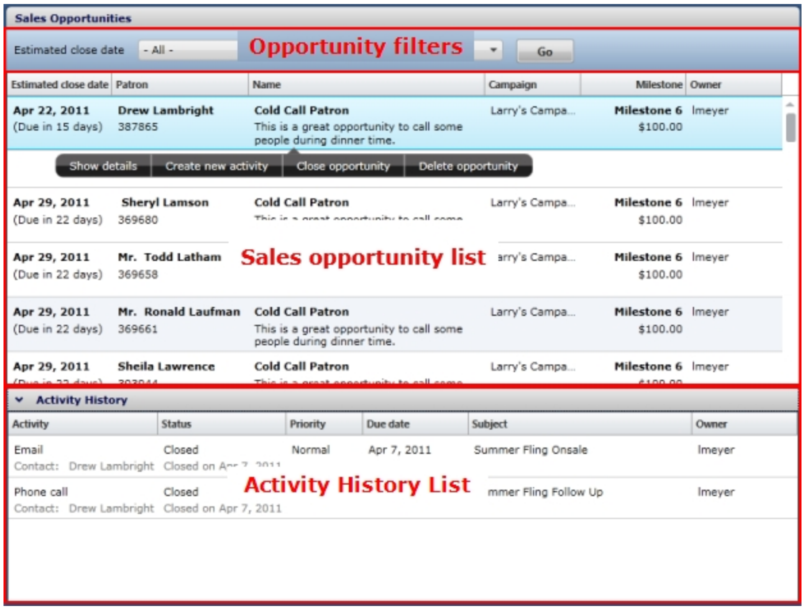
Note: Although working with donation opportunities is very similar to working with sales opportunities, there are some important differences. For information about donation opportunities, see Working with Donation Opportunities.

When working with sales opportunities, you can do the following:

- Navigate the Sales Opportunities hub
- Filter the opportunity list
- View opportunity details
- View the Activity History
- Manually create opportunities
- Select patrons for opportunities
- Edit opportunities
- Close opportunities
- Delete opportunities

Navigating the Sales Opportunities Hub

The Sales Opportunities hub is the central place for working with sales opportunities in CRM. From this hub you can edit, view, close, and delete opportunities. You can also create activities for the opportunities within the hub. The Sales Opportunities hub is composed of the following parts:



Opportunity filters

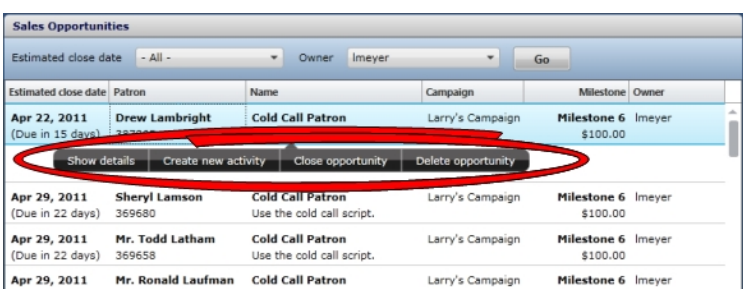
Use the drop-down settings in the opportunity filters area to display the list of sales opportunities you want. Once you've set the filters, click the **Go** button to display the subset of opportunities. The following filters are available:

- **Estimated close date** - This field filters opportunities by the date range during which they should be closed. The selections include All, Today, Tomorrow, Overdue, Next 7 days, and Next 30 days. These date selections are not configurable.
- **Owner** - This field filters opportunities by owner. By default, the Sales Opportunities hub displays the opportunities for which the currently signed in operator is owner. You can only view opportunities owned by other operators if you are their supervisor. For this reason, this setting only applies to supervisors.

If no opportunities meet the filter combination you set, the opportunity list is empty and CRM displays the message "There are no sales opportunities that match the search criteria. Please try again." For more information about opportunity filters, see Filtering the Opportunity List.

Sales opportunity list

The sales opportunity list contents are determined by the current CRM operator and the filter settings. By default, all open sales opportunities that are owned by the current operator are displayed. In the list, each row represents an opportunity. Click an opportunity row to display the actions that you can perform on that opportunity. Possible actions include:



- Show details. Click this button to display the Edit Sales Opportunity form (see Editing Sales Opportunities).

- Create new activity. Click this button to display the Create Activity form (see Manually Creating Activities).
- Close opportunity. Click this button to display the Close Opportunity dialog box (see Closing Sales Opportunities).
- Delete opportunity. Click this button to delete the opportunity (see Deleting Sales Opportunities).

The list columns contain the same type of information for each opportunity in the list. The default columns include the following:

- Estimated close date. The estimated close date and the number of days until or after the due date,relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest in the future date.
- Patron. The name of the patron for which the opportunity was created. Patron names are sorted by last name then first name.
- Name. The opportunity names are sorted alphanumerically.
- Campaign. The campaign names are sorted alphanumerically.
- Milestone. The milestone names are sorted alphanumerically.
- Owner. The owner names are sorted alphabetically.

You can sort the opportunities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many opportunities in the list to display in the list area, a scroll bar appears on the right side of the list.

Activity History list

The Activity History list displays the activities associated with the opportunity that is selected in the opportunity list. Both open and closed activities are included. By default, the Activity History list is minimized. Click the bar to expand the list. When expanded, the list displays over the bottom part of the opportunity list.

To view the details of an activity in the Activity History list, double-click the activity row. CRM will display the Edit Activity form for open activities and the View Activity form for closed activities. For information about using these forms, see Editing Activities and Viewing Activity Details.

You can sort the opportunities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many opportunities in the list to display in the list area, a scroll bar appears on the right side of the list.

The default columns include the following:

- Status. Activity statuses can be Open or Closed. Deleted activities are never displayed in the Activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during manual or bulk activity creation. See Creating Activities in Bulk or Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest out date.

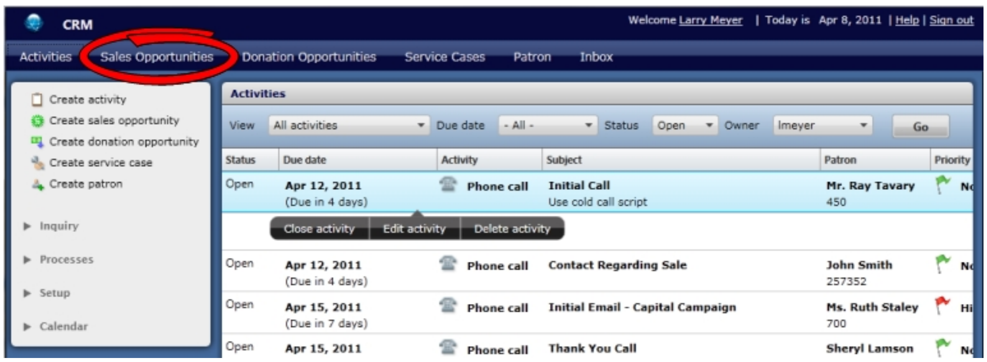
- Subject. The subjects of the activities are sorted by the subject name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

Filtering the Sales Opportunity List

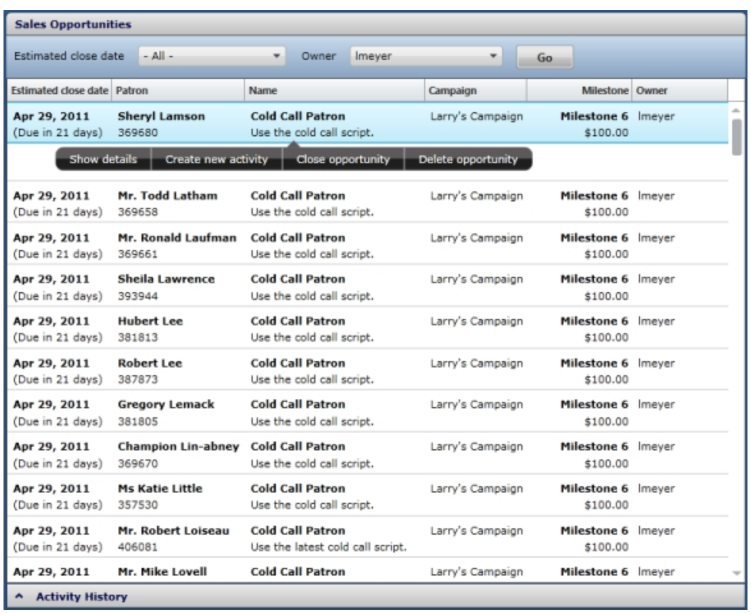
You can filter the sales opportunity list to display only the opportunities on which you want to work. By default, the opportunity list displays all open opportunities that are owned by the currently signed in operator. However, you can change the list of opportunities by filtering for the estimated close date. If you are a supervisor, you can also filter the list by owner. However, only your sub-ordinates will be available for selection. Opportunity filters work the same for both sales and donation opportunities.

To filter the sales opportunity list

1. Click the **Sales Opportunities** button in the main navigation bar.



CRM displays the Sales Opportunities hub.



2. In the opportunity filters area, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.

CRM displays the filtered sales opportunity list.

Viewing Sales Opportunity Details

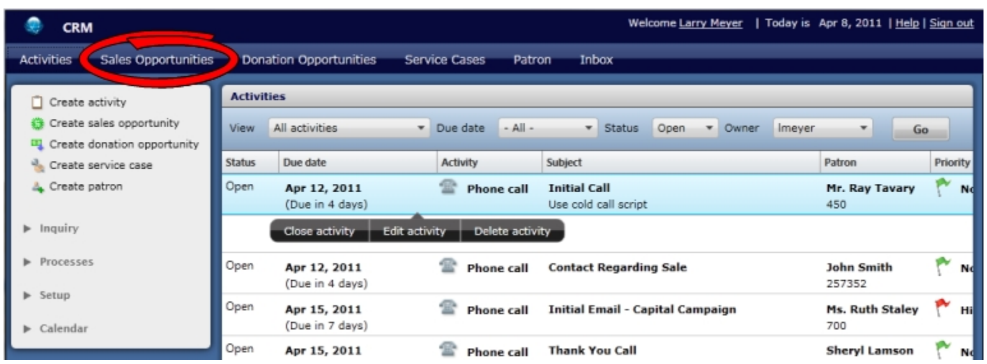
Once an opportunity has been created and assigned to you or one of your subordinates, you can view its details at any time. The exception is that you cannot view the details of deleted opportunities. Some reasons you might want to view opportunity details include:

- You want to see the details of an opportunity that has been assigned to you.
- You are working on an activity, and you want to see the opportunity for which the activity was created.
- You want to know why an opportunity was won or lost. To view closed opportunities, you must use CRM Data Views.
- You are a supervisor, and you want to check the progress your subordinates are making on their opportunities.

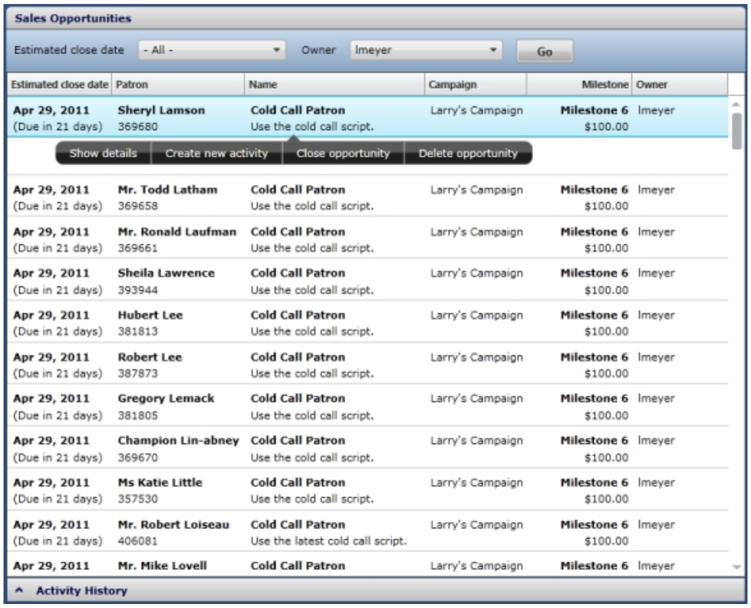
Note: Depending on your permissions, you may not be able to edit opportunities. In addition, your permissions settings may limit you to read-only access or no access to opportunities at all. For more information, see Managing Users.

To view sales opportunity details from the Sales Opportunities hub

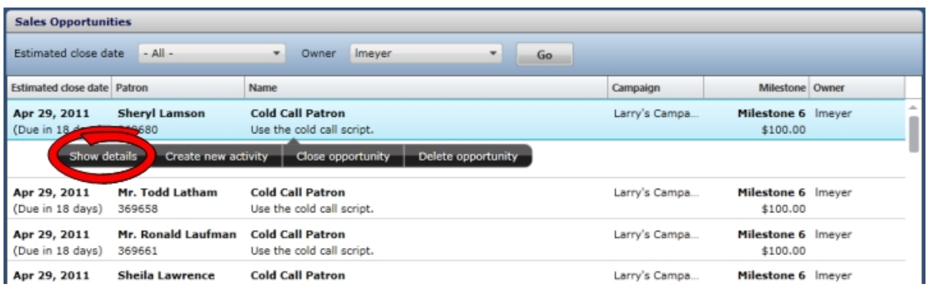
1. Click the **Sales Opportunities** button in the main navigation bar.



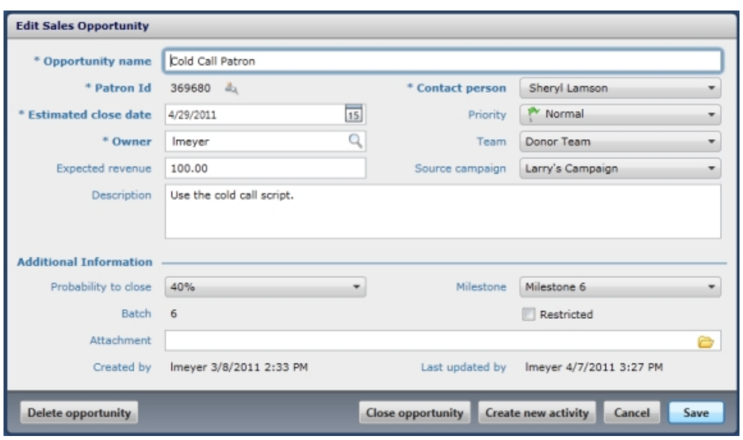
CRM displays the Sales Opportunities hub.



2. If the opportunity whose details you want to view or edit is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner. Only your subordinates are available in the **Owner** list.
3. Select the opportunity, and then click the **Show Details** button.



CRM displays the Edit Sales Opportunity form.

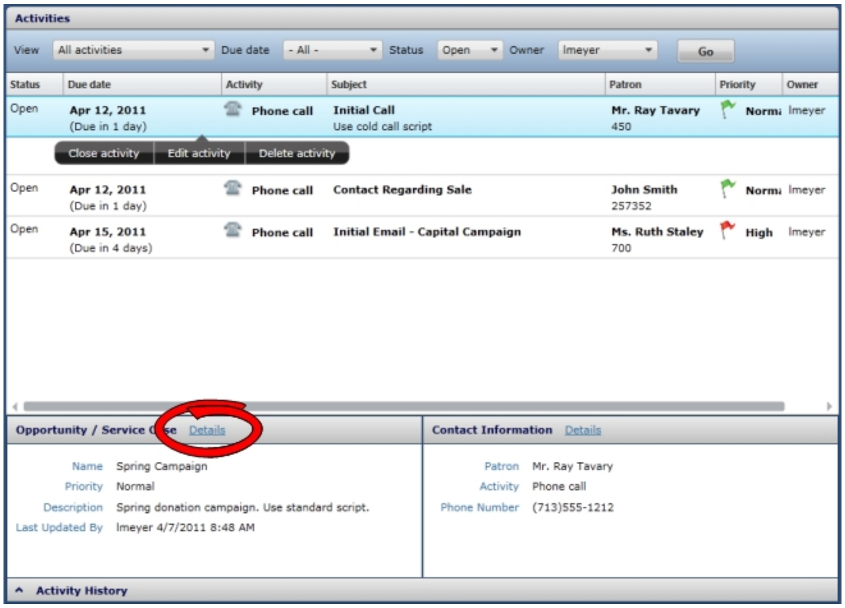


To view sales opportunity details from the Activities hub

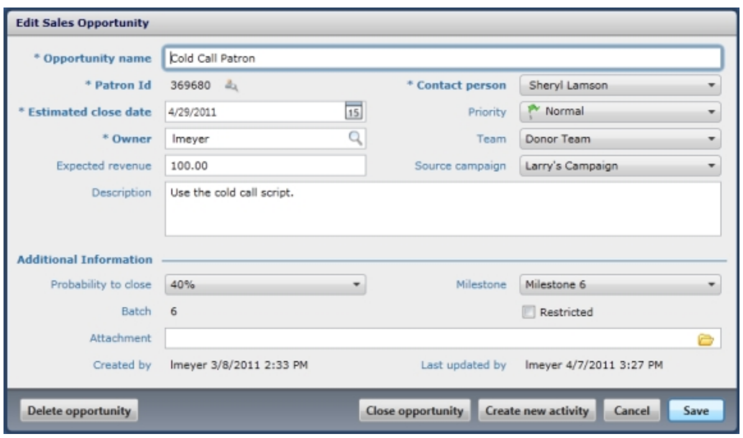
1. On the Activities hub, locate the activity associated with the opportunity whose details you want to view, and then select the activity. If the activity you want to view is not in the list,

try Filtering the Activity List.

2. In the Opportunity / Service Case pane, click the Details link.

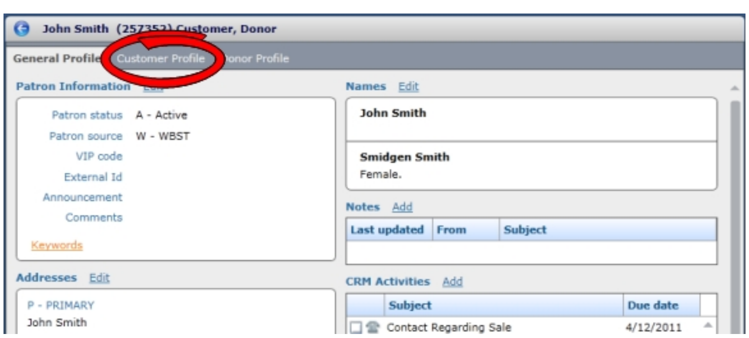


CRM displays the Edit Sales Opportunity form.



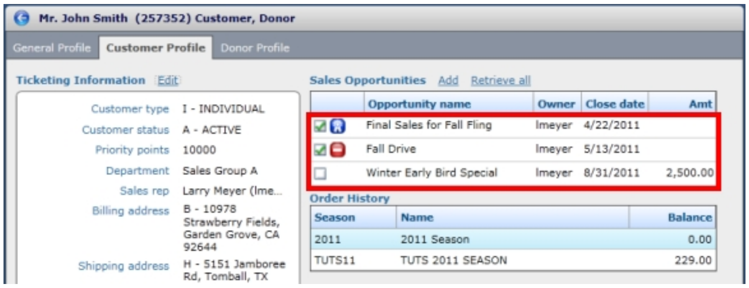
To view sales opportunity details from a patron record

1. In the patron record, click the **Customer Profile** tab. CRM displays the tab.

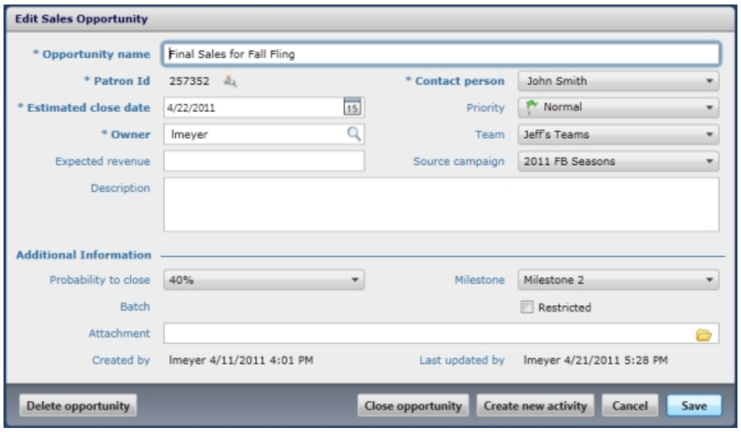


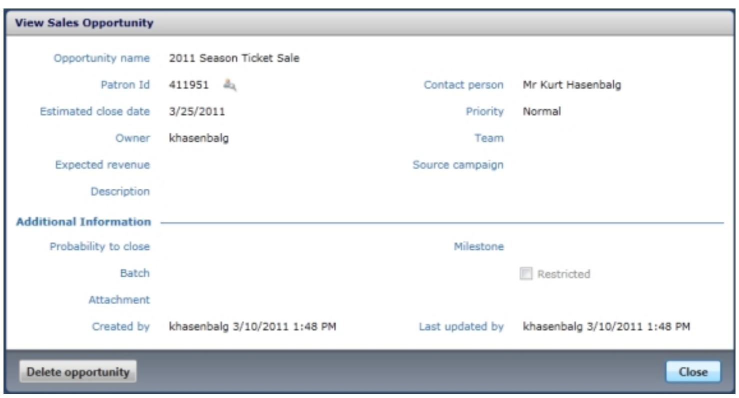
2. In the Sales Opportunities table, double-click the name of the opportunity that you want to view or edit. By default, only opportunities that have an open date less than 6 months ago

are included in the table. If you want to view opportunities older than 6 months, click the Retrieve all link.



If the opportunity is open and you or one of your subordinates is the owner, CRM displays the Edit Sales Opportunity form. If the opportunity is closed or a user besides you or one of your subordinates is the owner, CRM displays the View Sales Opportunity form.





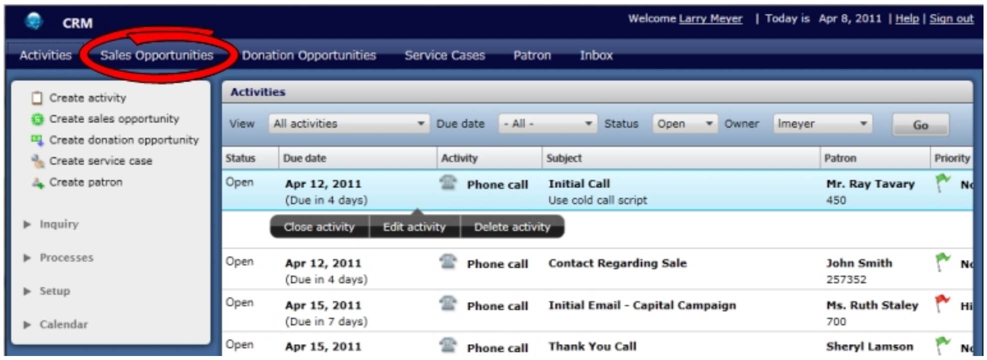
Viewing the Activity History of a Sales Opportunity

As you work toward winning a sales opportunity, you add and close CRM activities for the sales opportunity item. CRM creates an activity history for the item that you can display while you work. You can view the activity history on the Sales Opportunities hub.

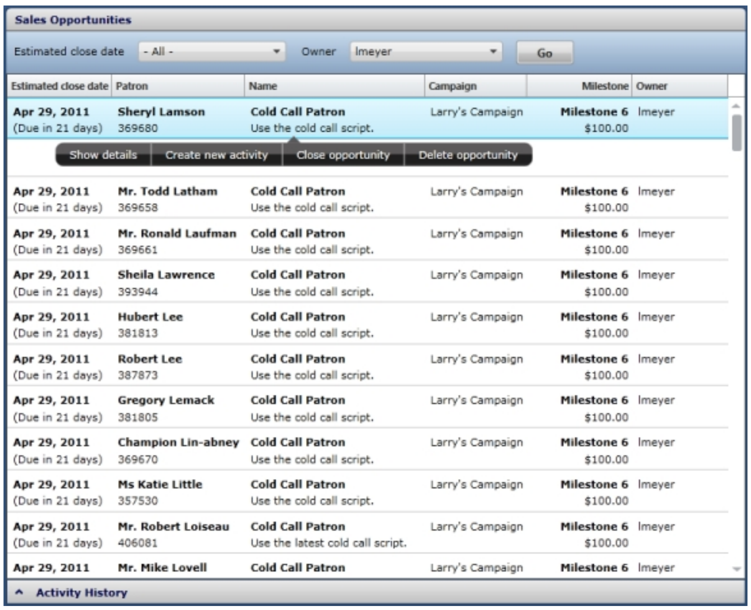
Tip: You can also view the activity history of a sales opportunity item in the patron summary of the patron for which the item was created. However, the activity history in the patron summary includes the activities for all opportunities, service cases, and standalone activities that have been created for the patron. For more information, see Viewing the Patron Summary.

To view the activity history of a sales opportunity

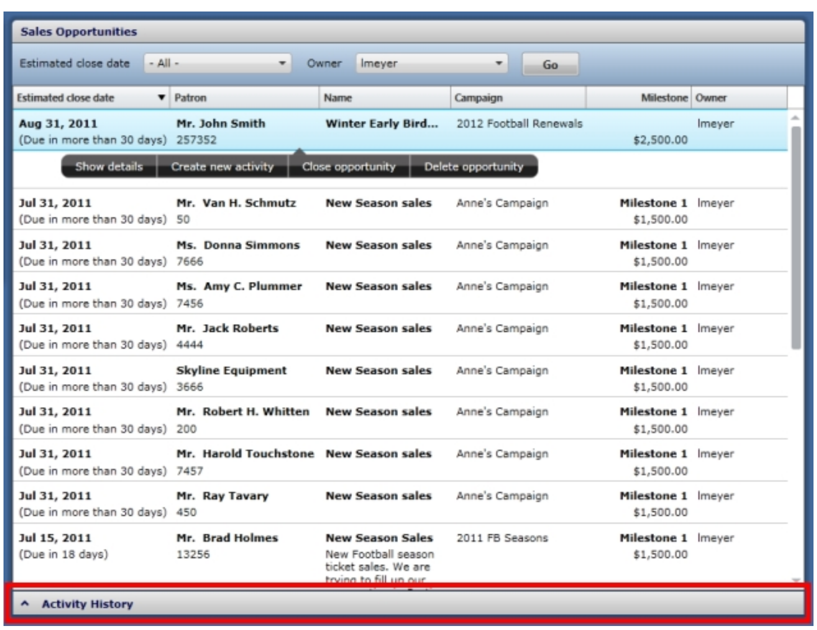
1. Click the **Sales Opportunities** button in the main navigation bar.



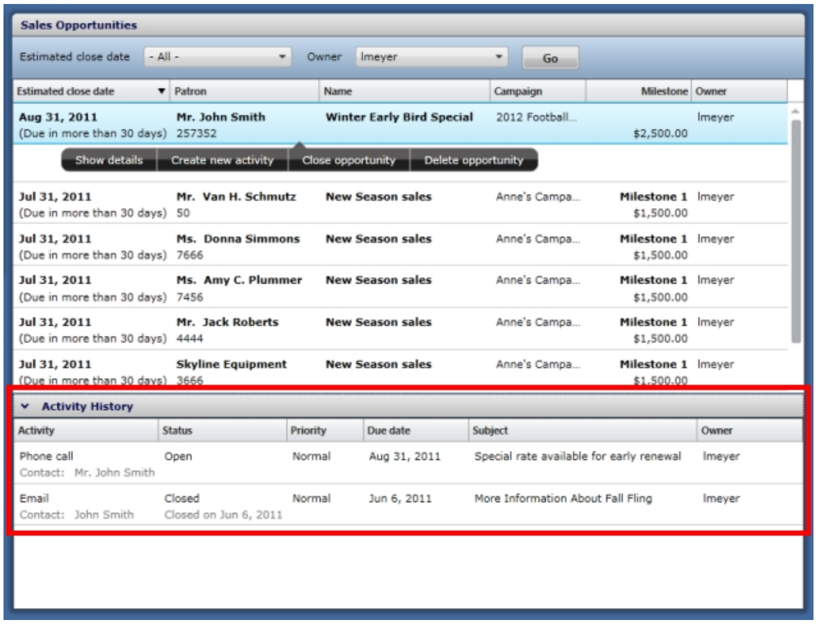
CRM displays the Sales Opportunities hub.



2. Select the sales opportunity item for which you want to view the activity history, and then click the Activity History bar.



CRM displays the Activity History list for the selected sales opportunity.



Tips about viewing the Activity History:

You can sort the opportunities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many opportunities in the list to display in the list area, a scroll bar appears on the right side of the list.

The default columns include the following:

- Status. Activity statuses can be Open or Closed. Deleted activities are never displayed in the Activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during manual or bulk activity creation. See Creating Activities in Bulk or Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest out date.
- Subject. The subjects of the activities are sorted by the subject name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

Manually Creating Sales Opportunities

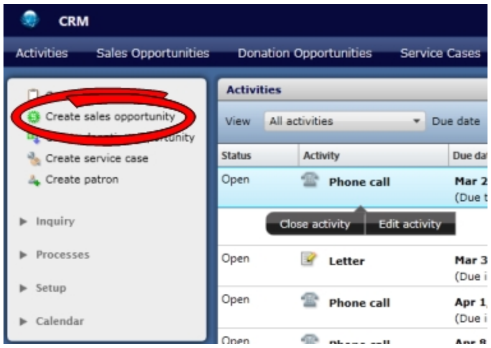
A CRM sales opportunity is created to track all related activities, communication, and information (forecast revenue, potential close date, and probability of closing) related to a potential sale. Each opportunity is assigned to a sales representative. When creating a sales opportunity, sales representatives will also create the opportunity’s first activity.

Note: This topic describes standalone, manual opportunity creation. However, the most common method of creating opportunities is as part of the bulk opportunity creation process. If you need to create a large number of similar opportunities quickly, you should use batch creation instead of this manual procedure.

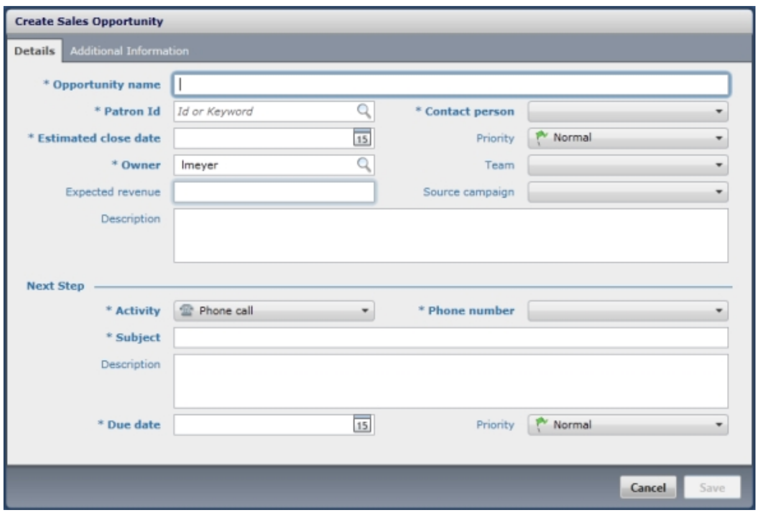
A typical use of manual opportunity creation is to track incoming communications from patrons, since the arrival of such communications cannot be anticipated. Opportunities may also be manually created when the number of actual opportunities is small.

To manually create a sales opportunity

1. In the navigation pane, click the **Create sales opportunity** button.



CRM displays the Create Sales Opportunity form.



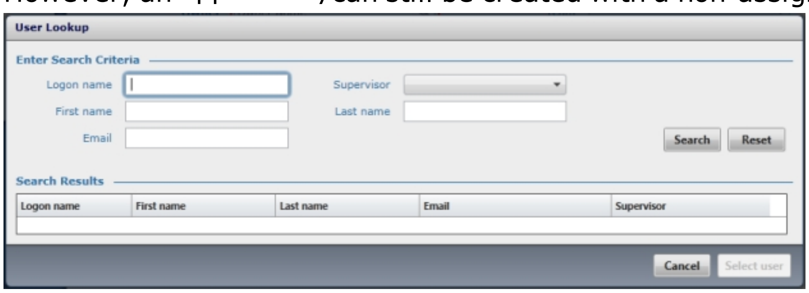
2. Set value for each field with an asterisk (required), and optionally enter values for any of the remaining fields. See the table below for an alphabetical list of the fields that may be included on this form with usage information about each one.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	Select an activity type for the first step towards winning the opportunity. The activity is automatically assigned to the owner of the opportunity. For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Additional Information	This tab contains data that is optional during sales opportunity creation, including probability to close, milestone selection, file attachments, and access

Field	Usage Information
tab	restriction. All Additional Information tab fields are optional.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a sales opportunity. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving and return to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the customer record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) In the first **Description** text box, enter a detailed description of the sales opportunity. In the **Description** text box in the Next Step area, enter a description of the next step activity.
Details tab	The default tab on the Create Sales Opportunity form. Use this tab to enter key information about the new opportunity. When you switch between this tab and the Additional Information tab, any entered or selected data is kept. You can navigate to the Additional Information tab even if you have entered invalid data on the Details tab.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Estimated close date	Enter or use the calendar popup to select the approximate date on which the owner will complete this opportunity. The estimated close date can be past, present or future.
Expected revenue	Enter the amount of money that you expect to be generated from the sales opportunity. The entry must be numeric and can include a decimal point and commas.
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This

Field	Usage Information
	field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting. The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Milestone	This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Next Step	The area of the Details tab where the activity required for the opportunity is entered. This is the first activity that must be completed to win the opportunity. This activity will display on the Activity hub of the opportunity owner and that of the owner's supervisor.
Opportunity name	The descriptive name that is displayed wherever the opportunity is represented in CRM.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include ticketing data for sales opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.



Patron Id	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A sales opportunity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an oppor-

Field	Usage Information
	tunity . This is because CRM assumes the sales opportunity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity and the next step activity. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Probability to close	The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Sales Opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the opportunity by clicking the **Create sales opportunity** button in the left navigation pane, CRM will display the Sales Opportunities hub. The **Save** button is enabled only if all required fields have valid entries.
Source campaign	(Optional) Select one of the predefined source campaigns from the drop-down list. CRM campaigns are used to group opportunities for reporting. They allow you to measure campaigns against each other or report on a single campaign with opportunities created from different patron lists. See Managing Source Campaigns.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

3. Click the **Save** button.

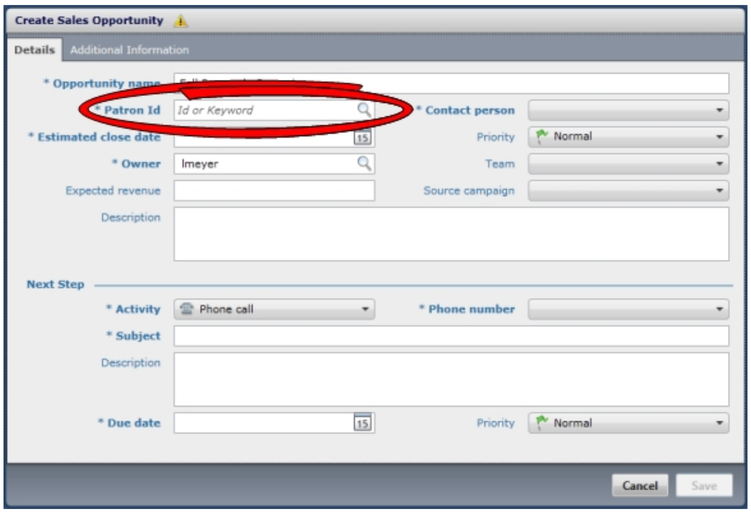
Selecting Patrons During Sales Opportunity Creation

As part of manually creating a sales opportunity, you need to select the patron for which you are creating the opportunity. To select a patron you can use a known patron Id number, a keyword, or the integrated Patron Lookup. Except for its integration into the sales opportunity creation process, the Patron Lookup works just like the Patron Search form on the Patron hub.

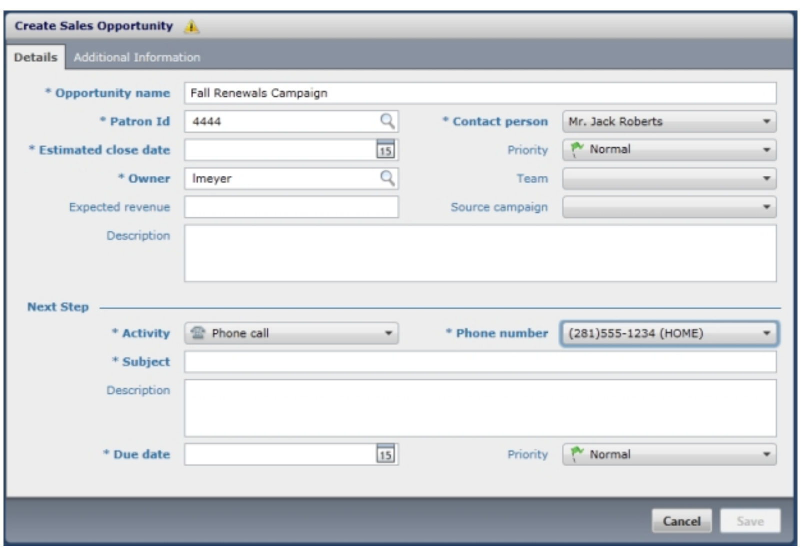
When using the Patron Lookup, you can search for a patron using the patron's name, Id, keywords, phone numbers, or email addresses. If the patron is an organization, you can search by the organization name. Once you locate the patron, you can assign the patron to the sales opportunity you are creating.

To select a patron using the patron Id number

1. On the Create Sales Opportunity form in the **Patron Id** field, enter the patron Id number, and then click the magnifying glass icon .

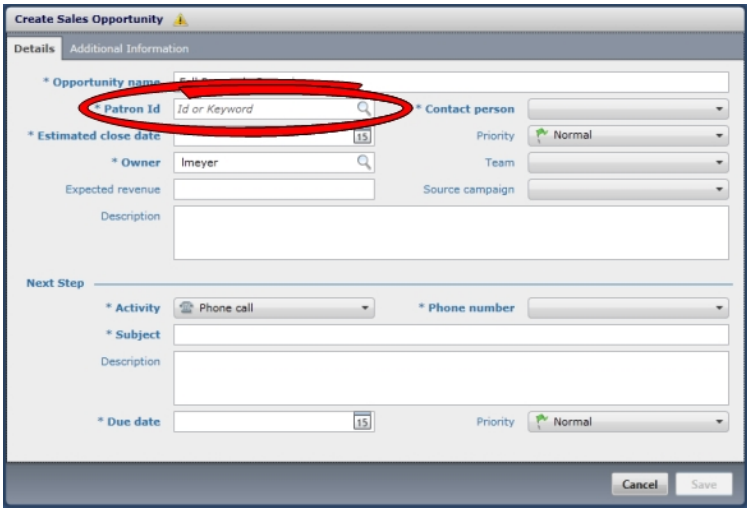


If the patron Id number is valid, CRM populates the Create Sales Opportunity form with the patron's information. If the patron Id is invalid, CRM displays the Patron Lookup. In this case, use the procedure to select a patron using the Patron Lookup search below.

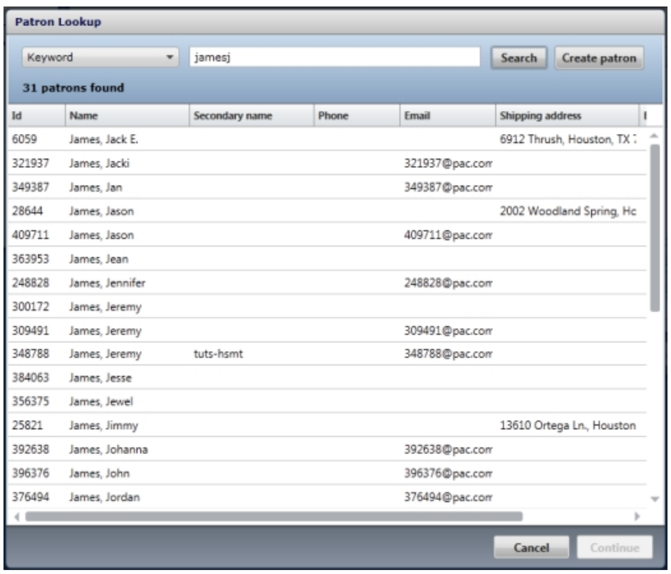


To select a patron using a patron keyword

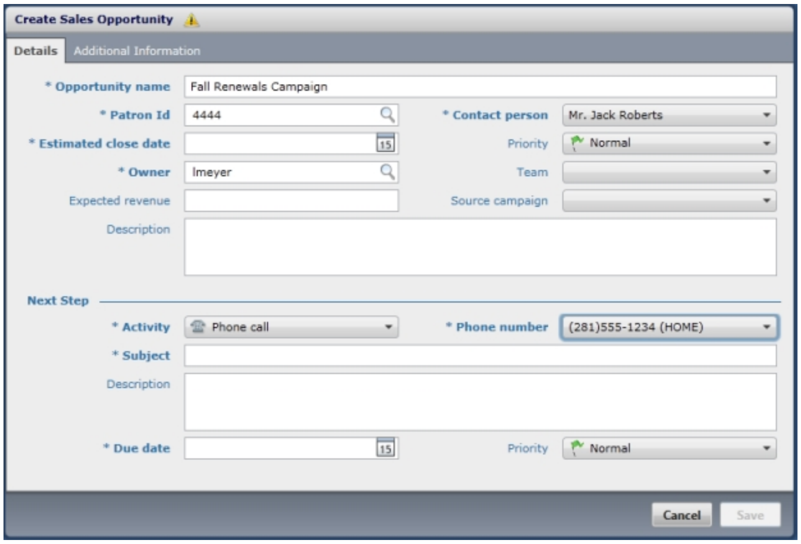
1. On the Create Sales Opportunity form in the **Patron Id** field, enter the keyword, and then click the magnifying glass icon .



If only one patron record contains the keyword, CRM populates the Create Sales Opportunity form with the patron's information. If more than one patron record uses the keyword, CRM displays the Patron Lookup with the matching patron records in the search results.

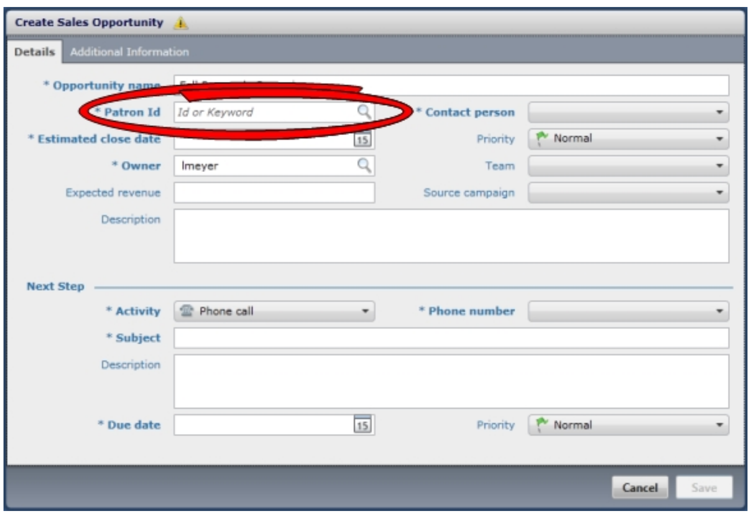


2. Locate the patron for which you are creating the sales opportunity. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
3. Double-click the patron's row. CRM redisplays the Create Sales Opportunity form populated with the patron's information.



To select a patron using the Patron Lookup search

1. On the Create Sales Opportunity form in the **Patron Id** field, click the magnifying glass icon .



CRM displays the Patron Lookup.

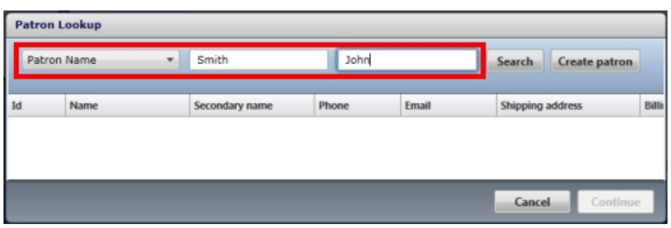
2. Select the search mode from the drop-down list.

3. Based on the search mode, enter the appropriate alphanumeric characters in the text boxes.

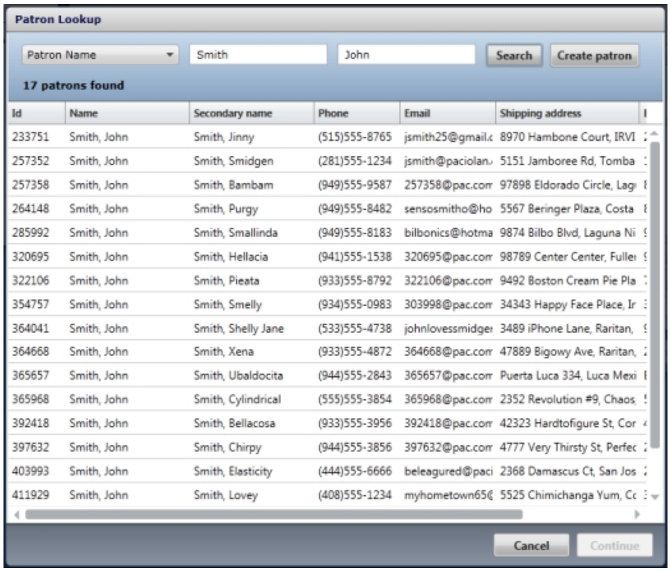
   See a table that describes the acceptable entries for each search mode.

Search mode	Acceptable entries
Patron name	Any alphanumeric In the second text box, you can use the asterisk (*) wildcard as long as the first character is a letter. For example, if you want to find the first name John, you can enter J*, Jo*, or Joh* . You cannot use *ohn. You also cannot use wild-cards for last names in the first text box.
Patron Id	Any alphanumeric
Keyword	Any alphanumeric. The search will return patron records with partial keyword matches.
Phone number	Any alphanumeric
Email address	Must be a valid email address format. For example, name@example.com
Organization name	Any alphanumeric

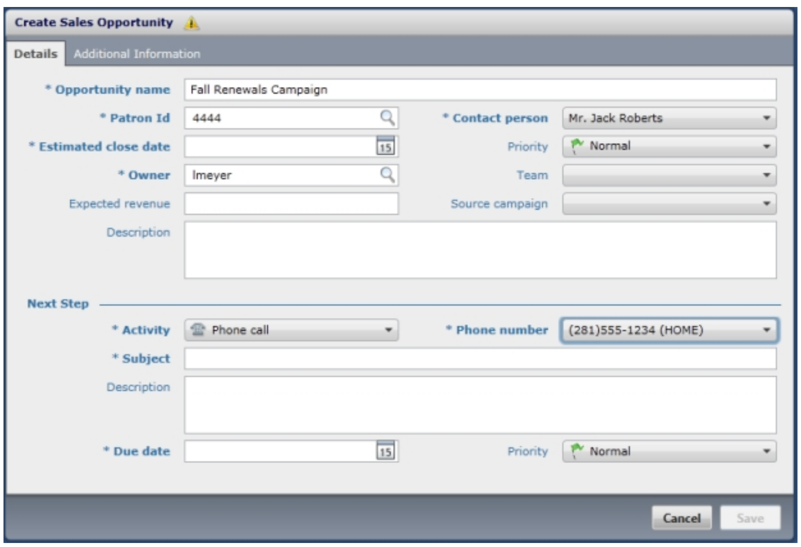
   The image below shows the Patron Name search mode, which has two required text boxes.



4. Click the **Search** button. CRM displays the search results. If no patrons match the search criteria, CRM displays a message to that effect.



5. Locate the patron for which you are creating the sales opportunity. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
6. Double-click the patron's row. CRM redisplays the Create Sales Opportunity form populated with the patron's information.



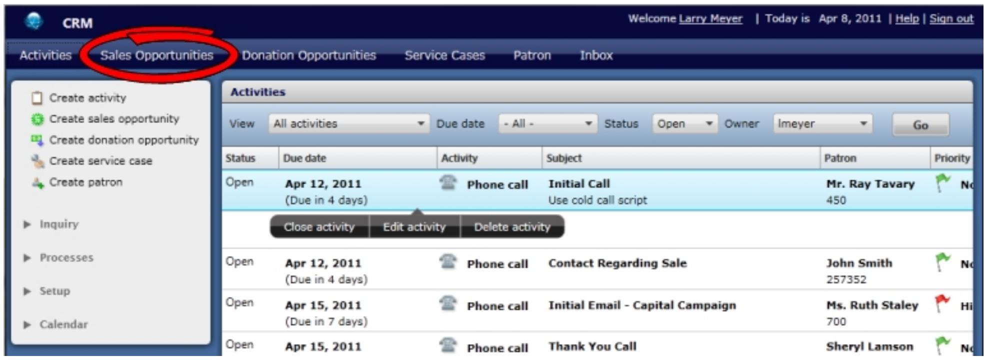
Editing Sales Opportunities

Sales opportunities for which you or your subordinates are the owner can be accessed on the Sales Opportunities hub. These opportunities have been assigned an owner during manual or bulk opportunity creation. Once an opportunity is assigned to you, the goal is to complete the activities required to close the opportunity. To accomplish this goal, you may need to edit the opportunity's fields or create a new activity for the opportunity .

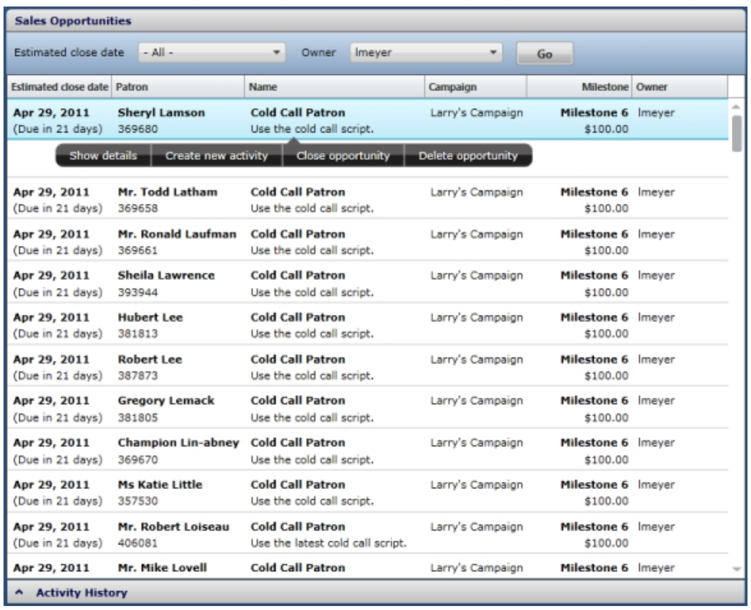
Tip: In the procedure below, a sales opportunity is accessed using the Sales Opportunity hub. You can also access opportunities from associated patron records and activities. For more information, see Viewing Sales Opportunity Details.

To edit a sales opportunity

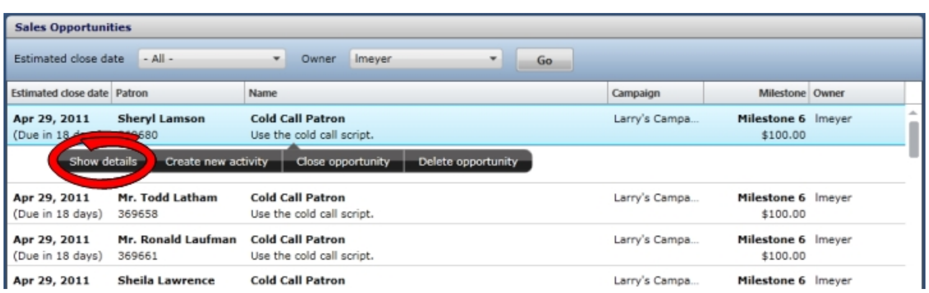
1. Click the **Sales Opportunities** button in the main navigation bar.



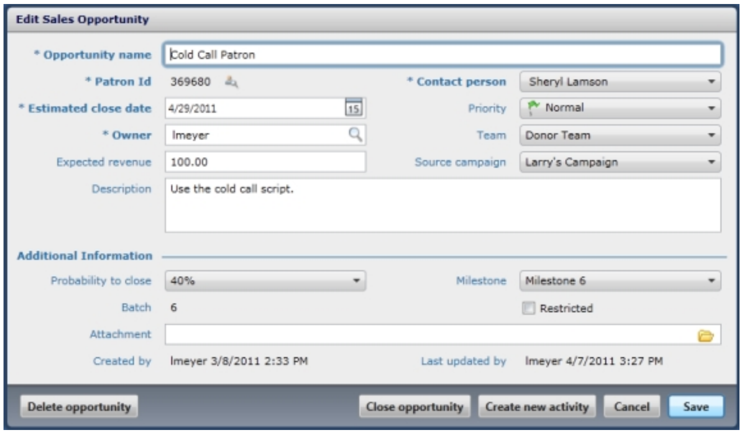
CRM displays the Sales Opportunities hub.



2. If the opportunity whose details you want to view or edit is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner. Only your subordinates are available in the **Owner** list.
3. Select the opportunity, and then click the **Show Details** button.



CRM displays the Edit Sales Opportunity form.

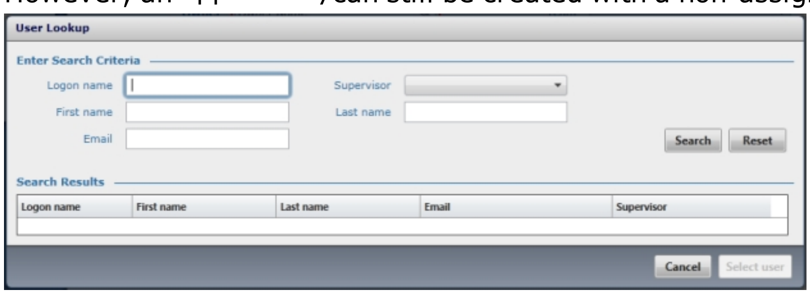


4. Edit the field values as required.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a sales opportunity. File size cannot exceed 2MB.
Batch	If the opportunity was created as part of a bulk process, this field displays the bulk process batch number. If no number is displayed, the opportunity was manually created.
Cancel	Click this button to close the form without saving changes. If you began editing the opportunity by clicking the **Show Details** button on the Sales Opportunities hub, CRM displays the Sales Opportunities hub. If you began editing from the Customer Profile tab of a patron profile form, CRM redisplays the tab on that form.
Close opportunity	If no further activity is required to pursue the opportunity, you can click this button to both save changes and close the opportunity. For more information, see Closing Sales Opportunities.
Contact person	Select the contact person from the patron record. Name #1 from the customer record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Create new activity	Displays the Create Activity form with the same owner and the opportunity's patron as the contact person. In addition, if the opportunity has a batch ID, CRM assigns the batch ID to the new activity.
Created by	A read-only field that displays the sign in name of the user who created the opportunity, as well as the creation date and time.
Delete opportunity	See Deleting Sales Opportunities.
Description	Edit the description of the sales opportunity.
Estimated close date	Enter or use the calendar popup to select the approximate date on which the owner will complete this opportunity. The estimated close date can be past, present or future.

Field	Usage Information
Expected revenue	(Supervisors only) Enter the amount of money that you expect to be generated from the sales opportunity. The entry must be numeric and can include a decimal point and commas.
Last updated by	A read-only field that displays the sign in name of the user who last updated the opportunity, as well as the update date and time. The user and date/time display is not updated when activities associated with the opportunity are changed.
Milestone	This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Opportunity name	The descriptive name that is displayed wherever the opportunity is represented in CRM.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include ticketing data for sales opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.



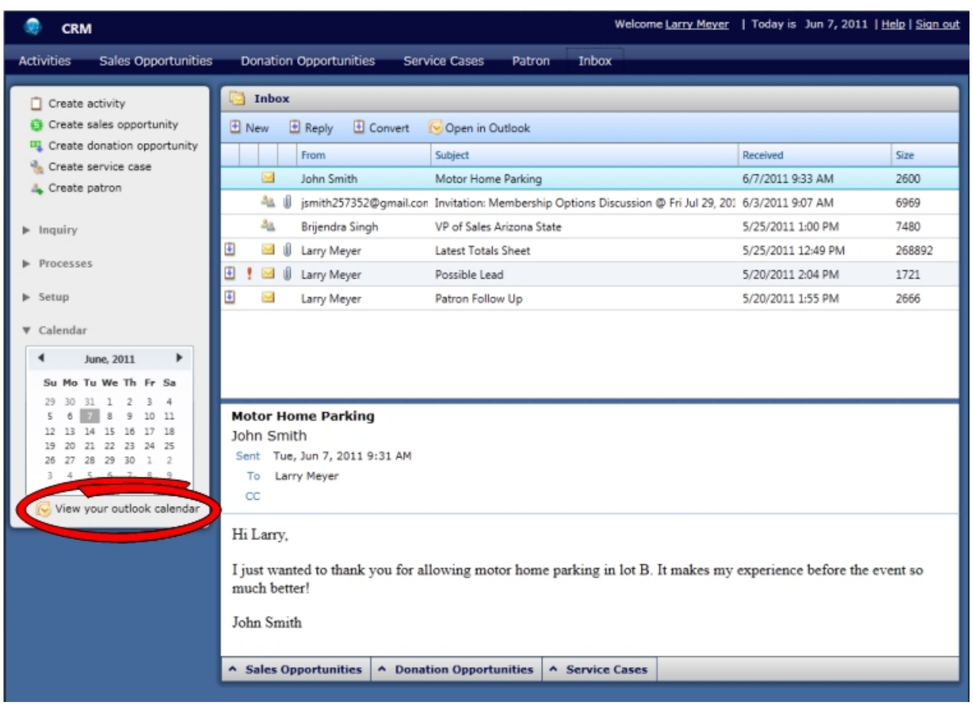
Field	Usage Information
Patron Id	The **Patron Id** field is static and the lookup is unavailable on the Edit Sales Opportunity form.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity. Your organization can decide what these priority levels mean. When you change the opportunity priority during editing, CRM does not change the priority of the activity that was added by the opportunity creation process. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Probability	The likelihood that an opportunity will be successfully closed (won). This field

Field	Usage Information
to close	is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Sales Opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the opportunity by clicking the **Create sales opportunity** button in the left navigation pane, CRM will display the Sales Opportunities hub. The **Save** button is enabled only if all required fields have valid entries.
Source campaign	(Optional) Select one of the predefined source campaigns from the drop-down list. CRM campaigns are used to group opportunities for reporting. They allow you to measure campaigns against each other or report on a single campaign with opportunities created from different patron lists. See Managing Source Campaigns.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

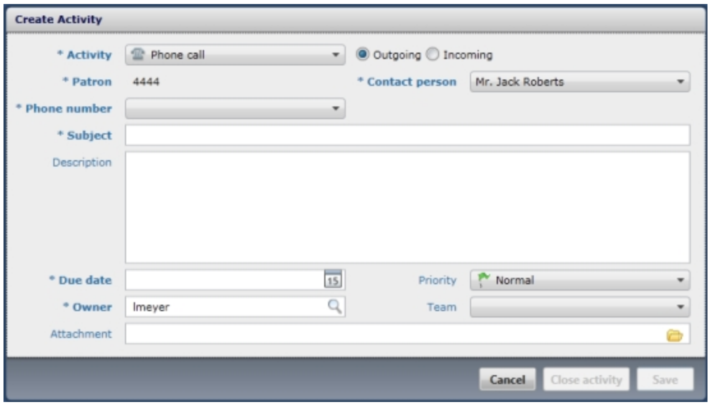
5. Click the **Save** button.

To create a new activity for a sales opportunity

1. Click the **Create new activity** button.



CRM displays the Create Activity form.



2. From the **Activity** drop-down list, select the type of activity that you want to create. The required and optional fields on the form change based on the activity type.
3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form. Because the group of fields displayed varies by activity type, the table lists the fields in alphabetical order.

   See an alphabetical list of the fields with usage information.

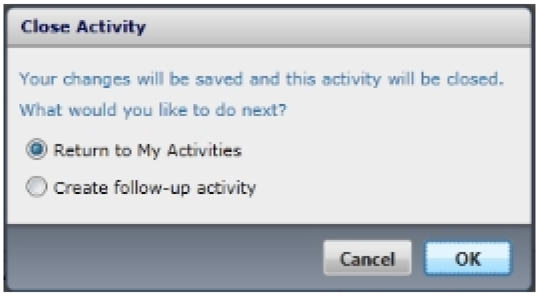
Field	Usage Information
Activity	For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Add meeting to Outlook calendar	(Outlook integration only) For a Meeting activity, select this option to add the meeting to your Outlook calendar. Your entry in the **Location** field will be automatically added to the **Location** field in the Outlook meeting. However, conference rooms with addresses in Outlook will not be added to the meeting. If a patron has an email address, you can also choose to send a meeting invitation to the patron's email account. If the patron has Outlook or another email application that supports Outlook meeting invitations, the patron can then add the meeting to an email integrated calendar. Depending on the Outlook integration of the patron's email application, you may also receive a confirmation email when the meeting invitation is accepted. See Using Integrated MS Outlook for more information.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a sales opportunity. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.

Field	Usage Information
Contact person	Select the contact person from the patron record. Name #1 from the customer record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) Enter a detailed description of the activity.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Edit in Outlook	(Outlook integration only) Save the email or meeting activity in CRM and open the email or meeting in Outlook. You can then edit the item as you normally would.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting. The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include ticketing data for sales opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User

Field	Usage Information
	Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.
Patron	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A sales opportunity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an opportunity . This is because CRM assumes the sales opportunity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity and the next step activity. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click to save the activity and return to the previous form. If you want to create a follow-up activity, click the **Close Activity** button instead. The **Save** button is enabled only if all required fields have valid entries.
Send Email	(Outlook integration only) Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

4. Do one of the following:
   - For Phone Call, Fax, Letter, Meeting, or Other activities, click **Save**.
   - For an Email activity, click **Send Email**. CRM prompts you to either return to the Activities hub or create a follow-up activity. To create a follow-up activity, select **Create follow-up activity**, and then click **OK**. Once you click **OK**, CRM closes the activity you just completed. CRM displays the Create Activity form. The form displays with the patron infor-

mation from the original email activity, and you can then repeat this procedure to create a new activity.



Closing Sales Opportunities

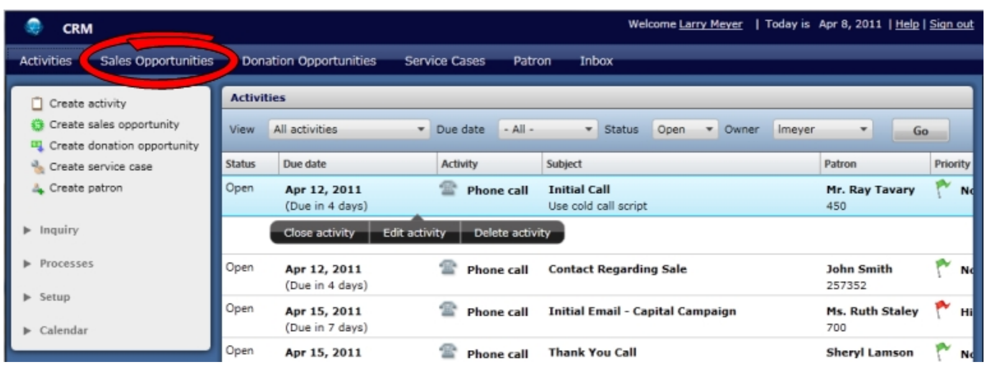
Once you have won or lost an opportunity, you should close the opportunity to remove it from the list of open opportunities. You must be the owner or the supervisor of the owner to close an opportunity. Opportunities must be marked as won or lost as part of the close opportunity process. This is done so that your organization can track how successful you have been in achieving the goals of your opportunities.

If you mark an opportunity as won, you must also enter the monetary amount of the sale. If you mark an opportunity as lost, you will be required to select the reason for the loss. For information about configuring lost reasons, see Managing Lost Reason Codes.

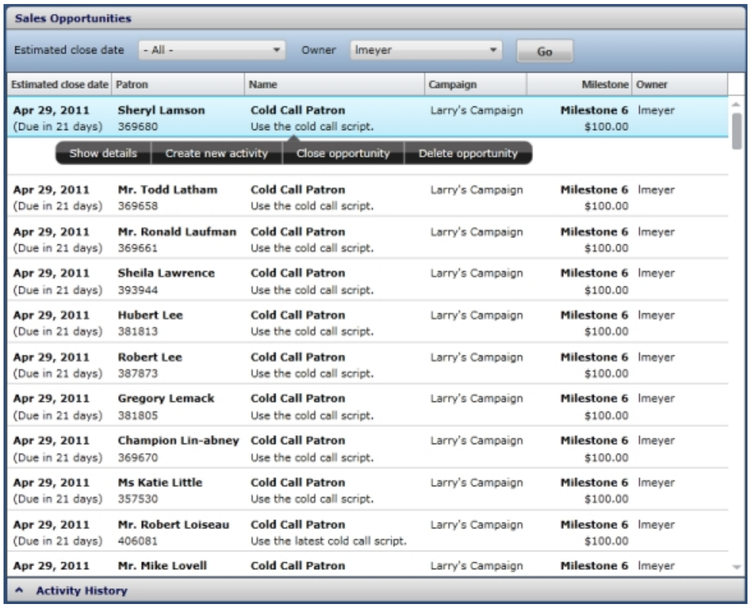
Tip: The procedure below uses the Sales Opportunities hub, but you can also close opportunities from the Edit Sales Opportunity form. See Editing Sales Opportunities for more information.

To close a sales opportunity

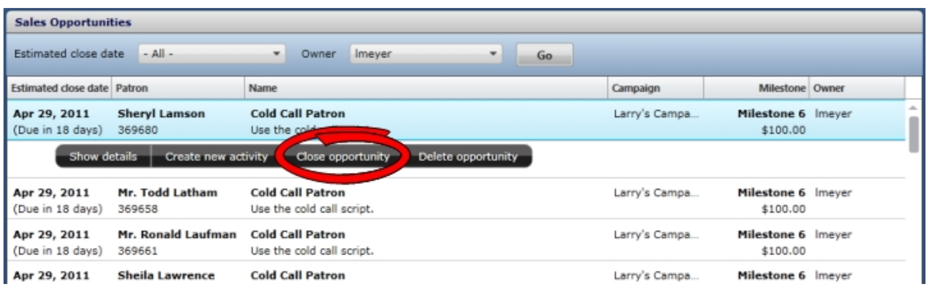
1. Click the **Sales Opportunities** button in the main navigation bar.



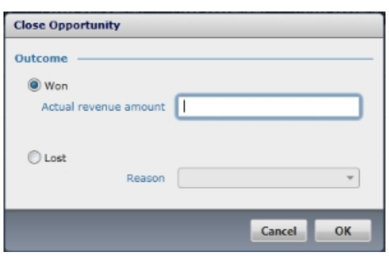
CRM displays the Sales Opportunities hub.



2. If the opportunity you want to close is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.
3. Select the opportunity, and then click the **Close opportunity** button.



CRM displays the Close Opportunity dialog box.



4. Do one of the following:
   - If you won the opportunity, select **Won**, and then enter the numerical amount in **Actual revenue amount**.
   - If you lost the opportunity, select **Lost**, and then select a lost reason from the **Reason** list.
5. Click **OK**. CRM redisplays the Sales Opportunities hub with the closed opportunity removed.

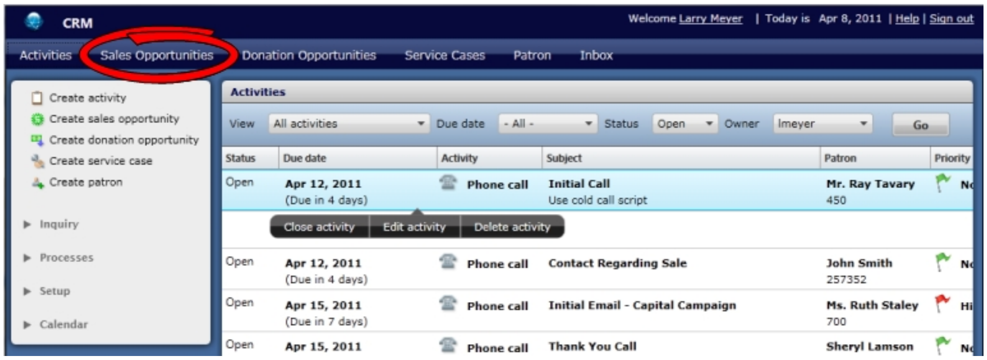
Deleting Sales Opportunities

If you are a supervisor, you can delete your own or a subordinate's opportunities. You may want to do this if you created an opportunity by mistake or if you do not want the opportunity to be recorded as either won or lost. When you delete an opportunity, all of its associated activities and attachments are also deleted.

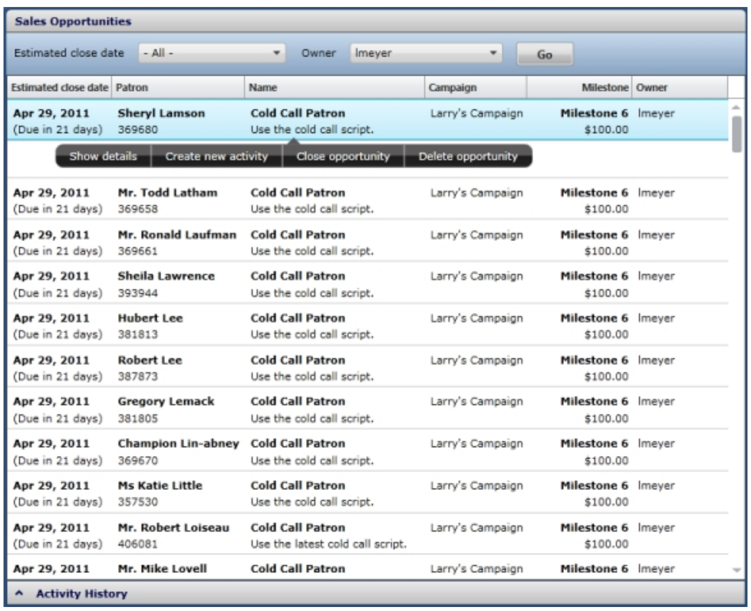
Tip: The procedure below uses the Sales Opportunities hub, but you can also delete opportunities from the Edit Sales Opportunity form. See Editing Sales Opportunities for more information.

To delete a sales opportunity

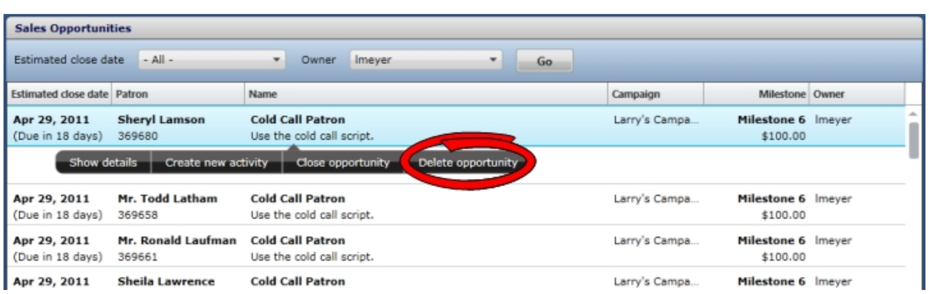
1. Click the **Sales Opportunities** button in the main navigation bar.



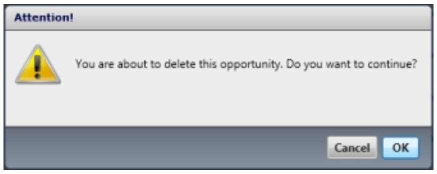
CRM displays the Sales Opportunities hub.



2. If the opportunity you want to delete is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.
3. Select the opportunity, and then click the **Delete opportunity** button.



CRM displays a warning to make sure you want to delete the opportunity.



4. Click **OK**. CRM deletes the opportunity and redisplays the Sales Opportunities hub.

Working with Donation Opportunities

A donation opportunity represents a potential donation to your organization. CRM opportunities are created to represent each of these real-world opportunities. Creating a CRM opportunity allows you to track all activities, communication, and patron information related to a potential donation. Supervisors create these donation opportunities in CRM and then assign them to fund development representatives. This assignment process can be done one opportunity at a time or in bulk. For information about bulk processing opportunities, see Creating Opportunities in Bulk.

Fund development representatives must take concrete steps to win donation opportunities. In CRM these steps are represented by activities. A CRM opportunity always has an activity associated with it, so that fund development representatives know the next step toward winning the opportunity. As each activity is completed, a representative can create another activity or close the opportunity. For more information about CRM activities, see Working with Activities.

While representatives are working on opportunities, they can also update patron information, change estimated close dates, add attachments, and edit opportunity information. When opportunities are closed, they are marked won or lost. Fund development representatives must have the correct CRM permissions to development data to work with opportunities.

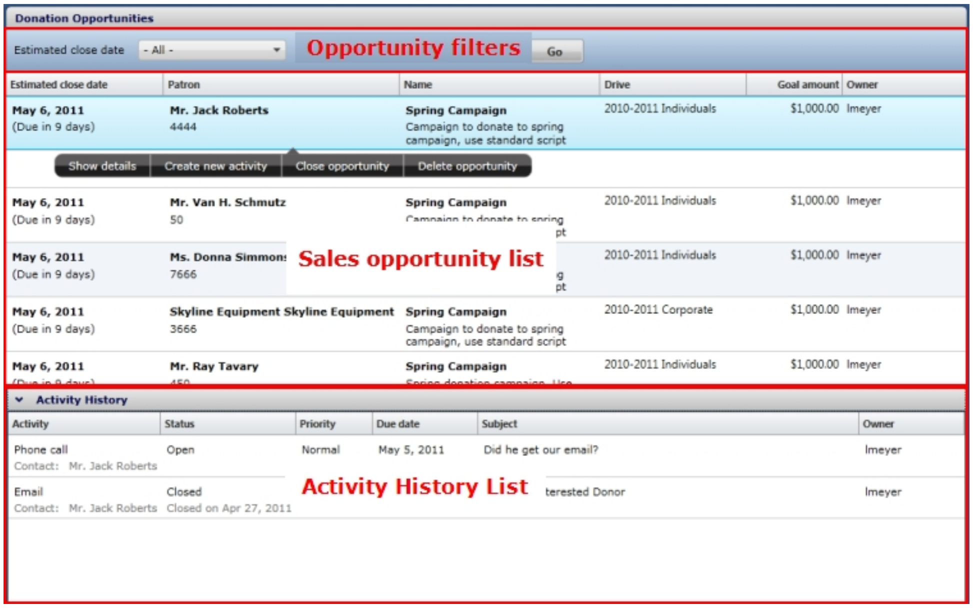
Note: Although working with sales opportunities is very similar to working with donation opportunities, there are some important differences. For information about sales opportunities, see Working with Sales Opportunities.

When working with donation opportunities, you can do the following:

- Navigate the Donation Opportunities Hub
- Filter the opportunity list
- View opportunity details
- View the Activity History
- Manually create opportunities
- Select patrons for opportunities
- Edit opportunities
- Close opportunities
- Delete opportunities

Navigating the Donation Opportunities Hub

The Donation Opportunities hub is the central place for working with donation opportunities in CRM. From this hub you can edit, view, close, and delete opportunities. You can also create activities for the opportunities within the hub. The Donation Opportunities hub is composed of the following parts:



Opportunity filters

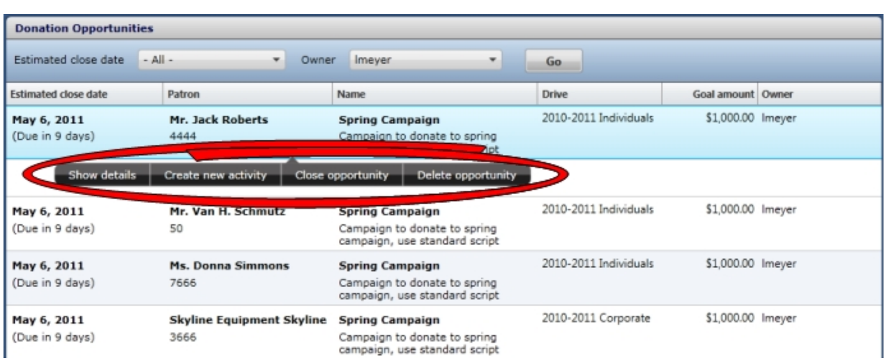
Use the drop-down settings in the opportunity filters area to display the list of donation opportunities you want. Once you've set the filters, click the **Go** button to display the subset of opportunities. The following filters are available:

- **Estimated close date** - This field filters opportunities by the date range during which they should be closed. The selections include All, Today, Tomorrow, Overdue, Next 7 days, and Next 30 days. These date selections are not configurable.
- **Owner** - This field filters opportunities by owner. By default, the Donation Opportunities hub displays the opportunities for which the currently signed in operator is owner. You can only view opportunities owned by other operators if you are their supervisor. For this reason, this setting only applies to supervisors.

If no opportunities meet the filter combination you set, the opportunity list is empty and CRM displays the message "There are no donation opportunities that match the search criteria. Please try again." For more information about opportunity filters, see Filtering the Opportunity List.

Donation opportunity list

The donation opportunity list contents are determined by the current CRM operator and the filter settings. By default, all open donation opportunities that are owned by the current operator are displayed. In the list, each row represents an opportunity. Click an opportunity row to display the actions that you can perform on that opportunity. Possible actions include:



- Show details. Click this button to display the Edit Donation Opportunity form (see Editing Donation Opportunities).
- Create new activity. Click this button to display the Create Activity form (see Manually Creating Activities).
- Close opportunity. Click this button to display the Close Opportunity dialog box (see Closing Donation Opportunities).
- Delete opportunity. Click this button to delete the opportunity (see Deleting Donation Opportunities).

The list columns contain the same type of information for each opportunity in the list. The default columns include the following:

- Estimated close date. The estimated close date and the number of days until or after the due date,relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest in the future date.
- Patron. The name of the patron for which the opportunity was created. Patron names are sorted by last name then first name.
- Name. The opportunity names are sorted alphanumerically.
- Drive. The drive names are sorted alphanumerically.
- Goal amount. The goal amounts are sorted numerically.
- Owner. The owner names are sorted alphabetically.

You can sort the opportunities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many opportunities in the list to display in the list area, a scroll bar appears on the right side of the list.

Activity History list

The Activity History list displays the activities associated with the opportunity that is selected in the opportunity list. Both open and closed activities are included. By default, the Activity History list is minimized. Click the bar to expand the list. When expanded, the list displays over the bottom part of the opportunity list.

To view the details of an activity in the Activity History list, double-click the activity row. CRM will display the Edit Activity form for open activities and the View Activity form for closed activities. For information about using these forms, see Editing Activities and Viewing Activity Details.

You can sort the opportunities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many opportunities in the list to display in the list area, a scroll bar appears on the right side of the list.

The default columns include the following:

- Status. Activity statuses can be Open or Closed. Deleted activities are never displayed in the Activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during manual or bulk activity creation. See Creating Activities in Bulk or Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days

late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest out date.

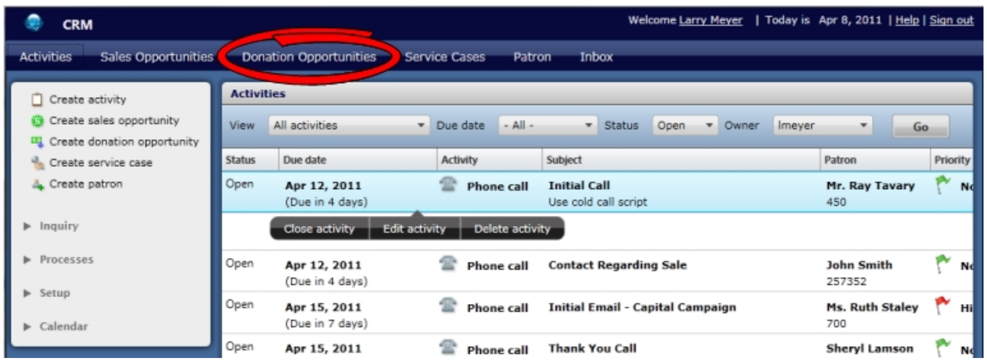
- Subject. The subjects of the activities are sorted by the subject name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

Filtering the Donation Opportunity List

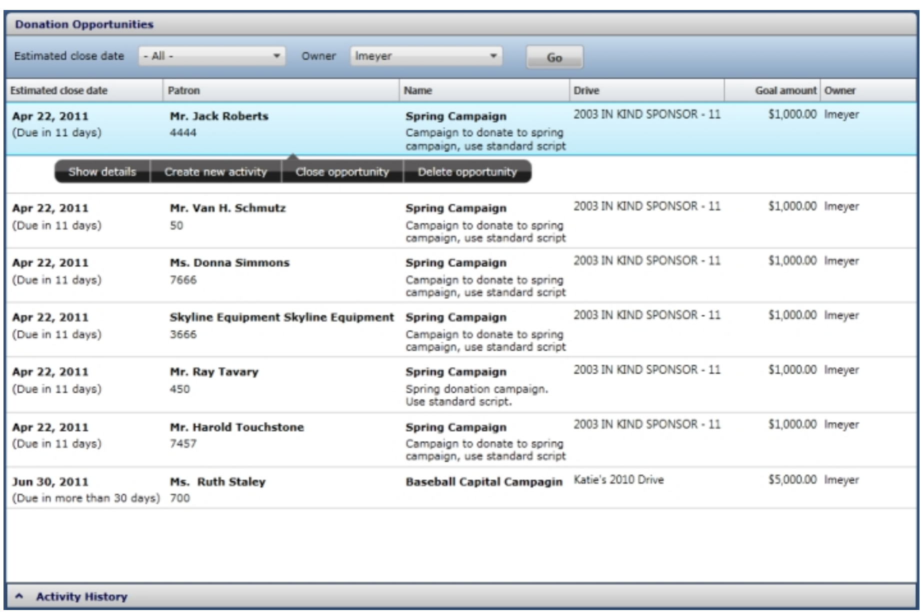
You can filter the donation opportunity list to display only the opportunities on which you want to work. By default, the opportunity list displays all open opportunities that are owned by the currently signed in operator. However, you can change the list of opportunities by filtering for the estimated close date. If you are a supervisor, you can also filter the list by owner. However, only your subordinates will be available for selection. Opportunity filters work the same for both sales and donation opportunities.

To filter the donation opportunity list

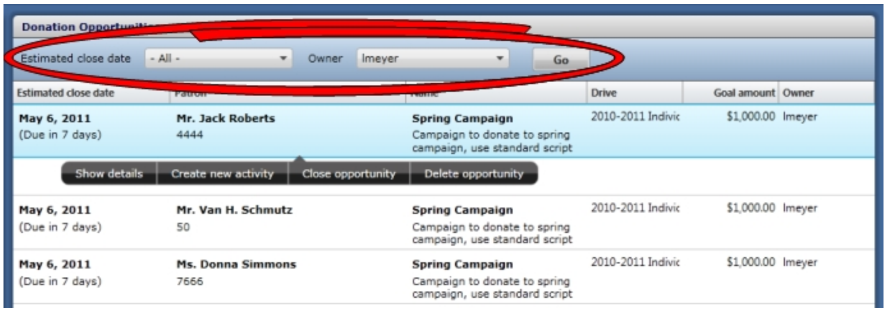
1. Click the **Donation Opportunities** button in the main navigation bar.



CRM displays the Donation Opportunities hub.



2. In the opportunity filters area, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.



CRM displays the filtered donation opportunity list.

Viewing Donation Opportunity Details

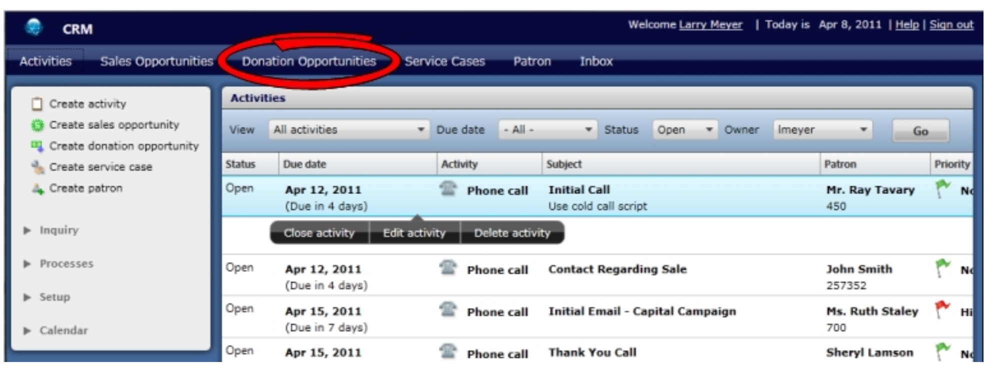
Once an opportunity has been created and assigned to you or one of your subordinates, you can view its details at any time. The exception is that you cannot view the details of deleted opportunities. Some reasons you might want to view opportunity details include:

- You want to see the details of an opportunity that has been assigned to you.
- You are working on an activity, and you want to see the opportunity for which the activity was created.
- You want to know why an opportunity was won or lost. To view closed opportunities, you must use CRM Data Views.
- You are a supervisor, and you want to check the progress your subordinates are making on their opportunities.

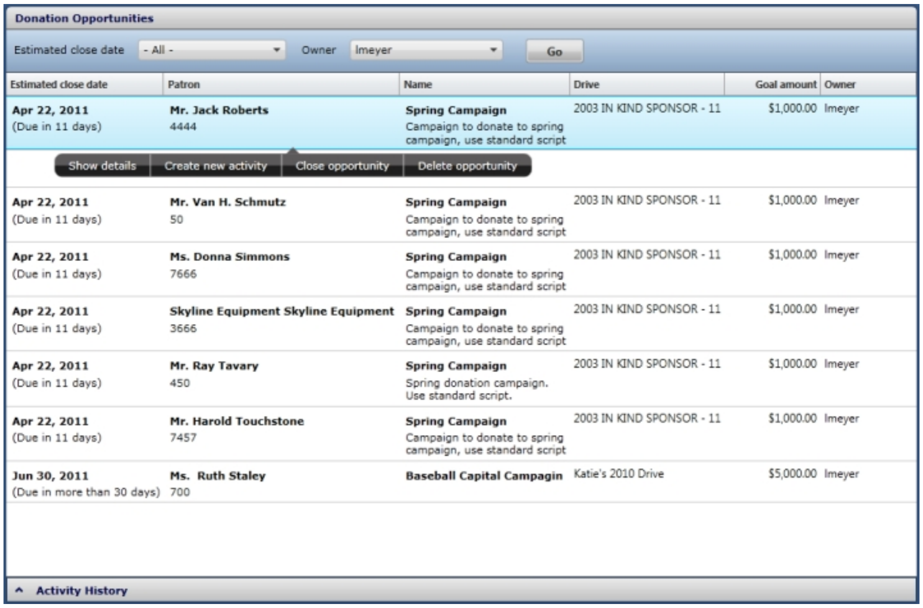
Note: Depending on your permissions, you may not be able to edit opportunities. In addition, your permissions settings may limit you to read-only access or no access to opportunities at all. For more information, see Managing Users.

To view opportunity details from the Donation Opportunities hub

1. Click the **Donation Opportunities** button in the main navigation bar.

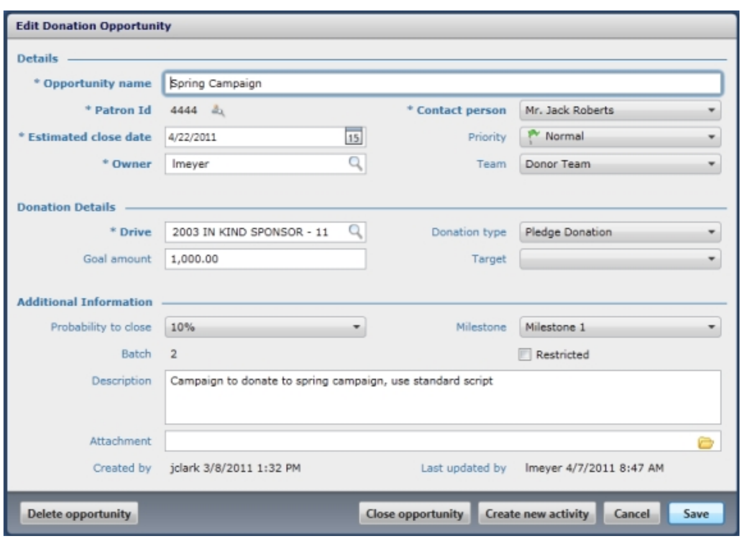


CRM displays the Donation Opportunities hub.



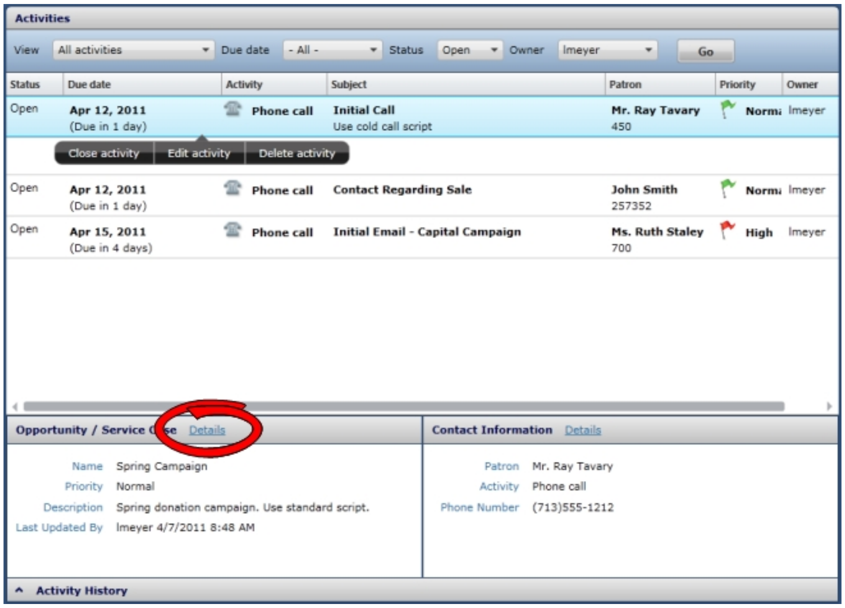
2. If the opportunity whose details you want to view or edit is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner. Only your subordinates are available in the **Owner** list.
3. Select the opportunity, and then click the **Show Details** button.

CRM displays the Edit Donation Opportunity form.

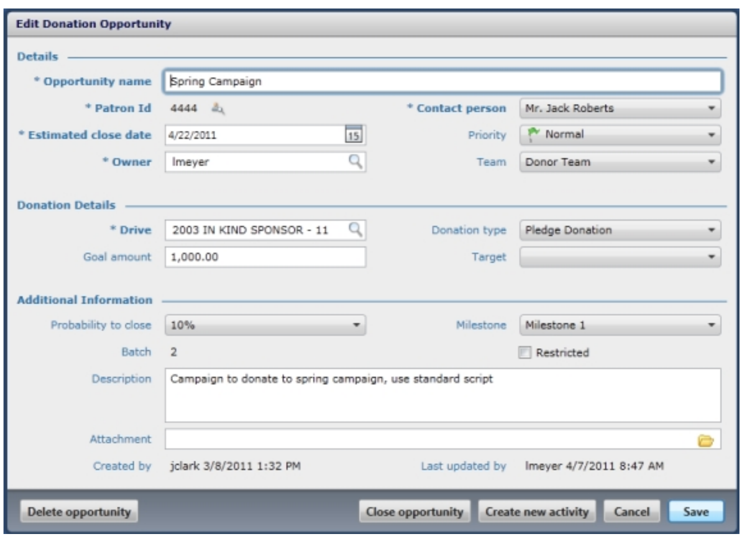


To view donation opportunity details from the Activities hub

1. On the Activities hub, locate the activity associated with the opportunity whose details you want to view, and then select the activity. If the activity you want to view is not in the list, try Filtering the Activity List.
2. In the Opportunity / Service Case pane, click the Details link.

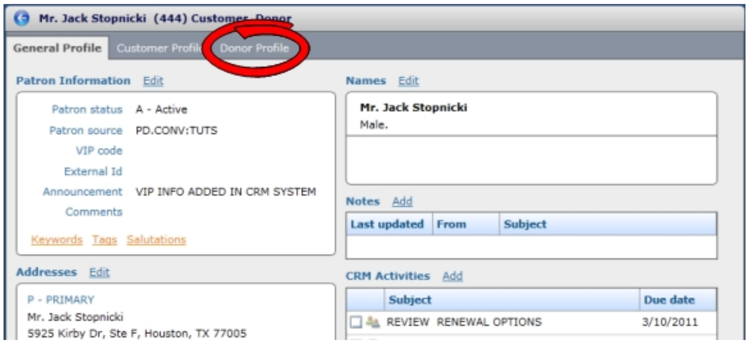


CRM displays the Edit Donation Opportunity form.

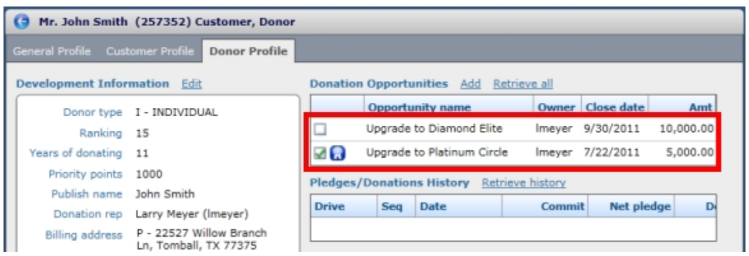


To view donation opportunity details from a patron record

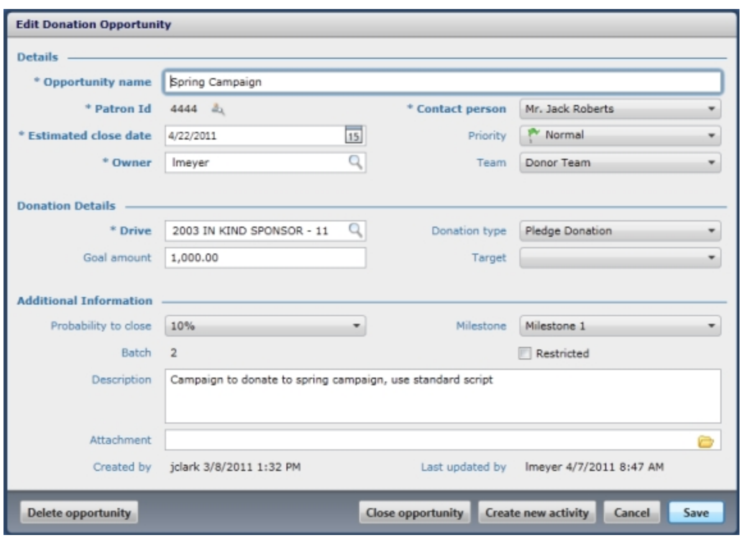
1. In the patron record, click the **Donor Profile** tab. CRM displays the tab.

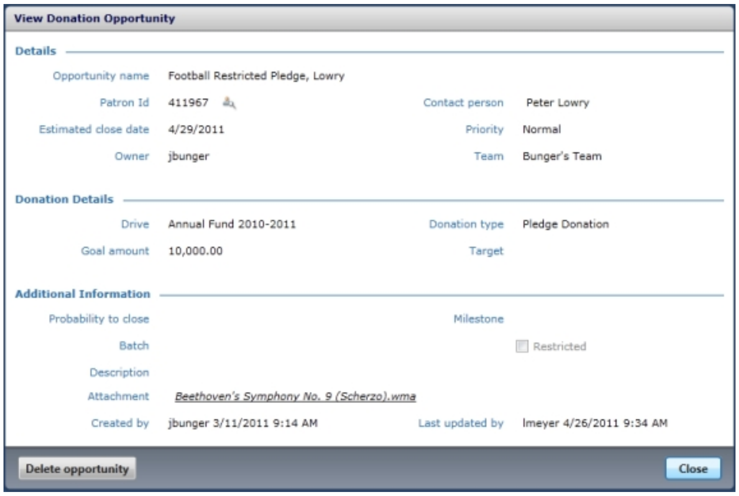


2. In the Donation Opportunities table, double-click the name of the opportunity that you want to view or edit. By default, only opportunities that have an open date less than 6 months ago are included in the table. If you want to view opportunities older than 6 months, click the Retrieve all link.



If the opportunity is open and you or one of your subordinates is the owner, CRM displays the Edit Donation Opportunity form. If the opportunity is closed or a user besides you or one of your subordinates is the owner, CRM displays the View Donation Opportunity form.





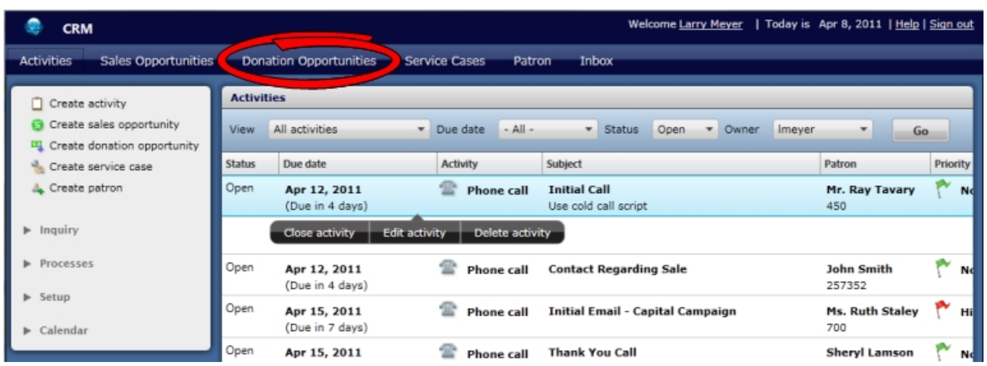
Viewing the Activity History of a Donation Opportunity

As you work toward winning a donation opportunity, you add and close CRM activities for the donation opportunity item. CRM creates an activity history for the item that you can display while you work. You can view the activity history on the Donation Opportunities hub.

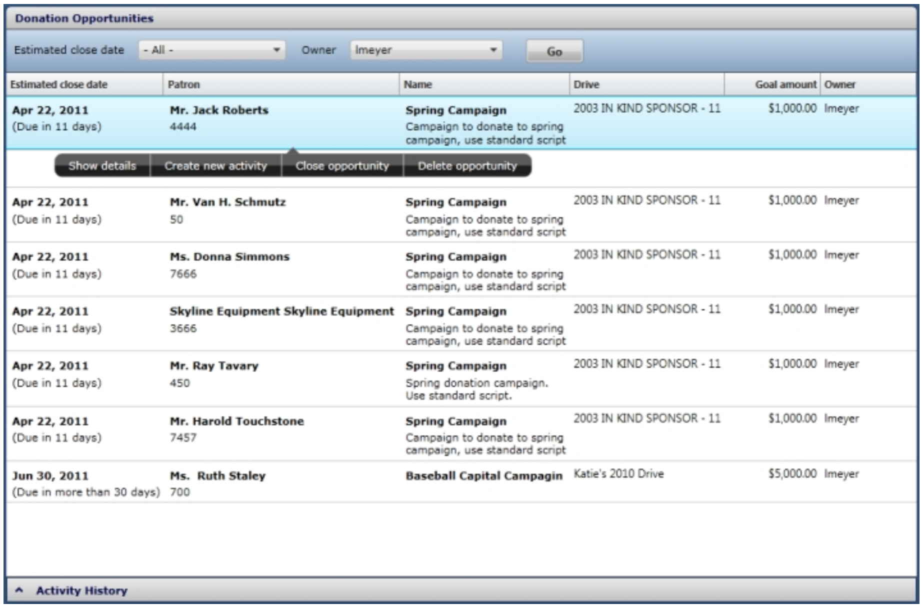
Tip: You can also view the activity history of a donation opportunity item in the patron summary of the patron for which the item was created. However, the activity history in the patron summary includes the activities for all opportunities, service cases, and standalone activities that have been created for the patron. For more information, see Viewing the Patron Summary.

To view the activity history of a donation opportunity

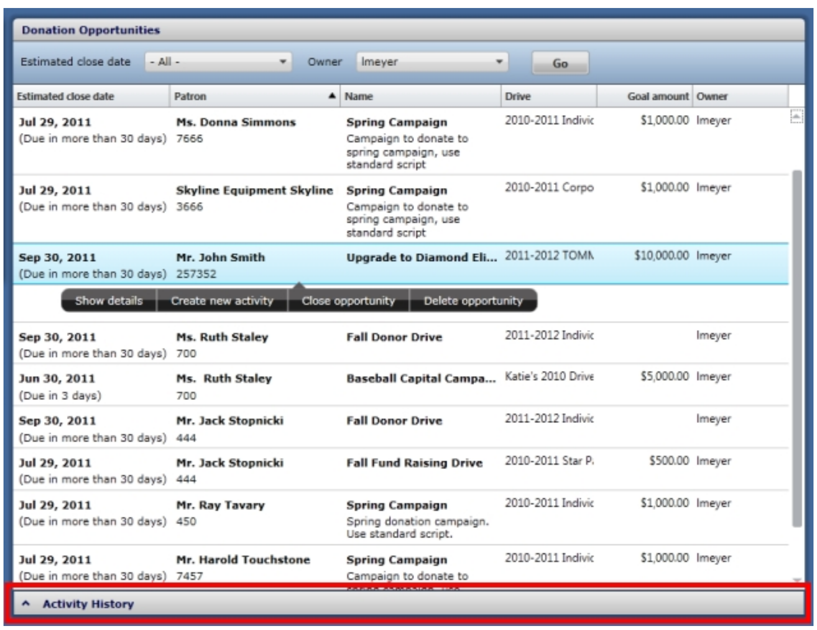
1. Click the **Donation Opportunities** button in the main navigation bar.



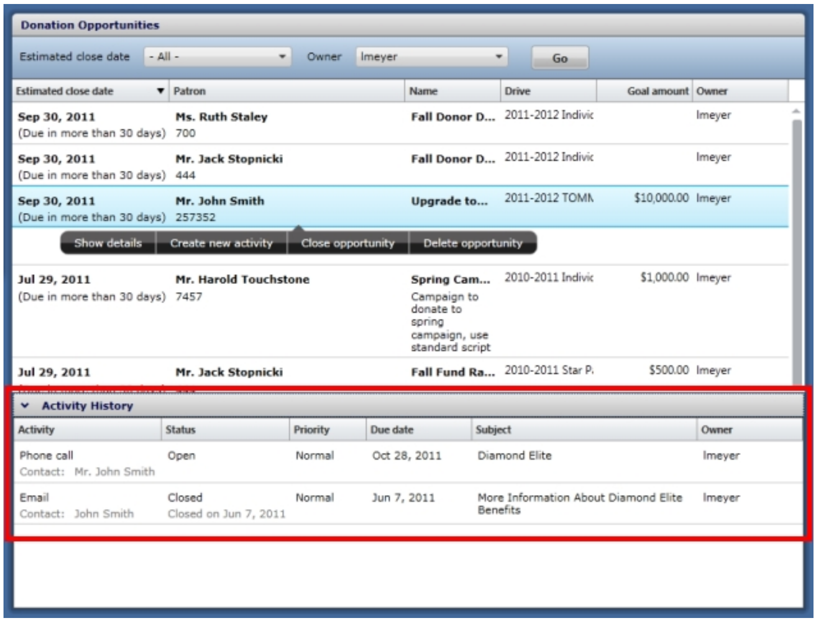
CRM displays the Donation Opportunities hub.



2. Select the donation opportunity item for which you want to view the activity history, and then click the Activity History bar.



CRM displays the Activity History list for the selected donation opportunity.



Tips about viewing the Activity History:

You can sort the opportunities in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many opportunities in the list to display in the list area, a scroll bar appears on the right side of the list.

The default columns include the following:

- Status. Activity statuses can be Open or Closed. Deleted activities are never displayed in the Activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during manual or bulk activity creation. See Creating Activities in Bulk or Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest out date.
- Subject. The subjects of the activities are sorted by the subject name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

Manually Creating Donation Opportunities

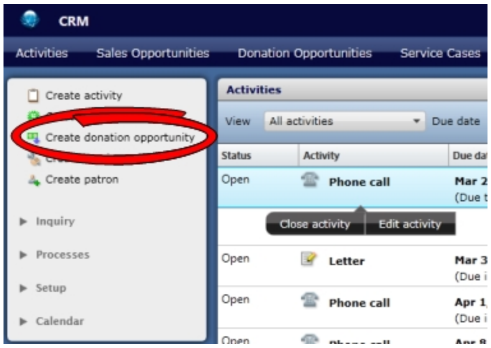
A CRM donation opportunity is created to track all related activities, communication, and information (goal amount, potential close date, and probability of closing) related to a potential donation. Each opportunity is assigned to a fund development representative. When creating a donation opportunity, fund development representatives will also create the opportunity’s first activity.

Note: This topic describes standalone, manual opportunity creation. However, the most common method of creating opportunities is as part of the bulk opportunity creation process. If you need to create a large number of similar opportunities quickly, you should use batch creation instead of this manual procedure.

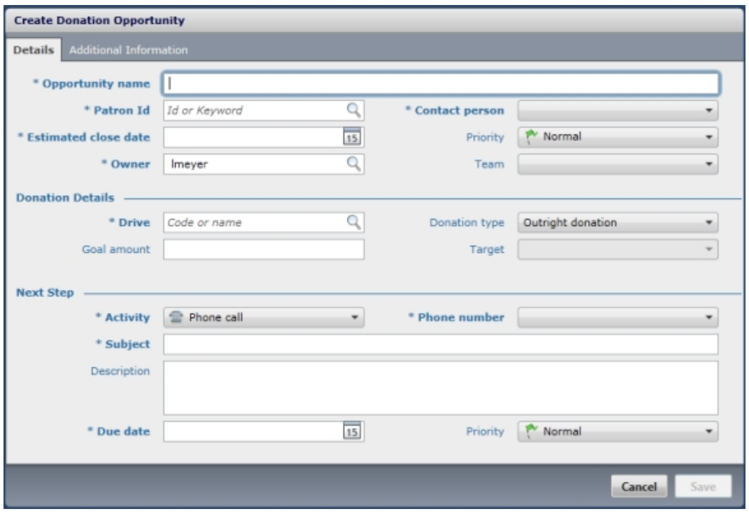
A typical use of manual opportunity creation is to track incoming communications from patrons, since the arrival of such communications cannot be anticipated. Opportunities may also be manually created when the number of actual opportunities is small.

To manually create a donation opportunity

1. In the navigation pane, click the **Create donation opportunity** button.



CRM displays the Create Donation Opportunity form.

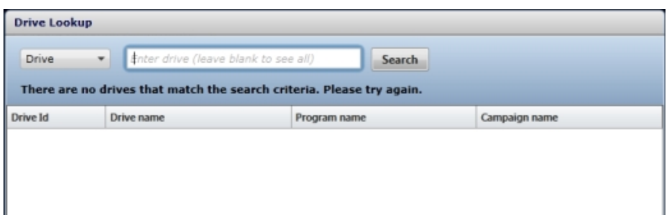


2. Set value for each field with an asterisk (required), and optionally enter values for any of the remaining fields. See the table below for an alphabetical list of the fields that may be included on this form with usage information about each one.

   See an alphabetical list of the fields with usage information.

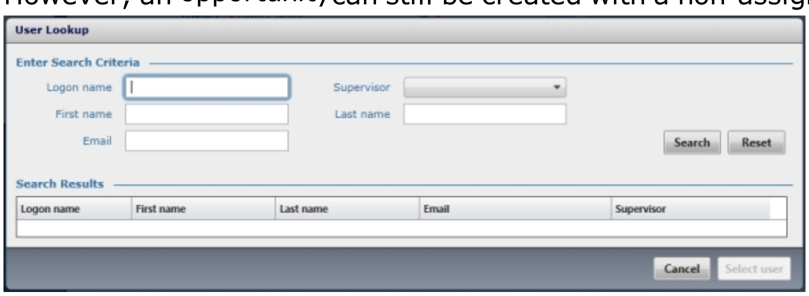
Field	Usage Information
Activity	Select an activity type for the first step towards winning the opportunity. The activity is automatically assigned to the owner of the opportunity. For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Additional Information tab	This tab contains data that is optional during donation opportunity creation, including probability to close, milestone selection, opportunity description, file attachments, and access restriction. All Additional Information tab fields are optional.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back

Field	Usage Information
	office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a donation opportunity. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving and return to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the donor record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) In the **Description** text box on the Additional Information tab, enter a detailed description of the donation opportunity. In the **Description** text box in the Next Step area, enter a description of the next step activity.
Details tab	The default tab on the Create Donation Opportunity form. Use this tab to enter key information about the new opportunity. When you switch between this tab and the Additional Information tab, any entered or selected data is kept. You can navigate to the Additional Information tab even if you have entered invalid data on the Details tab.
Donation type	The donation type options include outright donation, pledge, and gift in kind. Donation types are not configurable.
Drive	Drives and campaigns are defined in the back office using tFund. Enter the drive or campaign name or click to use the Drive Lookup. If you don't remember the exact drive or campaign name, you can select one from a list by leaving the **Drive** search field empty and clicking the **Search** button.



Field	Usage Information
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Estimated close date	Enter or use the calendar popup to select the approximate date on which the owner will complete this opportunity. The estimated close date can be past,

Field	Usage Information
	present or future.
Fax number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Goal amount	Enter the amount of money you hope to collect from the donor for this donation opportunity. The entry must be numeric and can include a decimal point and commas.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email activities, enter the body of the message for the email.
Milestone	This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Next Step	The area of the Details tab where the activity required for the opportunity is entered. This is the first activity that must be completed to win the opportunity. This activity will display on the Activity hub of the opportunity owner and that of the owner's supervisor.
Opportunity name	The descriptive name that is displayed wherever the opportunity is represented in CRM.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include donor data for donation opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.



Field	Usage Information
Patron Id	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A

Field	Usage Information
	donation opportunity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an opportunity . This is because CRM assumes the donation opportunity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity and the next step activity. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Probability to close	The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Donation Opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the opportunity by clicking the **Create donation opportunity** button in the left navigation pane, CRM will display the Donation Opportunities hub. The **Save** button is enabled only if all required fields have valid entries.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Target	If the drive you select has targets associated with it, select a target from this list. A target is used in the tFund system to represent a group of donors or patrons.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

3. Click the **Save** button.

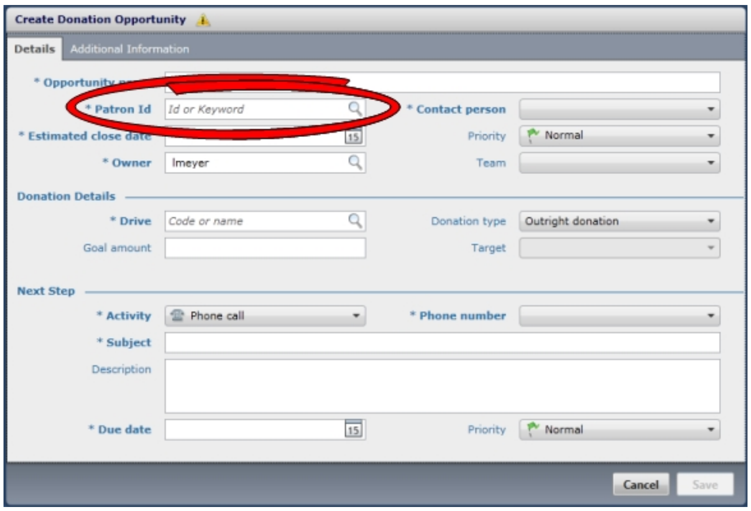
Selecting Patrons During Donation Opportunity Creation

As part of manually creating a donation opportunity, you need to select the patron for which you are creating the opportunity. To select a patron you can use a known patron Id number, a keyword, or the integrated Patron Lookup. Except for its integration into the donation opportunity creation process, the Patron Lookup works just like the Patron Search form on the Patron hub.

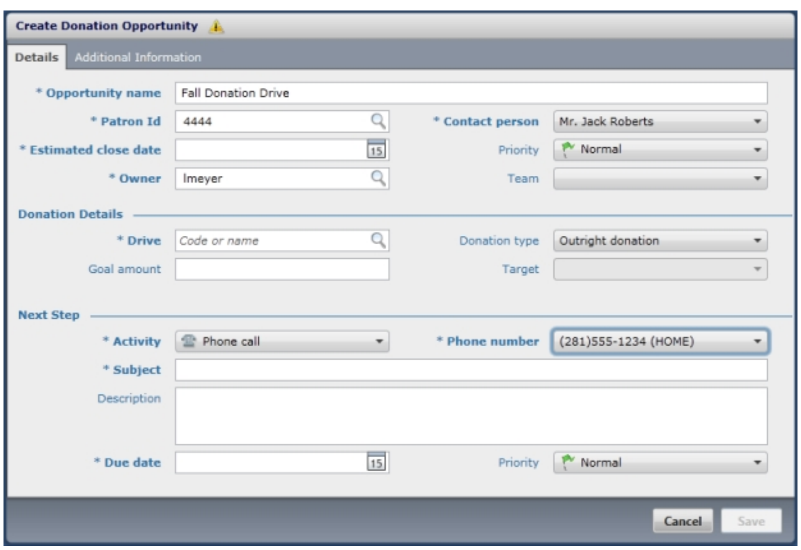
When using the Patron Lookup, you can search for a patron using the patron's name, Id, keywords, phone numbers, or email addresses. If the patron is an organization, you can search by the organization name. Once you locate the patron, you can assign the patron to the donation opportunity you are creating.

To select a patron using the patron Id number

1. On the Create Donation Opportunity form in the **Patron Id** field, enter the patron Id number, and then click the magnifying glass icon .

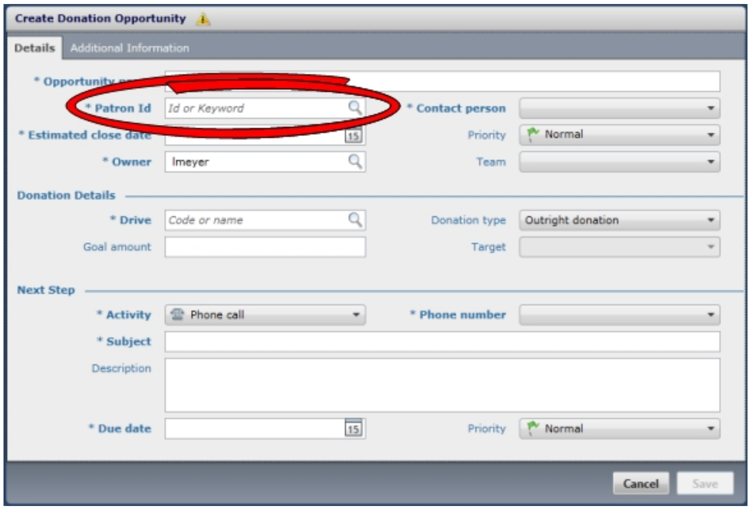


If the patron Id number is valid, CRM populates the Create Donation Opportunity form with the patron's information. If the patron Id is invalid, CRM displays the Patron Lookup. In this case, use the procedure to select a patron using the Patron Lookup search below.

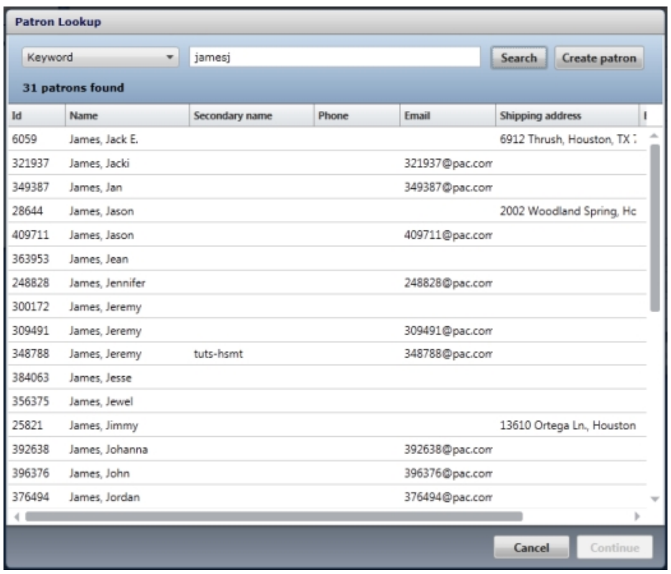


To select a patron using a patron keyword

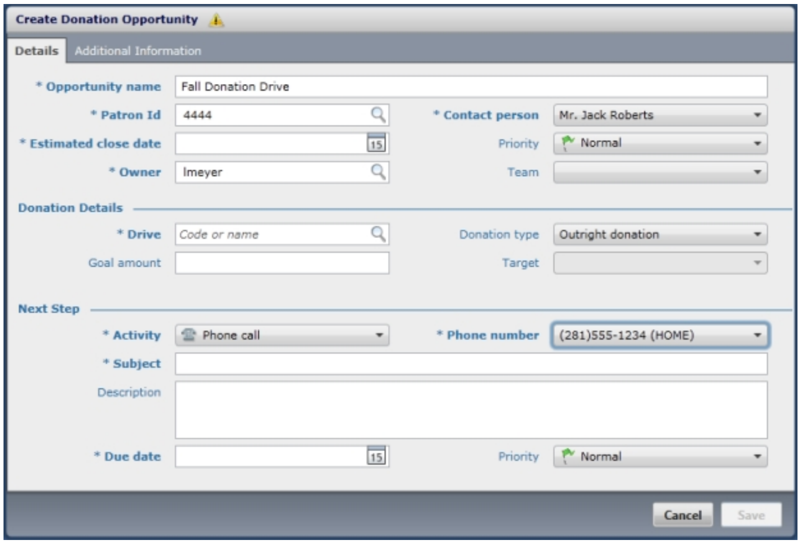
1. On the Create Donation Opportunity form in the **Patron Id** field, enter the keyword, and then click the magnifying glass icon .



If only one patron record contains the keyword, CRM populates the Create Donation Opportunity form with the patron's information. If more than one patron record uses the keyword, CRM displays the Patron Lookup with the matching patron records in the search results.

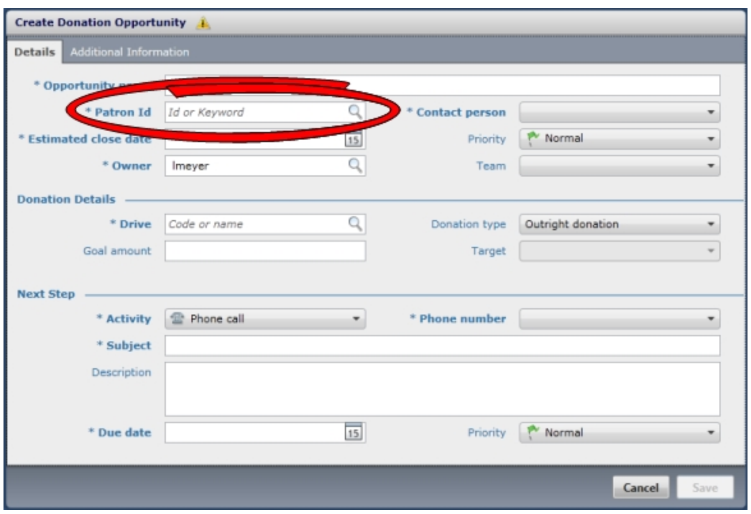


2. Locate the patron for which you are creating the donation opportunity. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
3. Double-click the patron's row. CRM redisplays the Create Donation Opportunity form populated with the patron's information.

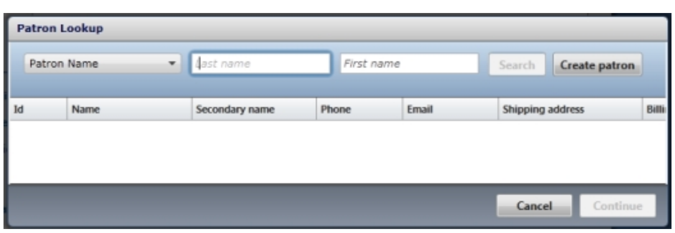


To select a patron using the Patron Lookup search

1. On the Create Donation Opportunity form in the **Patron Id** field, click the magnifying glass icon .



CRM displays the Patron Lookup.



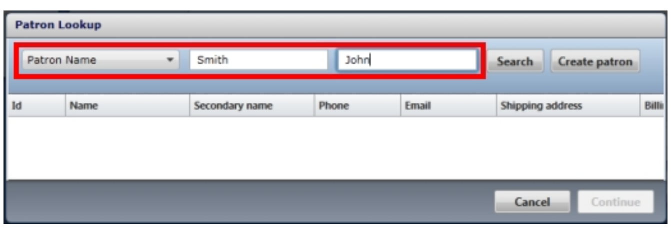
2. Select the search mode from the drop-down list.

3. Based on the search mode, enter the appropriate alphanumeric characters in the text boxes.

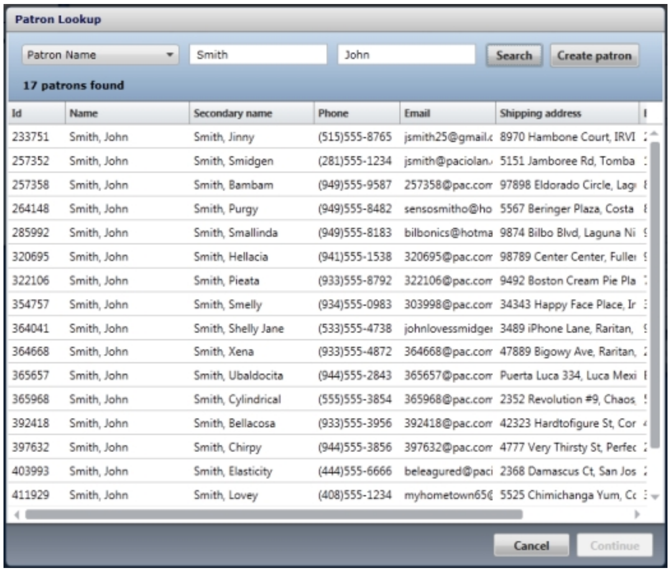
   See a table that describes the acceptable entries for each search mode.

Search mode	Acceptable entries
Patron name	Any alphanumeric In the second text box, you can use the asterisk (*) wildcard as long as the first character is a letter. For example, if you want to find the first name John, you can enter J*, Jo*, or Joh* . You cannot use *ohn. You also cannot use wild-cards for last names in the first text box.
Patron Id	Any alphanumeric
Keyword	Any alphanumeric. The search will return patron records with partial keyword matches.
Phone number	Any alphanumeric
Email address	Must be a valid email address format. For example, name@example.com
Organization name	Any alphanumeric

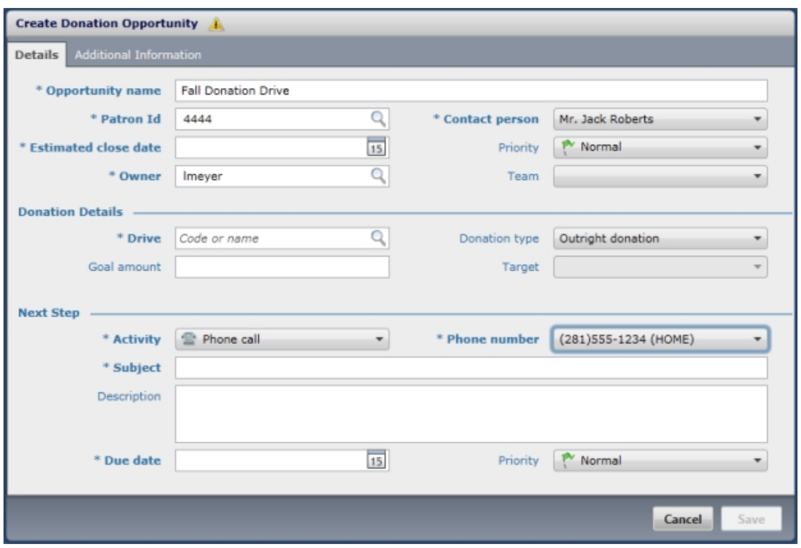
   The image below shows the Patron Name search mode, which has two required text boxes.



4. Click the **Search** button. CRM displays the search results. If no patrons match the search criteria, CRM displays a message to that effect.



5. Locate the patron for which you are creating the donation opportunity. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
6. Double-click the patron's row. CRM redisplays the Create Donation Opportunity form populated with the patron's information.



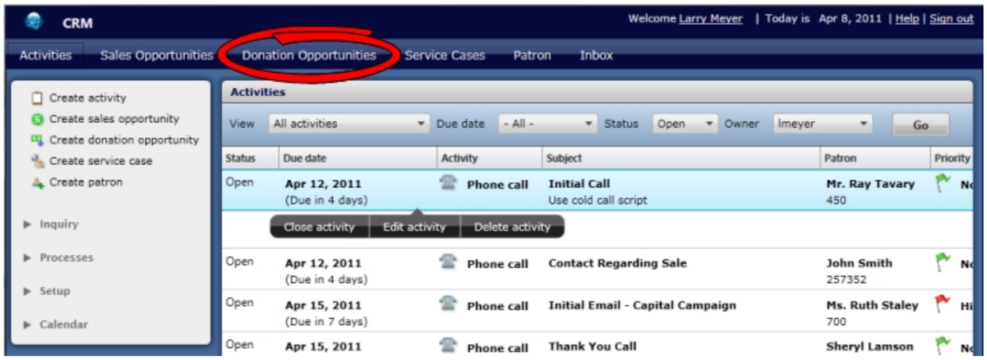
Editing Donation Opportunities

Donation opportunities for which you or your subordinates are the owner can be accessed on the Donation Opportunities hub. These opportunities have been assigned an owner during manual or bulk opportunity creation. Once an opportunity is assigned to you, the goal is to complete the activities required to close the opportunity. To accomplish this goal, you may need to edit the opportunity's fields or create a new activity for the opportunity .

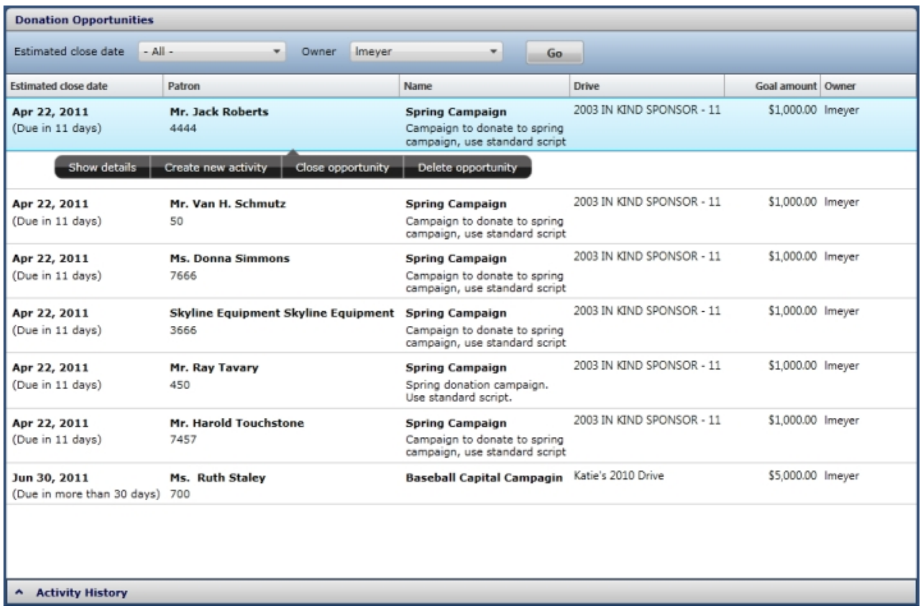
Tip: In the procedure below, a donation opportunity is accessed using the Donation Opportunity hub. You can also access opportunities from associated patron records and activities. For more information, see Viewing Donation Opportunity Details.

To edit a donation opportunity

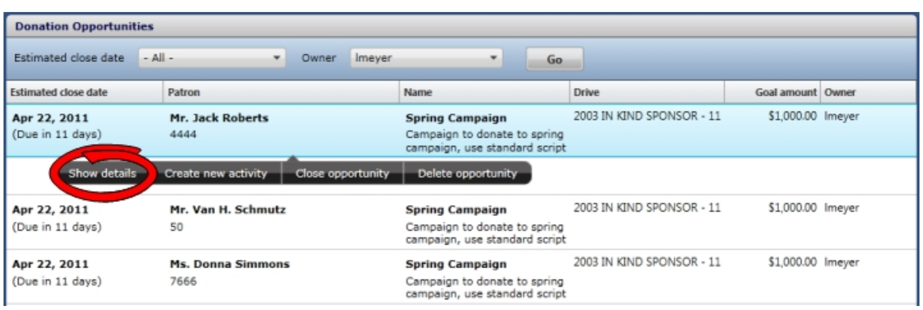
1. Click the **Donation Opportunities** button in the main navigation bar.



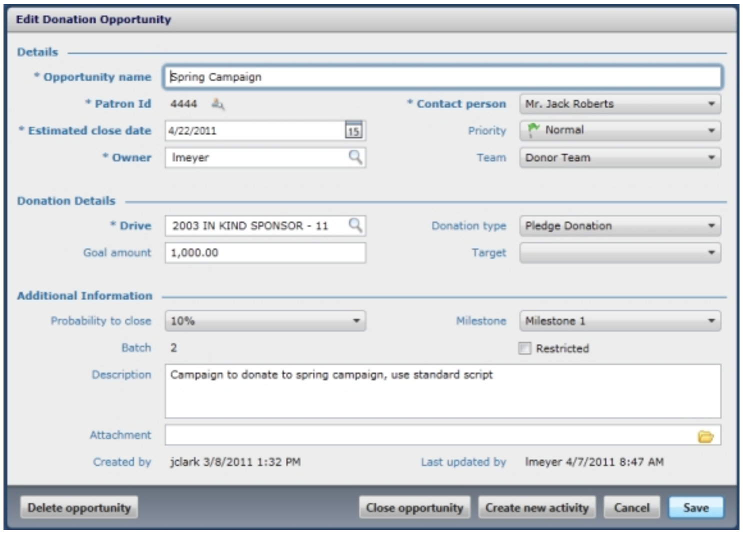
CRM displays the Donation Opportunities hub.



2. If the opportunity whose details you want to view or edit is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner. Only your subordinates are available in the **Owner** list.
3. Select the opportunity, and then click the **Show Details** button.



CRM displays the Edit Donation Opportunity form.

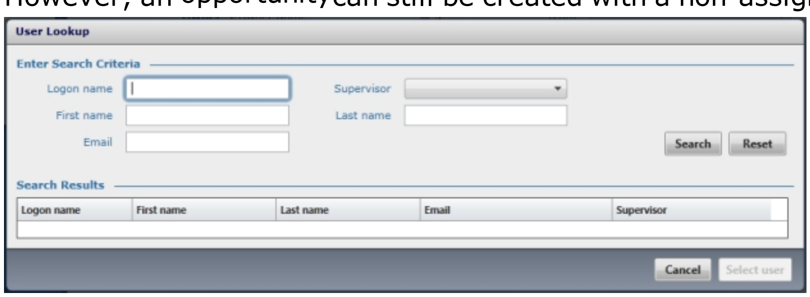


4. Edit the field values as required.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a donation opportunity. File size cannot exceed 2MB.
Batch	If the opportunity was created as part of a bulk process, this field displays the bulk process batch number. If no number is displayed, the opportunity was manually created.
Cancel	Click this button to close the form without saving changes. If you began editing the opportunity by clicking the **Show Details** button on the Donation Opportunities hub, CRM displays the Donation Opportunities hub. If you began editing from the Customer Profile tab of a patron profile form, CRM redisplays the tab on that form.
Close opportunity	If no further activity is required to pursue the opportunity, you can click this button to both save changes and close the opportunity. For more information, see Closing Donation Opportunities.
Contact person	Select the contact person from the patron record. Name #1 from the donor record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Create new activity	Displays the Create Activity form with the same owner and the opportunity's patron as the contact person. In addition, if the opportunity has a batch ID, CRM assigns the batch ID to the new activity.
Created by	A read-only field that displays the sign in name of the user who created the opportunity, as well as the creation date and time.
Delete opportunity	See Deleting Donation Opportunities.
Description	Edit the description of the donation opportunity.

Field	Usage Information
Drive	Drives and campaigns are defined in the back office using tFund. Enter the drive or campaign name or click to use the Drive Lookup. If you don't remember the exact drive or campaign name, you can select one from a list by leaving the **Drive** search field empty and clicking the **Search** button.
Donation type	The donation type options include outright donation, pledge, and gift in kind. Donation types are not configurable.
Estimated close date	Enter or use the calendar popup to select the approximate date on which the owner will complete this opportunity. The estimated close date can be past, present or future.
Goal amount	Enter the amount of money you hope to collect from the donor for this donation opportunity. The entry must be numeric and can include a decimal point and commas.
Last updated by	A read-only field that displays the sign in name of the user who last updated the opportunity, as well as the update date and time. The user and date/time display is not updated when activities associated with the opportunity are changed.
Milestone	This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Opportunity name	The descriptive name that is displayed wherever the opportunity is represented in CRM.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include donor data for donation opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.



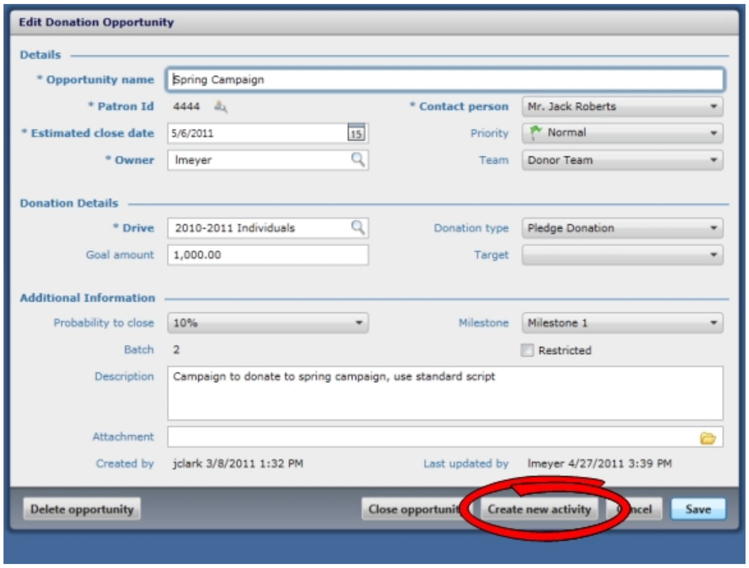
Field	Usage Information
Patron Id	The **Patron Id** field is static and the lookup is unavailable on the Edit Donation Opportunity form.

Field	Usage Information
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity. Your organization can decide what these priority levels mean. When you change the opportunity priority during editing, CRM does not change the priority of the activity that was added by the opportunity creation process. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Probability to close	The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Donation Opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your sub-ordinates is the owner of the opportunity.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the opportunity by clicking the **Create donation opportunity** button in the left navigation pane, CRM will display the Donation Opportunities hub. The **Save** button is enabled only if all required fields have valid entries.
Target	If the drive you select has targets associated with it, select a target from this list. A target is used in the tFund system to represent a group of donors or patrons.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

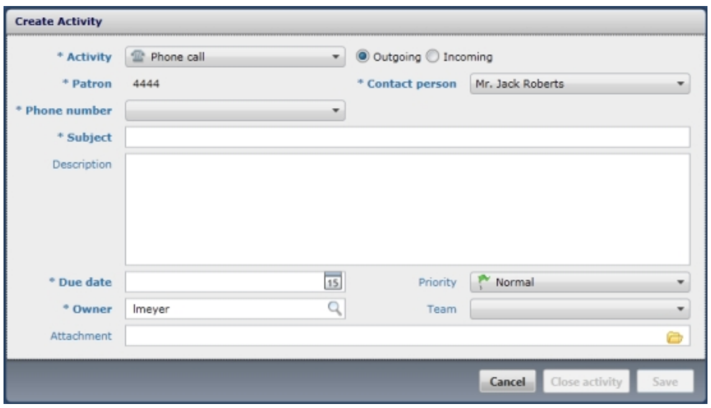
5. Click the **Save** button.

To create a new activity for a Donation opportunity

1. Click the **Create new activity** button.



CRM displays the Create Activity form.



2. From the **Activity** drop-down list, select the type of activity that you want to create. The required and optional fields on the form change based on the activity type.
3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form. Because the group of fields displayed varies by activity type, the table lists the fields in alphabetical order.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Add meeting to Outlook calendar	(Outlook integration only) For a Meeting activity, select this option to add the meeting to your Outlook calendar. Your entry in the **Location** field will be automatically added to the **Location** field in the Outlook meeting. However, conference rooms with addresses in Outlook will not be added to the meeting.

Field	Usage Information
	If a patron has an email address, you can also choose to send a meeting invitation to the patron's email account. If the patron has Outlook or another email application that supports Outlook meeting invitations, the patron can then add the meeting to an email integrated calendar. Depending on the Outlook integration of the patron's email application, you may also receive a confirmation email when the meeting invitation is accepted. See Using Integrated MS Outlook for more information.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a donation opportunity. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the donor record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) Enter a detailed description of the activity.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Edit in Outlook	(Outlook integration only) Save the email or meeting activity in CRM and open the email or meeting in Outlook. You can then edit the item as you normally would.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This

Field	Usage Information
	field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting. The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include donor data for donation opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.
Patron	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A donation opportunity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an opportunity . This is because CRM assumes the donation opportunity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity and the next step activity. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click to save the activity and return to the previous form. If you want to create a follow-up activity, click the **Close Activity** button instead. The **Save** button is enabled only if all required fields have valid entries.

Field	Usage Information
Send Email	(Outlook integration only) Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

4. Do one of the following:
   - For Phone Call, Fax, Letter, Meeting, or Other activities, click **Save**.
   - For an Email activity, click **Send Email**. CRM prompts you to either return to the Activities hub or create a follow-up activity. To create a follow-up activity, select **Create follow-up activity**, and then click **OK**. Once you click **OK**, CRM closes the activity you just completed. CRM displays the Create Activity form. The form displays with the patron information from the original email activity, and you can then repeat this procedure to create a new activity.

Closing Donation Opportunities

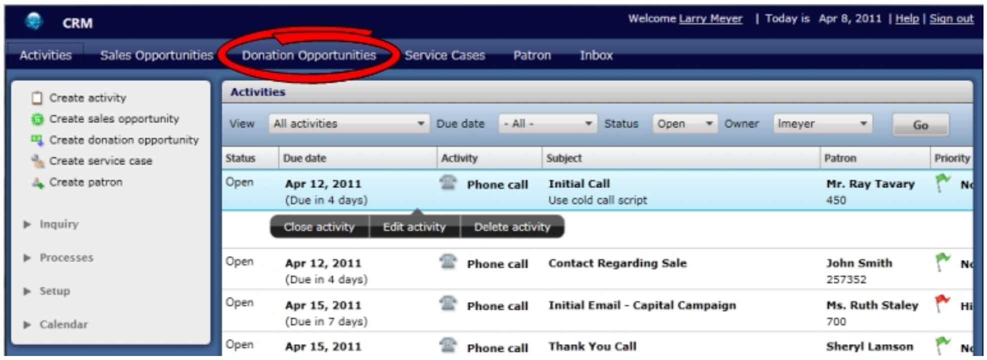
Once you have won or lost an opportunity, you should close the opportunity to remove it from the list of open opportunities. You must be the owner or the supervisor of the owner to close an opportunity. Opportunities must be marked as won or lost as part of the close opportunity process. This is done so that your organization can track how successful you have been in achieving the goals of your opportunities.

If you mark an opportunity as won, you must also enter the monetary amount of the sale. If you mark an opportunity as lost, you will be required to select the reason for the loss. For information about configuring lost reasons, see Managing Lost Reason Codes.

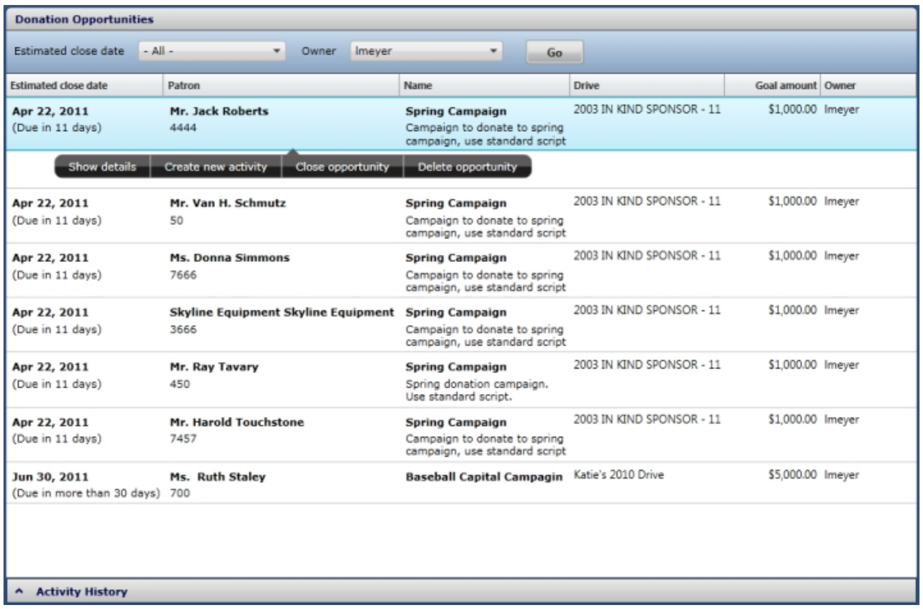
Tip: The procedure below uses the Donation Opportunities hub, but you can also close opportunities from the Edit Donation Opportunity form. See Editing Donation Opportunities for more information.

To close a donation opportunity

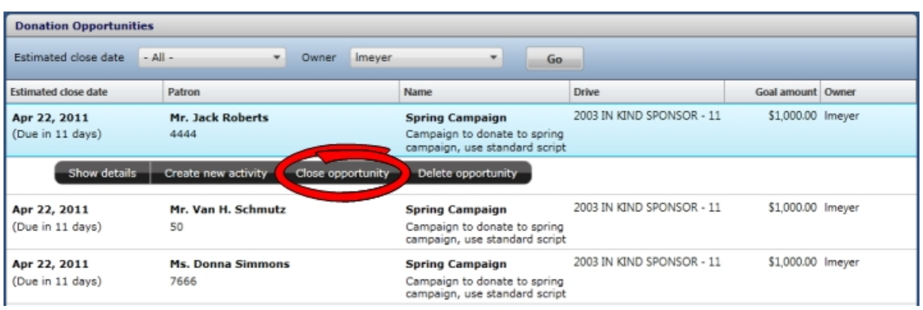
1. Click the **Donation Opportunities** button in the main navigation bar.



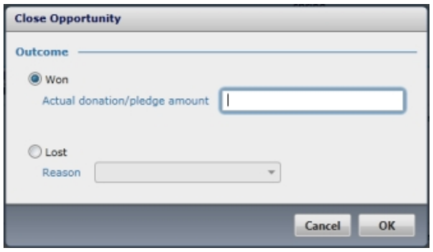
CRM displays the Donation Opportunities hub.



2. If the opportunity you want to close is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.
3. Select the opportunity, and then click the **Close opportunity** button.



CRM displays the Close Opportunity dialog box.



4. Do one of the following:
   - If you won the opportunity, select **Won**, and then enter the numerical amount in **Actual donation/pledge amount**.
   - If you lost the opportunity, select **Lost**, and then select a lost reason from the **Reason** list.
5. Click **OK**. CRM redisplays the Donation Opportunities hub with the closed opportunity removed.

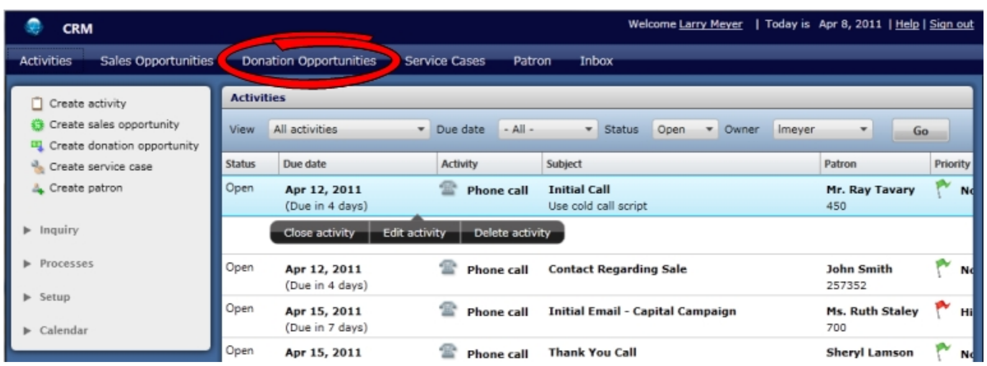
Deleting Donation Opportunities

If you are a supervisor, you can delete your own or a subordinate's opportunities. You may want to do this if you created an opportunity by mistake or if you do not want the opportunity to be recorded as either won or lost. When you delete an opportunity, all of its associated activities and attachments are also deleted.

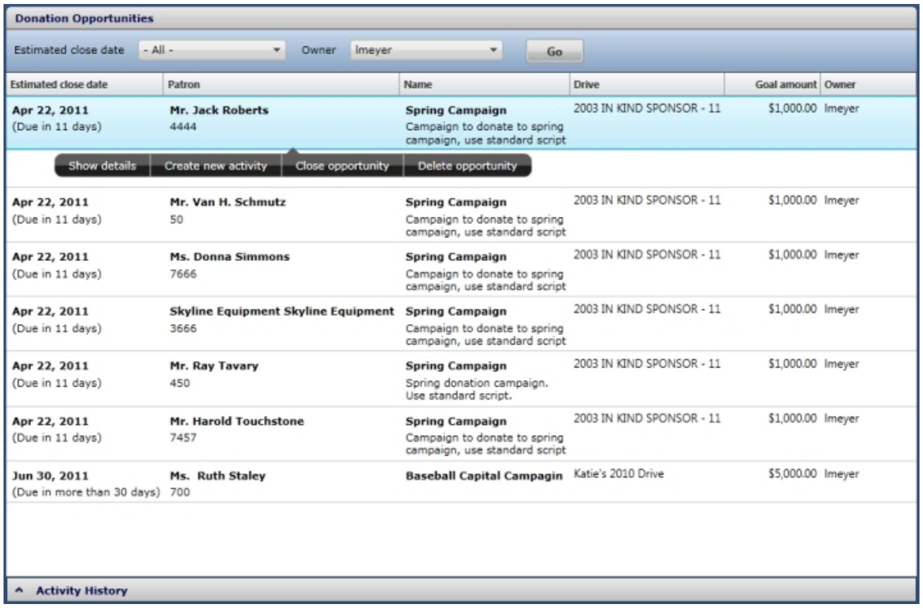
Tip: The procedure below uses the Donations Opportunities hub, but you can also delete opportunities from the Edit Donations Opportunity form. See Editing Donation Opportunities for more information.

To delete a donation opportunity

1. Click the **Donation Opportunities** button in the main navigation bar.

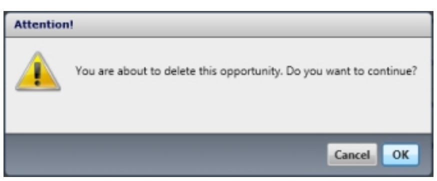


CRM displays the Donation Opportunities hub.



2. If the opportunity you want to delete is not in the opportunity list, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.
3. Select the opportunity, and then click the **Delete opportunity** button.

CRM displays a warning to make sure you want to delete the opportunity.



4. Click **OK**. CRM deletes the opportunity and redisplays the Donation Opportunities hub.

Working with Service Cases

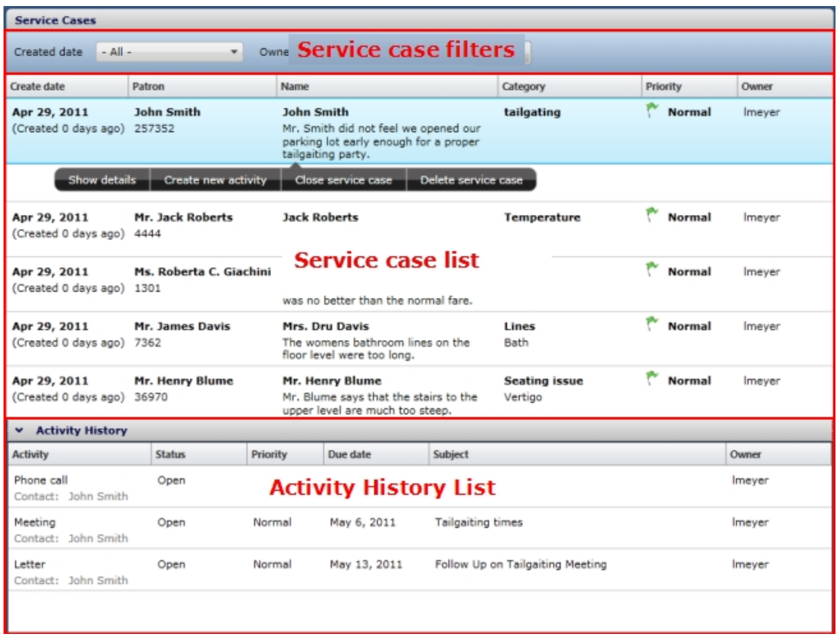
When a customer reports an issue that needs to be resolved, you can create a CRM service case to track all the related activities, communication, and information needed to resolve the issue. Service cases are usually assigned to customer support representatives or managers. During the process of resolving a case, all actions and communications they take are recorded using CRM activities associated with the service case. This allows you to track the progress made in resolving the issues that service cases represent.

When working with CRM service cases, you can do the following:

- Navigate the Service Cases hub
- Filter the service case list
- View service case details
- View the Activity History
- Create service cases
- Select patrons for service cases
- Edit service cases
- Close service cases
- Delete service cases

Navigating the Service Cases Hub

The Service Cases hub is the central place for working with service cases in CRM. From this hub you can edit, view, close, and delete service cases. You can also create activities for the service cases within the hub. The Service Cases hub is composed of the following parts:



Service case filters

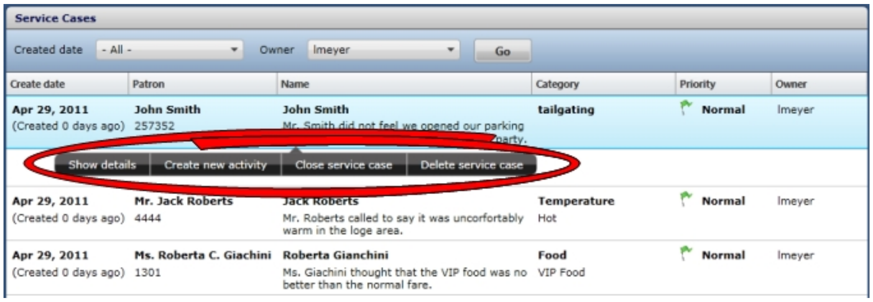
Use the drop-down settings in the service case filters area to display the list of service cases you want. Once you've set the filters, click the **Go** button to display the subset of service cases. The following filters are available:

- **Created date** - This field filters service cases by how long ago they were created. The selections include All, Today, Yesterday, Within the past 7 days, Within the past 30 days, and More than 30 days. These date selections are not configurable.
- **Owner** - This field filters service cases by owner. By default, the Service Cases hub displays the service cases for which the currently signed in operator is owner. You can only view service cases owned by other operators if you are their supervisor. For this reason, this setting only applies to supervisors.

If no service cases meet the filter combination you set, the service case list is empty and CRM displays the message "There are no service cases that match the search criteria. Please try again." For more information about opportunity filters, see Filtering the Opportunity List.

Service case list

The service case list contents are determined by the current CRM operator and the filter settings. By default, all open service cases that are owned by the current operator are displayed. In the list, each row represents a service case. Click a service case row to display the actions that you can perform on that service case. Possible actions include:



- Show details. Click this button to display the Edit Service Case form (see Editing Service Cases).
- Create new activity. Click this button to display the Create Activity form (see Manually Creating Activities).
- Close service case. Click this button to display the Close Service Case dialog box (see Closing Service Cases).
- Delete service case. Click this button to delete the service case (see Deleting Service Cases).

The list columns contain the same type of information for each service case in the list. The default columns include the following:

- Create date. The date on which the service case was created, along with the number of days that have elapsed since the creation date.
- Patron. The name of the patron for which the service case was created. Patron names are sorted by last name then first name.
- Name. The service case names are sorted alphanumerically.
- Category. The category that was assigned to the service case when it was created. Categories sort alphabetically.
- Priority. The priority that was assigned to the service case when it was created. Priorities sort alphabetically.
- Owner. The owner names are sorted alphabetically.

You can sort the service cases in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many service cases in the list to display in the list area, a scroll bar appears on the right side of the list.

Activity History list

The Activity History list displays the activities associated with the service case that is selected in the service case list. Both open and closed activities are included. By default, the Activity History list is minimized. Click the bar to expand the list. When expanded, the list displays over the bottom part of the service case list.

To view the details of an activity in the Activity History list, double-click the activity row. CRM will display the Edit Activity form for open activities and the View Activity form for closed activities. For information about using these forms, see Editing Activities and Viewing Activity Details.

You can sort the service cases in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many service cases in the list to display in the list area, a scroll bar appears on the right side of the list.

The default columns include the following:

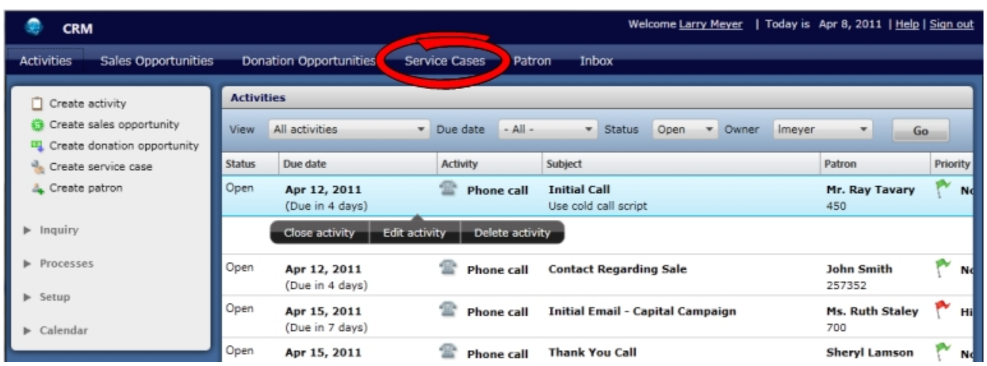
- Status. Activity statuses can be Open or Closed. Deleted activities are never displayed in the Activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during manual or bulk activity creation. See Creating Activities in Bulk or Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest out date.
- Subject. The subjects of the activities are sorted by the subject name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

Filtering the Service Case List

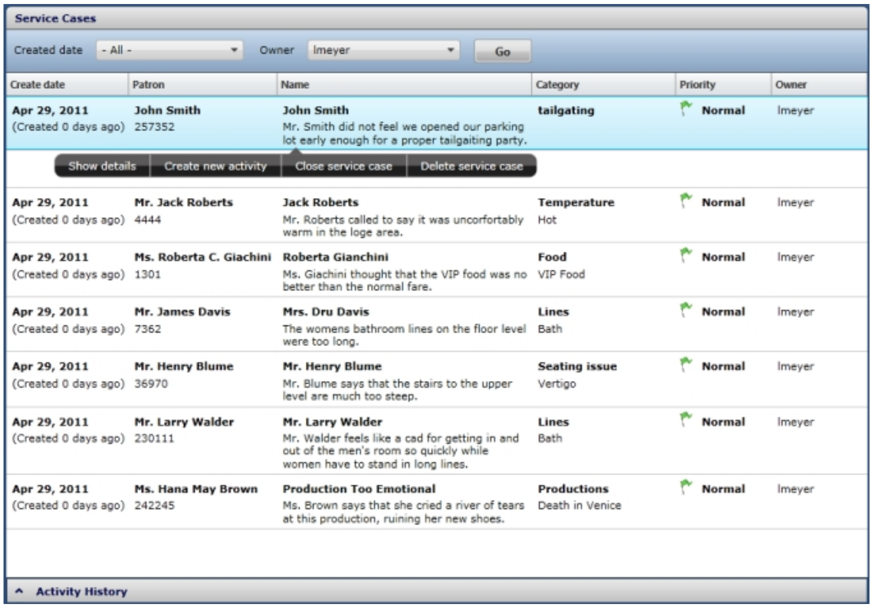
You can filter the service case list to display only the service cases on which you want to work. By default, the service case list displays all open service cases that are owned by the currently signed in operator. However, you can change the list of service cases by filtering for the creation date. If you are a supervisor, you can also filter the list by owner. However, only your subordinates will be available for selection.

To filter the service case list

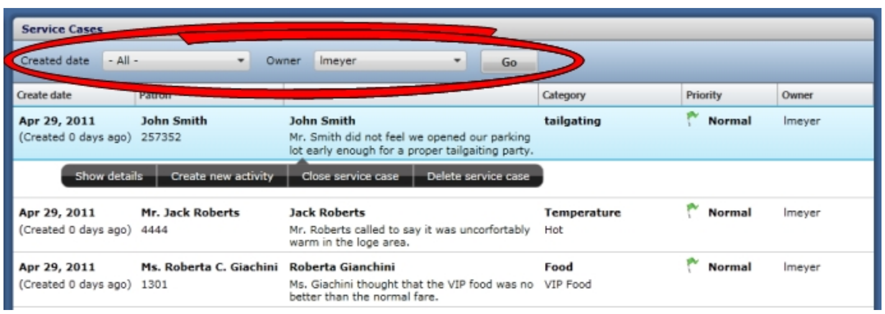
1. Click the **Service Cases** button in the main navigation bar.



CRM displays the Service Cases hub.



2. In the opportunity filters area, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.



CRM displays the filtered service case list.

Viewing Service Case Details

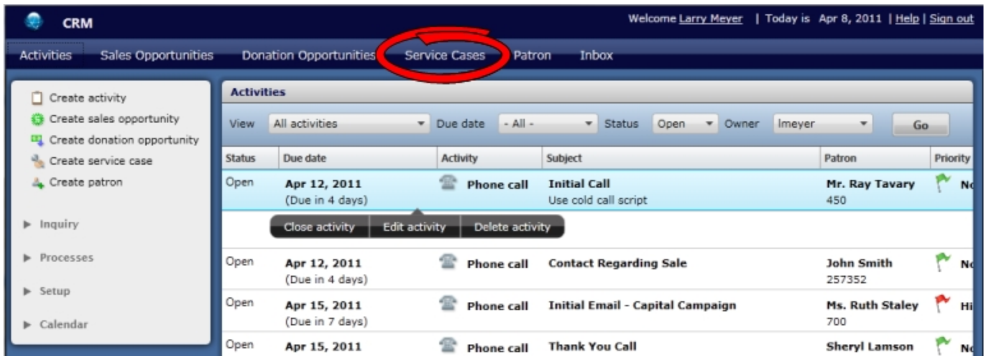
Once a service case has been created and assigned to you or one of your subordinates, you can view its details at any time. The exception is that you cannot view the details of deleted service cases. Some reasons you might want to view service case details include:

- You want to see the details of a service case that has been assigned to you.
- You are working on an activity, and you want to see the service case for which the activity was created.
- You are a supervisor, and you want to check the progress your subordinates are making on their service cases.

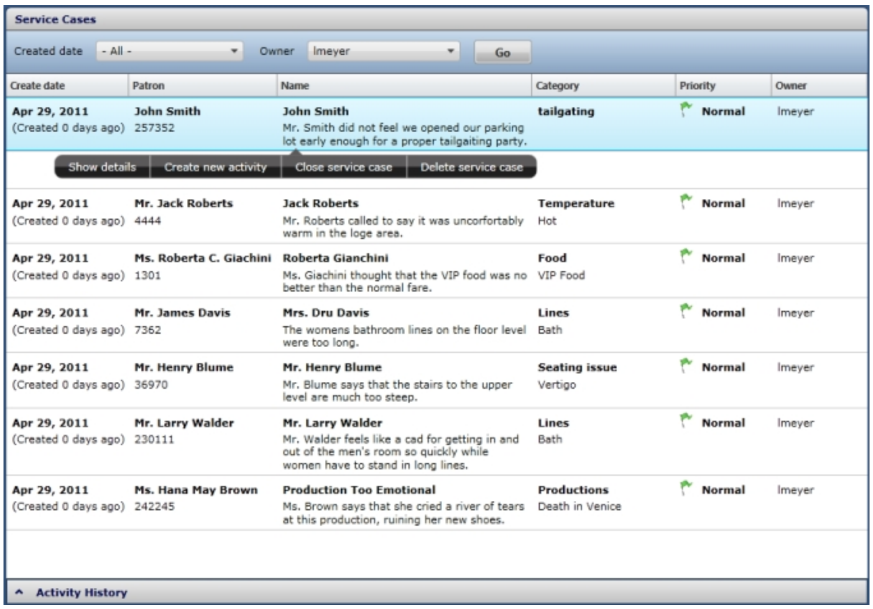
Note: Depending on your permissions, you may not be able to edit service cases. In addition, your permissions settings may limit you to read-only access or no access to service cases at all. For more information, see Managing Users.

To view service case details from the Service Cases hub

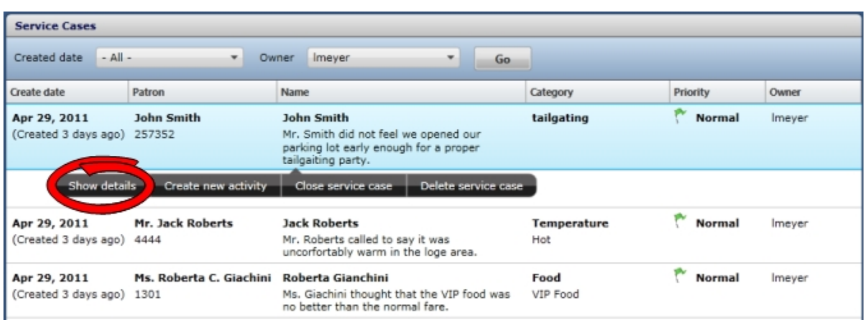
1. Click the **Service Cases** button in the main navigation bar.



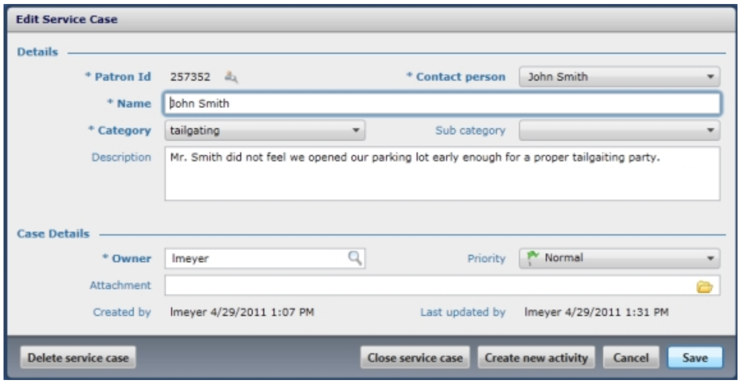
CRM displays the Service Cases hub.



2. If the service case whose details you want to view or edit is not in the opportunity list, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner. Only your subordinates are available in the **Owner** list.
3. Select the service case, and then click the **Show Details** button.

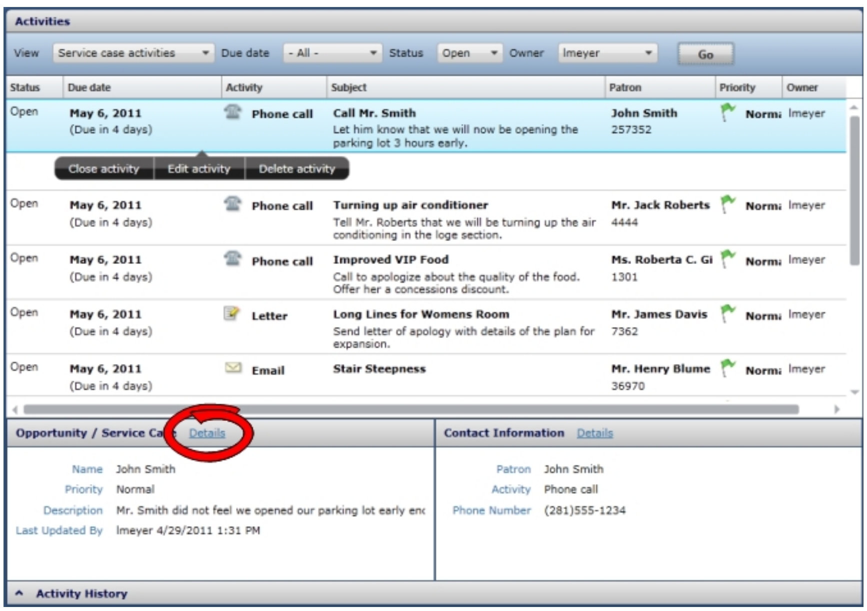


CRM displays the Edit Service Case form.

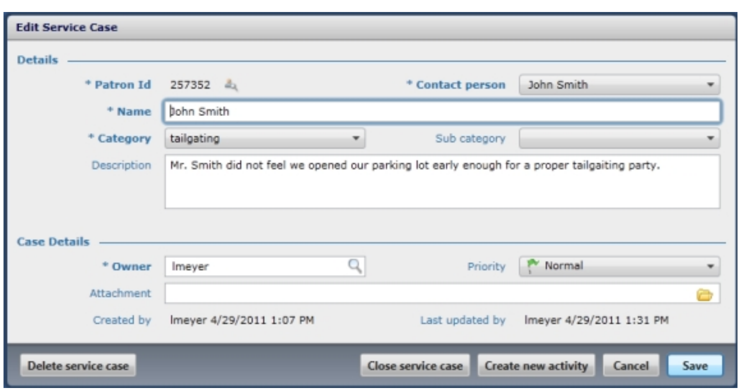


To view service case details from the Activities hub

1. On the Activities hub, locate the activity associated with the service case whose details you want to view, and then select the activity. If the activity you want to view is not in the list, try Filtering the Activity List.
2. In the Opportunity / Service Case pane, click the Details link.

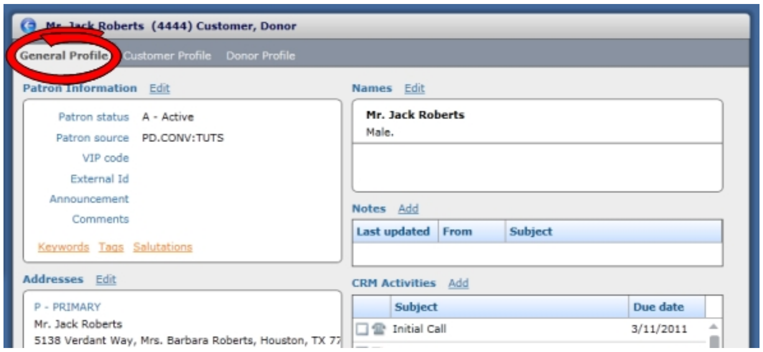


CRM displays the Edit Service Case form.

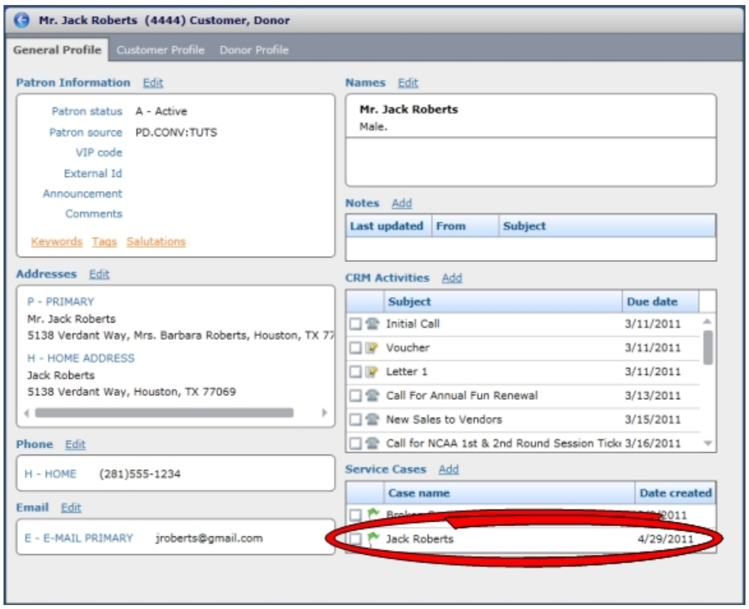


To view service details from a patron record

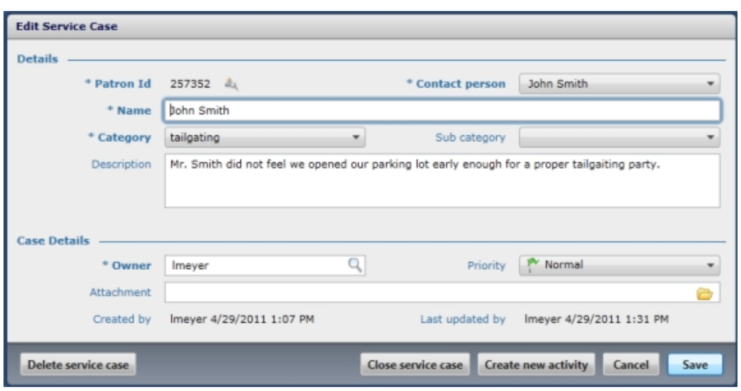
1. In the patron record, click the **General Profile** tab. CRM displays the tab.

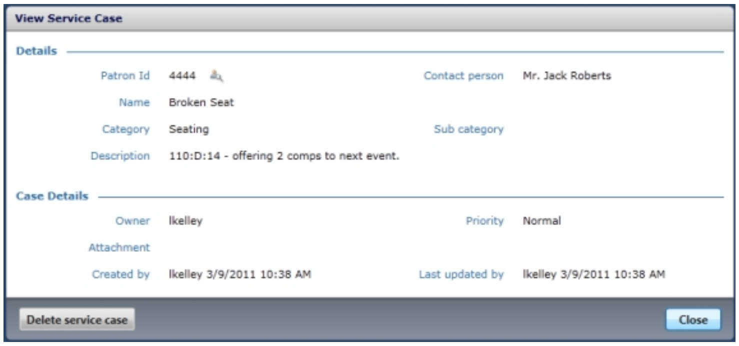


2. In the Service Cases table, double-click the name of the service case that you want to view or edit.



If the service case is open and you or one of your subordinates is the owner, CRM displays the Edit Service Case form. If the service case is closed or a user besides you or one of your subordinates is the owner, CRM displays the View Service Case form.





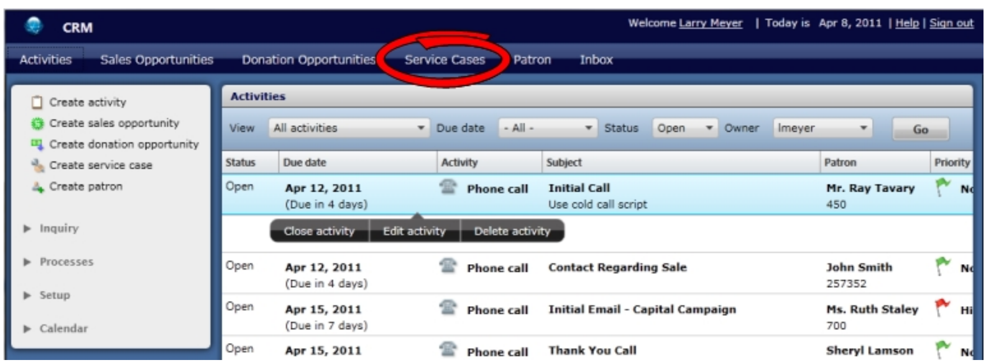
Viewing the Activity History of a Service Case

As you work toward resolving a service case, you add and close CRM activities for the service case item. CRM creates an activity history for the item that you can display while you work. You can view the activity history on the Service Cases hub.

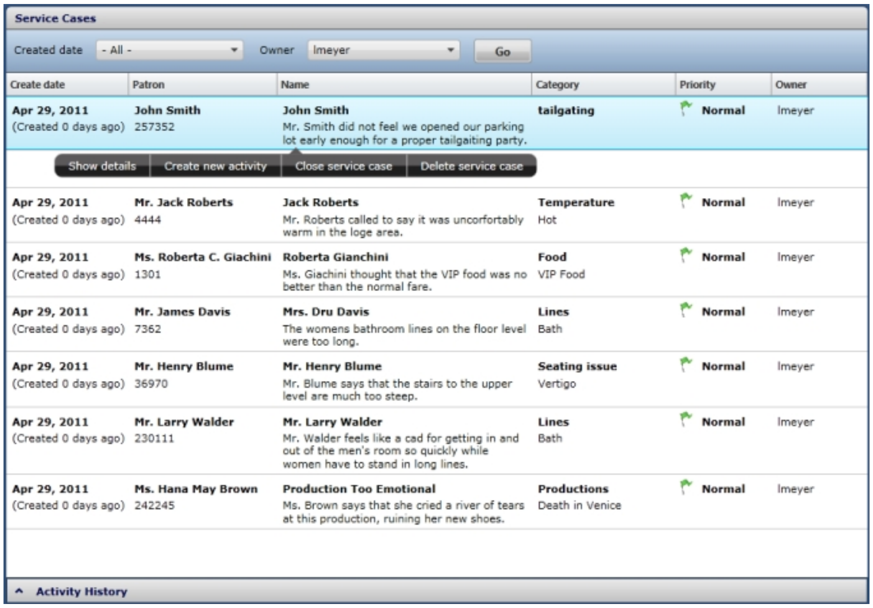
Tip: You can also view the activity history of a service case item in the patron summary of the patron for which the item was created. However, the activity history in the patron summary includes the activities for all opportunities, service cases, and standalone activities that have been created for the patron. For more information, see Viewing the Patron Summary.

To view the activity history of a service case

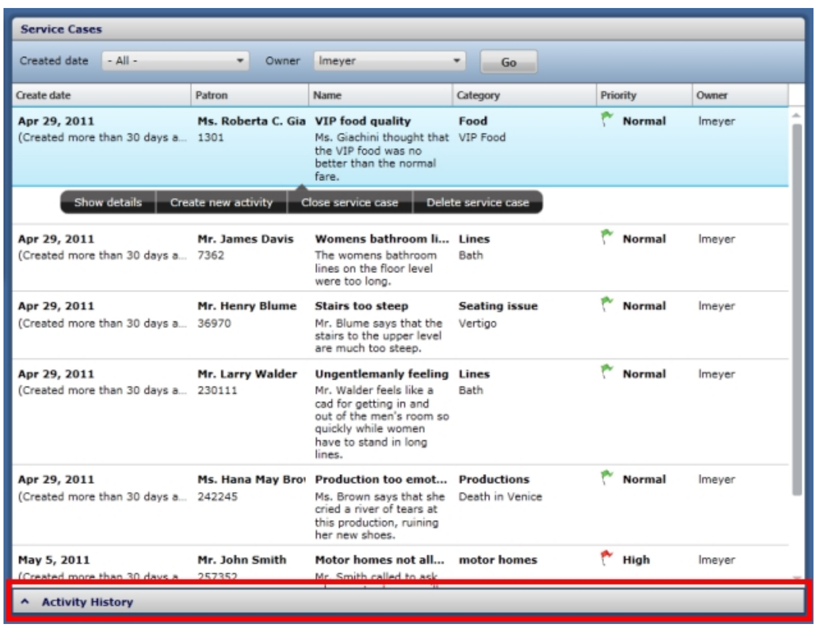
1. Click the **Service Cases** button in the main navigation bar.



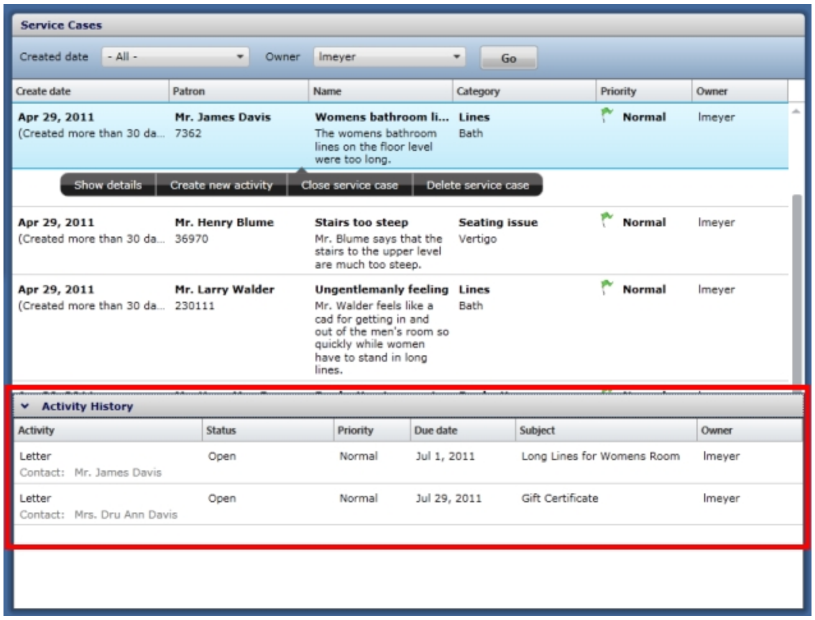
CRM displays the Service Cases hub.



2. Select the service case item for which you want to view the activity history, and then click the Activity History bar.



CRM displays the Activity History list for the selected service case.



Tips about viewing the Activity History:

You can sort the service cases in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many service cases in the list to display in the list area, a scroll bar appears on the right side of the list.

The default columns include the following:

- Status. Activity statuses can be Open or Closed. Deleted activities are never displayed in the Activity list, but you can see them using data views.
- Activity. Activity types include phone call, email, fax, letter, meeting, and other. The activity type is chosen during manual or bulk activity creation. See Creating Activities in Bulk or Manually Creating Activities.
- Due date. Displays the activity due date and the number of days until or after the due date, relative to the current date. If the due date is more than 30 days in the future or 30 days late, the due date and "Due in more than 30 days" or "More than 30 days overdue" are displayed. The default sort is from the oldest to the furthest out date.
- Subject. The subjects of the activities are sorted by the subject name.
- Priority. High, Normal, Medium, or Low. The sort is alphabetical.

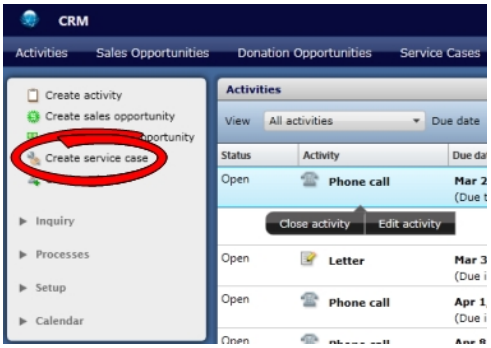
Creating Service Cases

A CRM service case is created to track all activities, communication, and information related to an incoming customer complaint. If follow up actions are necessary, a CRM activity can also be created and associated with the service case. Unlike CRM opportunities and activities, CRM service cases cannot be created in bulk. This because customer complaints are always unscheduled, single incidences. Once the customer complaint has been resolved, you can close the service case.

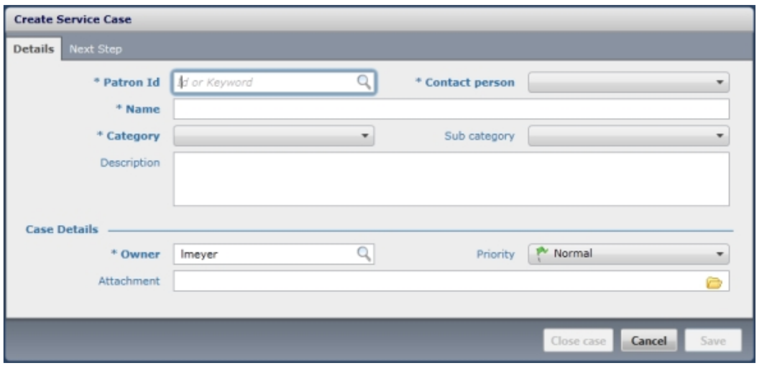
The power of service case creation is realized in CRM data views that gather, organize, and present customer complaint data. CRM allows you to set up service case categories from which your customer service representatives must choose when they create a service case. Then, when you generate a data view, you will be able to identify and address your customers' most common complaints.

To create a service case

1. In the navigation pane, click the **Create service case** button.



CRM displays the Create Service Case form.



2. Set value for each field with an asterisk (required), and optionally enter values for any of the remaining fields. See the table below for an alphabetical list of the fields that may be included on this form with usage information about each one.

See an alphabetical list of the fields with usage information

Field	Usage Information
Activity	Select an activity type for the next step towards addressing the customer complaint. The activity is automatically assigned to the owner of the service case. For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a service case. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving and return to the previous form.
Category	You must select a category for the service case. Categories for service cases include service areas about which customers may complain, such as parking,

Field	Usage Information
	concessions, and restroom lines. Categories are used to generate CRM data views of service cases. Service case categories and subcategories are configurable in CRM. See Configuring Service Case Categories.
Close case	If no further activity is required after entering the service case, you can click this button to save and close the service case. If you want the service case to remain open, click the **Save** button.
Contact person	Select the contact person from the patron record. Name #1 from the patron record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	There are two Description text boxes. On the Details tab, enter a detailed description of the customer complaint. On the Next Step tab, enter a description of the activity that must be completed to address the complaint.
Details tab	The fields on this tab capture the details of the customer's complaint.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Fax number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting.
Name	Enter a short, descriptive name for the service case. This is not related to the patron name.
Next Step tab	If you need to take action to address the customer complaint in the service case after it is created, use these fields to open a next step activity when the case is saved.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates.

Field	Usage Information
	Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an service case can still be created with a non-assigned owner.
Patron Id	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A service case can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an service case. This is because CRM assumes the service case is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority lists of the service case on the Details tab and the next step activity on the Next Step tab. The priority settings on the two tabs are independent of one another. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the service case by clicking the **Create service case** button in the left navigation pane, CRM will display the Service Cases hub. The **Save** button is enabled only if all required fields have valid entries.
Start time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Sub category	If the currently selected category has subcategories, you can select one from this list.
Subject	Enter a brief description of the purpose of the activity.

3. Do one of the following:
    - To save the service case and leave it open, click **Save**.
    - To save and immediately close the service case, click **Close case.**

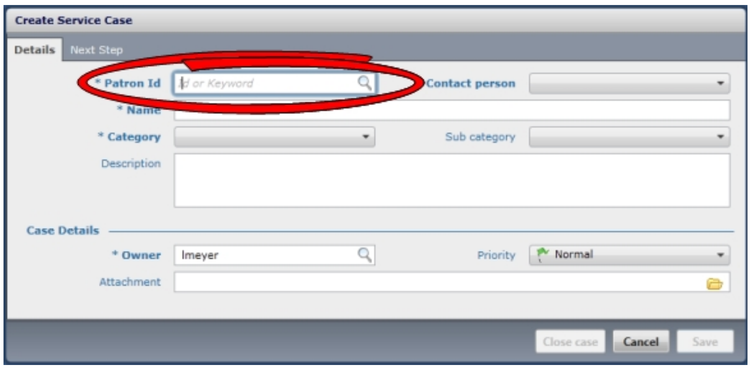
Selecting Patrons During Service Case Creation

As part of manually creating a service case, you need to select the patron for which you are creating the service case. To select a patron you can use a known patron Id number, a keyword, or the integrated Patron Lookup. Except for its integration into the service case creation process, the Patron Lookup works just like the Patron Search form on the Patron hub.

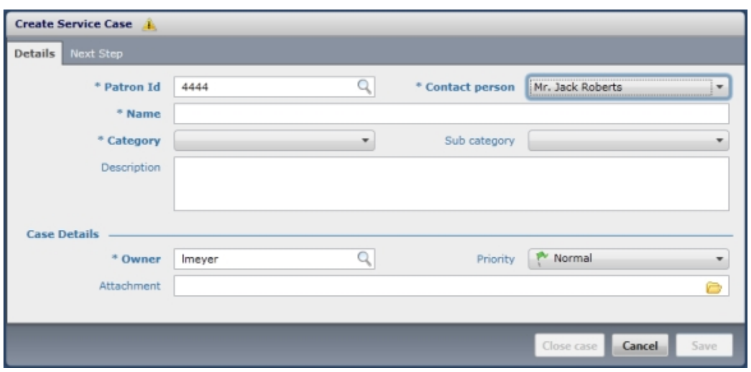
When using the Patron Lookup, you can search for a patron using the patron's name, Id, keywords, phone numbers, or email addresses. If the patron is an organization, you can search by the organization name. Once you locate the patron, you can assign the patron to the service case you are creating.

To select a patron using the patron Id number

1. On the Create Service Case form in the **Patron Id** field, enter the patron Id number, and then click the magnifying glass icon .

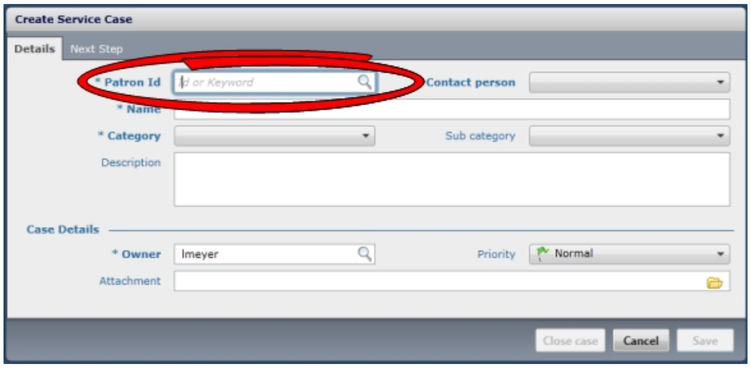


If the patron Id number is valid, CRM populates the Create Service Case form with the patron's information. If the patron Id is invalid, CRM displays the Patron Lookup. In this case, use the procedure to select a patron using the Patron Lookup search below.

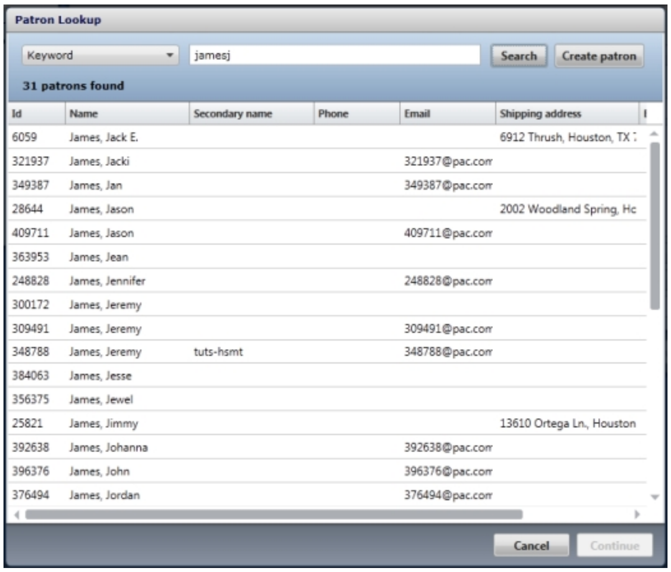


To select a patron using a patron keyword

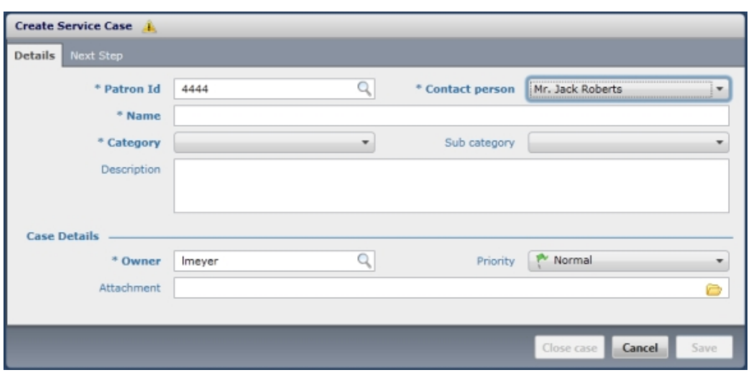
1. On the Create Service Case form in the **Patron Id** field, enter the keyword, and then click the magnifying glass icon .



If only one patron record contains the keyword, CRM populates the Create Service Case form with the patron's information. If more than one patron record uses the keyword, CRM displays the Patron Lookup with the matching patron records in the search results.

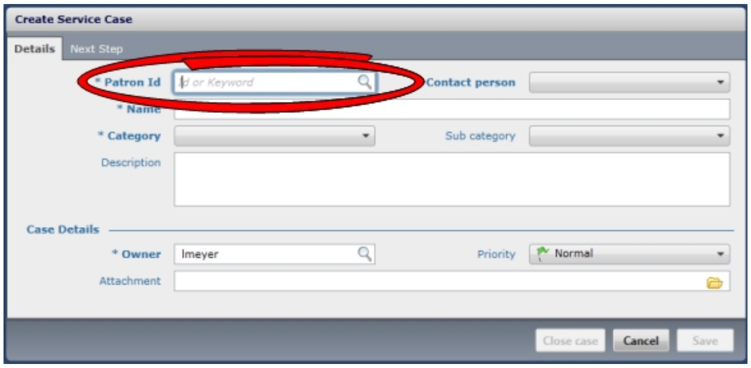


2. Locate the patron for which you are creating the service case. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
3. Double-click the patron's row. CRM redisplays the Create Service Case form populated with the patron's information.



To select a patron using the Patron Lookup search

1. On the Create Service Case form in the **Patron Id** field, click the magnifying glass icon .



CRM displays the Patron Lookup.

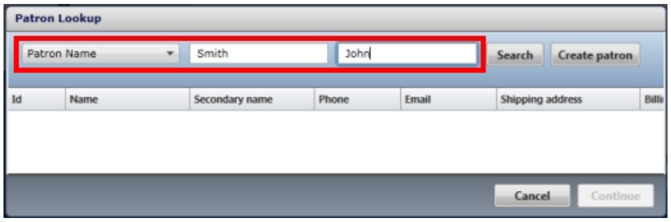
2. Select the search mode from the drop-down list.

3. Based on the search mode, enter the appropriate alphanumeric characters in the text boxes.

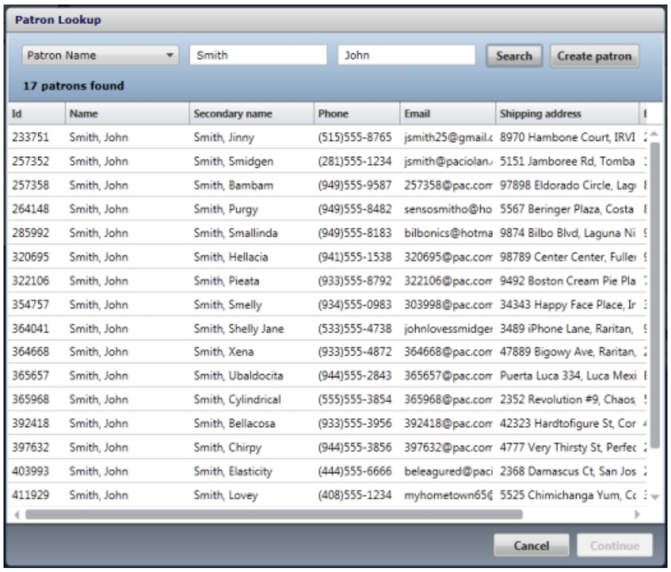
   See a table that describes the acceptable entries for each search mode.

Search mode	Acceptable entries
Patron name	Any alphanumeric In the second text box, you can use the asterisk (*) wildcard as long as the first character is a letter. For example, if you want to find the first name John, you can enter J*, Jo*, or Joh* . You cannot use *ohn. You also cannot use wild-cards for last names in the first text box.
Patron Id	Any alphanumeric
Keyword	Any alphanumeric. The search will return patron records with partial keyword matches.
Phone number	Any alphanumeric
Email address	Must be a valid email address format. For example, name@example.com
Organization name	Any alphanumeric

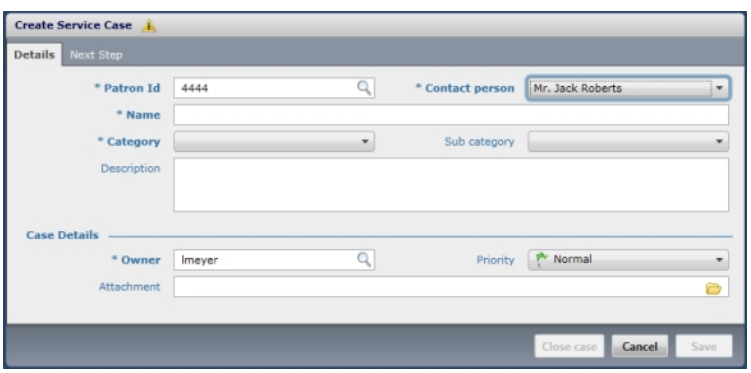
The image below shows the Patron Name search mode, which has two required text boxes.



4. Click the **Search** button. CRM displays the search results. If no patrons match the search criteria, CRM displays a message to that effect.



5. Locate the patron for which you are creating the service case. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
6. Double-click the patron's row. CRM redisplays the Create Service Case form populated with the patron's information.



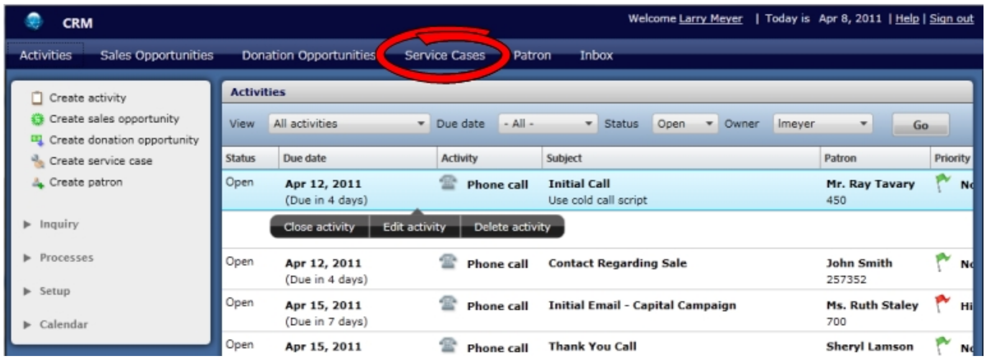
Editing Service Cases

Service cases for which you or your subordinates are the owner can be accessed on the Service Cases hub. These service cases have been assigned an owner during manual creation or subsequent editing. Once a service case is assigned to you, the goal is to complete the activities required to close the service case. To accomplish this goal, you may need to edit the service case's fields or create a new activity for the service case.

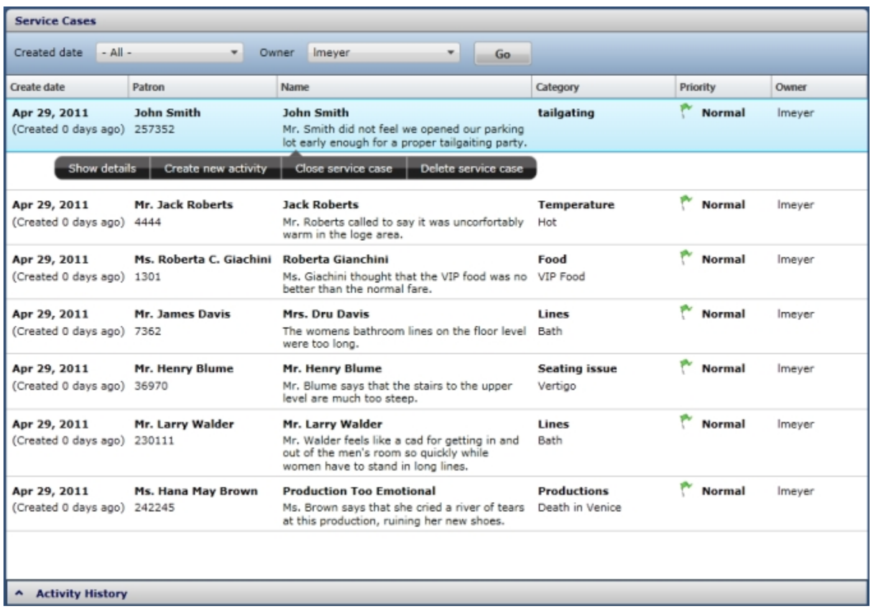
Tip: In the procedure below, a service case is accessed using the Service Cases hub. You can also access service cases from associated patron records and activities. For more information, see Viewing Service Case Details.

To edit a service case

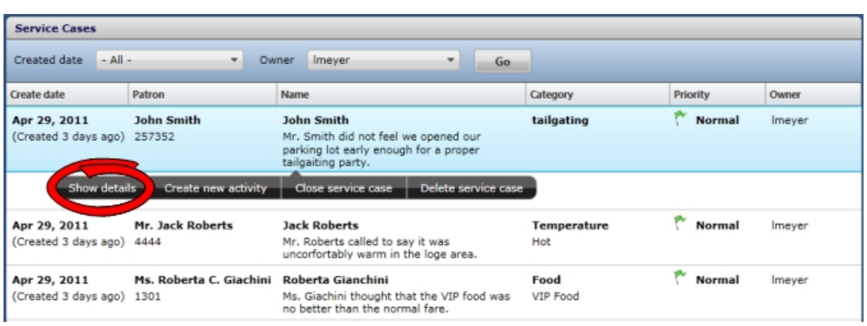
1. Click the **Service Cases** button in the main navigation bar.



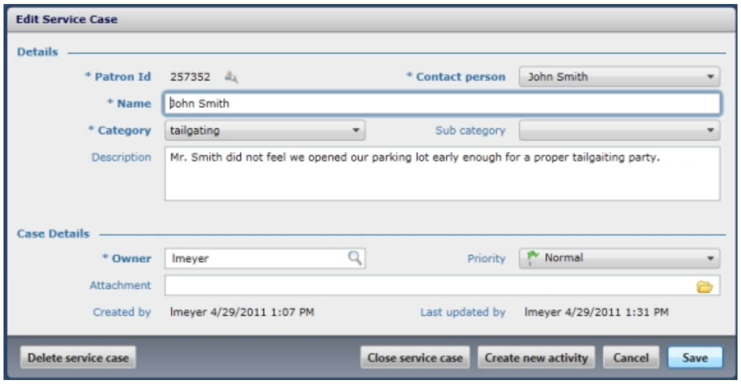
CRM displays the Service Cases hub.



2. If the service case whose details you want to view or edit is not in the opportunity list, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner. Only your subordinates are available in the **Owner** list.
3. Select the service case, and then click the **Show Details** button.



CRM displays the Edit Service Case form.



4. Edit the field values as required.

   See an alphabetical list of the fields with usage information

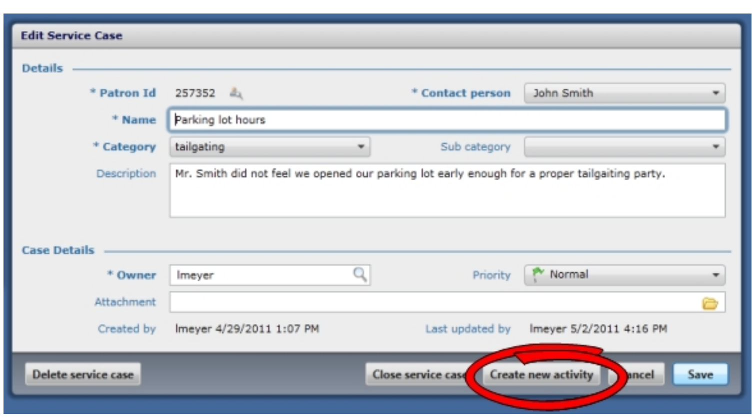
Field	Usage Information
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a service case. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving changes. If you began editing the service case by clicking the **Show Details** button on the Service Cases hub, CRM displays the Service Cases hub. If you began editing from the Customer Profile tab of a patron profile form, CRM redisplays the tab on that form.
Category	You must select a category for the service case. Categories for service cases include service areas about which customers may complain, such as parking, concessions, and restroom lines. Categories are used to generate CRM data views of service cases. Service case categories and subcategories are configurable in CRM. See Configuring Service Case Categories.
Close service case	If no further activity is required to address the service case, you can click this button to both save changes and close the service case. For more information, see Closing Service Cases.
Contact person	Select the contact person from the patron record. Name #1 from the patron record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Create new activity	Displays the Create Activity form with the same owner and the service case's patron as the contact person.
Created by	A read-only field that displays the sign in name of the user who created the service case, as well as the creation date and time.
Delete service case	See Deleting Service Cases.
Description	You can add to or change the description of the customer complaint.
Last updated by	A read-only field that displays the sign in name of the user who last updated the service case, as well as the update date and time. The user and date/time display is not updated when activities associated with the service case are changed.

Field	Usage Information
Name	You can change the short description of the service case. This is not related to the patron name.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an service case can still be created with a non-assigned owner.
Patron Id	The **Patron** field is static and the lookup is unavailable on the Edit form.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the service case. Your organization can decide what these priority levels mean. When you change the service case priority during editing, CRM does not change the priority of the activity that was added by the service case creation process. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the service case by clicking the **Create service case** button in the left navigation pane, CRM will display the Service Cases hub. The **Save** button is enabled only if all required fields have valid entries.
Start time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Sub category	If the currently selected category has subcategories, you can select one from this list.
Subject	Enter a brief description of the purpose of the activity.

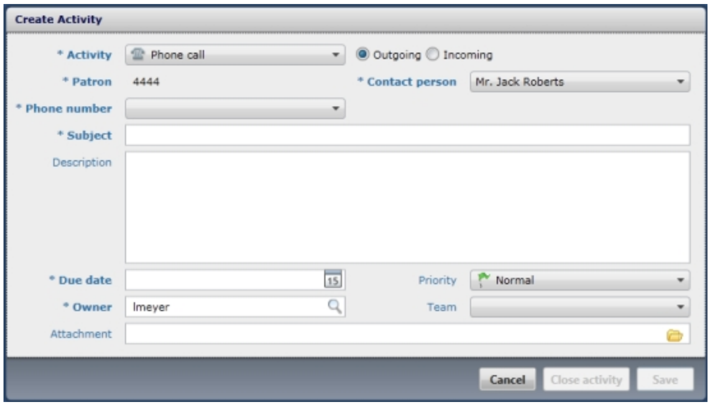
5. Click the **Save** button.

To create a new activity for a service case

1. On the Edit Service Case form, click the **Create new activity** button.



CRM displays the Create Activity form.



2. From the **Activity** drop-down list, select the type of activity that you want to create. The required and optional fields on the form change based on the activity type.
3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form. Because the group of fields displayed varies by activity type, the table lists the fields in alphabetical order.

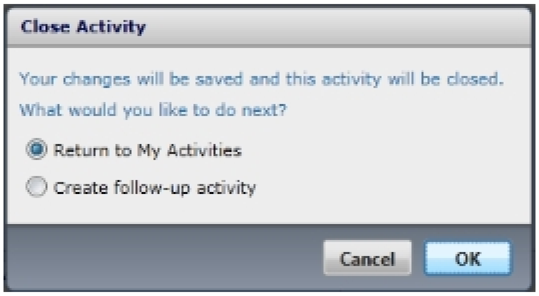
   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	For the Phone Call, Email, Fax, Letter, and Other activity types, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Add meeting to Outlook calendar	(Outlook integration only) For a Meeting activity, select this option to add the meeting to your Outlook calendar. Your entry in the **Location** field will be automatically added to the **Location** field in the Outlook meeting. However, conference rooms with addresses in Outlook will not be added to the meeting. If a patron has an email address, you can also choose to send a meeting invitation to the patron's email account. If the patron has Outlook or another email application that supports Outlook meeting invitations, the patron can then add the meeting to an email integrated calendar. Depending on the Outlook integration of the patron's email application, you may also receive a confirmation email when the meeting invitation is accepted. See Using Integrated MS Outlook for more information.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	(Optional) Use this field to add a .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx file attachment to a service case. File size cannot exceed 2MB.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up

Field	Usage Information
	activity or returning to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the patron record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) Enter a detailed description of the activity.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Edit in Outlook	(Outlook integration only) Save the email or meeting activity in CRM and open the email or meeting in Outlook. You can then edit the item as you normally would.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email and meeting activities, enter the body of the message for the email or meeting. The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different

Field	Usage Information
	owner, CRM will display a warning message to that effect. However, an service case can still be created with a non-assigned owner.
Patron	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A service case can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an service case. This is because CRM assumes the service case is being created for that patron.
Patron Lookup	Click 🔍 to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority lists of the service case on the Details tab and the next step activity on the Next Step tab. The priority settings on the two tabs are independent of one another. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click to save the activity and return to the previous form. If you want to create a follow-up activity, click the **Close Activity** button instead. The **Save** button is enabled only if all required fields have valid entries.
Send Email	(Outlook integration only) Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

4. Do one of the following:
   - For Phone Call, Fax, Letter, Meeting, or Other activities, click **Save**.
   - For an Email activity, click **Send Email**. CRM prompts you to either return to the Activities hub or create a follow-up activity. To create a follow-up activity, select **Create follow-up activity**, and then click **OK**. Once you click **OK**, CRM closes the activity you just completed. CRM displays the Create Activity form. The form displays with the patron information from the original email activity, and you can then repeat this procedure to create a new activity.



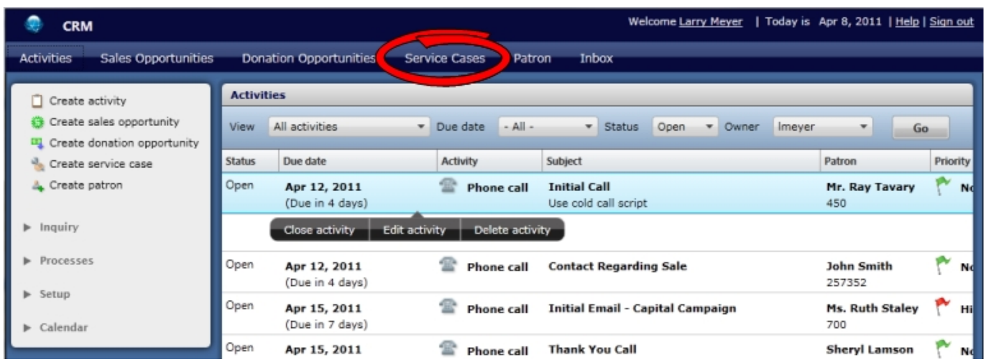
Closing Service Cases

Once you have addressed the customer complaint represented by a service case, you should close the service case to remove it from the list of open service cases on the Service Cases hub. You must be the owner or the supervisor of the owner to close a service case. Although closed service cases are not visible on the Service Cases hub, they are still visible by generating CRM data views.

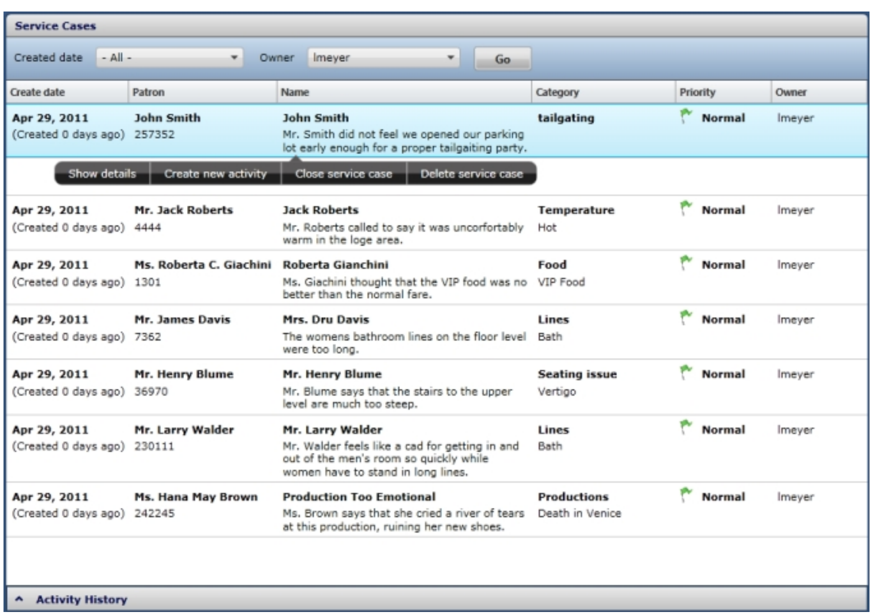
Tip: The procedure below uses the Service Cases hub, but you can also close opportunities from the Edit Service Case form. See Editing Service Cases for more information.

To close a service case

1. Click the **Service Cases** button in the main navigation bar.

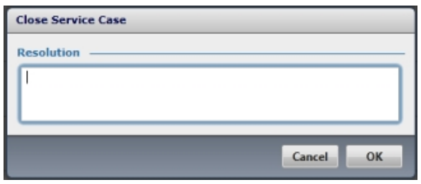


CRM displays the Service Cases hub.



2. If the service case you want to close is not in the service case list, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.
3. Select the service case, and then click the **Close service case** button.

CRM displays the Close Service Case dialog box.



4. (Optional) In the **Resolution** text box, enter a description of how the service case was resolved. This description will be available when viewing closed service cases in a CRM data view.
5. Click **OK**. CRM redisplays the Service Cases hub with the closed service case removed.

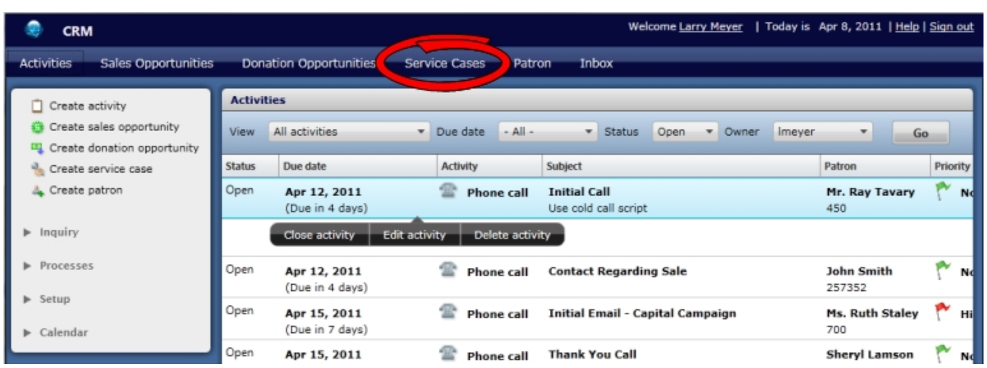
Deleting Service Cases

If you are a supervisor, you can delete your own or a subordinate's service cases. You may want to do this if you created a service case by mistake. When you delete a service case, all of its associated activities and attachments are also deleted.

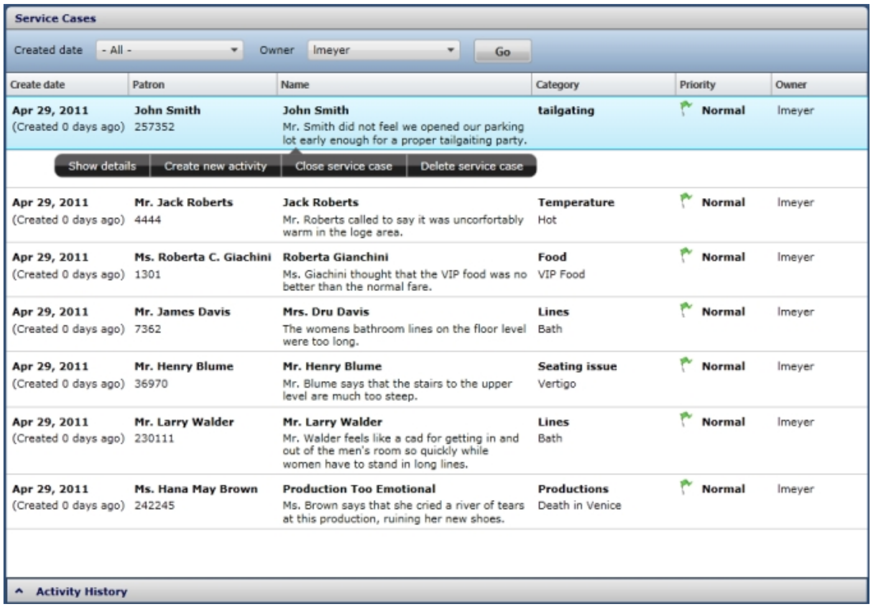
Tip: The procedure below uses the Service Cases hub, but you can also delete opportunities from the Edit Service Case form. See Editing Service Cases for more information.

To delete a service case

1. Click the **Service Cases** button in the main navigation bar.

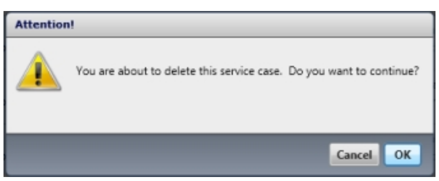


CRM displays the Service Cases hub.



2. If the service case you want to delete is not in the service case list, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot filter by owner.
3. Select the opportunity, and then click the **Delete service case** button.

CRM displays a warning to make sure you want to delete the service case.



4. Click **OK**. CRM deletes the service case and redisplays the Service Cases hub.

Working with Patrons

The Paciolan CRM system is designed to facilitate and track communications between you and your patrons. CRM patron management is central to this communication because it provides an interface to back office patron records. A summary of each record in CRM is divided into customer ticketing data, donor fund development data, and general patron information. When editing patron information in CRM, the record detail is divided into Name, Phone/Address, Biographic, Institutions, Ticketing, E-Ticketing, and Development tabs.

CRM allows you to search for, display, and edit patron records within the application. CRM also allows you to create records for new patrons. The ability to view, edit, and create of patron data in CRM is controlled by CRM user permissions. For more information, see Managing Users.

CRM patron management is tightly integrated with CRM activities, sales and donation opportunities, and service cases. This integration includes:

- A Patron Lookup tool that allows you to search for and assign patrons when creating activities, opportunities, and service cases. For more information, see Using the Patron Lookup.
- A Patron hub that allows you to see all the activities, opportunities, and service cases assigned to a patron. For more information, see Navigating the Patron Hub.
- A list management tool that allows you to assign activities and opportunities to patrons in bulk. For more information, see the Bulk Processes Overview.

When working with patrons in CRM, you can do the following:

- Navigate the Patron Hub
- Search for Patrons
- Use the Patron Lookup
- Manually Enter Patrons
- View the Patron Summary
- Edit Patron Information

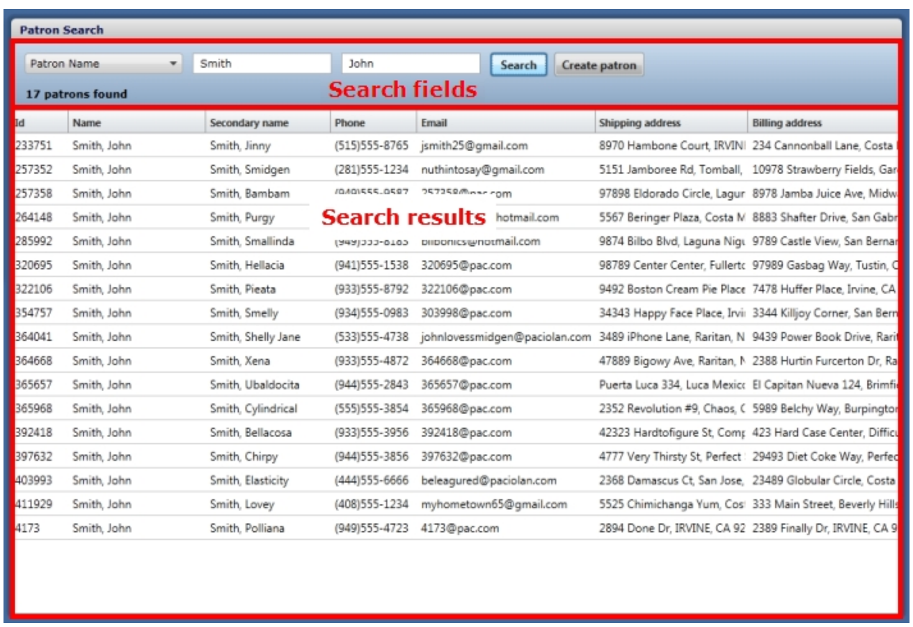
Note: You cannot delete patrons in CRM.

Navigating the Patron Hub

The Patron hub is the central place for working with patron data in CRM. The hub is comprised of the Patron Search, Patron Summary, and Patron Detail forms. The Patron Search form is used to locate or create patrons, while the Patron Summary and Patron Detail forms allow you to view and edit all the information about a single patron.

Patron Search form

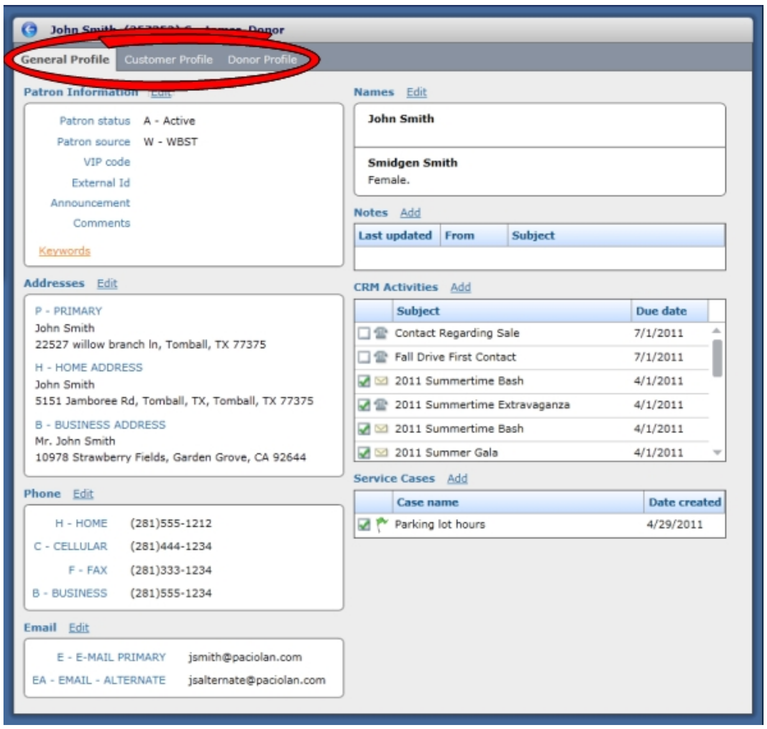
The Patron Search form is used to locate the individual patron whose information you want to view or edit. You can also begin the patron creation process from this form. To find an existing patron, you enter values in the search fields, and then click the Search button. If there are patrons that match your search parameters, they are displayed in the search results.



You can sort the patrons in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many patrons in the list to display in the list area, a scroll bar appears on the right side of the list. To view a patron's information, double-click the row containing the patron record. CRM then displays the Patron Summary form for that patron.

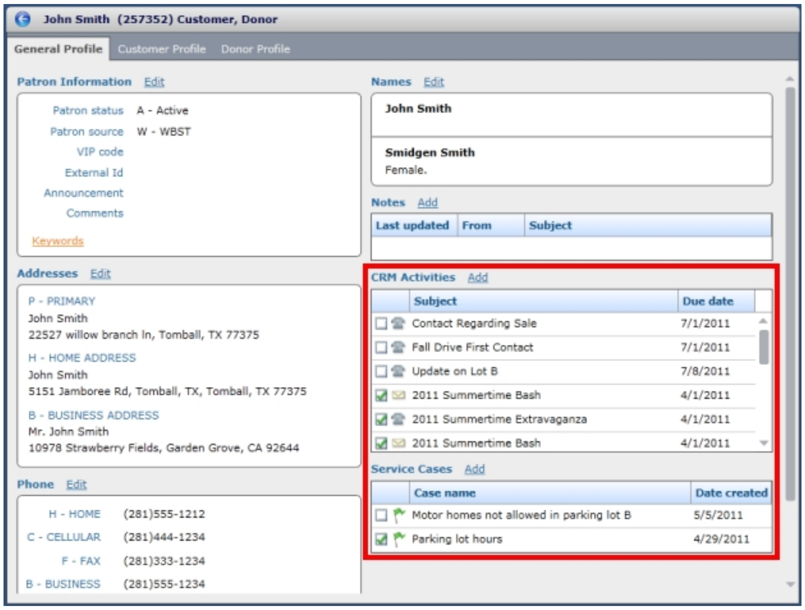
Patron Summary form

The Patron Summary form is used to view general information about a single patron. Depending on your permissions, you can also see any customer (ticketing) and donor (fund development) information about the patron on this form. This information is located on three tabs, including General Profile, Customer Profile, and Donor Profile. The Customer Profile and Donor Profile tabs are only displayed if you have access to ticketing and development data. Click a tab to change which profile is displayed.



Clicking the **blue links** on the form allows you to edit, add, or refresh patron information and patron-specific notes, activities, opportunities, and service cases. Clicking the **orange links** displays a pop-up with additional patron information. The title bar of the Patron Summary form has a back button that displays the Patron Search form.

You can display view or edit versions of the note, activity, opportunity, and service case forms by double-clicking the corresponding table rows. The Patron Summary form in the image below contains tables with rows you could double-click to access activities and service cases.



The icons to the left of each activity, opportunity, and service case item communicate information about the item, including the following:

Item status icons

- open activity, opportunity, or service case

- closed activity, opportunity, or service case

Opportunity status icons

- won opportunity

- lost opportunity

File attachment icon

- file is attached to the item

Priority flags

- normal priority

- low priority

- medium priority

- high priority

Activity type icons

- phone call or other activity type

- email activity type

- activity type

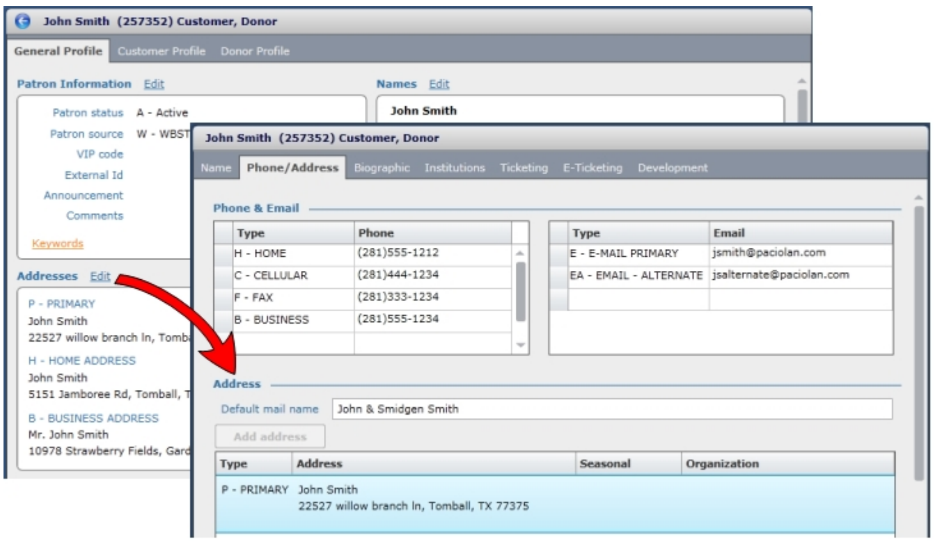
- meeting activity type

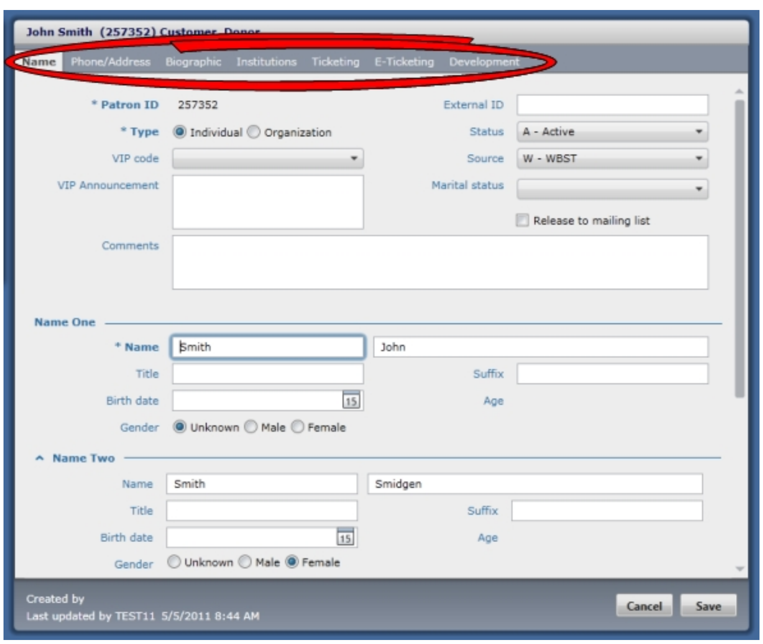
- letter activity type

Patron Detail form

The Patron Detail form is used to edit information for a single patron and is accessed by clicking one of the Edit links on the Patron Summary form. Similar patron information types are grouped on each of the Patron Detail form's tabs, including the Name, Phone/Address, Biographic, Institutions, Ticketing, E-Ticketing, and Development tabs. All users see the Name and Phone/Address tabs. The visibility of the rest of the tabs is based on your permissions (patron policy). When you click the Edit link for an information type, CRM displays the tab that allows you to edit that type. See an example

If you click the Edit link for the Addresses information type, CRM displays the Patron Detail form with the Phone/Address tab active.





All fields with an asterisk (*) are mandatory so, at a minimum, the form must have values for those fields. When you are finished making changes to the patron information, click the Save button to return to the Patron Summary form.

Searching for Patrons

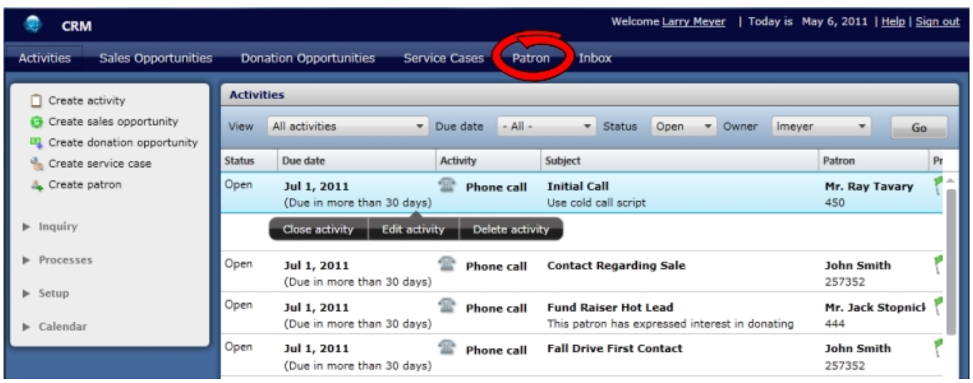
When communicating with patrons, you will often need to refer to information about them. Before you can view their patron information (patron record), you need to locate the patron and display the patron summary. You can do this using the following methods:

- On the Patron hub through the Patron Search form, using the patron's name, Id, keywords, phone numbers, and email addresses. If the patron is an organization, you can also search by the organization name.
- Through the activities, opportunities, or service cases to which the patron is assigned.
- As part of manually creating activities, opportunities, and service cases. For more information, see Using the Patron Lookup.

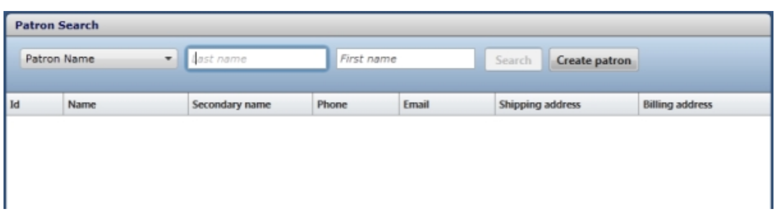
Tip: If you notice that the patron record contains incomplete or inaccurate information, you can edit the patron information at any time.

To search for a patron using the Patron Search form

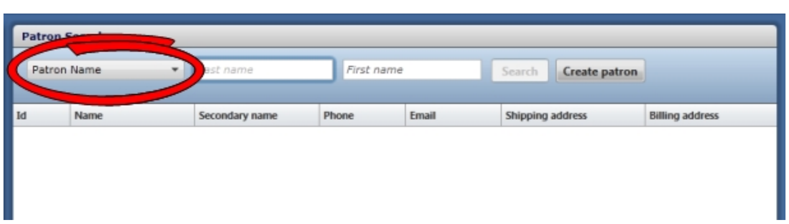
1. Click the **Patron** button in the main navigation bar.



   CRM displays the Patron Search form.



2. Select the search mode from the drop-down list.

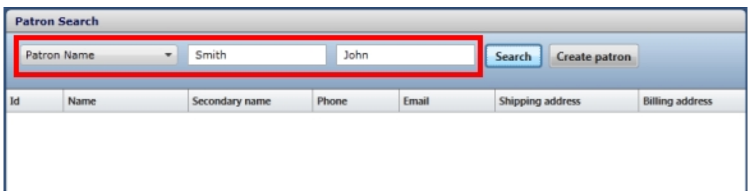


3. Based on the search mode, enter the appropriate alphanumeric characters in the text boxes.

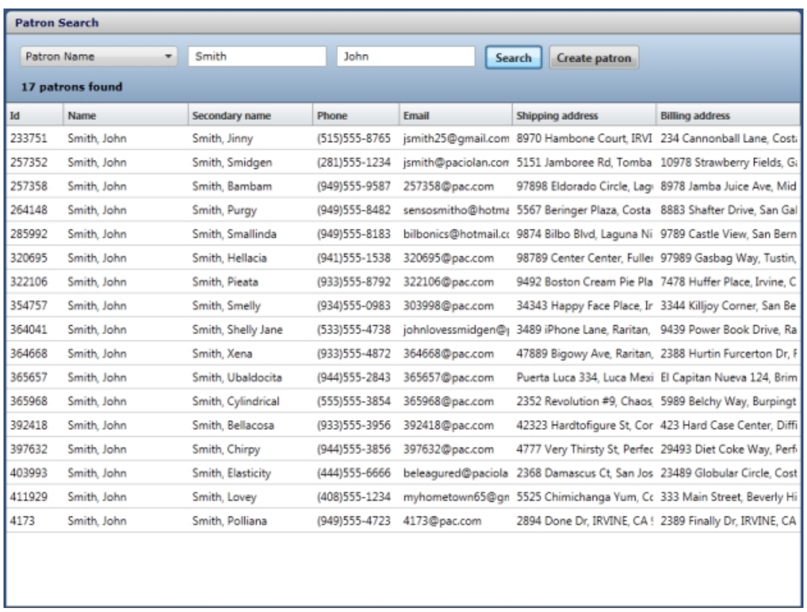
   See a table that describes the acceptable entries for each search mode.

Search mode	Acceptable entries
Patron name	Any alphanumeric In the second text box, you can use the asterisk (*) wildcard as long as the first character is a letter. For example, if you want to find the first name John, you can enter J*, Jo*, or Joh* . You cannot use *ohn. You also cannot use wild-cards for last names in the first text box.
Patron Id	Any alphanumeric
Keyword	Any alphanumeric. The search will return patron records with partial keyword matches.
Phone number	Any alphanumeric
Email address	Must be a valid email address format. For example, name@example.com
Organization name	Any alphanumeric

The image below shows the Patron Name search mode, which has two required text boxes.

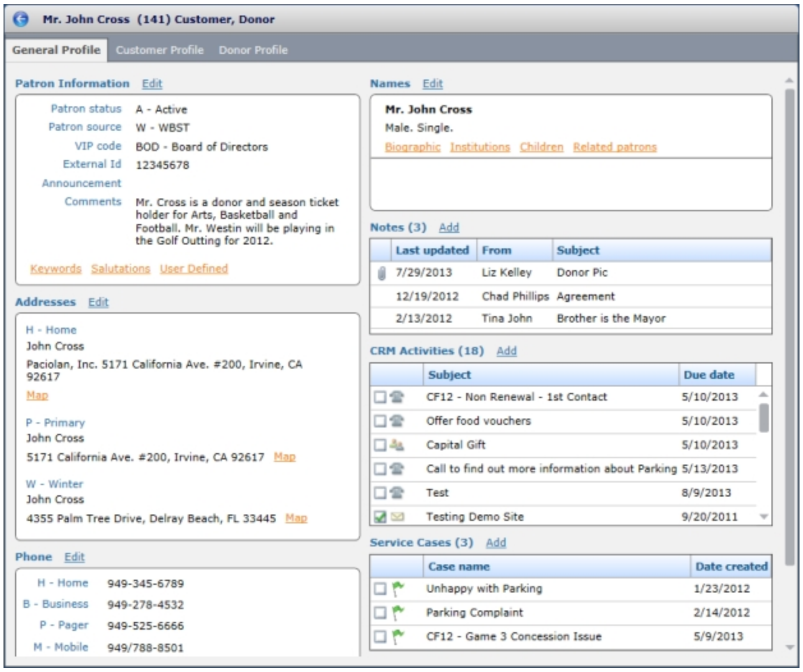


4. Click the **Search** button. CRM displays the search results. If no patrons match the search criteria, CRM displays a message to that effect.



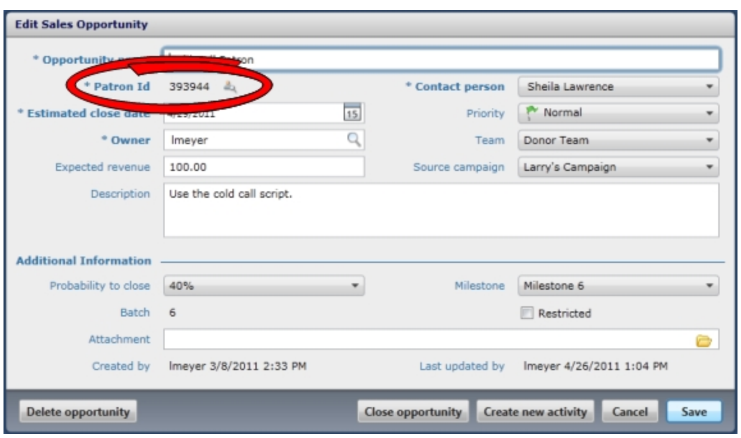
Id	Name	Secondary name	Phone	Email	Shipping address	Billing address
233751	Smith, John	Smith, Jinny	(515)555-8765	jsmith25@gmail.com	8970 Hambone Court, IRVI	234 Cannonball Lane, Cost
257352	Smith, John	Smith, Smidgen	(281)555-1234	jsmith@paciolan.con	5151 Jamboree Rd, Tomba	10978 Strawberry Fields, G
257358	Smith, John	Smith, Bambam	(949)555-9587	257358@pac.com	97898 Eldorado Circle, Lag	8978 Jamba Juice Ave, Mid
264148	Smith, John	Smith, Purgy	(949)555-8482	sensosmitho@hotm	5567 Beringer Plaza, Costa	8883 Shafter Drive, San Gal
285992	Smith, John	Smith, Smallinda	(949)555-8183	bilbonics@hotmail.c	9874 Bilbo Blvd, Laguna Ni	9789 Castle View, San Bern
320695	Smith, John	Smith, Hellacia	(941)555-1538	320695@pac.com	98789 Center Center, Fulle	97989 Gasbag Way, Tustin,
322106	Smith, John	Smith, Pieata	(933)555-8792	322106@pac.com	9492 Boston Cream Pie Pla	7478 Huffer Place, Irvine, C
354757	Smith, John	Smith, Smelly	(934)555-0983	303998@pac.com	34343 Happy Face Place, Ir	3344 Killjoy Corner, San Be
364041	Smith, John	Smith, Shelly Jane	(533)555-4738	johnlovessmidgen@	3489 iPhone Lane, Raritan,	9439 Power Book Drive, Ra
364668	Smith, John	Smith, Xena	(933)555-4872	364668@pac.com	47889 Bigowy Ave, Raritan,	2388 Hurtin Furcerton Dr, F
365657	Smith, John	Smith, Ubaldocita	(944)555-2843	365657@pac.com	Puerta Luca 334, Luca Mexi	El Capitan Nueva 124, Brim
365968	Smith, John	Smith, Cylindrical	(555)555-3854	365968@pac.com	2352 Revolution #9, Chaos,	5989 Belchy Way, Burpingt
392418	Smith, John	Smith, Bellacosa	(933)555-3956	392418@pac.com	42323 Hardtofigure St, Cor	423 Hard Case Center, Diffi
397632	Smith, John	Smith, Chirpy	(944)555-3856	397632@pac.com	4777 Very Thirsty St, Perfec	29493 Diet Coke Way, Perf
403993	Smith, John	Smith, Elasticity	(444)555-6666	beleagured@paciola	2368 Damascus Ct, San Jos	23489 Globular Circle, Cost
411929	Smith, John	Smith, Lovey	(408)555-1234	myhometown65@gn	5525 Chimichanga Yum, Cc	333 Main Street, Beverly Hi
4173	Smith, John	Smith, Polliana	(949)555-4723	4173@pac.com	2894 Done Dr, IRVINE, CA	2389 Finally Dr, IRVINE, CA

5. Locate the patron whose information you want to view or edit. You can rearrange the col-umns by dragging their column headers. You can sort the list by the data in a column by click-ing the column header.
6. Double-click the patron's row. CRM displays the Patron Summary form for that patron.

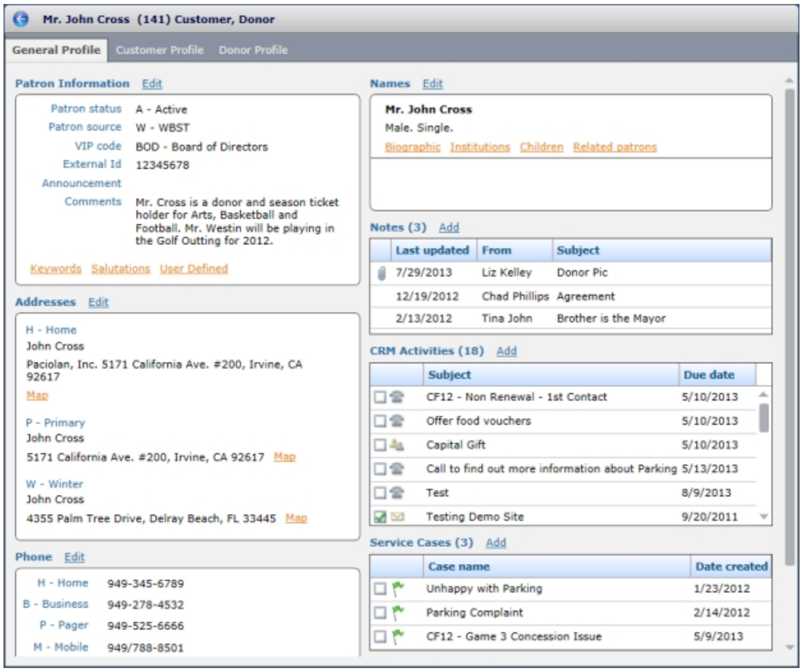


To view a patron record from the view or edit form of an activity, opportunity, or service case

1. Navigate to the view or edit form. If you're not sure how, you can use one of the following procedures:
   - Viewing Activity Details
   - Viewing Sales Opportunity Details
   - Viewing Donation Opportunity Details
   - Viewing Service Case Details
2. In the **Patron Id** field, click the View patron details icon . The image below uses the sales opportunity version of the edit form as an example.



Once you click the icon, CRM displays the Patron Summary form.



Using the Patron Lookup

The Patron Lookup is used to locate and assign patrons to activities, opportunities, and service cases. For this reason, it is tightly integrated into the manual activity, opportunity, and service case creation processes. Except for this integration, the Patron Lookup works just like the Patron Search form on the Patron hub.

When using the Patron Lookup, you can search for a patron using the patron's name, Id, keywords, phone numbers, or email addresses. If the patron is an organization, you can search by the organization name. The patrons that match your criteria will display in the search results table.

You can sort the patrons in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many patrons in the list to display in the list area, a scroll bar appears on the right side of the list.

Once located, you can assign the patron to the activity, opportunity, or service case you are creating. The Patron Lookup may also be used to locate a patron for a data view (see CRM Data Views). For more information about using the Patron Lookup, see the following topics:

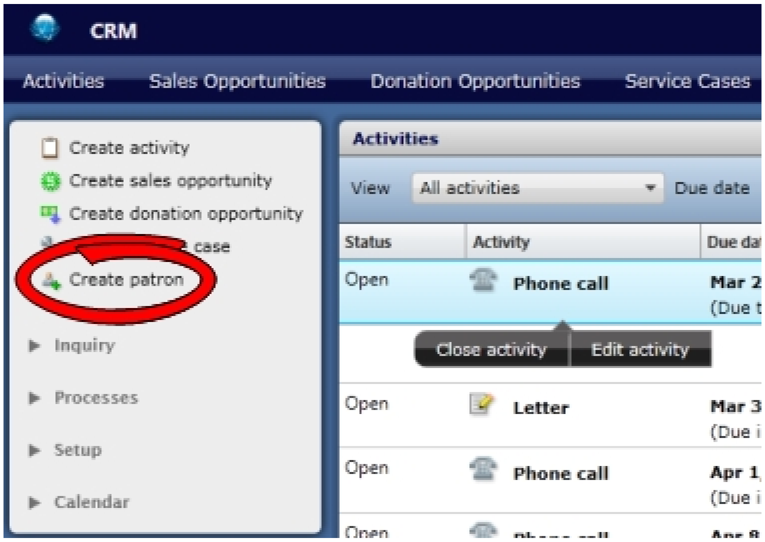
- Selecting Patrons During Activity Creation
- Selecting Patrons During Sales Opportunity Creation
- Selecting Patrons During Donation Opportunity Creation
- Selecting Patrons During Service Case Creation

Manually Entering Patrons

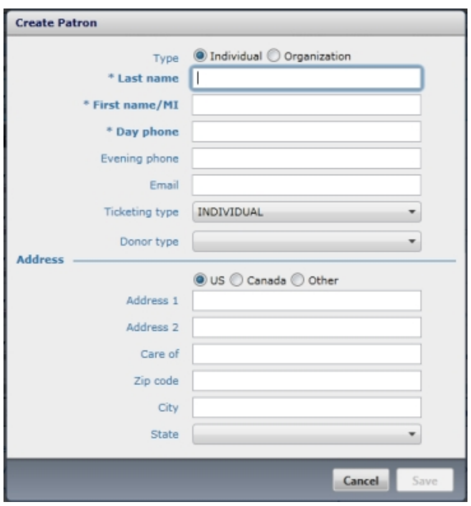
Patron records are an integral part of the sales and fund development work that is captured and facilitated by CRM. Most often patrons are added to CRM in bulk using a patron list exported from the back office. However, if you communicate with a patron for which there is no patron record, you can manually enter the patron in CRM. When manually entering patrons, you can begin at the left navigation pane or on the Patron Search form of the Patron hub.

To manually enter a patron from the left navigation pane

1. In the left navigation pane, click **Create Patron**.



CRM displays the Create Patron dialog form.



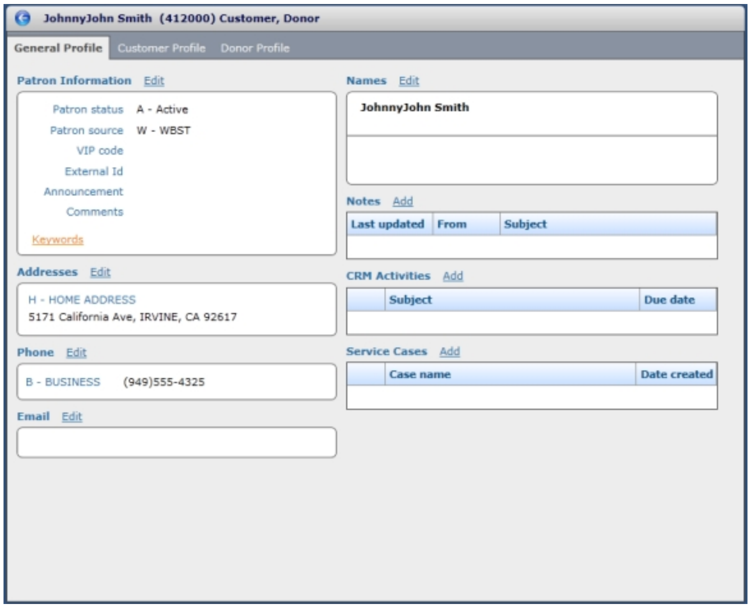
2. Enter values in the mandatory fields. For individuals, the **Last name**, **First name/MI**, and **Day phone** fields are mandatory. For organizations, the **Organization name**, **Organization type**, and **Day phone** fields are mandatory. CRM field mapping to back office fields is set in the WBST Data Account.
3. Enter values in the remaining optional fields as required. The selections and defaults for the **Organization type**, **Ticketing type**, and **Donor type** lists are configured in the back office. See the Configuration section for more information.

   If you enter values in the **Address 1** or **Address 2** fields, note the following:

   - For US addresses, entering a zip code will automatically add the **City** and **State** field values. If you enter a zip code that is not already mapped, CRM will remember the new city and state for the next time the zip code is entered.
   - Canadian and international address (Other) fields change automatically to reflect those address types.

- If you enter a value in any one of these fields for a US address, the **Address 1**, **Zip code**, **City**, and **State** fields become mandatory. For Canadian addresses, the **Address 1**, **Postal code**, **City/Town**, and **Province** fields become mandatory. For Other (international) addresses, **Address 1**, **Postal code**, **City/Town**, **Int. Province/Region**, and **Country fields** become mandatory.

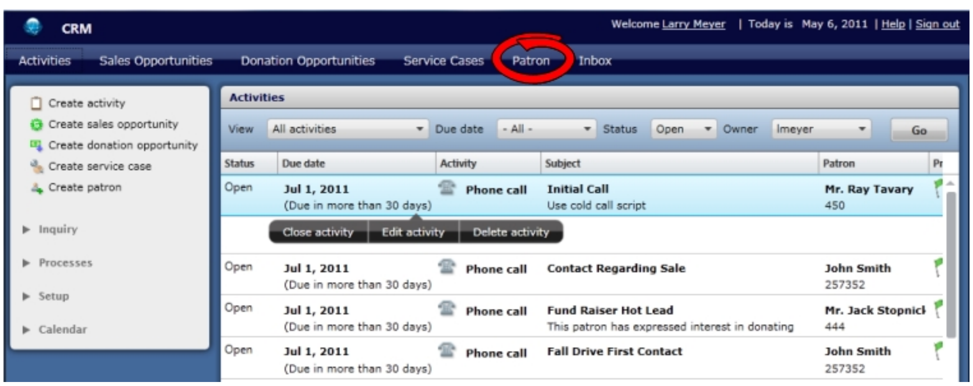
4. Click **Save**. CRM displays the Patron Summary page for the new patron.



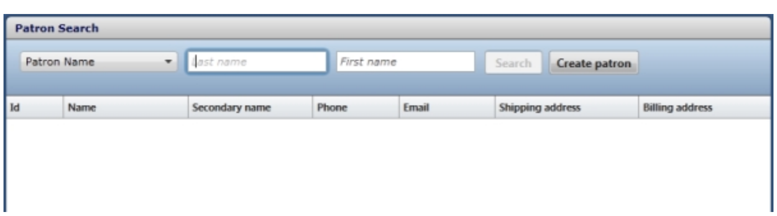
5. If you have more information to add to the patron record, you can editing the patron information.

To manually enter a patron from the Patron hub

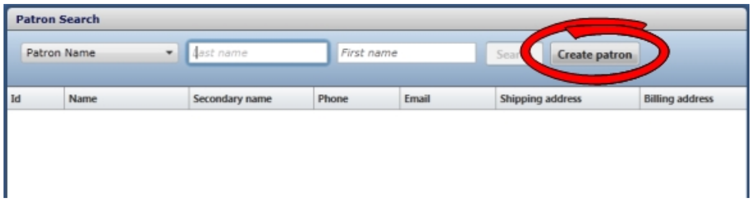
1. Click the **Patron** button in the main navigation bar.



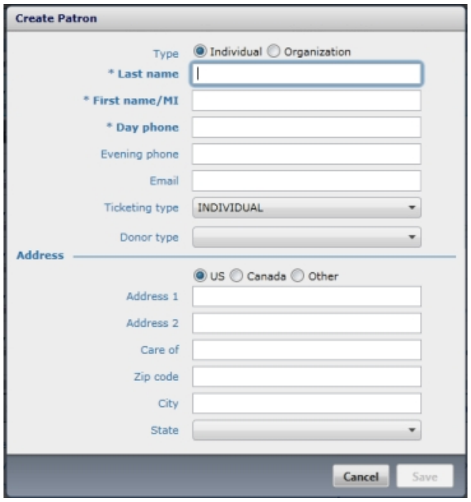
CRM displays the Patron Search form.



2. Click **Create Patron**.



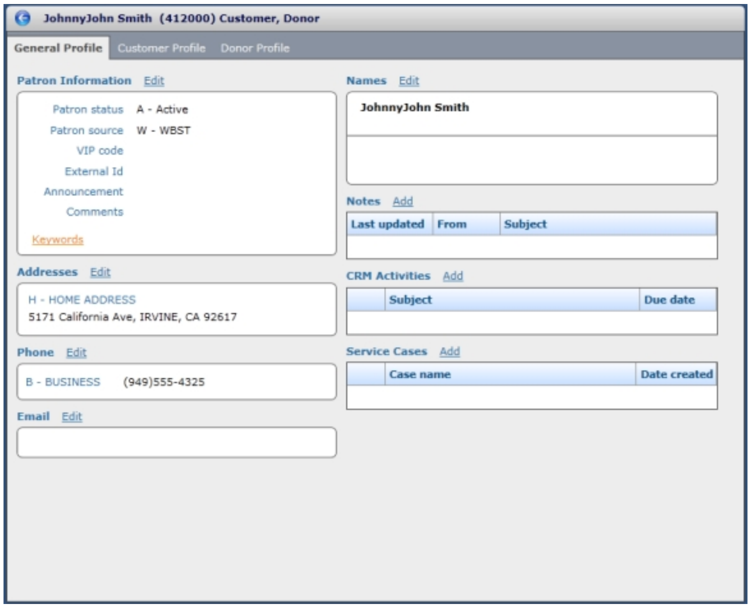
CRM displays the Create Patron dialog form.



3. Enter values in the mandatory fields. For individuals, the **Last name**, **First name/MI**, and **Day phone** fields are mandatory. For organizations, the **Organization name**, **Organization type**, and **Day phone** fields are mandatory. CRM field mapping to back office fields is set in the WBST Data Account.
4. Enter values in the remaining optional fields as required. The selections and defaults for the **Organization type**, **Ticketing type**, and **Donor type** lists are configured in the back office. See the Configuration section for more information.

   If you enter values in the **Address 1** or **Address 2** fields, note the following:

   - For US addresses, entering a zip code will automatically add the **City** and **State** field values. If you enter a zip code that is not already mapped, CRM will remember the new city and state for the next time the zip code is entered.
   - Canadian and international address (Other) fields change automatically to reflect those address types.
   - If you enter a value in any one of these fields for a US address, the **Address 1**, **Zip code**, **City**, and **State** fields become mandatory. For Canadian addresses, the **Address 1**, **Postal code**, **City/Town**, and **Province** fields become mandatory. For Other (international) addresses, **Address 1**, **Postal code**, **City/Town**, **Int. Province/Region**, and **Country fields** become mandatory.
5. Click **Save**. CRM displays the Patron Summary page for the new patron.



6. If you have more information to add to the patron record, you can editing the patron information.

Viewing the Patron Summary

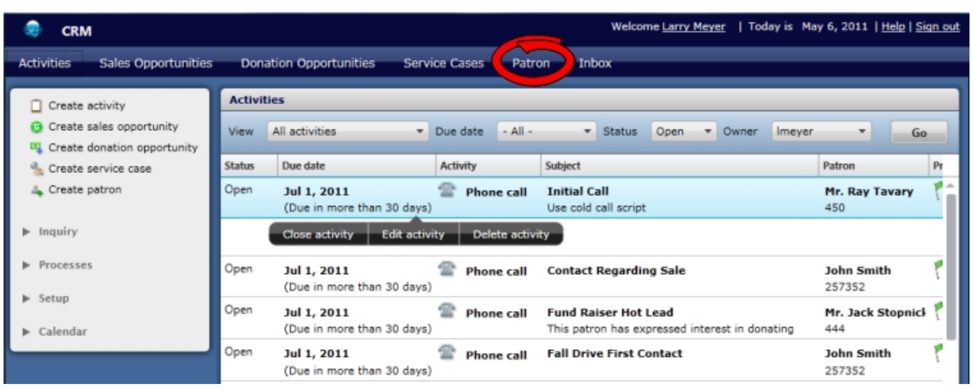
When communicating with patrons, you will often need to refer to information about them. Before you can view their patron information (patron record), you need to locate the patron and display the patron summary. You can do this using the following methods:

- On the Patron hub through the Patron Search form, using the patron's name, Id, keywords, phone numbers, and email addresses. If the patron is an organization, you can also search by the organization name.
- Through the activities, opportunities, or service cases to which the patron is assigned.
- As part of manually creating activities, opportunities, and service cases. For more information, see Using the Patron Lookup.

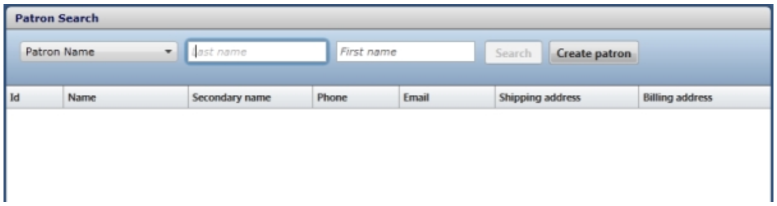
Tip: If you notice that the patron record contains incomplete or inaccurate information, you can edit the patron information at any time.

To view the Patron Summary through the Patron Search form

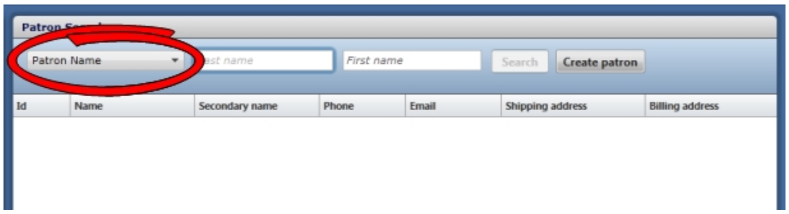
1. Click the **Patron** button in the main navigation bar.



CRM displays the Patron Search form.



2. Select the search mode from the drop-down list.

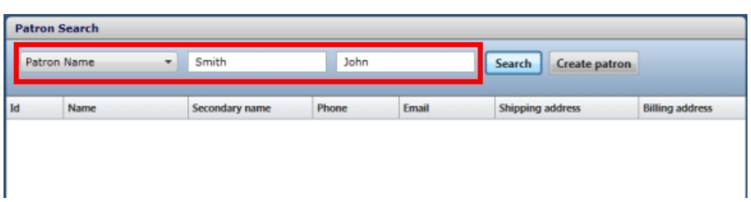


3. Based on the search mode, enter the appropriate alphanumeric characters in the text boxes.

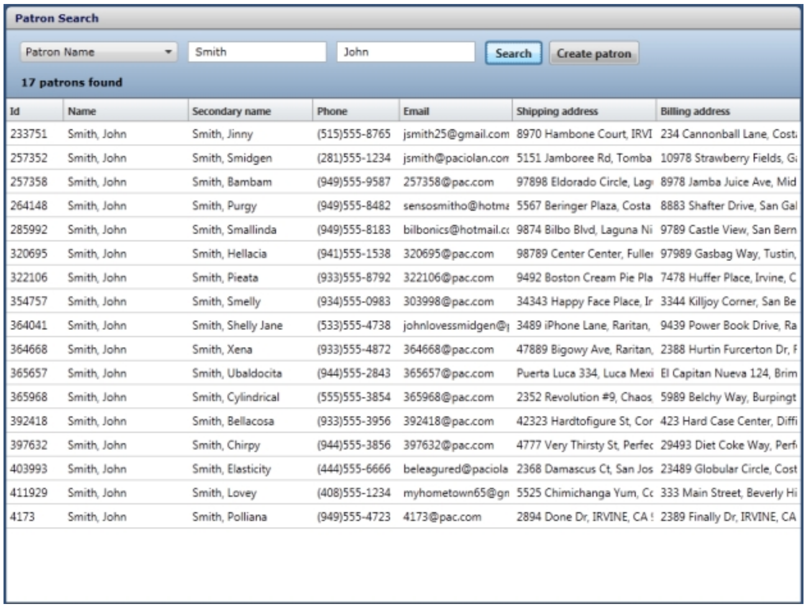
   See a table that describes the acceptable entries for each search mode.

Search mode	**Acceptable entries**
Patron name	Any alphanumeric In the second text box, you can use the asterisk (*) wildcard as long as the first character is a letter. For example, if you want to find the first name John, you can enter J*, Jo*, or Joh* . You cannot use *ohn. You also cannot use wild-cards for last names in the first text box.
Patron Id	Any alphanumeric
Keyword	Any alphanumeric. The search will return patron records with partial keyword matches.
Phone number	Any alphanumeric
Email address	Must be a valid email address format. For example, name@example.com
Organization name	Any alphanumeric

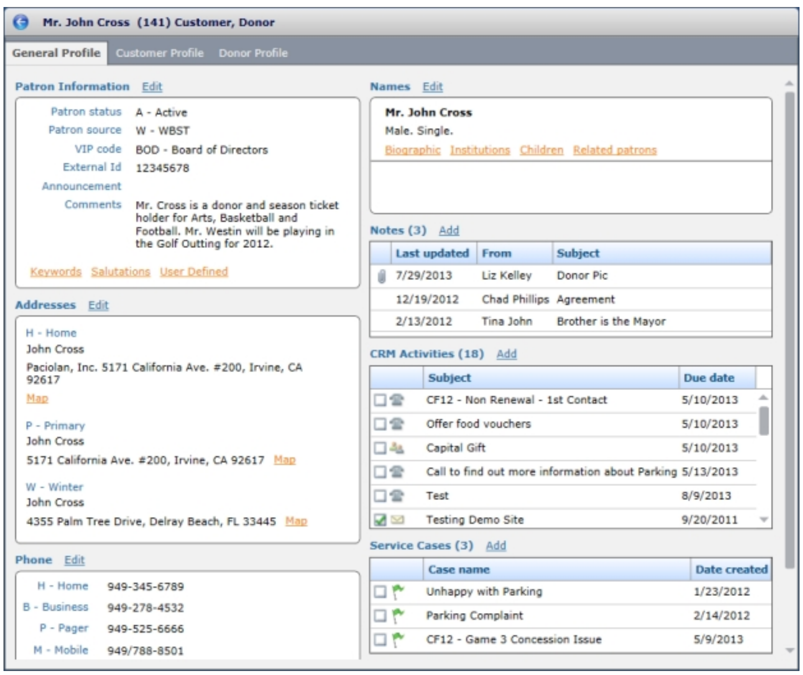
   The image below shows the Patron Name search mode, which has two required text boxes.



4. Click the **Search** button. CRM displays the search results. If no patrons match the search criteria, CRM displays a message to that effect.



5. Locate the patron whose information you want to view or edit. You can rearrange the columns by dragging their column headers. You can sort the list by the data in a column by clicking the column header.
6. Double-click the patron's row. CRM displays the Patron Summary form for that patron.

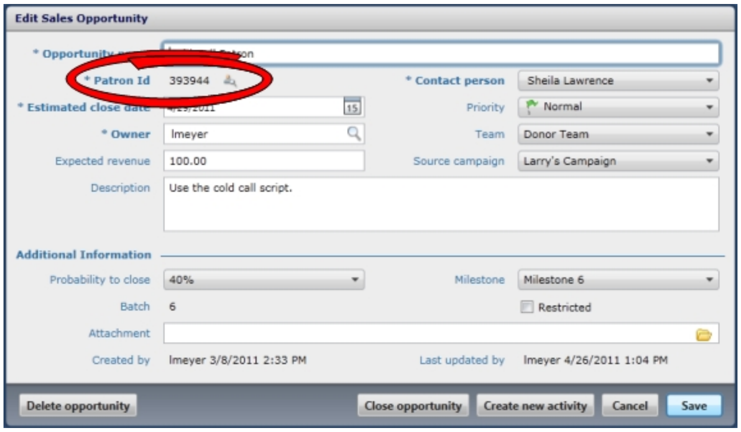


To view the Patron Summary through the view or edit form of an activity, opportunity, or service case

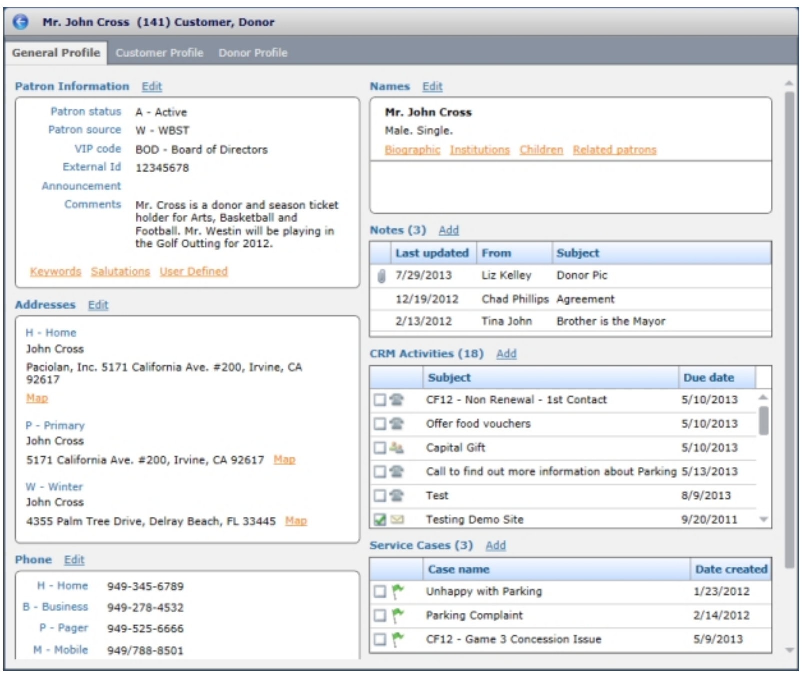
1. Navigate to the view or edit form. If you're not sure how, you can use one of the following procedures:
   - Viewing Activity Details
   - Viewing Sales Opportunity Details

- Viewing Donation Opportunity Details
- Viewing Service Case Details

2. In the Patron Id field, click the View patron details icon . The image below uses the sales opportunity version of the edit form as an example.

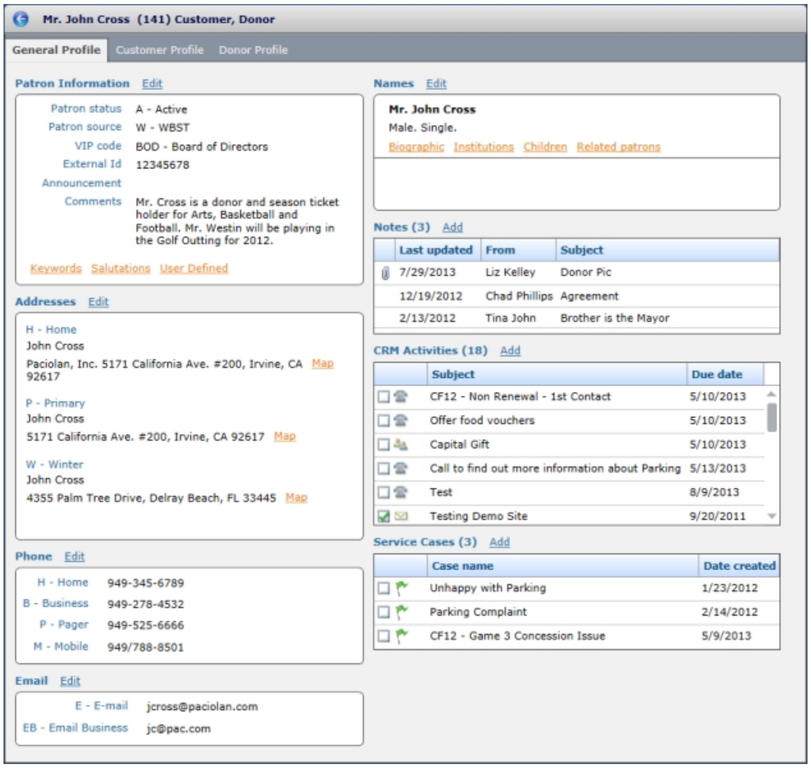


Once you click the icon, CRM displays the Patron Summary form.



Once you've displayed the Patron Summary form for a patron, you can easily access most relevant patron information using the General Profile, Customer Profile, and Donor Profile tabs. The General Profile tab is the default tab and is available to any user with access to patron data. The Customer Profile and Donor Profile tabs may also be available, depending on the permissions in your patron policy.

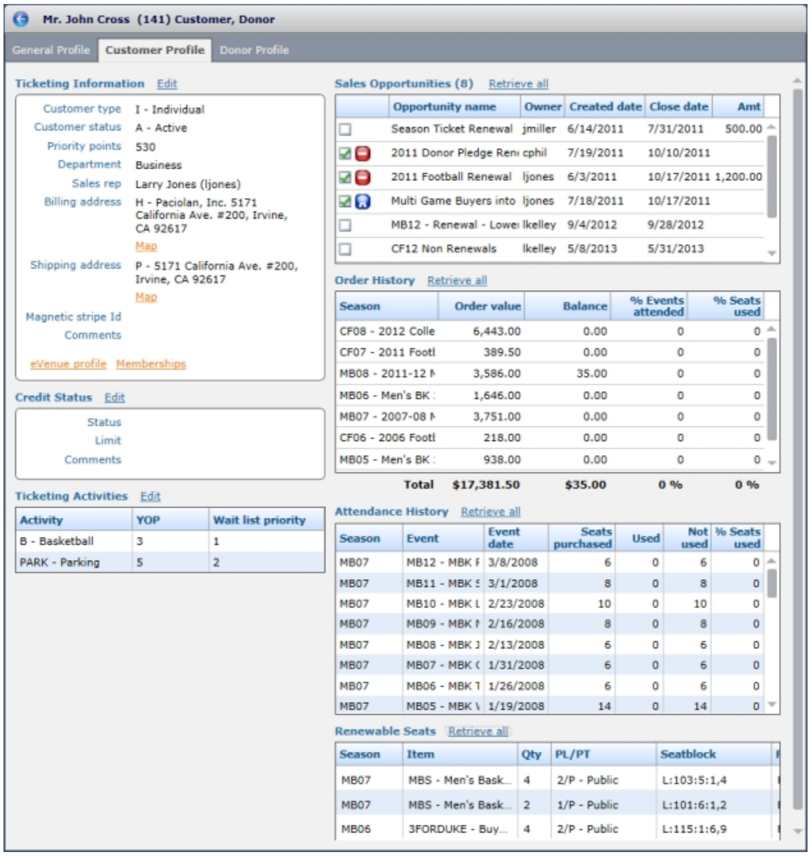
General Profile tab field descriptions



Field	Usage information
Patron Information	If you want to edit patron information, click the Edit link to display the Name tab of the Patron Edit form.
Patron status	The status of the patron (for example, Active, Deceased, or Inactive).
Patron source	The sales channel in which the patron data was captured (for example, W - WBST)
VIP code	These codes are used to mark special patrons, such as high value donors. The code and the code name are combined in the selection list. When a user assigns a patron to an activity, opportunity, or service case, CRM displays an Attention message with the code and code name.
External Id	A record locator from a system other than the Paciolan back office.
Announcement	This text will display in an Attention message whenever a user assigns the patron to an activity, opportunity, or service case. If no text is displayed here, the VIP code and name will display in the Attention message instead.
Comments	Additional information about the patron.
Keywords	Click the link to display a popup with the list of the patron's keywords. If no link is displayed, the patron does not have any keywords assigned. Keywords are helpful for patron searches.
Tags	Click the link to display a popup with the list of the patron's tags. If no link is displayed, the patron does not have any tags assigned. Tags are useful for reporting and request building.
Mail codes	Click the link to display a popup with the list of the patron's mail codes. If no link is displayed, the patron does not have any mail codes assigned. Mail codes are used to determine the mailings that the donor should receive.
Salutations	Click the link to display a popup with the list of the salutation types associated with the patron. For each salutation type, the salutation text (for example, Mr.) is also displayed.

User Defined	A popup link that displays the user defined field descriptions and their values. This link is always displayed. Ticketing and development user defined fields are independent of one another.
Addresses	This section includes the address type and the address for each of the patron's addresses. If you want to change address information, click the Edit link to display the Phone/Address tab of the Patron Edit form.
Phone	This section includes the phone type and number for each of the patron's phone numbers. If you want to change phone information, click the Edit link to display the Phone/Address tab of the Patron Edit form.
Email	This section includes the email type and address for each of the patron's email addresses. If you want to change any email information, click the Edit link to display the Phone/Address tab of the Patron Edit form.
Names	This section includes the names and basic personal information of Name One and Name Two of the patron record. Depending on the available patron information, Biographic, Institutions, Children, and Related Patrons links may be displayed. Click these links to display popups with the information. If you want to change the name information, click the Edit link to display the Names tab of the Patron Edit form.
Notes	This section contains a table of all the notes related to the patron. Notes with file attachments have the paperclip next to them. You can double-click a note to display the Edit Note form, view or make changes, and then cancel or save back to the General Profile tab. To add a note for this patron, click the Add link.
CRM Activities	This section contains a table of all the activities assigned to this patron. You can double-click an activity to display the Edit Activity or View Activity form. The Edit Activity form displays for open activities. On the Edit Activity form, you can view, edit, close, or delete the activity. If you double-click a closed activity's row, the View Activity form displays. Activities with a green check mark are closed and those with a paperclip have a file attachment. On this form you can close the form or delete the activity. CRM redisplays the General Profile tab when you are finished with the activity. To create an activity for this patron, click the Add link.
Service Cases	This section contains a table of all the service cases that have been opened for this patron. You can double-click a service case to display the Edit Service Case or View Service Case form. The Edit Service Case form displays for open service cases. On the Edit Service Case form, you can view, edit, close, or delete the service case. You can also create a new activity for the service case. The View Service Case form displays when you double-click closed service cases. The icons to the left of each service case's opportunity indicate its status, including open or closed, the priority flag, and the paper clip if a file is attached. On this form you can close the form or delete the service case. CRM redisplays the General Profile tab when you are finished with the service case. To create a service case for this patron, click the Add link.

Customer Profile tab field descriptions



Field	Usage information
Ticketing Information	This section displays the relevant ticketing information for the patron. Click the Edit link to display the Ticketing tab of the Patron Edit form.
Customer type	The ticketing customer type.
Customer status	The ticketing customer status of the patron (for example, Active, Deceased, or Inactive).
Priority points	The total number of priority points accumulated by the patron.
Department	The ticketing department code associated with the patron.
Sales rep	The sales representative assigned to this patron in CRM.
Billing address	The billing address selected for this patron in CRM or the back office.
Shipping address	The shipping address selected for this patron in CRM or the back office.
Magnetic stripe ID	This field (with last 4 digits of number) will only be displayed if it is allowed in the patron policy.
Comments	Comments about this patron.
eVenue profile	Click this link to display a popup with patron's eVenue information. This link may not display based on the patron policy and whether any profile information exists.
Memberships	Click this link to display a popup with the patron's ticketing membership records. This link will not display if it is not allowed in the patron policy or if no membership information exists.

Tags

A popup link that displays the ticketing tags associated with the patron. This link will only display if the patron record has ticketing tags. Ticketing and development tags are independent of one another. Tags are useful for reporting and request building.

User Defined

A popup link that displays the user defined field descriptions and their values. This link is always displayed. Ticketing and development user defined fields are independent of one another.

Credit Status

This section displays information about the status of the patron’s credit. Click the Edit link to display the Ticketing tab of the Patron Edit form.

Status

This is the credit status message that displays during the sales process. The message can warn about a credit limit or deny a sale.

Limit

If the **Status** message is set to warn about a credit limit, this is the dollar amount of the limit.

Comments

Additional comments about the patron's credit status.

Ticketing Activities

This table is used to track the number of years a patron has purchased tickets for an activity. YOP stands for years of purchase. An activity may have both the **YOP** and **Wait List Priority** fields empty.

Sales Opportunities

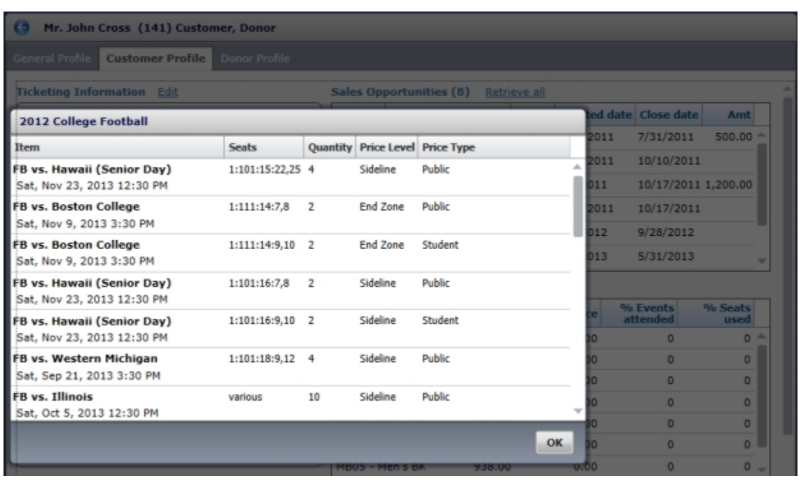
By default, this section contains a table of all sales opportunities assigned to the current patron for the past 6 months, regardless of status, ownership, restricted flags, or user permissions. However, you can click the Retrieve All link to display all of the patron's opportunities, including those older than 6 months. The icons to the left of each opportunity indicate its status, including open, closed, won, or lost. In addition, a paperclip is displayed if the opportunity has a file attachment.

If the Add link is displayed, you can click it to manually create a sales opportunity for the patron. Depending on your CRM permissions, you may also be able to view or edit an opportunity by double-clicking its row.

The Owner column lists the owner of each opportunity created for the patron. The Close Date column contains the estimated close date for each opportunity. The Amt column contains the estimated revenue for each sales opportunity that has a revenue value entered.

Order History

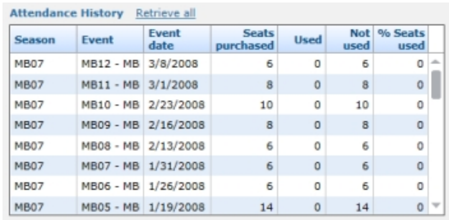
This section contains a table of the patron's order history. Each row summarizes all purchases for a single season. You can double-click a row to see individual orders for that season. The image below shows the patron's orders for season 2011.



Attendance

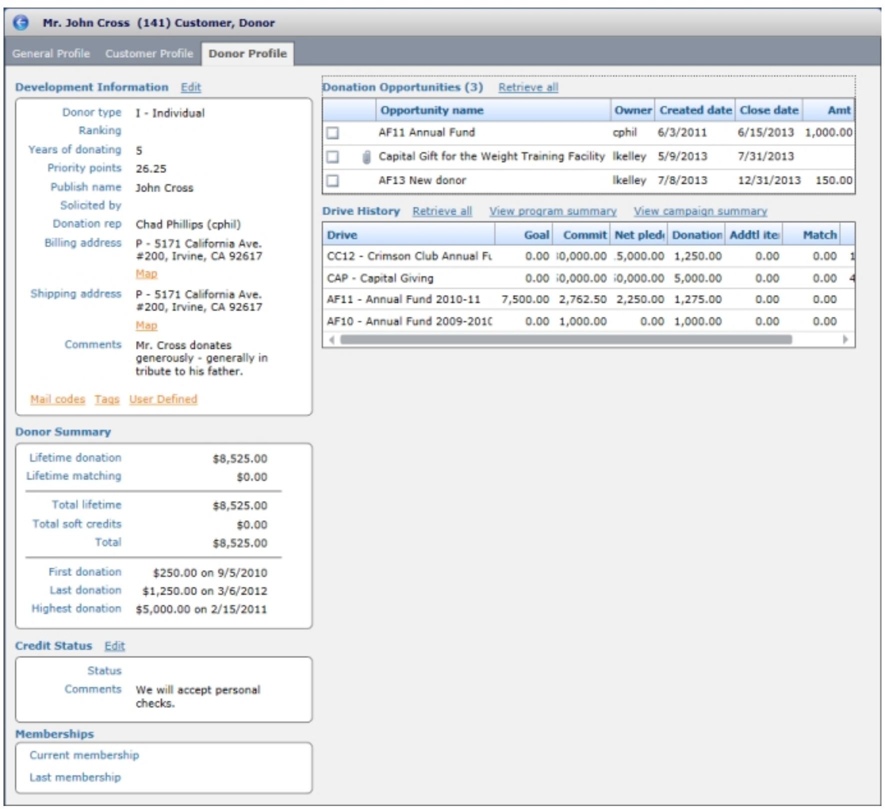
Attendance history data is only relevant if you use Access Management. To display

History	the patron's attendance history, click the Retrieve history link. This is necessary because the history does not load automatically. No data will display if the patron has no attendance history. If you need to update the patron's history again, click the back button, locate and display the same Patron Summary form, and then click the Retrieve history link once more.



Renewable Seats	This table contains the patron's renewable seats by season. Each season has its own row. Click the Retrieve data link to display the renewable seats for the patron. This is necessary because the data does not load automatically. No data will display if the patron has no attendance history. If you need to update the patron's data again, click the back button, locate and display the same Patron Summary form, and then click the Retrieve data link once more.

Donor Profile tab field descriptions



Field	Usage information
Development Information	The section displays the relevant development information for the patron. Click the Edit link to display the Development tab of the Patron Edit form.

Donor type	This field identifies the donor as an individual or a corporation.
Ranking	This is the ranking of the patron based on the total number of priority points accumulated.
Years of donating	The number of years the patron has donated to your organization.
Priority points	The total number of priority points accumulated by the patron.
Publish name	The default name as it will appear in publications, such as an annual report or a playbill.
Donation rep	The donation representative assigned to this patron in CRM.
Billing address	The billing address selected for this patron in CRM or the back office.
Shipping address	The shipping address selected for this patron in CRM or the back office.
Comments	Comments about this patron.
Mail codes	Click this link to display a popup with the codes that determine what mailings the donor will receive. This link will only display if the patron record has mail codes assigned.
Tags	Click this link to display a popup with the development tags associated with the patron. This link will only display if the patron record has development tags. Development and ticketing tags are independent of one another. Tags are useful for reporting and request building.
User Defined	Click this link to display a popup with the user defined fields and their values, as entered in the back office (for example, spouse name, child, or friend). Development and ticketing user defined fields are independent of one another. This link will only display if the patron record has user defined fields.
Donor Summary	A summary of donations, matching donations, and soft credits with total, lifetime, first, last, and highest amounts.
Credit Status	This section displays information about the status of the patron's credit. Click the Edit link to display the Development tab of the Patron Edit form.
Status	This is the credit status message that displays during pledge and donation entry for this patron. The message can warn about a preference to use a credit card, for example.
Comments	Additional comments about the patron's credit status.
Memberships	This table displays the patron's membership information, including the current and previous membership names and dates.
Donation Opportunities	This section contains a table of all donation opportunities assigned to the current patron for the past 6 months, regardless of status, ownership, restricted flags, or user permissions. However, you can click the Retrieve all link to display all of the patron's opportunities, including those older than 6 months. The icons to the left of each opportunity indicate its status, including open, closed, won, or lost. In addition, a paperclip is displayed if the opportunity has a file attachment. If the Add link is displayed, you can click it to manually create a donation opportunity for the patron. Depending on your CRM permissions, you may also be able to view or edit an opportunity by double-clicking its row. The Owner column lists the owner of each opportunity created for the patron. The Close Date column contains the estimated close date for each opportunity. The Amt

column contains the goal amount for each donation opportunity with a value entered.

Drive History This section contains a table of the patron's donation history by drive. Click the Retrieve all link to display the drive history for the patron. This necessary because the data does not load automatically. No data will display if the patron has no drive history.

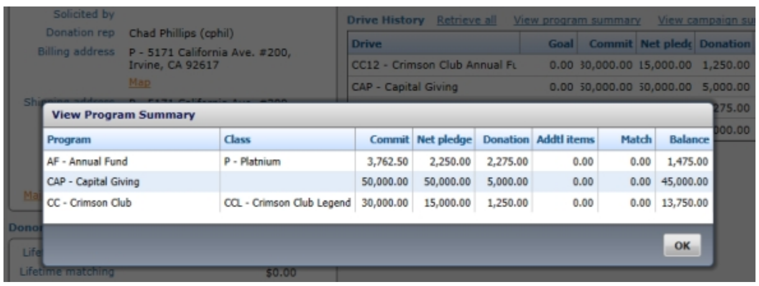

Drive History Retrieve all View program summary View campaign summary

Drive	Goal	Commit	Net pledg	Donation	Addtl iter	Match	Balance
CC12 - Crimson Club Annual Fu	0.00	30,000.00	15,000.00	1,250.00	0.00	0.00	13,750.00
CAP - Capital Giving	0.00	50,000.00	50,000.00	5,000.00	0.00	0.00	45,000.00
AF11 - Annual Fund 2010-11	7,500.00	2,762.50	2,250.00	1,275.00	0.00	0.00	1,475.00
AF10 - Annual Fund 2009-201(	0.00	1,000.00	0.00	1,000.00	0.00	0.00	0.00

When you click the retrieve link for either of the donation information sections , the data for both sections is retrieved and displayed.

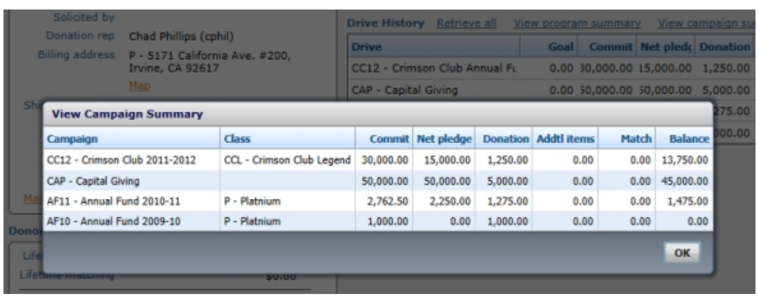
Since none of the two donation information sections' (Donation Opportunities and Drive History) data loads automatically, you may need to update the patron's data again. To do this, click the back button, locate and display the same Patron Summary form, and then click any of the three retrieve links.

Click the View program summary link to display a View Program Summary table (see image below) of the patron's donation history by program. No data will display if the patron has no donation history.


View Program Summary

Program	Class	Commit	Net pledge	Donation	Addtl items	Match	Balance
AF - Annual Fund	P - Platnium	3,762.50	2,250.00	2,275.00	0.00	0.00	1,475.00
CAP - Capital Giving		50,000.00	50,000.00	5,000.00	0.00	0.00	45,000.00
CC - Crimson Club	CCL - Crimson Club Legend	30,000.00	15,000.00	1,250.00	0.00	0.00	13,750.00

Click the View campaign summary link to display a View Campaign Summary table (see image below) of the patron's donation history by campaign.No data will display if the patron has no donation history.

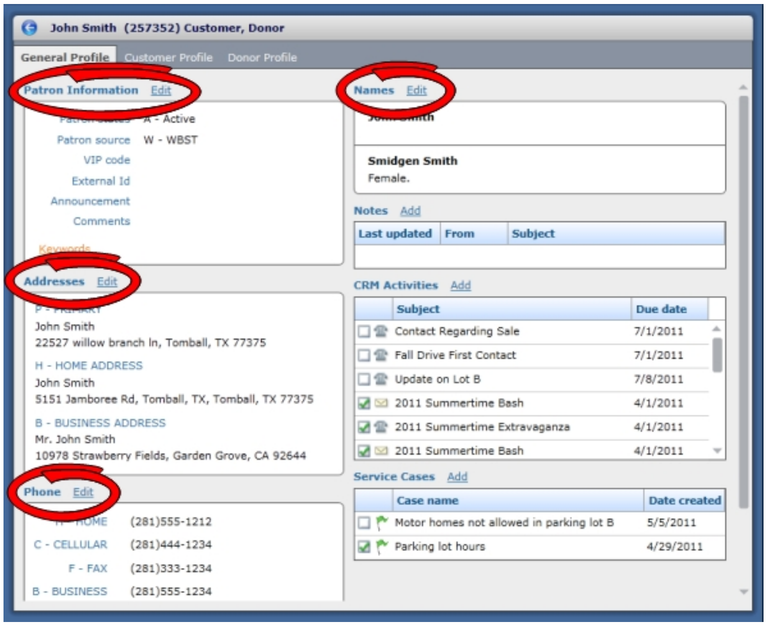

View Campaign Summary

Campaign	Class	Commit	Net pledge	Donation	Addtl items	Match	Balance
CC12 - Crimson Club 2011-2012	CCL - Crimson Club Legend	30,000.00	15,000.00	1,250.00	0.00	0.00	13,750.00
CAP - Capital Giving		50,000.00	50,000.00	5,000.00	0.00	0.00	45,000.00
AF11 - Annual Fund 2010-11	P - Platnium	2,762.50	2,250.00	1,275.00	0.00	0.00	1,475.00
AF10 - Annual Fund 2009-10	P - Platnium	1,000.00	0.00	1,000.00	0.00	0.00	0.00

Editing Patron Information

During your communications with patrons, you may find that some of the patron information in CRM is inaccurate. Or, you may have manually entered a patron and later decide to change some of the information. For these reasons, CRM allows you to edit information about individual patrons at any time.

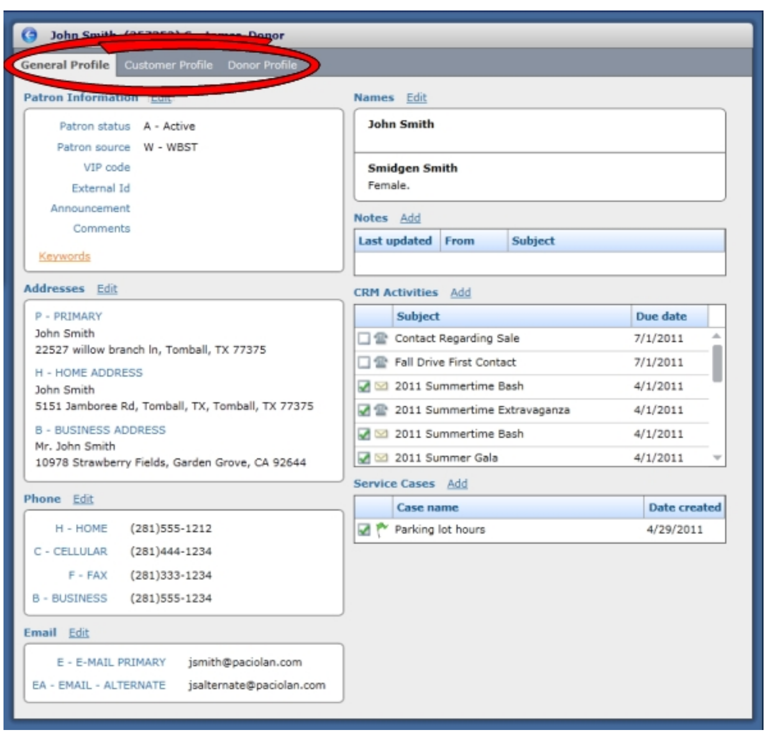
Since you will most often be viewing patron information without editing, CRM is not designed to allow you to directly edit information on the Patron Summary form. However, some sections each of the three tabs (General Profile, Customer Profile, and Donor Profile) of the form contain values that can be edited on the Patron Edit form. Editable information includes any field contained in a section with an Edit link.



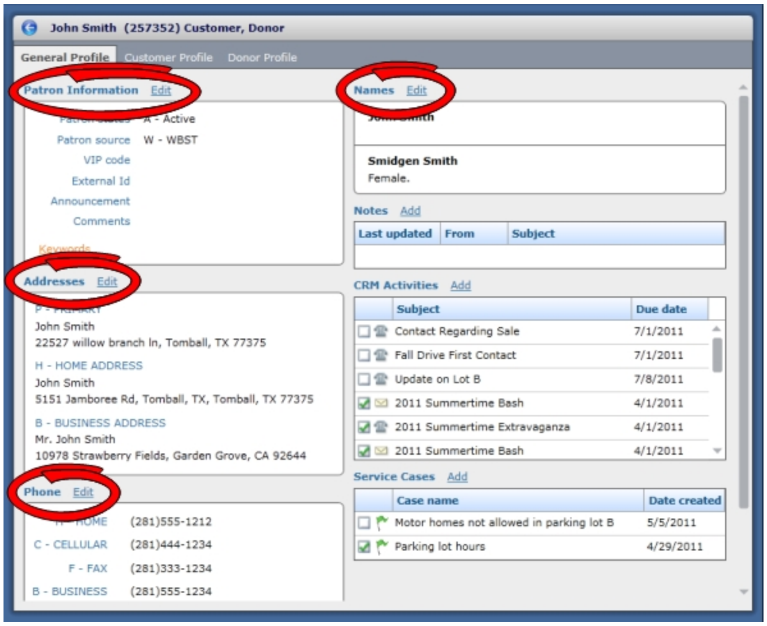
Tip: Sections with an Add link allow you to add a CRM note, activity, opportunity, or service case. If one of these sections already has items listed, you can double-click an item to open the edit or view screen for that item. For information about editing these items, see the edit topics for notes, activities, sales opportunities, donation opportunities, and service cases.

To edit patron information from the Patron Summary form

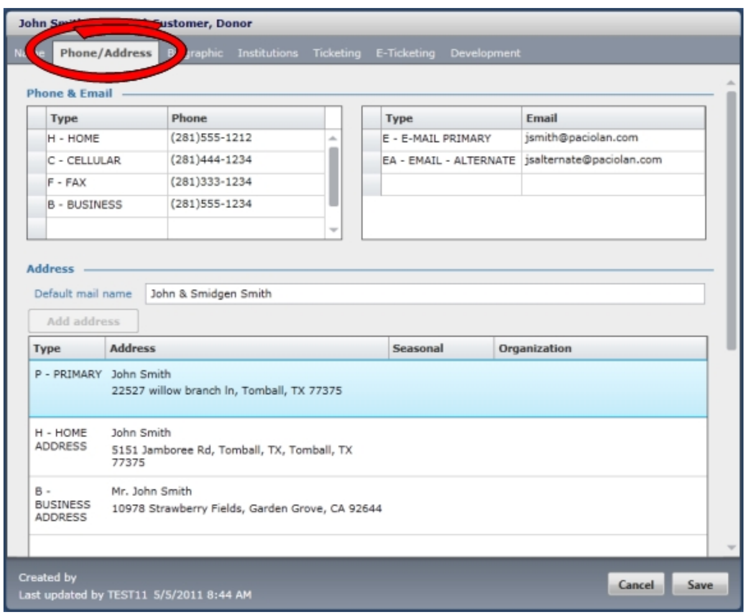
1. Display the Patron Summary form for the patron whose information you want to edit. If you're not sure how to do this, see Searching for Patrons.
2. Select the patron profile tab that contains the information you want to edit.



3. Click the Edit link of the section that contains the field whose value you want to edit.



CRM displays the Patron Detail form with the tab containing the value you want to edit displayed.



Once the Patron Detail form is displayed, you do not need to go back to the Patron Summary form to edit other patron information fields. Just click the tab that contains the field, and then edit the field. The changes you make on a tab are kept when you click another tab. However, changes are not saved until you click the Save button. For information about the fields on each of the Patron Edit form tabs, see the tables below.

Note: If you are an administrator and you want to change drop-down list selections for the fields in the table below, many of them are configurable in the back office. For more information, see Configuring Patron Detail Form Options.

Name tab field descriptions

Field	Usage information
Patron ID	A read-only field with the patron's Id number.
Type	Select individual or organization. This selection determines what fields are listed for **Name One** below.
VIP code	These codes are used to mark special patrons, such as high value donors. The code and the code name are combined in the selection list. When a user assigns a patron to an activity, opportunity, or service case, CRM displays an Attention message with the code and code name. However, if you enter text in the VIP Announcement field, the announcement message will display instead.
VIP Announce-ment	Enter the text that will display in an Attention message whenever a user assigns the patron to an activity, opportunity, or service case. If you select a VIP code but do not enter text in this field, the VIP code and name will display in the Attention message instead.
External ID	You can use this field to enter a record locator from a system other than the Paciolan back office.
Status	Select the status of the patron (for example, Active, Deceased, or Inactive).
Source	Select the channel by which the patron was first entered into the system (for example, donations, Internet sales, or walk up sales). The default selection is WBST, although the selection may be left blank.
Marital status	Select the marital status of the patron.
Release to mailing list	Select this option to allow the patron's information to be used for a mailing list.
Comments	This is a free form area where you can enter additional comments about the patron.
Name One	The fields included in the **Name One** section are based on the patron type. If the patron is an individual, the basic name fields are displayed. If the patron is an organization, only the **Organization Name** and **Organization Type** fields are displayed.
Organization Name	Enter the name of the organization.
Organization Type	Select the type of organization represented by the patron record.
Name Two	The **Name Two** fields are always the basic name fields. **Name Two** cannot be an organization.
Tags	Enter tags related to this patron to help in other functions such as reporting. You can delete an existing tag by deleting its text name.
Salutation Type	Click on a **Type** field to display the list of available salutation types. For each salutation type, enter the salutation you want to be used. You can enter salutations for each type by adding them in a row and entering text for them.
Keywords	Enter keywords related to this patron to help in other functions such as searching. You can delete an existing keyword by deleting its text name.
Mail Code	Select the mail codes related to the patron from the list. Each time you select a mail code, CRM displays an empty cell in which you can select

another mail code.

Phone/Address tab field descriptions

Field	**Usage information**
Type (phone)	Select a phone number type from a list in the **Type** column, and then enter the phone number in the adjacent table cell in the **Phone** column. You can enter one phone number for each phone type in the list.
Type (email)	Select an email address type from a list in the **Type** column, and then enter the email address in the adjacent table cell in the **Email** column. You can enter one email address for each email address type in the list.
Default mail name	Enter the name to use for the patron when sending mail. There are no validations for this text field, so whatever you enter is what CRM will use. If you leave the field empty, CRM will generate a name based on the values entered in the **Name One** section of the Name tab.
Add address	Click this button to display the Add Address dialog box. If this button is disabled, all the address types have an addressed entered for them.
Type (address)	Click the **Type** column header to sort the address list alphabetically by address type. You can double-click an address row to display the Edit Address dialog form for that address.
Seasonal	The date range during which the patron resides at the address. You cannot sort by the **Seasonal** column.
Organization	Click the **Organization** column header to sort the address list alphabetically by organization name.

Biographic tab field descriptions

Field	Usage information
Children	Enter the name, birth date, and any comments in a single row for each of the children of the patron. Their ages are calculated automatically using their birth dates.
Related Patrons	Add relatives of the patron. Click the **Add Patron** button, and then use the Patron Lookup for each relative. Once you've added a related patron, you can select values from the **Relationship** and **Other Relationship** lists, whose items are defined in the back office. The **Comments** field is a free form text box and is not validated by the system.
Name One	Enter biographical information about this patron. The **Nickname**, **Maiden Name**, and **Birth place** fields are free form text boxes and are not validated by the system. The items in the **Ethnicity**, **Religion**, and **Household income** lists are defined in the back office.
Attributes	Attributes are characteristics of a patron, such as vegetarian or board member. The items in the **Attributes** list are defined in the back office.
Notes	A free form text box in which you can enter notes about the attributes.
Interest	Interests are things about which the patron cares, such as charitable organizations. The items in the **Interest** list are defined in the back office.

Approach	The method of contact to use for the patron about an interest. The items in the **Approach** list are defined in the back office.
Language	Add all the languages that the patron can speak to this table. The list of languages is defined in the back office.
Name Two	The fields available for the patron in the **Name Two** section are the same as the ones in **Name One**, except that the **Household income** list is left out.

Institutions tab field descriptions

Field	Usage information
Name One	Use this section to track the educational institutions that the primary patron attended or is associated with in some way.
Add Institution	Click this button to display the Add Institution dialog box. The dialog box requires you to select the institution from a predefined list. You can also select from a list the patron status (for example, alumni or current student) with regard to the institution. The form also includes free form text box fields, including **Start date**, **End date**, **Degree**, **Comments**, **Major**, **Minor**, and **Varsity Letter**.
Institution Name table	You can sort the table of institutions by clicking the **Institution Name**, **Degree**, **Major/Minor/Varsity Letters**, and **Status** column headers. You can also double-click an institution's row to display the Edit Institution dialog box. The Add Institution and Edit Institution dialogs have the same functionality.
Name Two	Use this section to track the institutional relationships of the name two patron, if one has been added to the patron record. The Add Institution functionality and the **Institution Name** table are identical to those used for the name one patron.

Ticketing tab field descriptions

Field	Usage information
Customer type	Select the of ticketing customer type of the patron. The list items are defined in the back office.
Source	An optional market analysis code indicating the sales channel from which the patron originated. You can use this data for sorting, selecting, or reporting in the back office.
External ID	You can use this field to enter a record locator from a ticketing system other than tRes.
Billing Address	Select the billing address to store in the ticketing system. Ticketing (tRes), general (tPatron), and fund development (tFund) have separate address information. The billing address types in the list are the same ones used for the **Shipping address**. The same types are also used when entering address information on the Development and Phone/Address tabs. You are allowed to select an address type for which the patron has no address information.
Sales representative	If you want a dedicated ticketing sales representative for the patron, enter the user name. You can only assign yourself or one of your subordinates to be the sales representative.

Field	Usage information
	(Supervisors only) Click in the **Sales representative** field to display the User Lookup, and then use the form to select a user. Or, if you know the user's sign in name, you can enter the name directly into the **Sales representative** field. If you only know part of the sign in name, you can enter it in the **Sales representative** field and then click to get search results in the User Lookup for the partial name. The User Lookup will only find users who report to you.
Customer status	Select the ticketing customer status of the patron (for example, Active, Deceased, or Inactive). The available list items are defined in the back office. This list is independent of the **Status** field list on the Name tab.
Department	A free form text field in which you can enter the name of the ticketing department associated with this customer.
Shipping address	The shipping address types in the list are the same ones used for the **Billing address**. The same types are also used when entering address information on the Phone/Address tab. You are allowed to select an address type for which the patron has no address information.
Customer comments	A free form text field in which you can enter any additional ticketing information about the patron.
Credit Status	Use this section to capture information about the status of the patron’s credit.
Status	Choosing one of the **Status** list items will cause the corresponding message to display during the sales process. The message can warn about a credit limit or deny a sale.
Limit	If you set the **Status** message to warn about a credit limit, enter the dollar amount of the limit.
Comments	Use this free form text field to enter additional comments about the patron's credit status.
Ticketing Tags	Enter tags related to this patron's ticketing behavior to help in other functions such as searching. You can delete an existing tag by deleting its text name.
Ticketing Memberships	Select the patron's ticketing memberships and enter the years in which the memberships began. Although the **Year** column is meant to track the first year of the membership, this is a free form field in which you can enter any text.
Ticketing Activities	This table is used to track the number of years a patron has purchased tickets for an activity. YOP stands for years of purchase. If you use wait list priorities, you can enter them in that column. Both the **YOP** and **Wait List Priority** columns consist of free form text fields with no validations. You can select an activity and leave both the **YOP** and **Wait List Priority** fields empty.

E-Ticketing tab field descriptions

Field	Usage information
Magstripe ID	This section is only visible if access to magnetic stripe ID is allowed in the patron policy.

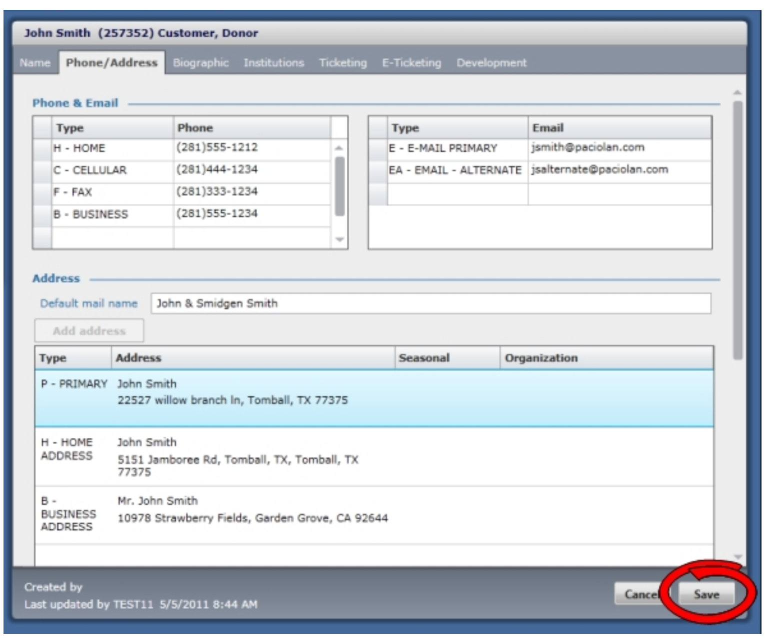
Field	Usage information
Current ID	This read-only field displays the last four digits of the magnetic stripe ID number that is used for paperless ticketing.
New ID	To assign a new magnetic stripe ID to the patron, enter the number in this field. The value of the ID must be numeric but can be any length.
eVenue Information	This section is used to view and modify eVenue information for the patron. The section is only visible if access to eVenue information is allowed in the patron policy.
Internet profile	Internet profiles are used to offer specific groups of customers the opportunity to purchase items online that are not available to the general public. A patron can only have one internet profile assigned at a time.
Locked account?	Default selection is **No**. If **Yes** is selected, the patron will not have the ability to log into the eVenue web site. If the patron attempts to log in, an alert message will display directing the patron to call the ticket office.
Email	This read-only field displays the email address the patron uses on the eVenue web site.
Email opt in?	Select **Yes** for patrons that have given you permission to send them email communications. If you select **Yes**, the format should be set to HTML in the back office.
Password	This read-only field displays the patron's eVenue web site password.
PIN	The patron's personal identification number for the eVenue web site. This number is used to link the back office account to the eVenue account.
Email preferences	This field lists the specific email opt ins. The options available are defined in the back office.

Development tab field descriptions

Field	Usage information
Donor type	Select the type of donor the patron is. The list items are defined in the back office.
Donation representative	If you want a dedicated donation representative for the patron, enter the user name. You can only assign yourself or one of your subordinates as the donation representative. (Supervisors only) Click in the **Donation representative** field to display the User Lookup, and then use the form to select a user. Or, if you know the user's sign in name, you can enter the name directly into the **Donation representative** field. If you only know part of the sign in name, you can enter it in the **Donation representative** field and then click to get search results in the User Lookup for the partial name. The User Lookup will only find users who report to you.
Publish name	Enter the donor’s name as you want it to appear in publications, such as an annual report or a playbill. This field also updates the Publish field in the Donation record (FD.DONATION.E), which can then be edited as needed during donation entry in tFund.
Billing address	Select the billing address to store in the fund development system. Ticketing (tRes), general (tPatron), and fund development (tFund) have sep-

Field	Usage information
	arate address information. The billing address types in the list are the same ones used for the shipping address. The same types are also used when entering address information on the Ticketing and Phone/Address tabs. You are allowed to select an address type for which the patron has no address information.
Shipping address	Select the shipping address to store in the fund development system. Ticketing (tRes), general (tPatron), and fund development (tFund) have separate address information. The shipping address types in the list are the same ones used for the billing address. The same types are also used when entering address information on the Ticketing and Phone/Address tabs. You are allowed to select an address type for which the patron has no address information.
Donor comments	Use this free form text field to enter any additional donation information about the patron.
Years of donating	Enter any whole number for the years the patron has been donating to your organization.
Mail Code	Select one or more mailings that the donor should receive. The list items are defined in the back office.
Tags	Enter text for one or more tags associated with this donor. Tags are one word descriptions used to identify or group donors.
Credit Status	Use this section to capture information about the status of the patron's credit.
Status	Choosing one of the **Status** list items will cause the corresponding message to display during the donation process. The message can warn about a preference to use a credit card, for example.
Comments	Enter text comments about the donor's credit status.

4. When you're finished editing, click **Save** to save your changes.



CRM redisplays the Patron Summary form with the updated values.

Using Integrated Outlook

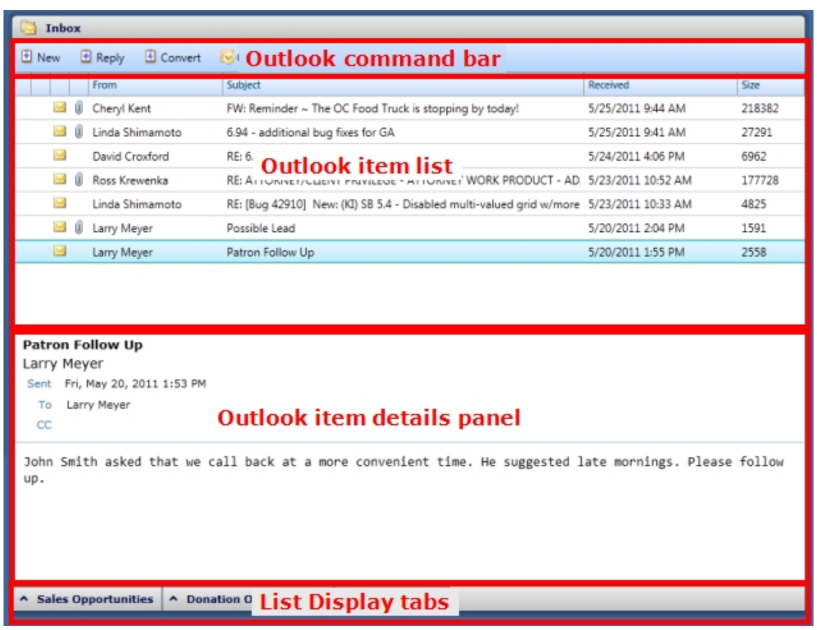
Note: This section only applies to you if you use integrated Outlook in CRM.

One of the most common CRM activities is communicating with patrons using email messages. For this reason, the basic Microsoft (MS) Outlook email and meeting functionality can be integrated into Paciolan CRM.This integration includes automatic synchronization of email messages and meeting items between the Outlook and CRM inboxes. Also, if Outlook is not running and you open CRM, CRM will launch the program for you. Using the Outlook integration in CRM, you can do the following:

- View Outlook email and meeting invitations in CRM.
- Create and send email from CRM.
- Convert email messages into CRM email activities, opportunities, or service cases.
- Open CRM Inbox items in Outlook.
- View opportunities and service cases within the CRM Inbox.
- Associate email messages with existing opportunities or service cases.
- Launch Outlook Calendar in a separate window.

Navigating the Inbox

The CRM Inbox is the central place for working with integrated Outlook Inbox items (email messages and meeting invitations) in CRM. The Inbox form contains an Outlook command bar, an Outlook item list, and an Outlook item details panel. The form also contains tabs that allow you to display sales opportunity, donation opportunity, and service case lists at the same time as the Outlook item list. Using this form capability, you can associate email messages with opportunities and service cases.



Outlook command bar

Click the command buttons to initiate CRM and Outlook functionality. Click the New button to create an email activity and send the new message via Outlook. To use the Reply, Convert, and Open in Outlook commands, select an item from the Outlook item list, and then click the command button.

Outlook item list

This list is a read-only view all the items in the current CRM user's Outlook Inbox. In the list, each row represents an Outlook item (email message or meeting invitation). You can drag an item row onto an opportunity or service case in one of the tabbed panels below to associate the item with that opportunity or service case.

The columns for the item list display the attributes of each item. The columns include:

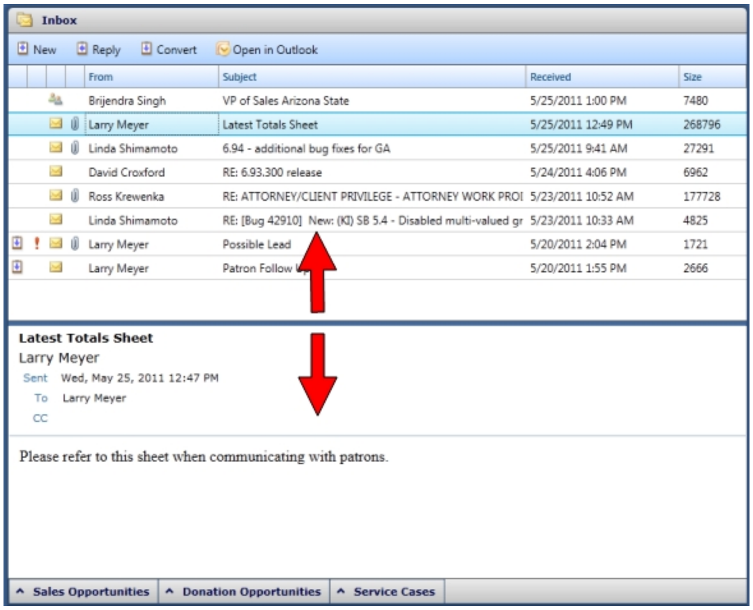
- {converted} The first column has no header but contains a conversion icon if the email message has been converted to an activity, opportunity, or service case. Meeting invitations cannot be converted to CRM items.
- {importance} The second column has no header but contains the high importance icon ! if the email message importance level has been set to high in Outlook. No icon is displayed for normal or low importance level messages.
- {item type} The third column has no header but contains icons that mark the Outlook item type as an email message or a meeting invitation. The CRM Inbox does not indicate whether email messages are read or unread.
- {attachment} The fourth column has no header but contains a paperclip icon if the message has a file attachment.
- From. The sender of the message.
- Subject. The email subject line.
- Received. The date and time the email message was received.
- Size. The file size of the item in kilobytes. For items with attachments, the size includes the size of the attached file.

You can sort the items in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many items in the list to display in the list area, a scroll bar appears on the right side of the list.

To view the header and body of an Outlook item in the Outlook item details panel, select it in the Outlook item list. You can also view an item in Outlook by double-clicking its row. You can apply the commands in the Outlook command bar (New, Reply, Convert, and Open in Outlook) by selecting a message and then clicking the command button.

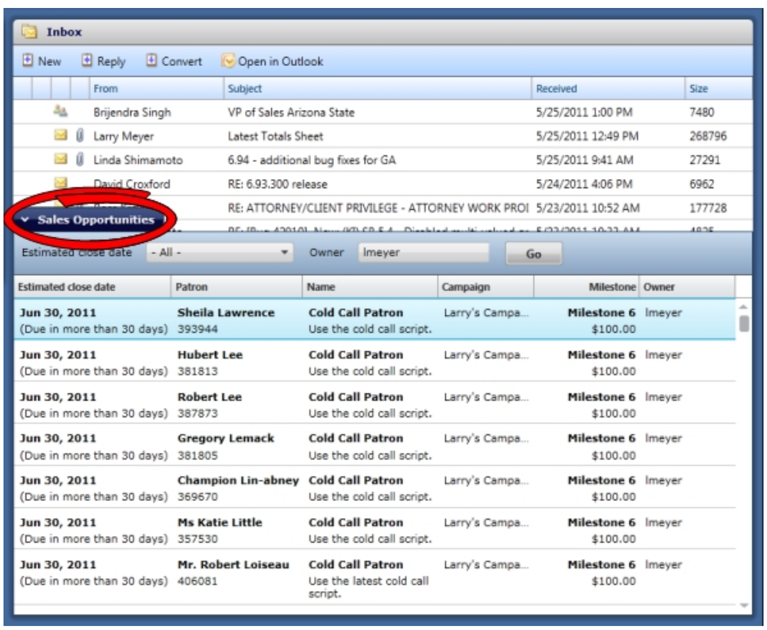
Outlook item details panel

When you select an item in the Outlook item list, it's header and body is displayed in this read-only panel. If you want to modify, reply, or do any other Outlook action, you will need to use the Outlook item list. If you display an Outlook item with an attachment, the attachment will not display on this panel. You can adjust the vertical size of this panel in the Inbox by dragging the separator bar up and down.



Opportunity and service case panels

You can click one of the tabs at the bottom of the Inbox form to display the Sales Opportunities, Donation Opportunities, or Service Cases panel. Each panel contains a list of opportunities or service cases. In the image below, the Sales Opportunities tab has been clicked to display a panel with a list of sales opportunities. To hide a displayed panel, click the panel's tab again.



The opportunity and service case lists on these panels work the same as opportunity and service case hubs, except that action buttons do not display when you select a row. However, you can still double-click a row to bring up the edit form for an opportunity or service case. The list filtering works similarly to the other CRM hubs. See Filtering CRM Inbox Items for more information.

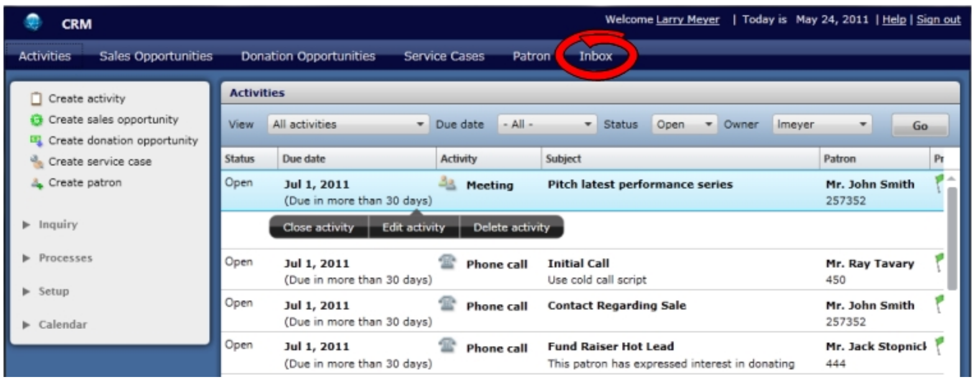
You can sort the items in the list by column by clicking the column header. You can also change the column order in the list by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many items in the list to display in the list area, a scroll bar appears on the right side of the list.

Viewing Items in the Inbox

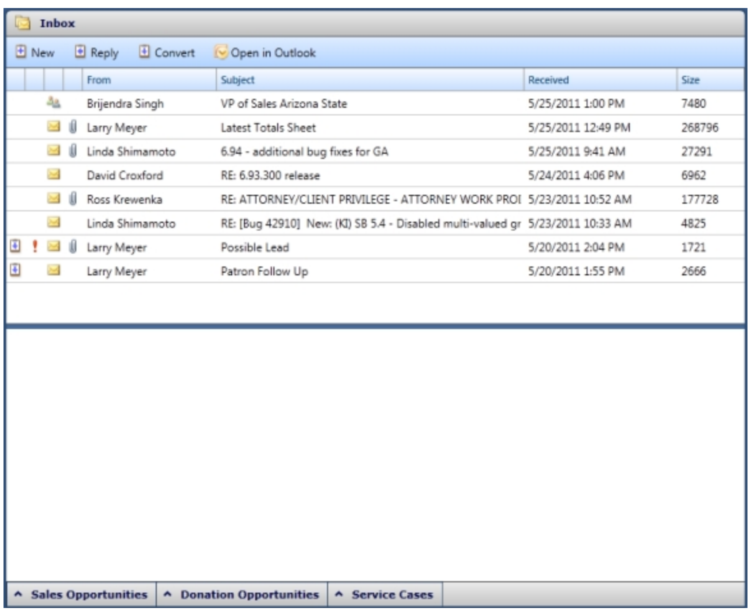
If you use integrated Outlook in CRM, your Outlook email messages and meeting invitations will be visible in the CRM Inbox. CRM synchronizes its Inbox automatically and immediately whenever a new item is delivered to your Outlook Inbox. The CRM Inbox also allows you to filter and view all your opportunities and service cases while simultaneously viewing the Inbox item list.

To view Outlook items in CRM

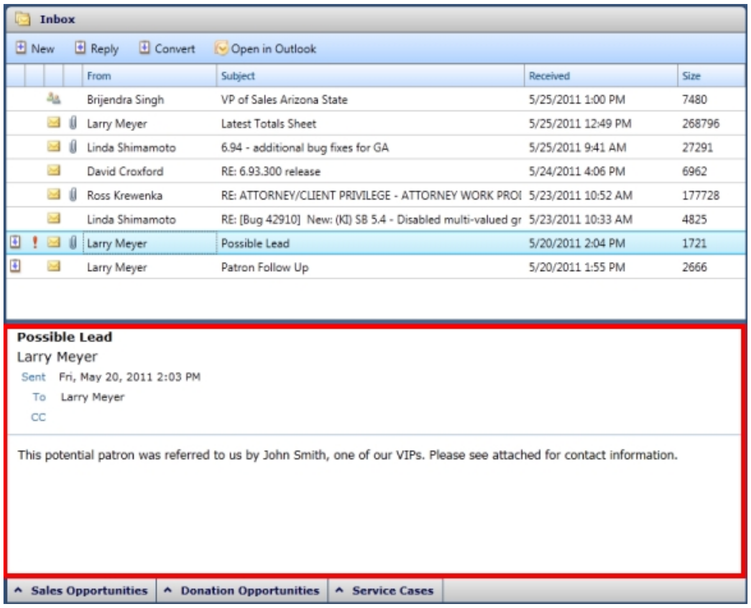
1. Click the **Inbox** button in the main navigation bar.



CRM displays the Inbox.

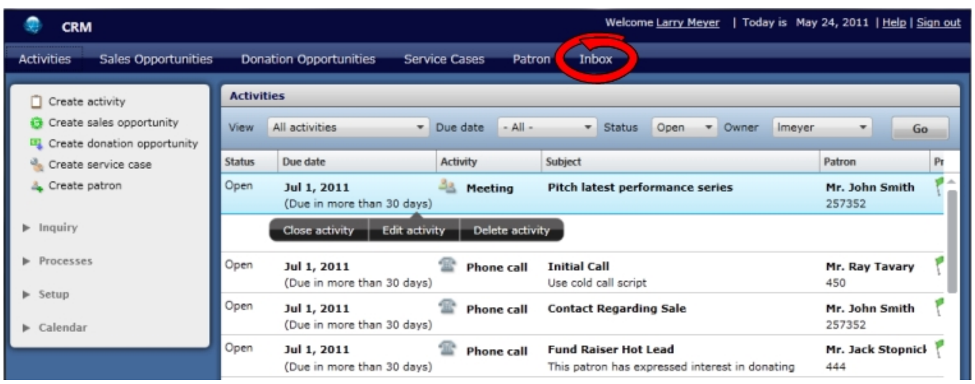


2. Select the inbox item you want to view. CRM displays the message or meeting invitation, including the header and body, in the Outlook item details panel. For detailed information about CRM Inbox navigation features, see Navigating the CRM Inbox.

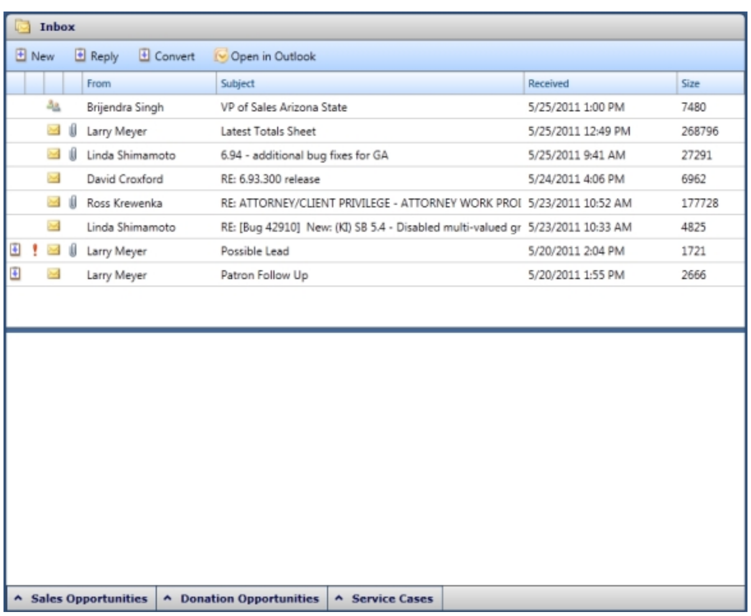


To view sales opportunities from the Inbox

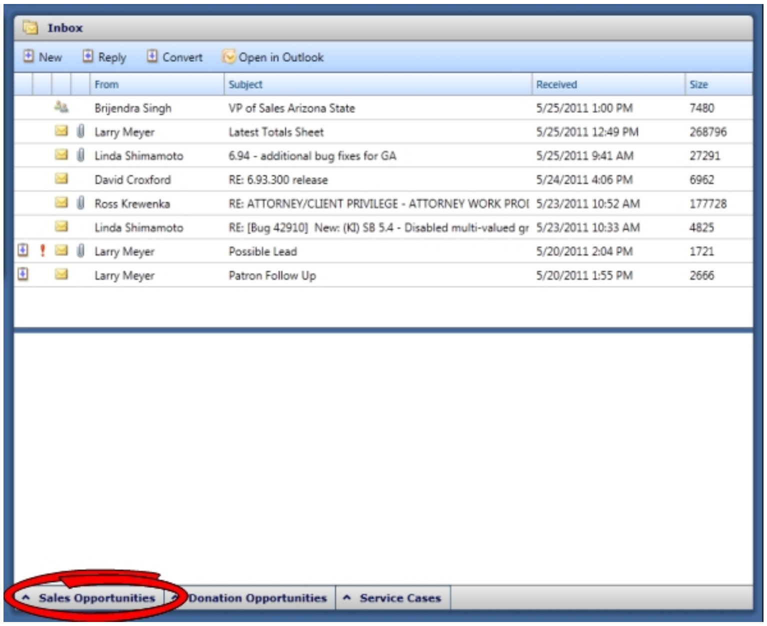
1. Click the **Inbox** button in the main navigation bar.



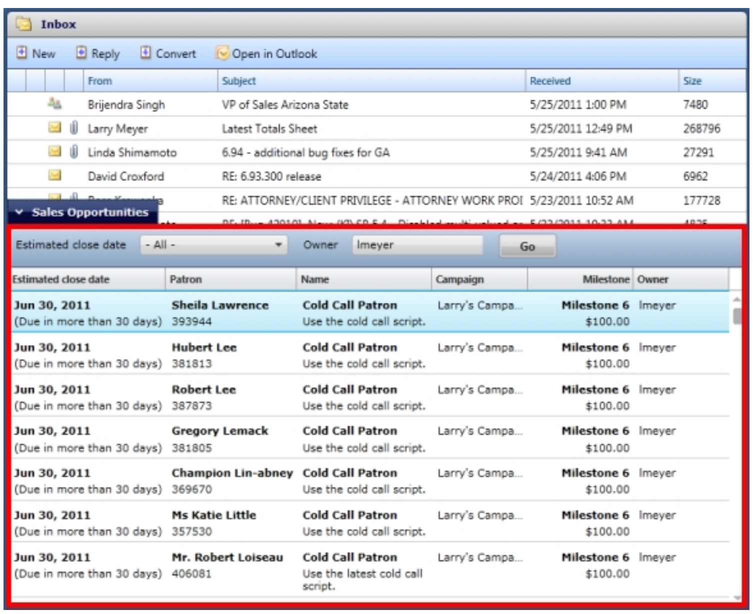
CRM displays the Inbox.



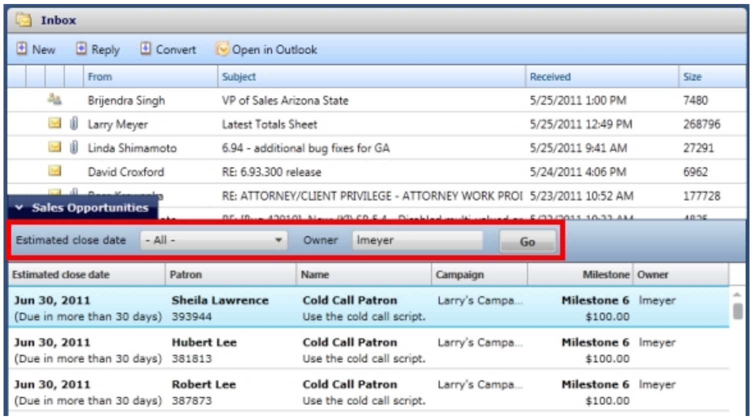
2. Click the **Sales Opportunities** tab at the bottom of the Inbox.



CRM displays the panel within the Inbox. When you want to minimize the opportunities, just click the **Sales Opportunities** tab again.

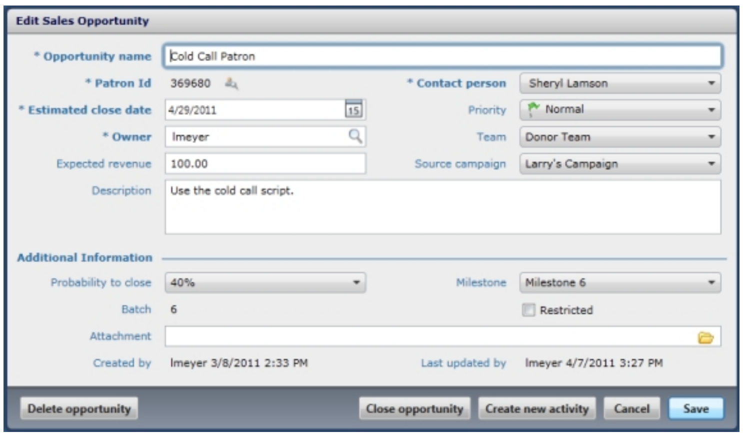


3. To filter the Sales Opportunities list, do the following:
   a. In the opportunity filters area, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot use the **Owner** filter.



CRM displays the filtered Sales Opportunities list.

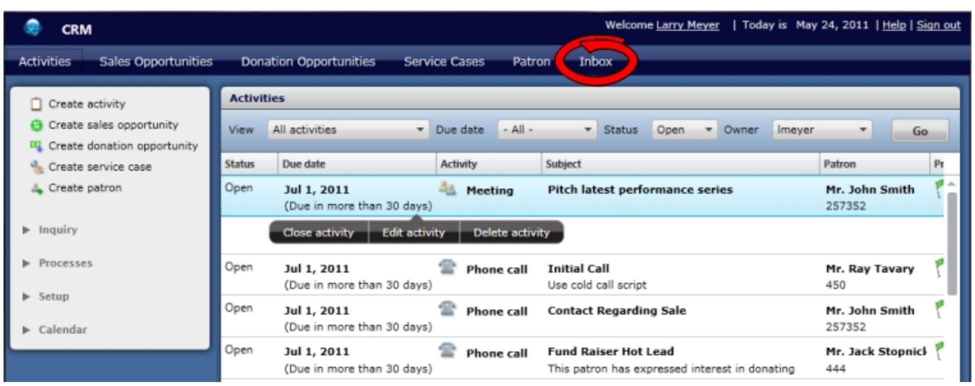
4. Locate the sales opportunity you want to view, and then double-click its row. CRM displays the Edit Sales Opportunity form for that opportunity.



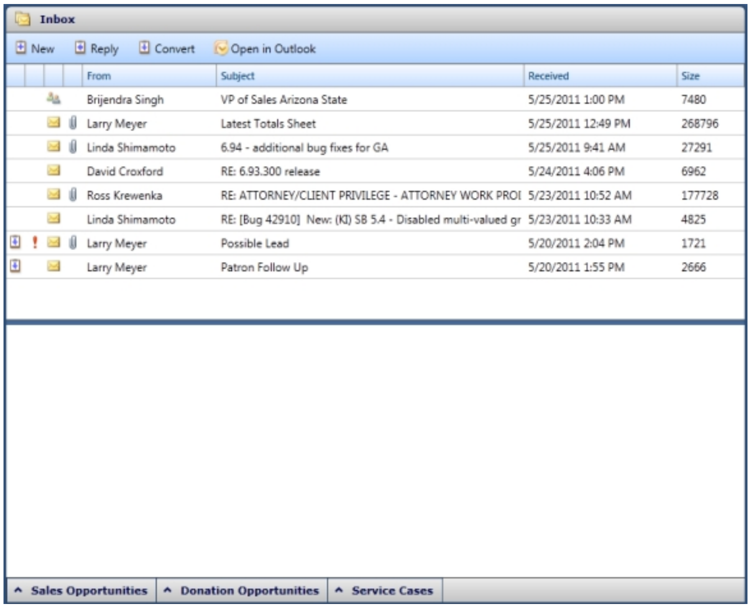
For information about editing sales opportunities, see Editing Sales Opportunities.

To view donation opportunities from the Inbox

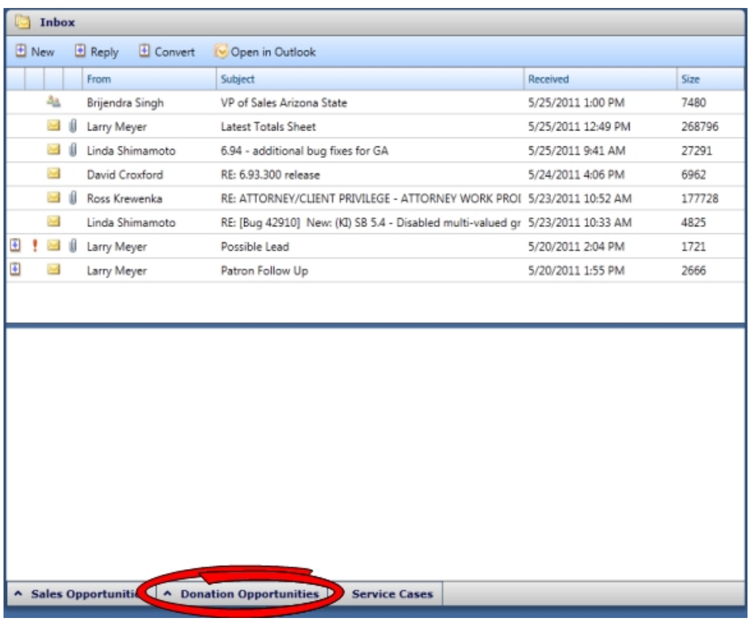
1. Click the **Inbox** button in the main navigation bar.



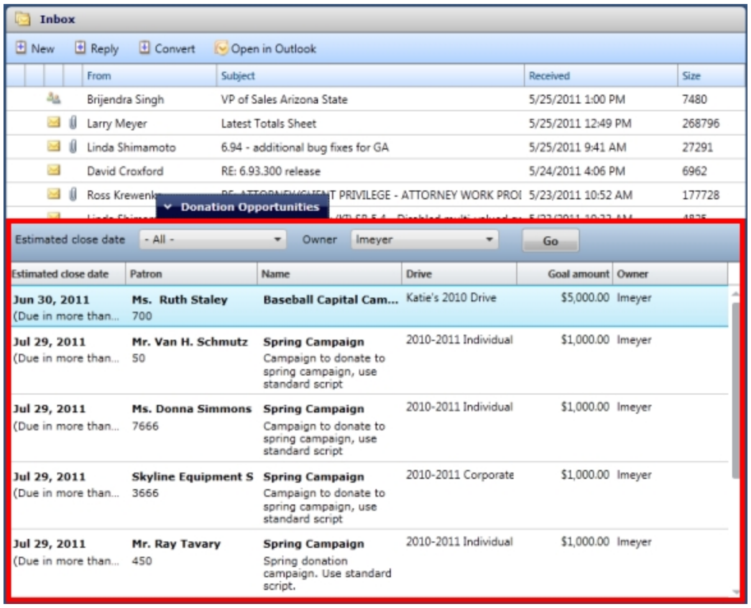
CRM displays the Inbox.



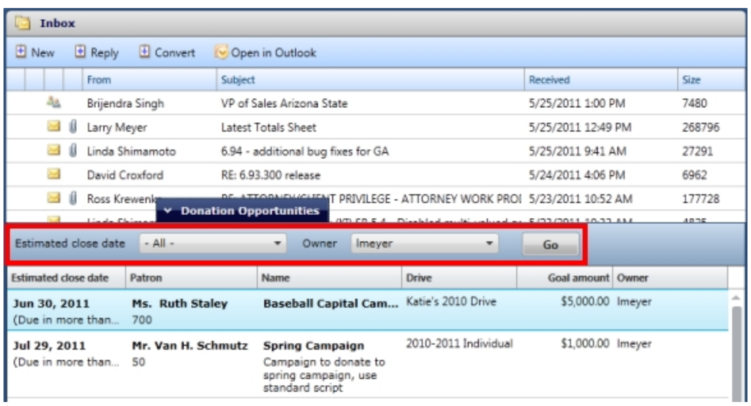
2. Click the **Donation Opportunities** tab at the bottom of the Inbox.



CRM displays the panel within the Inbox. When you want to minimize the panel, just click the **Donation Opportunities** tab again.

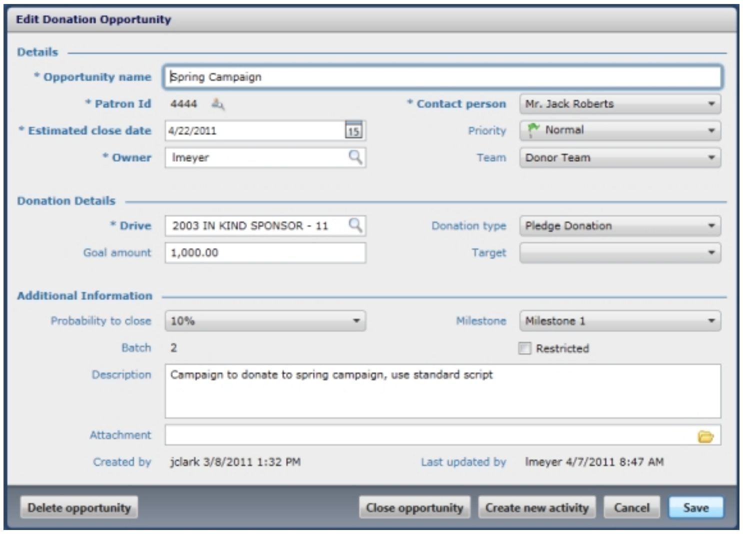


3. To filter the Donation Opportunities list, do the following:
   a. In the opportunity filters area, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot use the **Owner** filter.



   CRM displays the filtered Donation Opportunities list.

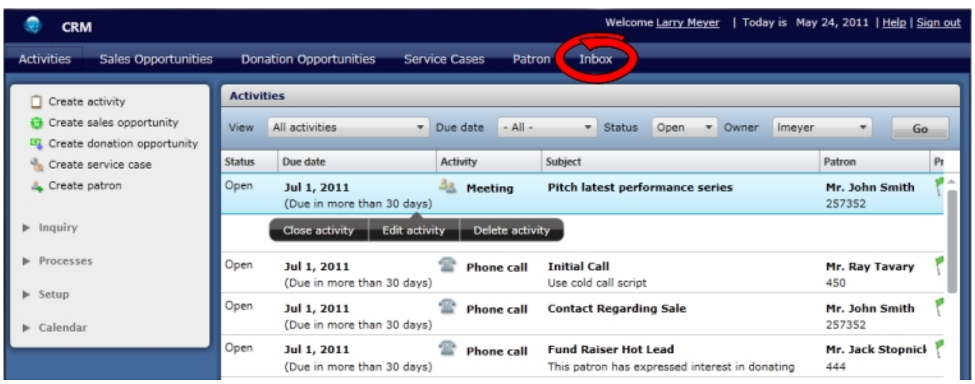
4. Locate the opportunity you want to view, and then double-click its row. CRM displays the Edit Donation Opportunity form for that opportunity.



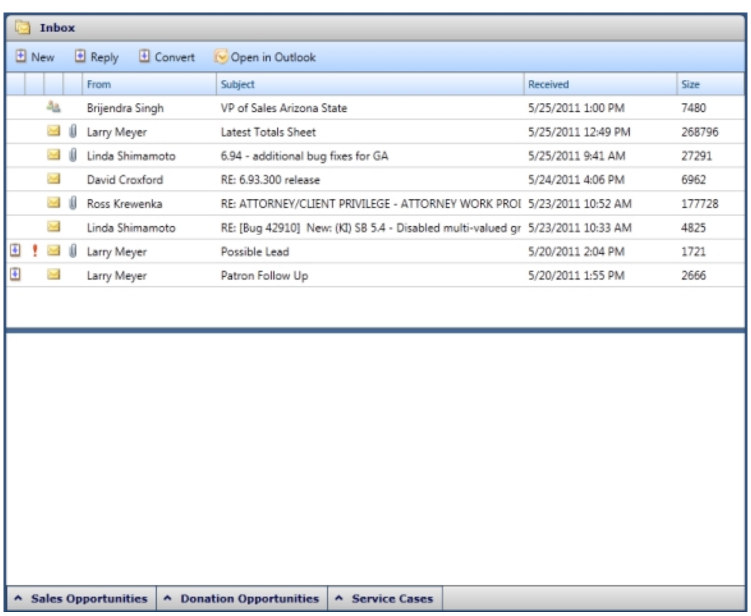
For information about editing donation opportunities, see Editing Donation Opportunities.

To view service cases from the Inbox

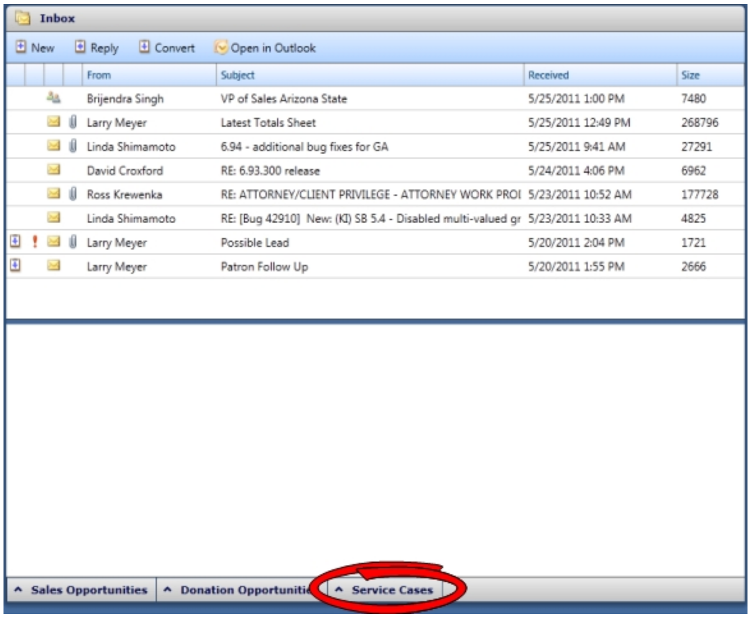
1. Click the **Inbox** button in the main navigation bar.



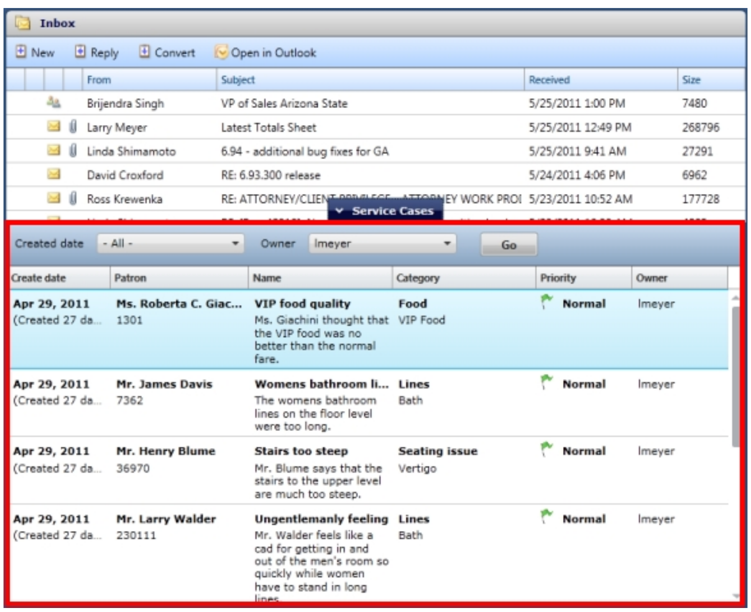
CRM displays the Inbox.



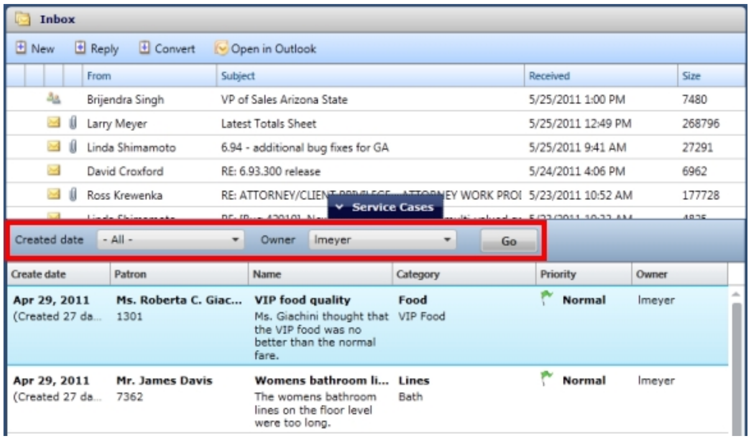
2. Click the **Service Cases** tab at the bottom of the Inbox.



CRM displays the panel within the Inbox. If at some point you want to minimize the service cases, just click the **Service Cases** tab again.

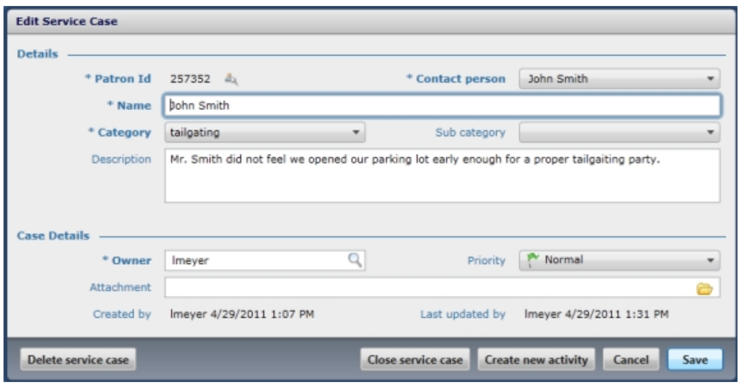


3. To filter the service cases list, do the following:
   a. In the service cases filters area, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot use the **Owner** filter.



CRM redisplays the filtered service cases list.

4. Locate the service case you want to view, and then double-click its row. CRM displays the Edit Service Case form for that service case.



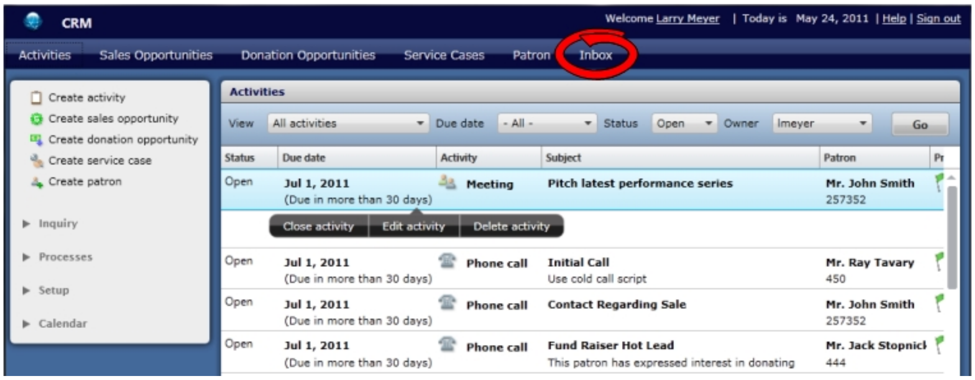
For information about editing service cases, see Editing Service Cases.

Filtering Items in the Inbox

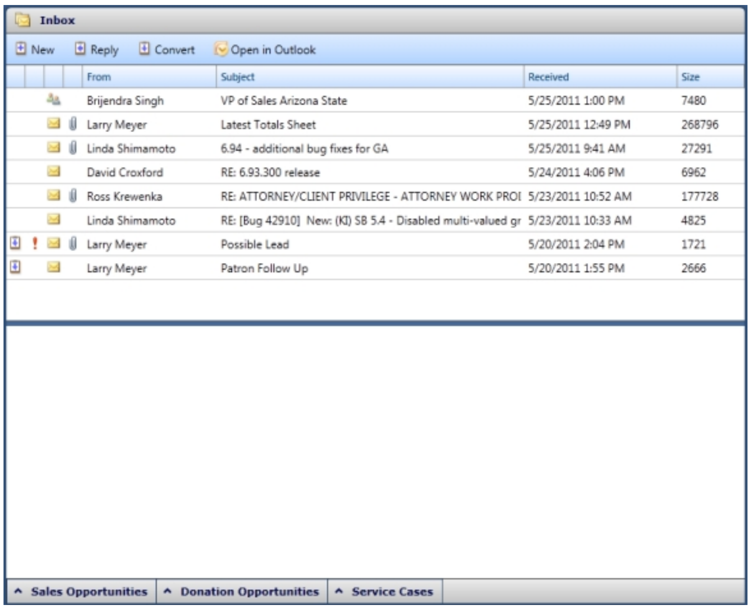
The CRM Inbox has tabbed panels that allow you access to opportunity and service case items while you work with email messages. The main purpose of this is to allow you to convert email messages to activities and associate them with opportunities and service cases. However, before you can make an association, you need to locate the opportunity or service case to which an email is related. To facilitate this, CRM allows you to filter the opportunity and service case lists that are displayed on tabbed panels in the CRM Inbox.

To filter sales opportunities in the CRM Inbox

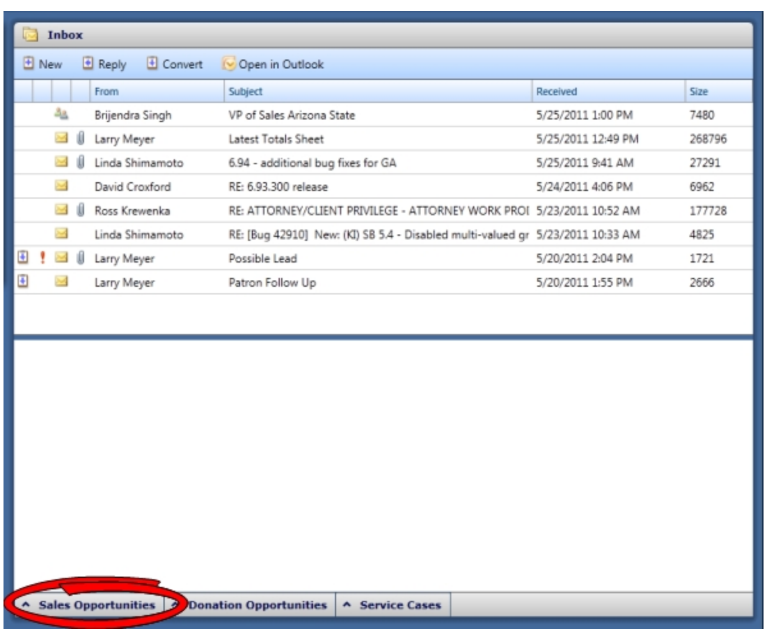
1. Click the **Inbox** button in the main navigation bar.



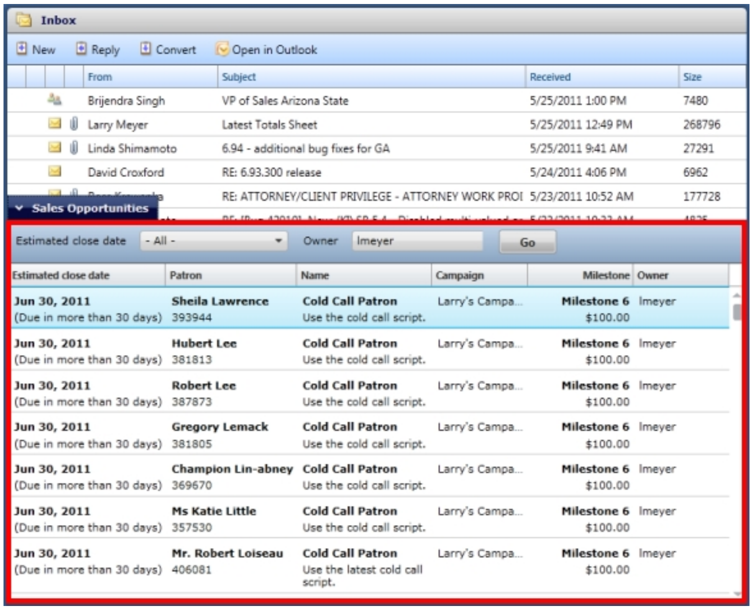
CRM displays the Inbox.



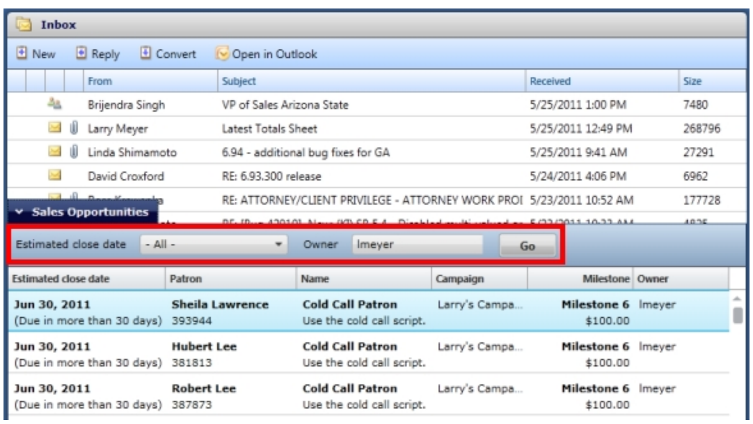
2. Click the **Sales Opportunities** tab at the bottom of the Inbox.



CRM displays the panel within the Inbox. When you want to minimize the opportunities, just click the **Sales Opportunities** tab again.



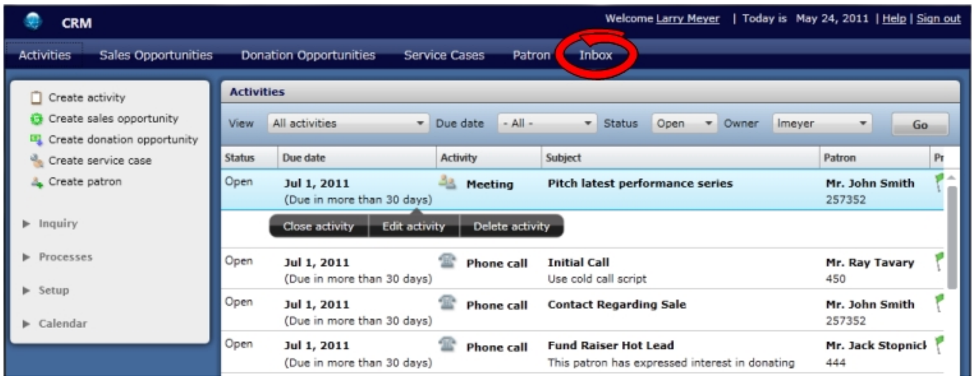
3. To filter the Sales Opportunities list, do the following:
   a. In the opportunity filters area, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot use the **Owner** filter.



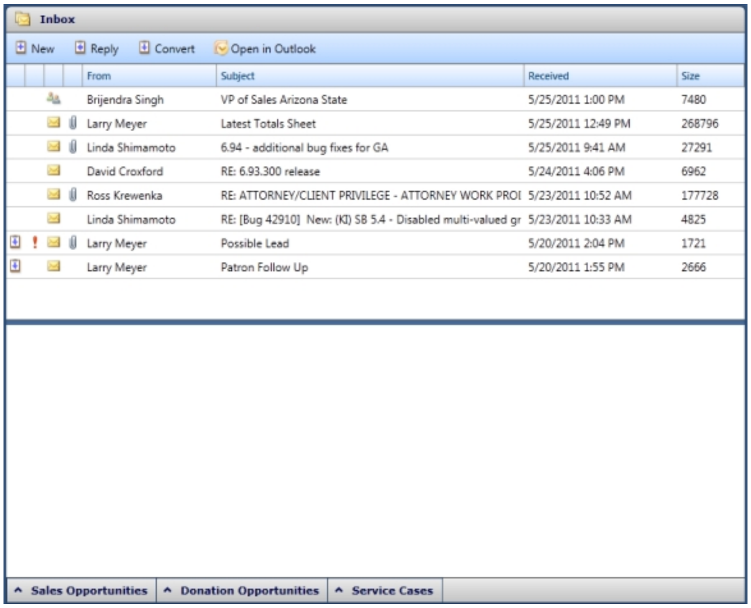
CRM displays the filtered Sales Opportunities list.

To filter donation opportunities from the CRM Inbox

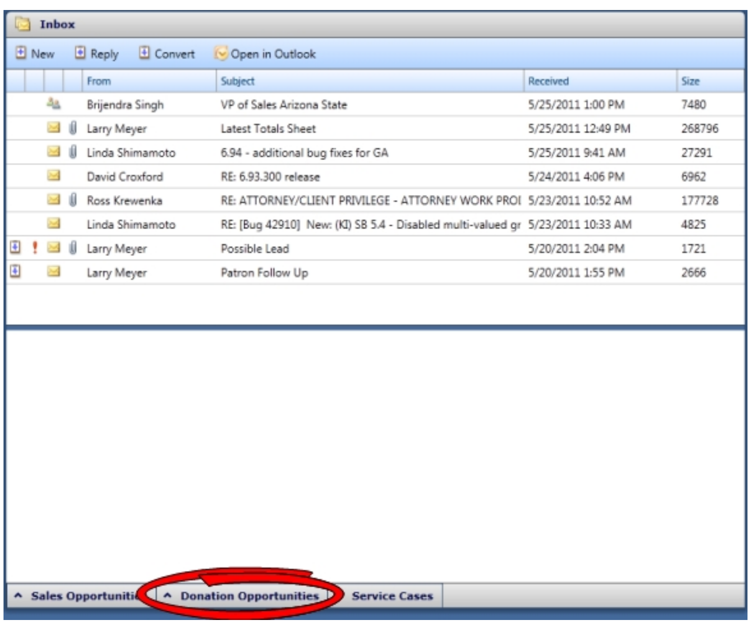
1. Click the **Inbox** button in the main navigation bar.



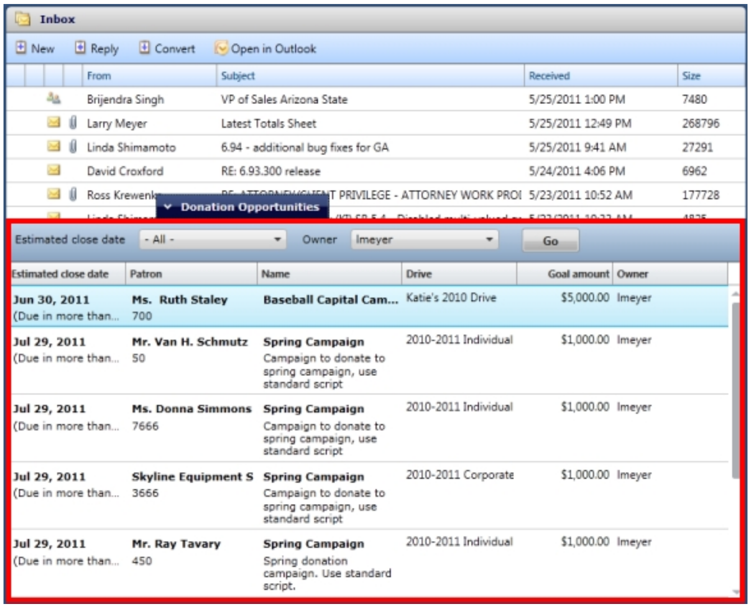
CRM displays the Inbox.



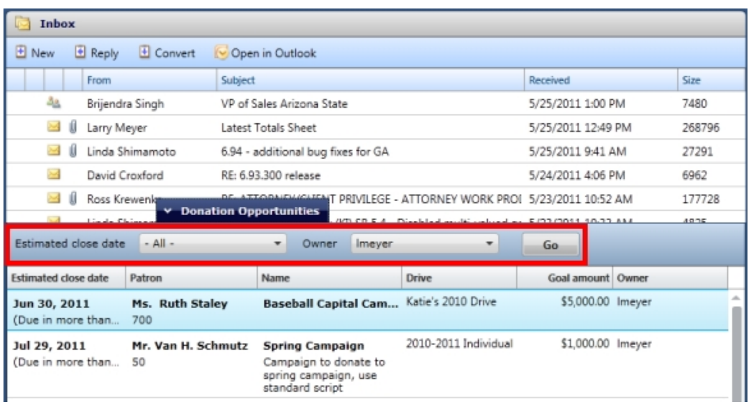
2. Click the **Donation Opportunities** tab at the bottom of the Inbox.



CRM displays the panel within the Inbox. When you want to minimize the panel, just click the **Donation Opportunities** tab again.



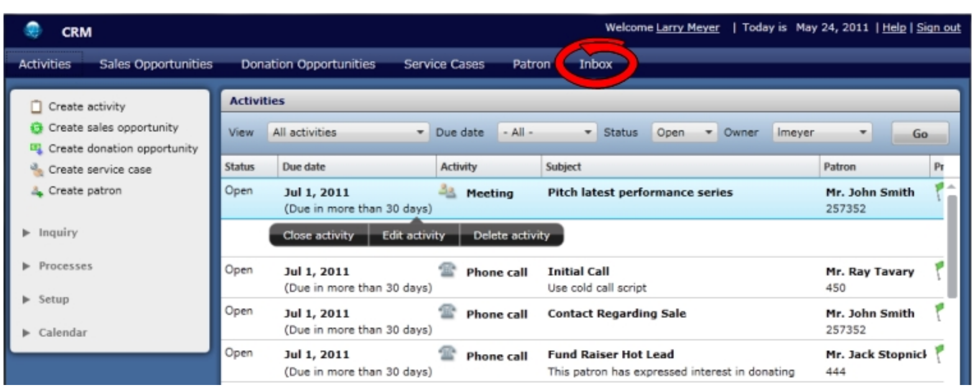
3. To filter the Donation Opportunities list, do the following:
   a. In the opportunity filters area, set the **Estimated close date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot use the **Owner** filter.



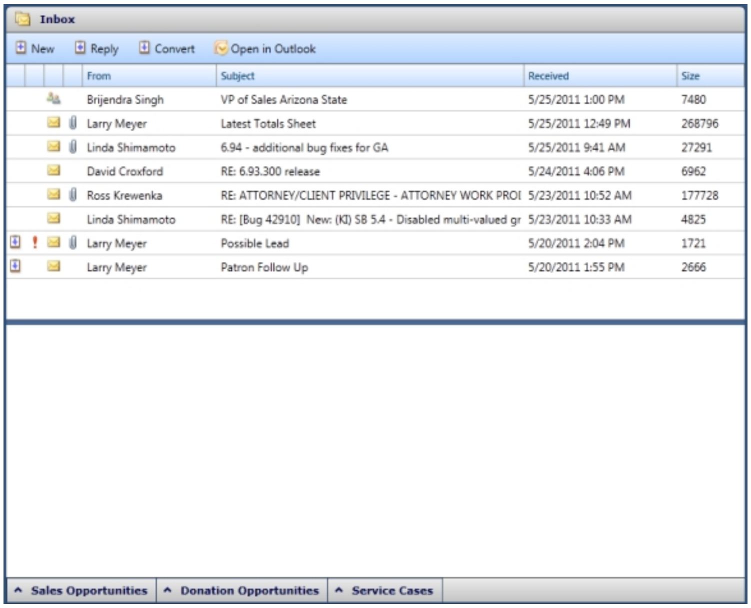
CRM displays the filtered Donation Opportunities list.

To filter service cases from the CRM Inbox

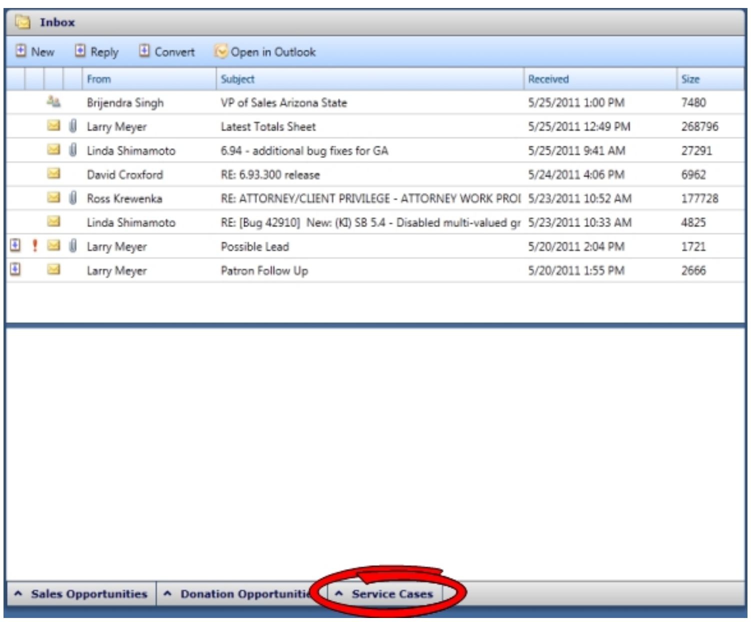
1. Click the **Inbox** button in the main navigation bar.



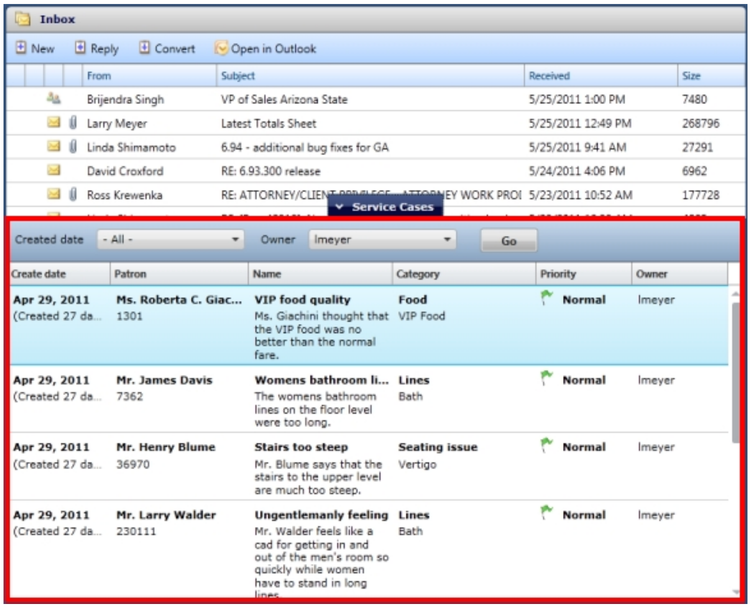
CRM displays the Inbox.



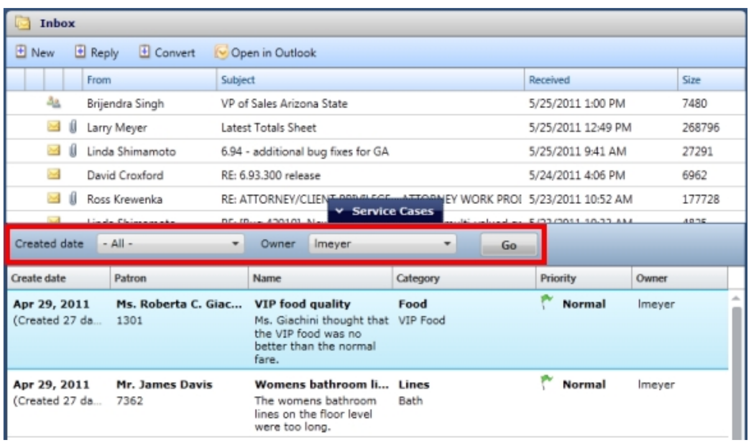
2. Click the **Service Cases** tab at the bottom of the Inbox.



CRM displays the panel within the Inbox. If at some point you want to minimize the service cases, just click the **Service Cases** tab again.



3. To filter the service cases list, do the following:
   a. In the service cases filters area, set the **Created date** and **Owner** filters, and then click the **Go** button. If you are not a supervisor, you cannot use the **Owner** filter.



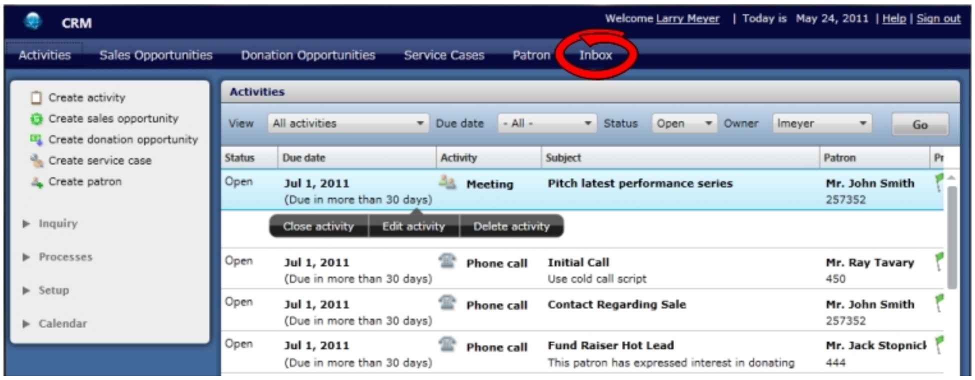
CRM redisplays the filtered service cases list.

Creating Email Messages

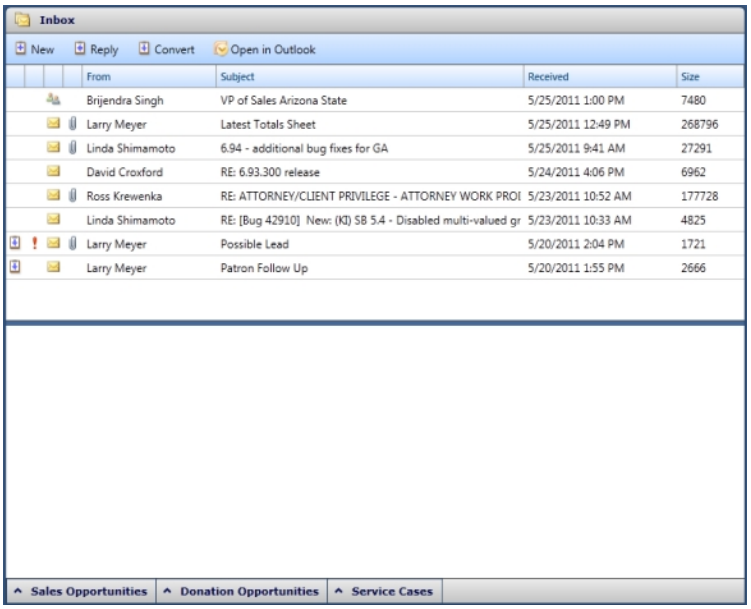
If you use CRM with integrated MS Outlook, you can create and send email messages to communicate with your patrons or other staff members from within CRM. You can create email messages by creating an email as a standalone activity or while you are working with opportunities and service cases. Standalone email messages can be created from the CRM Inbox, the Activities hub, or the Patron Summary form. Once you've entered all the required fields for an email activity, you can send the email from CRM or edit and send it from MS Outlook.

To create a standalone email activity from the CRM Inbox

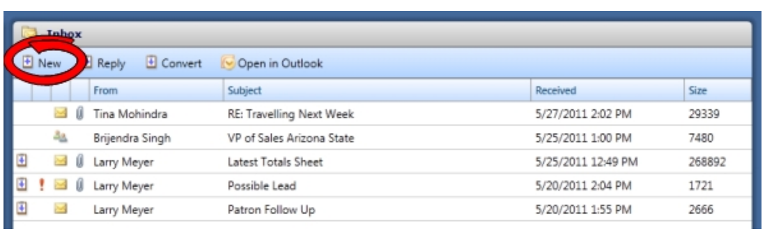
1. Click the **Inbox** button in the main navigation bar.



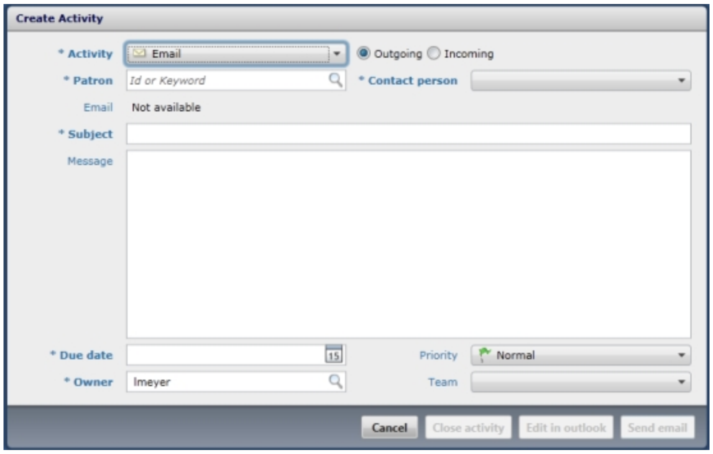
CRM displays the Inbox.



2. In the Outlook command bar, click the **New** button.



CRM displays the Create Activity form. If you decide you want to create an activity type other than email, you can select it from the **Activity** drop-down list. For more information about creating activities, see Manually Creating Activities.



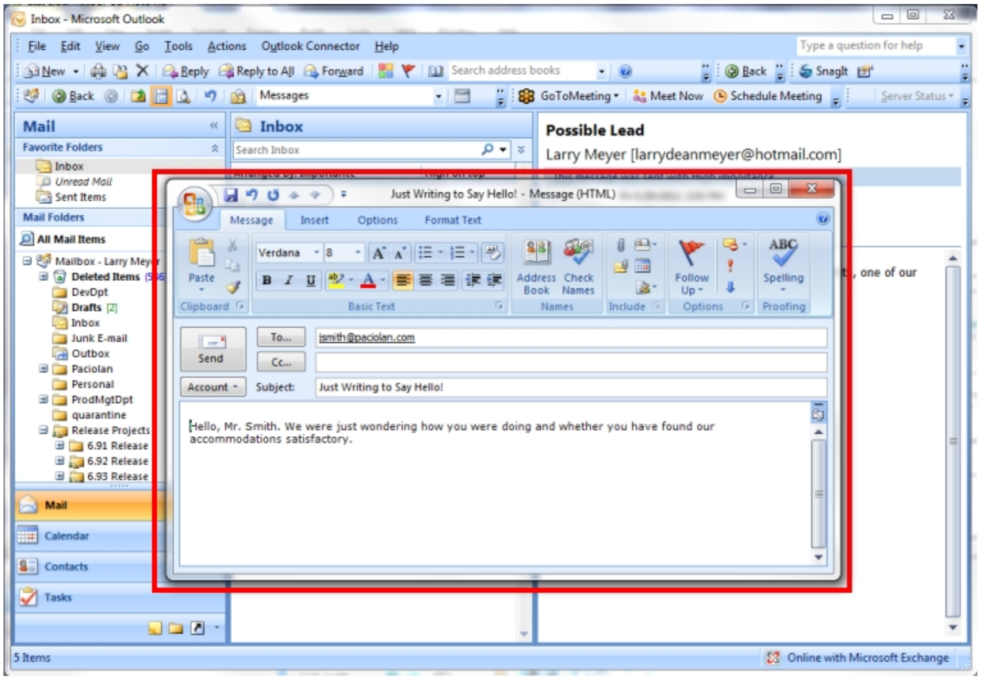
3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact person	Select the contact person from the patron record. Name #1 from the record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
Subject	Enter a brief description of the purpose of the activity.

Field	Usage Information
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email activity in CRM and open the email in Outlook. You can then edit the item as you normally would.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

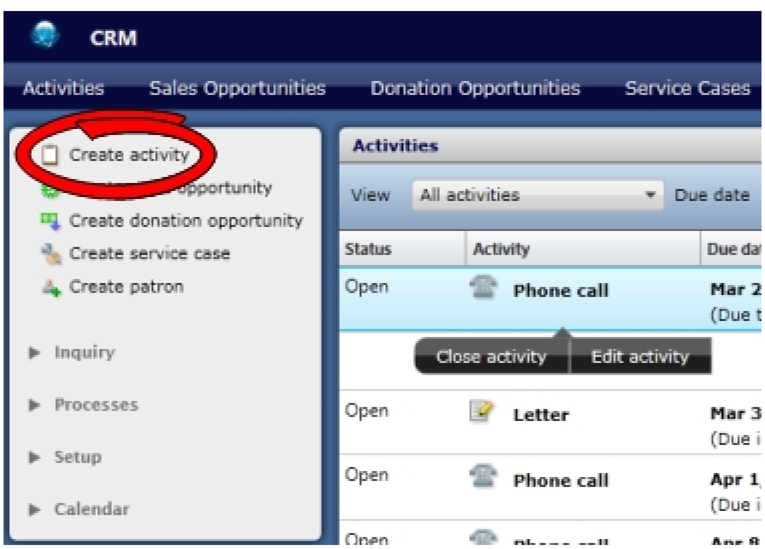
4. Do one of the following:
   - Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.
   - Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



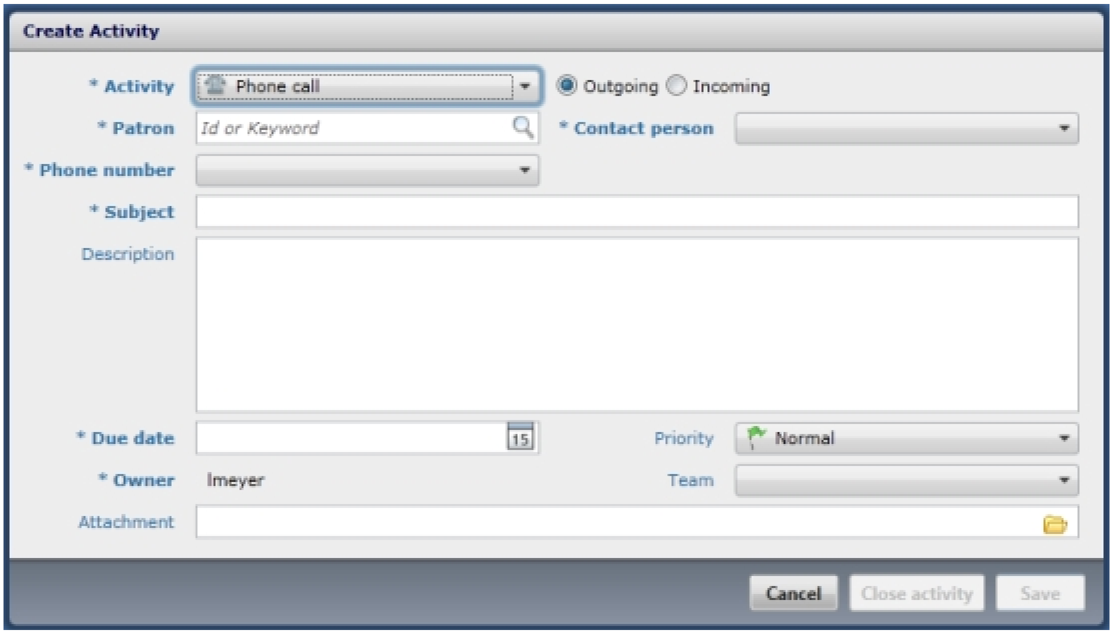
- Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

To create a standalone email activity from the left navigation pane

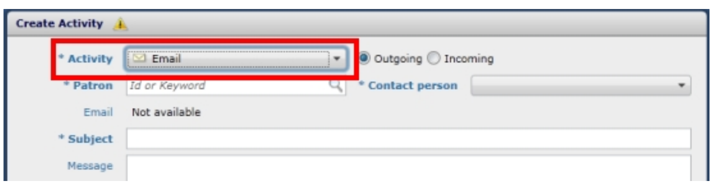
1. In the navigation pane, click **Create Activity**.



CRM displays the Create Activity form in the work area.



2. From the **Activity** drop-down list, select **Email**.



3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

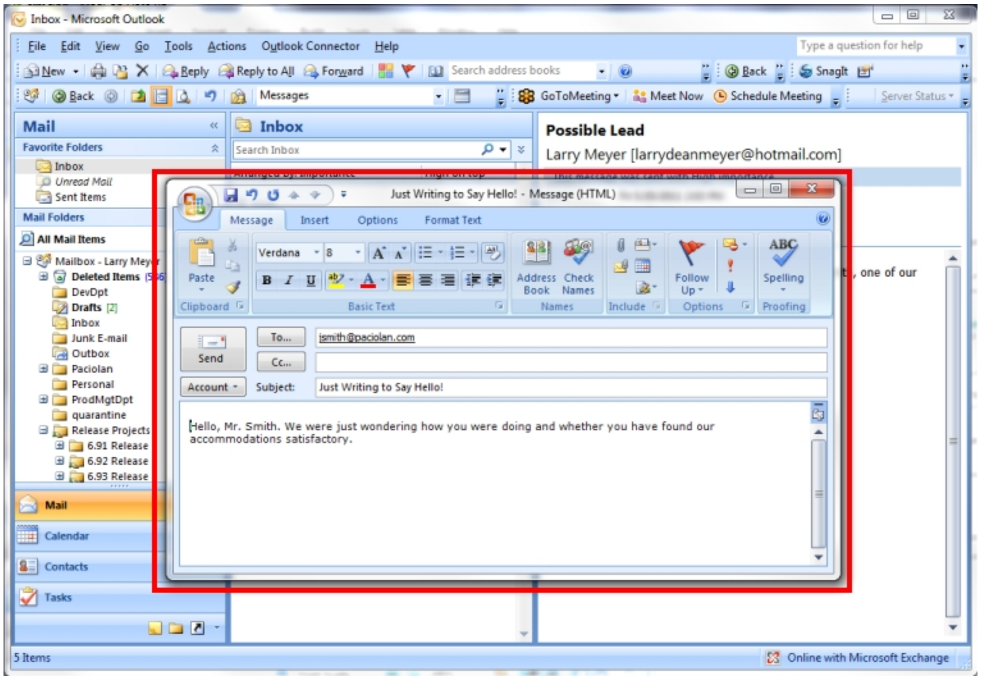
   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact	Select the contact person from the patron record. Name #1 from the record in the

Field	Usage Information
person	back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
Subject	Enter a brief description of the purpose of the activity.
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email activity in CRM and open the email in Outlook. You can then edit the item as you normally would.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

4. Do one of the following:

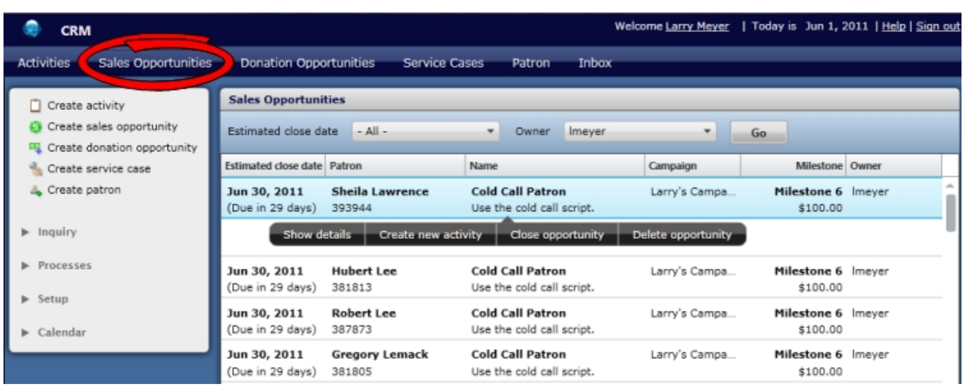
- Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



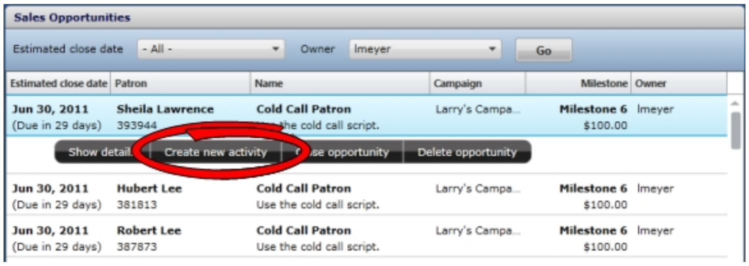
- Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

To create an email message activity for a sales opportunity

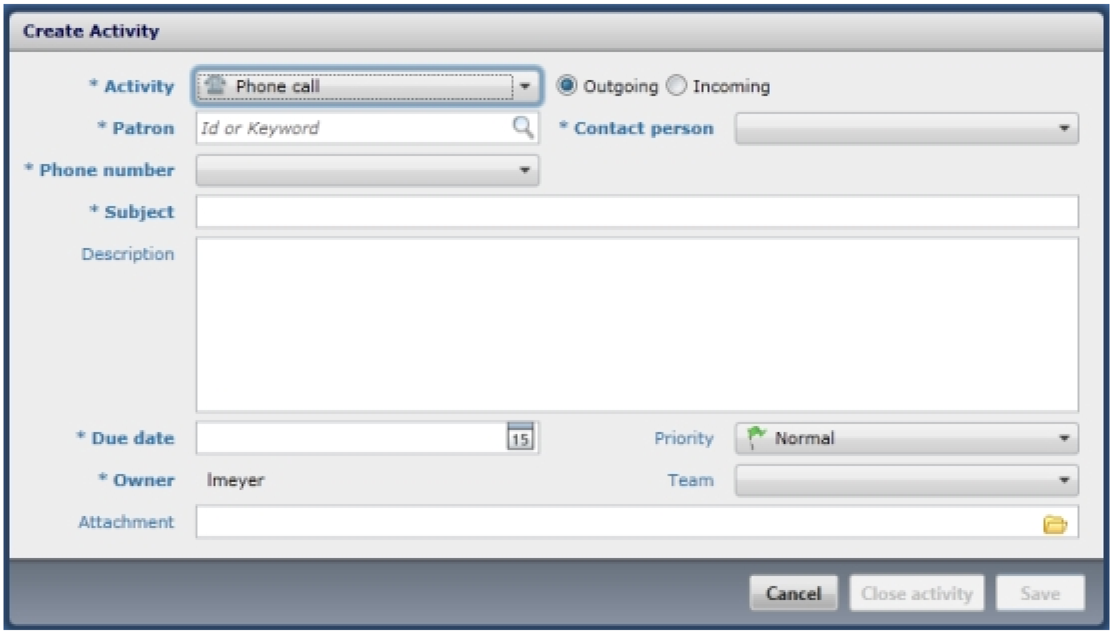
1. Click the **Sales Opportunities** button in the main navigation bar.



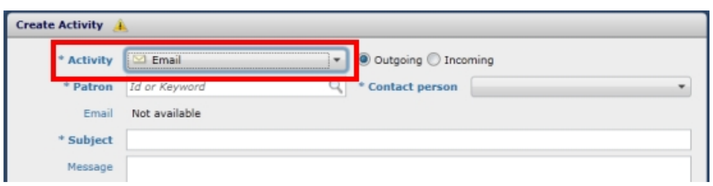
2. Locate the sales opportunity for which you want to send the new email message. For more information, see Viewing Sales Opportunity Details.
3. Select the opportunity, and then click the **Create new activity** button.



CRM displays the Create Activity form in the work area.



4. From the **Activity** drop-down list, select **Email**.



5. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

   List of the fields with usage information.

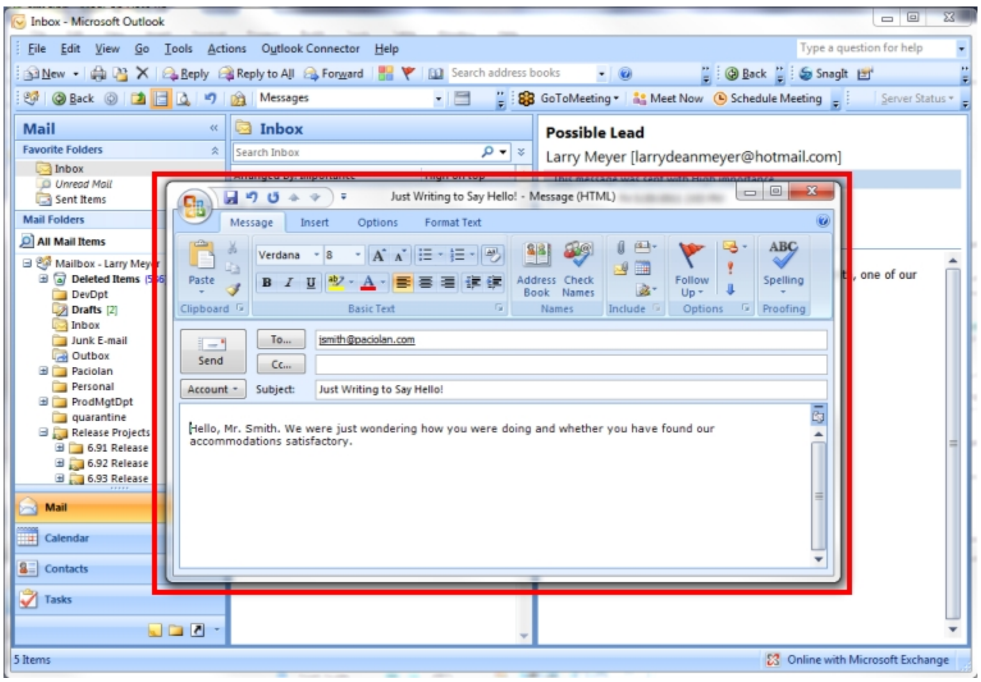
Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron.

Field	Usage Information
	Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact person	Select the contact person from the patron record. Name #1 from the record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
Subject	Enter a brief description of the purpose of the activity.
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to

Field	Usage Information
	closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email activity in CRM and open the email in Outlook. You can then edit the item as you normally would.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

6. Do one of the following:

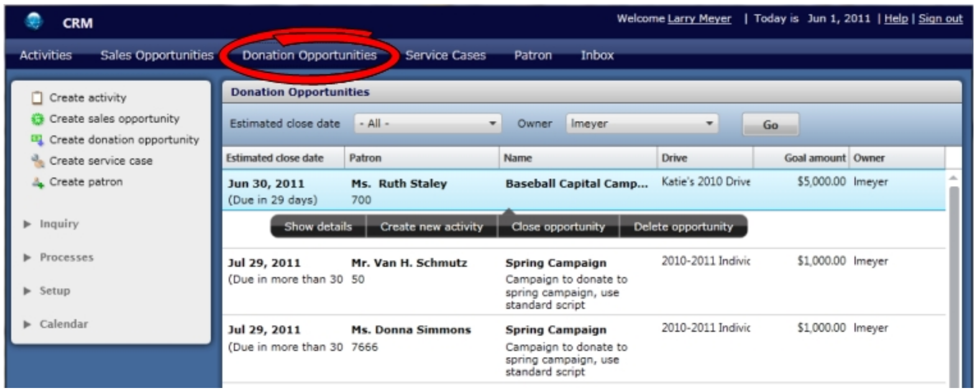
   - Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.
   - Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



   - Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
   - Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

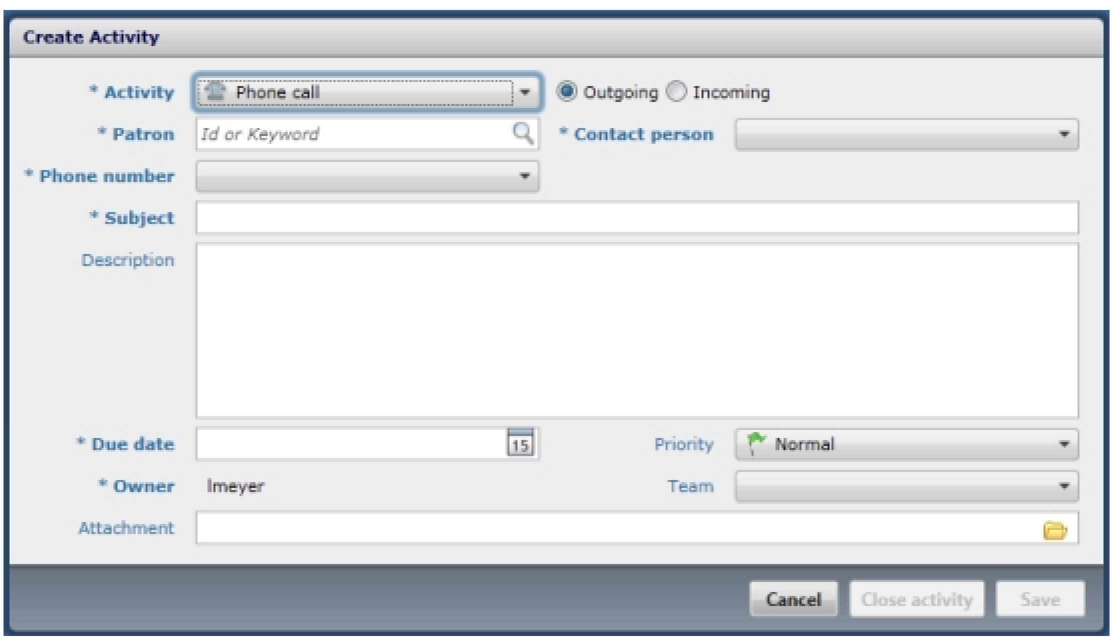
To create an email message activity for a donation opportunity

1. Click the **Donation Opportunities** button in the main navigation bar.

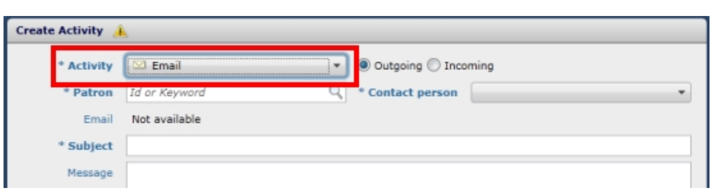


2. Locate the donation opportunity for which you want to send the new email message. For more information, see Viewing Donation Opportunity Details.
3. Select the opportunity, and then click the **Create new activity** button.

CRM displays the Create Activity form in the work area.



4. From the **Activity** drop-down list, select **Email**.



5. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

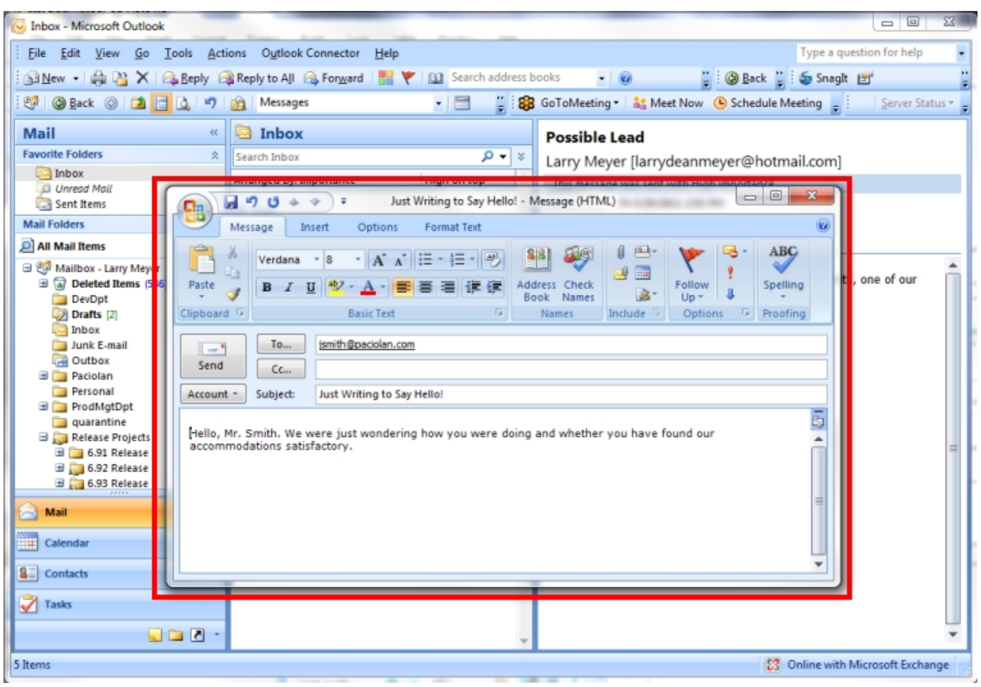
   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact person	Select the contact person from the patron record. Name #1 from the record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
Subject	Enter a brief description of the purpose of the activity.
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If

Field	Usage Information
	the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email activity in CRM and open the email in Outlook. You can then edit the item as you normally would.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

6. Do one of the following:

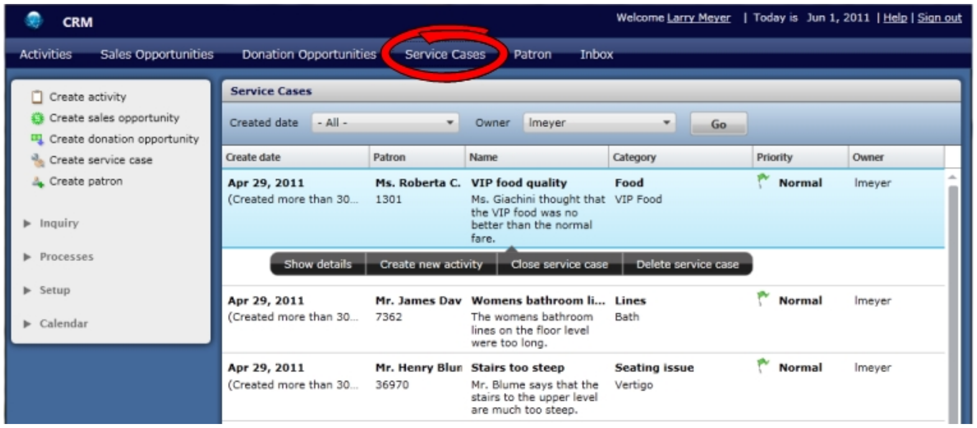
- Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



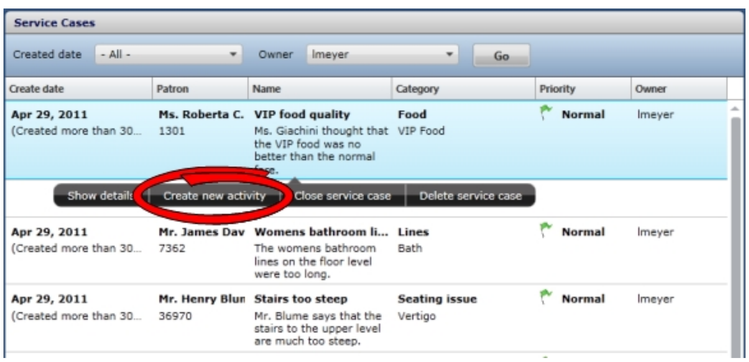
- Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

To create an email message activity for a service case

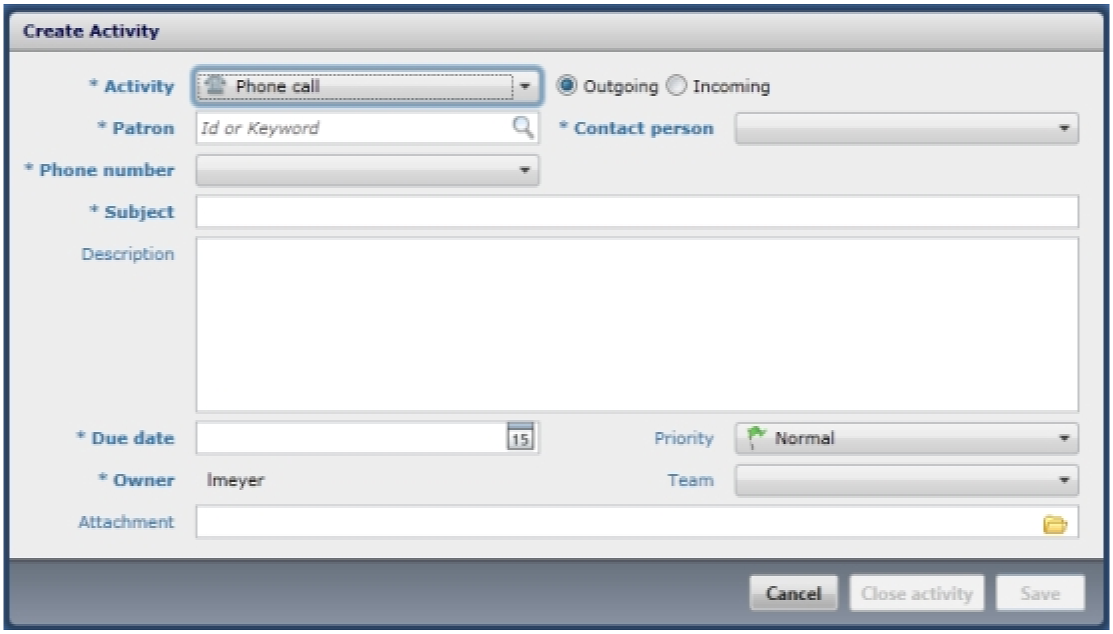
1. Click the **Service Cases** button in the main navigation bar.



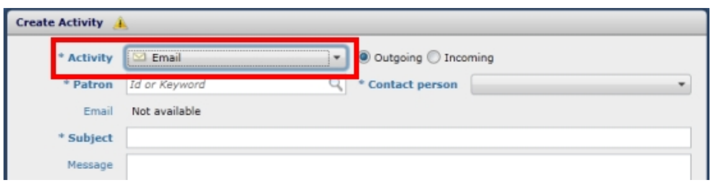
2. Locate the service case for which you want to send the new email message. For more information, see Viewing Service Case Details.
3. Select the service case, and then click the **Create new activity** button.



CRM displays the Create Activity form in the work area.



4. From the **Activity** drop-down list, select **Email**.



5. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

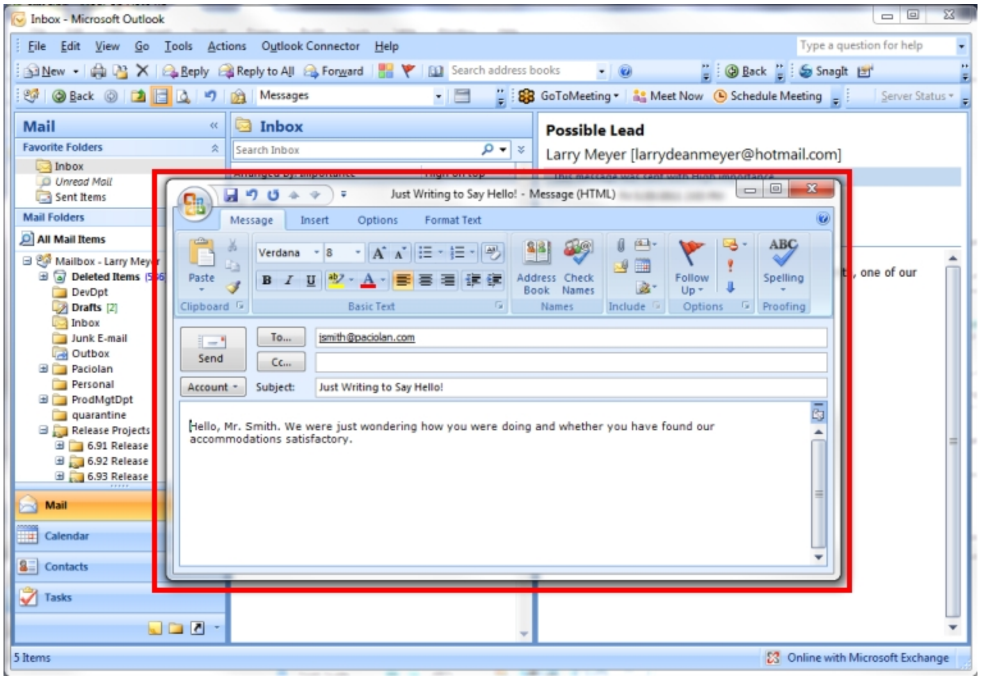
   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact	Select the contact person from the patron record. Name #1 from the record in the

Field	Usage Information
person	back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
Subject	Enter a brief description of the purpose of the activity.
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email activity in CRM and open the email in Outlook. You can then edit the item as you normally would.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

6. Do one of the following:

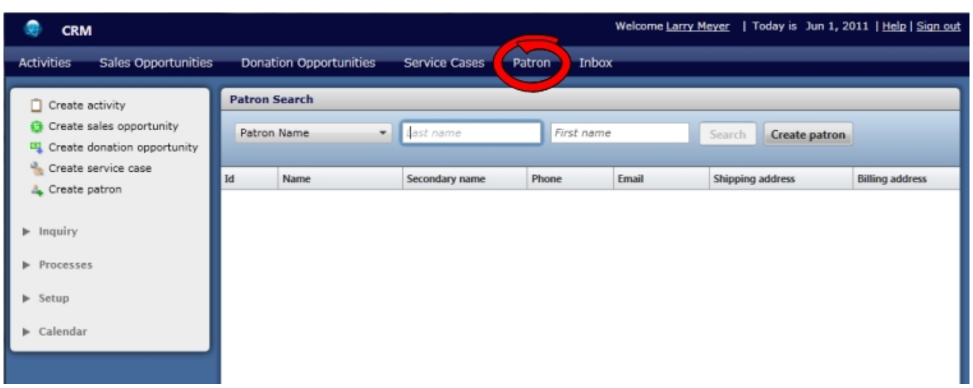
- Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



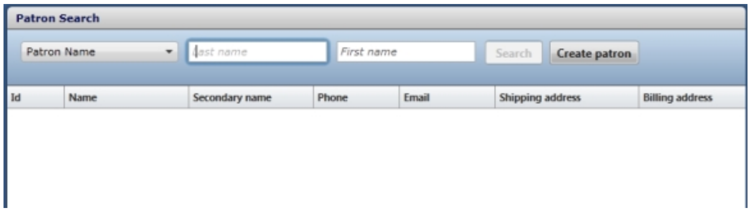
- Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

To create an email message activity from the Patron Summary form

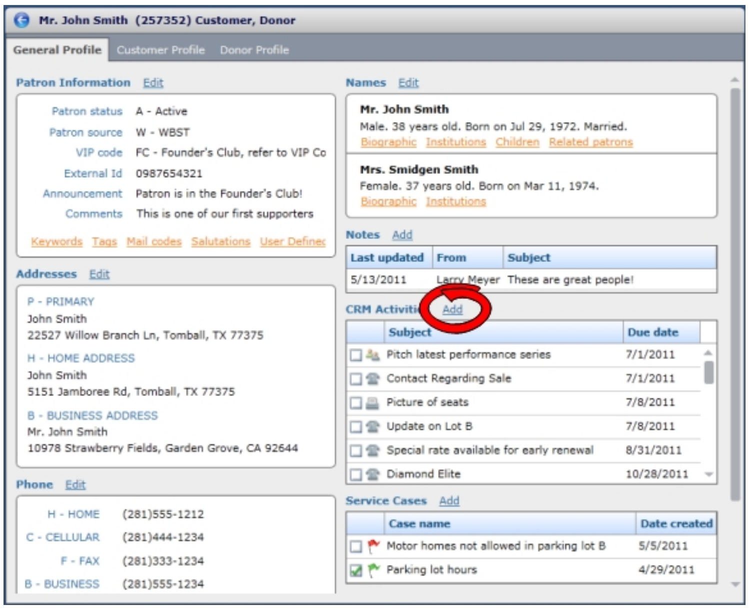
1. Click the **Patron** button on the main navigation bar.



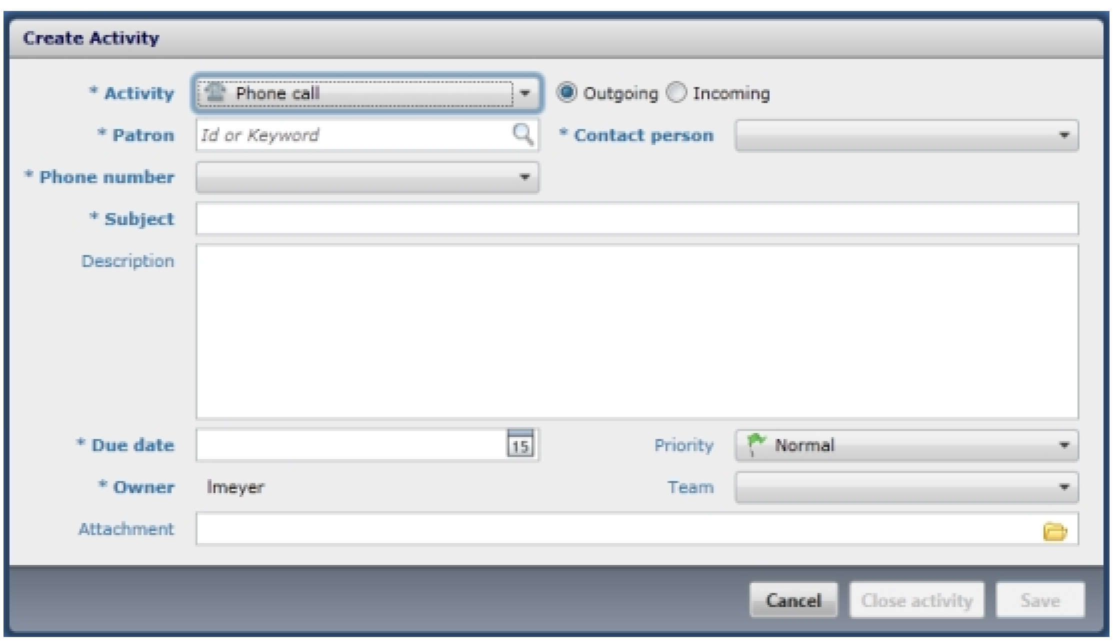
CRM displays the Patron Search form.



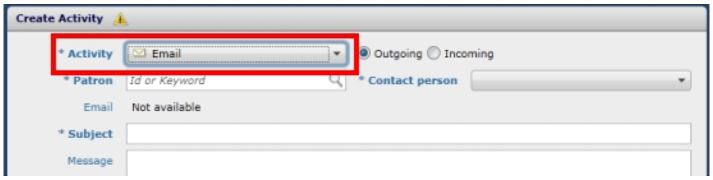
2. Use the search form to find the patron to whom you want to send an email message. For more information, see Searching for Patrons.
3. Once you've located the patron in the search results, double-click the patron's row. CRM displays the Patron Summary form for that patron.
4. In the CRM Activities section of the Patron Summary form, click the Add link.



CRM displays the Create Activity form in the work area.



5. From the **Activity** drop-down list, select **Email**.



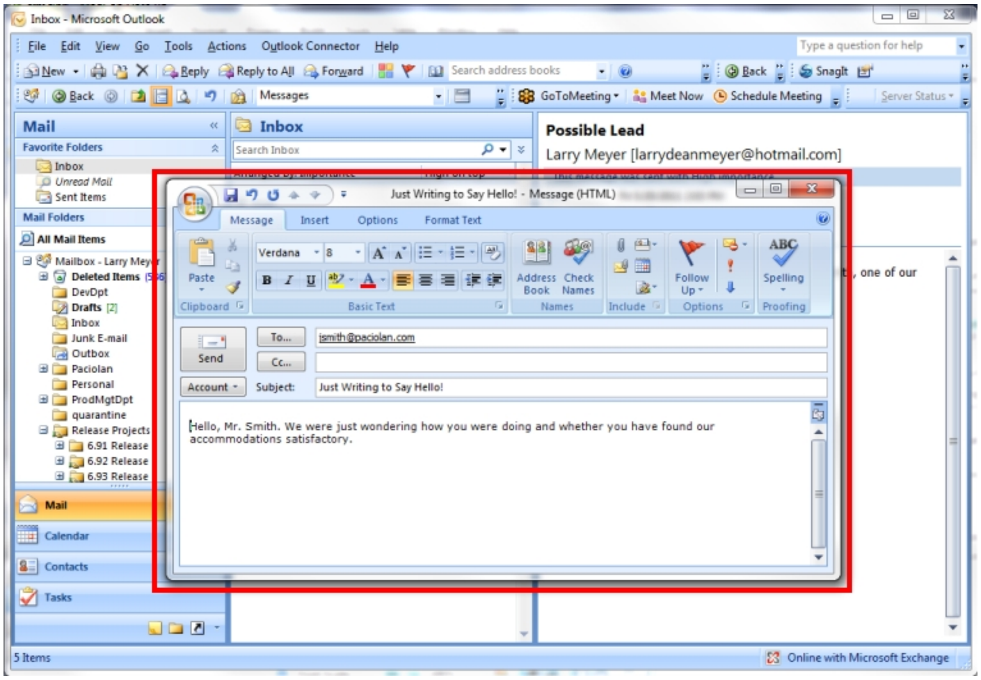
6. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact person	Select the contact person from the patron record. Name #1 from the record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
Subject	Enter a brief description of the purpose of the activity.
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates.

Field	Usage Information
	Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the . Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email activity in CRM and open the email in Outlook. You can then edit the item as you normally would.
Send Email	Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

7. Do one of the following:
   - Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.
   - Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



- Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

Replying to Email Messages

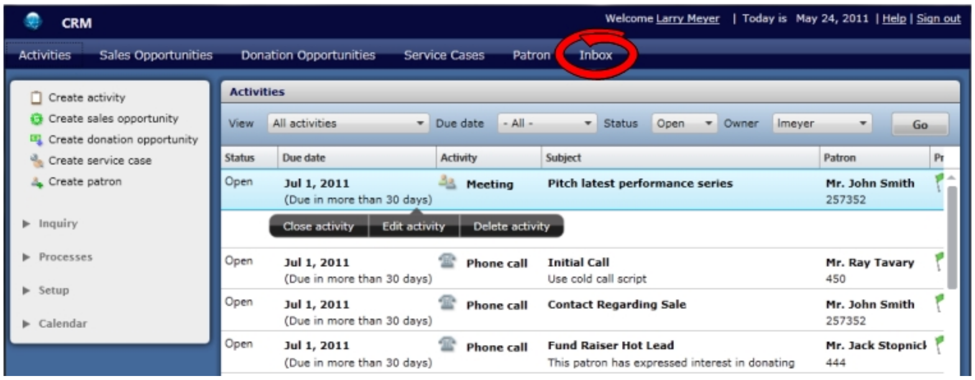
When an email message arrives in your MS Outlook Inbox, it is automatically and immediately displayed in the CRM Inbox. You can reply to an email message in the CRM Inbox at any time. When you reply to an email message, CRM creates a new email activity. Message replies are only sent to the email sender. Any other TO, CC, or BCC recipients are not included in the reply.

CRM automatically displays the Create Activity form for composing email message replies. When the form displays, email is selected as the activity type and the existing subject line is added with the RE: prefix. In addition, the original email text is automatically added to the message reply, along with the date, time, and author of the original email.

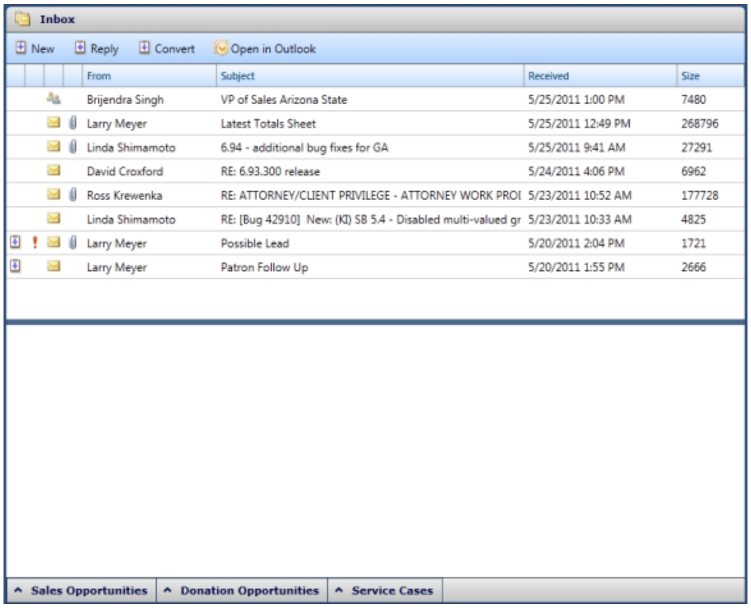
Note: If you have already downloaded the original email to a CRM activity, the email will be downloaded to a new activity again and also linked to the original email message.

To reply to an email message in the CRM Inbox

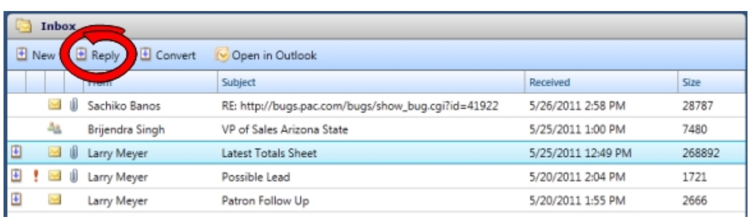
1. Click the **Inbox** button in the main navigation bar.



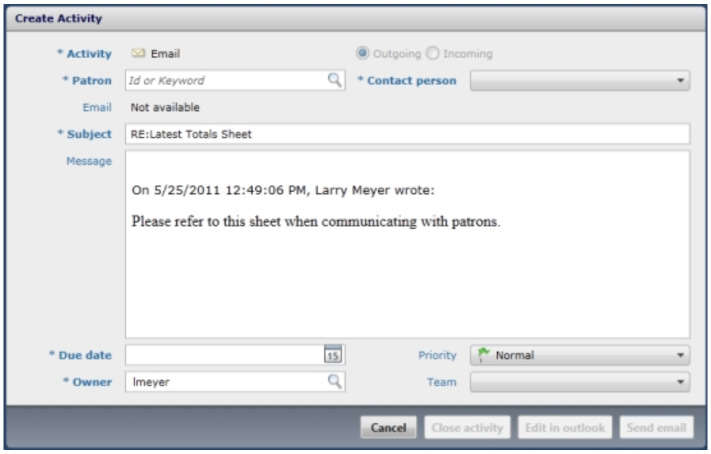
CRM displays the Inbox.



2. Select the email message row, and then click the **Reply** button. If you have previously downloaded the message by replying to it or converting it, CRM will display a confirmation dialog box. This dialog box is just to make sure you realize that the message has previously been replied to or converted to a CRM item.



CRM displays the Create Activity form.



3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

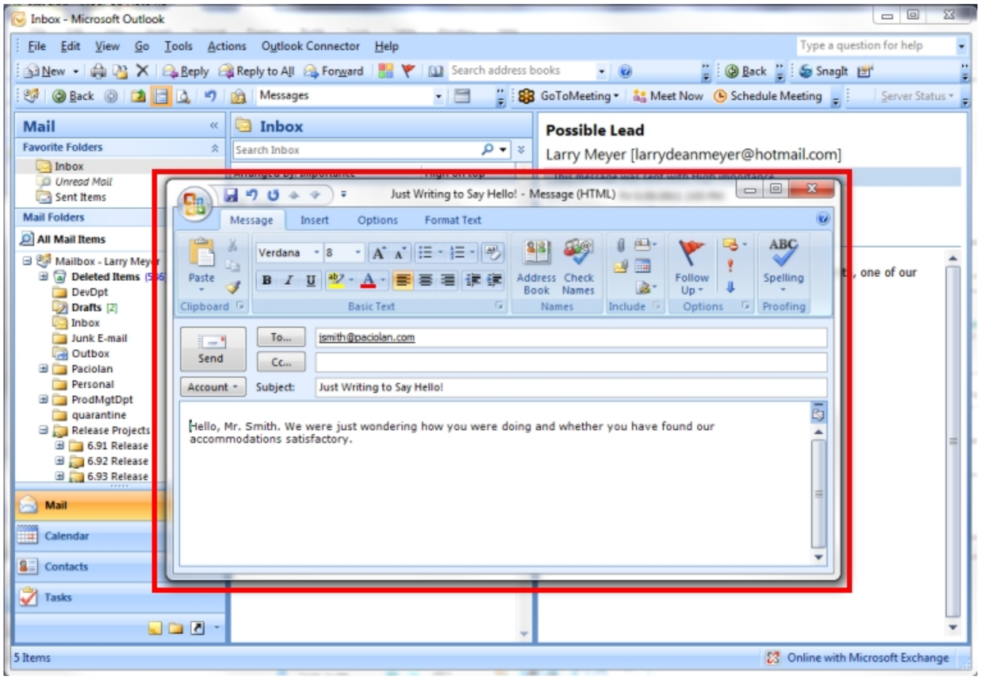
   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact person	Select the contact person from the patron record. Name #1 from the patron customer donor record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM. To learn about working with MS Outlook email in CRM, see Using Integrated Outlook.

Field	Usage Information
Subject	Enter a brief description of the purpose of the activity.
Message	For email and meeting activities, enter the body of the message for the email or meeting.The **Message** field is not required, so CRM will send a message or meeting invitation with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar. For Meeting activities, this should be set to the end day of the meeting.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include ticketing data for sales donor data for donation opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity opportunityservice case can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority lists of the opportunity and the next step activityservice case on the Details tab and the next step activity on the Next Step tab. The priority settings on the two tabs are independent of one another. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.
Edit in Outlook	(Outlook integration only) Save the email or meeting activity in CRM and open the email or meeting in Outlook. You can then edit the item as you normally would.
Send Email	(Outlook integration only) Click to send the email activity as an email message from your MS Outlook account. CRM then closes the activity and gives you the option of creating a follow-up activity.

4. Do one of the following:
   - Click the **Send email** button. CRM sends the email message and gives you the option of creating a follow-up activity or going to the Activities hub.

- Click the **Edit in outlook** button. CRM saves the activity information, opens the message in MS Outlook as an email item, closes the activity, and then gives you the option of creating a follow-up activity or going to the Activities hub. In MS Outlook, you can then edit and send the email message as you normally would.



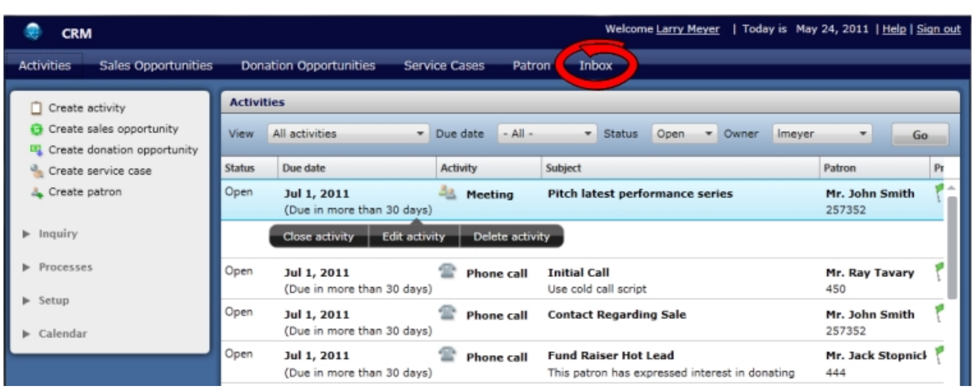
- Click the **Close activity** button. CRM closes the email activity but does not send the email message. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
- Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

Responding to Meeting Invitations

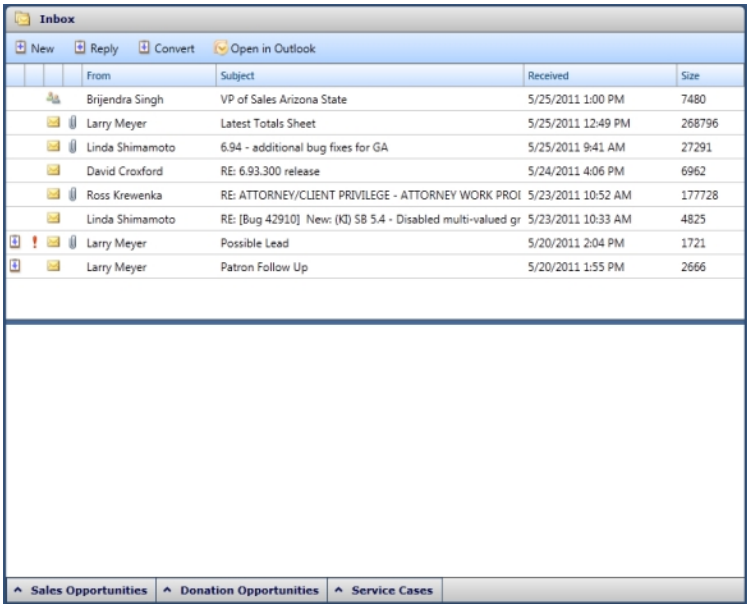
Although MS Outlook meeting invitations are visible in the CRM Inbox, you cannot respond to them directly in CRM. To respond to an invitation from the CRM Inbox, you must first open it in Outlook. Once you respond, it is removed from both the Outlook and CRM inboxes. Possible responses to a meeting invitation in Outlook include Accept, Tentative, Decline, and Propose New Time. See the MS Outlook Help for more information.

To respond to a meeting invitation from CRM

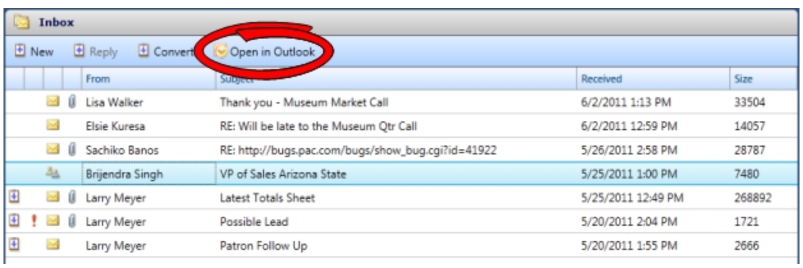
1. Click the **Inbox** button in the main navigation bar.



CRM displays the Inbox.

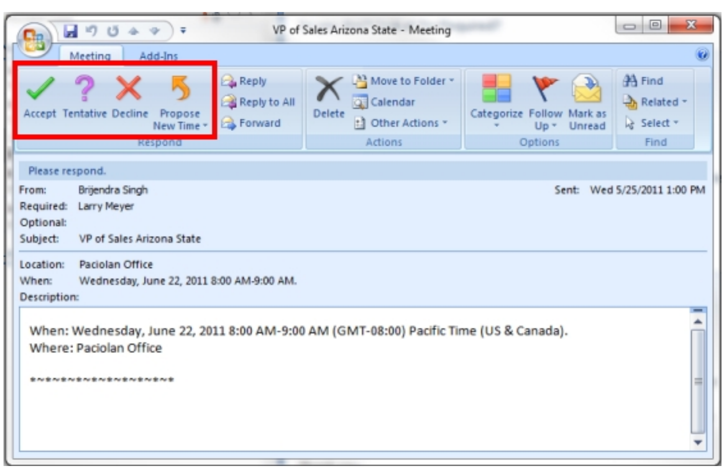


2. Locate the meeting invitation, and then do one of the following:
   - Double-click the meeting invitation row.
   - Select the meeting invitation row, and then click the **Open in Outlook** button.



CRM displays the meeting invitation in an Outlook window.

3. In the Outlook message window, click one of the invitation response buttons. For more information about Outlook meetings, see the MS Outlook Help.



Opening CRM Inbox Items in Outlook

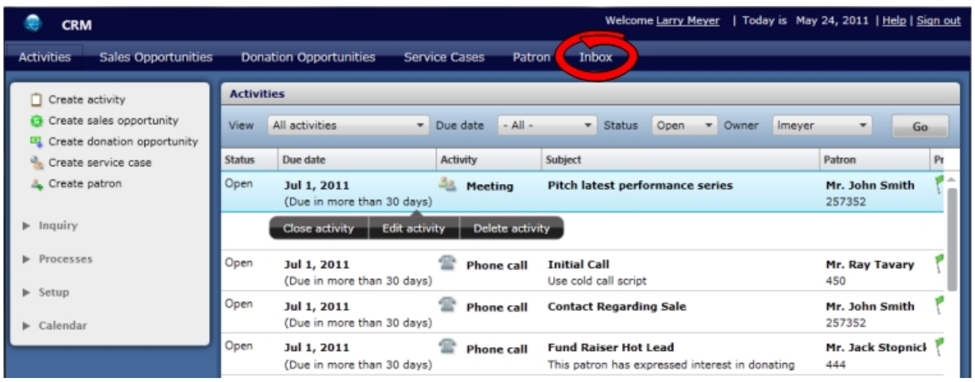
Although the CRM Inbox shares some basic functionality with the MS Outlook Inbox, you may need some of the non-integrated basic and advanced features of Outlook to process your email messages and meeting invitations. For this reason, CRM allows you to open email messages and meeting invitations in Outlook from the CRM Inbox. Some examples include:

- Since you can only reply to the sender of an email message in CRM, you may want to open the message in Outlook to use the Reply to All function.
- Since you cannot forward an email message in CRM, you need to open the message in CRM to use the Forward function.
- Since you cannot accept a meeting invitation in CRM, you need to open the meeting item in Outlook to accept the invitation.

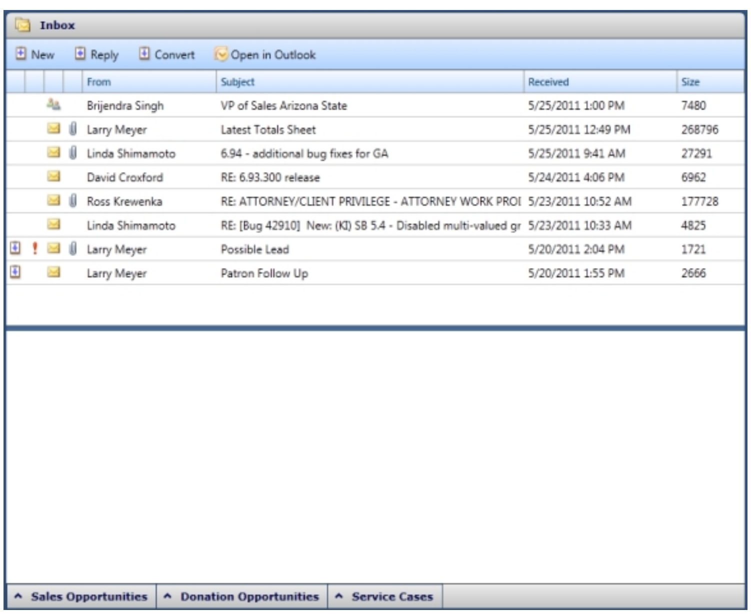
Note: If you reply to or forward an email message from the CRM Inbox in Outlook, the message will not be converted to an email activity as it would if you replied within the CRM Inbox.

To open a CRM Inbox item in Outlook

1. Click the **Inbox** button in the main navigation bar.

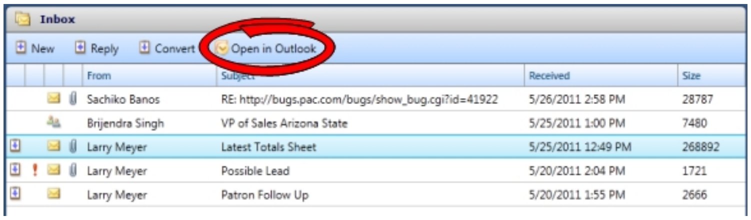


CRM displays the Inbox.

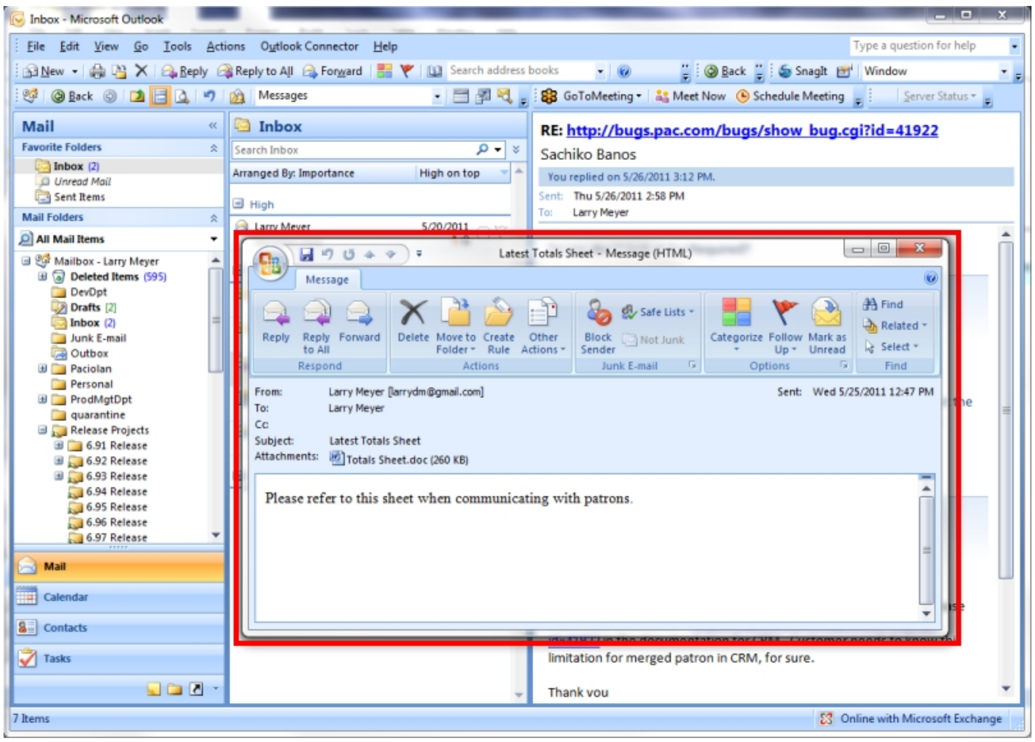


2. Do one of the following:

- Double-click the row of the email message or meeting invitation.
- Select the email message or meeting invitation, and then click the **Open in Outlook** button.



CRM displays the CRM Inbox item in Outlook. The item in the image below is an email message.



Converting Email Messages to CRM Items

If you receive an email message related that is part of your communications with a patron, you can convert the message to an activity, opportunity, or service case. Conversion of email messages allows CRM to keep track of all the communication you have with your patrons. When you convert a message to a CRM item, the message body is copied or attached to the item. Email attachments are not converted.

If the sender's email address matches one for an existing patron record, the patron information is automatically entered for the CRM item. If more than one patron has the same email address, you can choose the patron for whom you want to create the CRM item. If the email address does not match any of the patron records, you begin creating the CRM item without patron information. To complete the conversion you will then need to use the Patron Lookup to find an existing patron or enter a new patron.

For information about email message conversion to the different CRM item types, see the following:

- Converting Email Messages to Activities
- Converting Email Messages to Sales Opportunities
- Converting Email Messages to Donation Opportunities
- Converting Email Messages to Service Cases

If you receive an email message from a patron that requires further communication and you convert it to an email activity, the Create Activity form contains all the information from the original email. Once you enter the required due date,

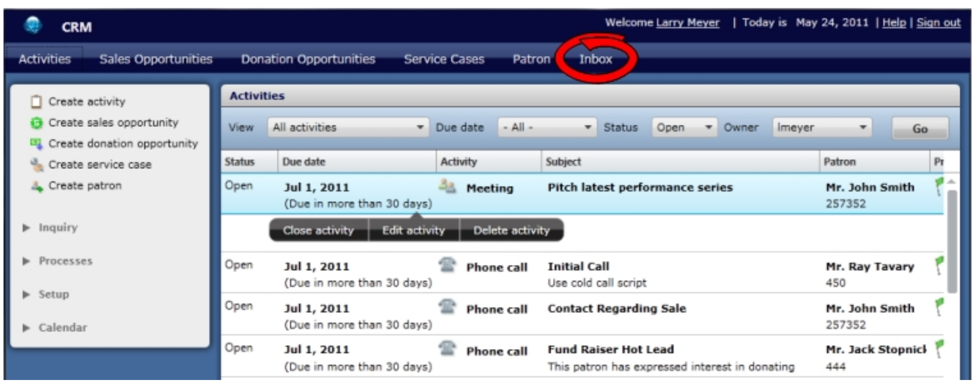
Attachments are not converted. The email message is automatically attached to new opportunities and service cases as an RTF file. If converting to an email activity, the body of the email is copied into the new activity's Message field.

Converting Email Messages to Activities

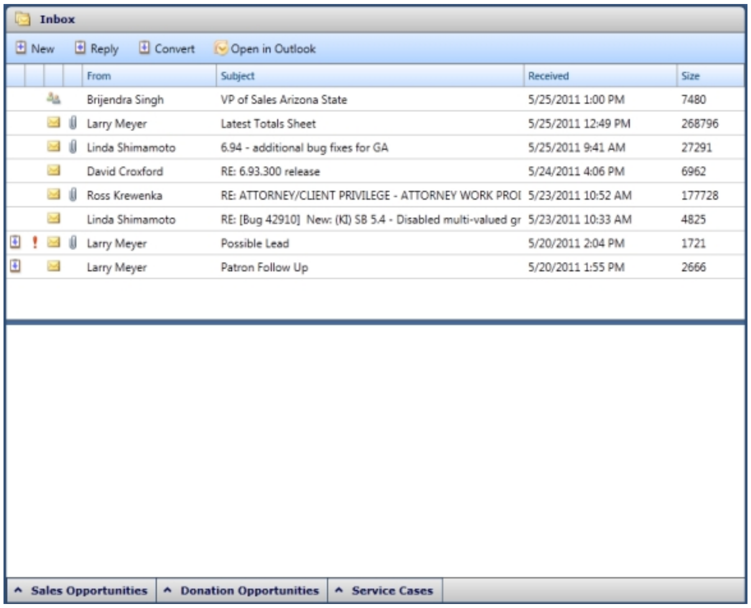
If you receive an email message from a patron, you will most likely want CRM to record it along with other communications from the same patron. To do this, you can convert the message to an email activity. When you convert the message, the sender's patron information and the message body are automatically added to the appropriate fields of the new activity. However, attachments are not kept as part of the conversion.

To convert an email message to an activity

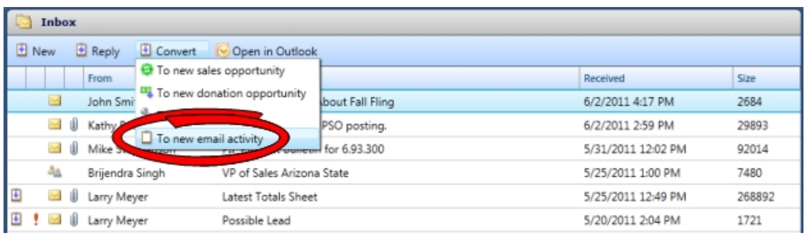
1. Click the **Inbox** button in the main navigation bar.



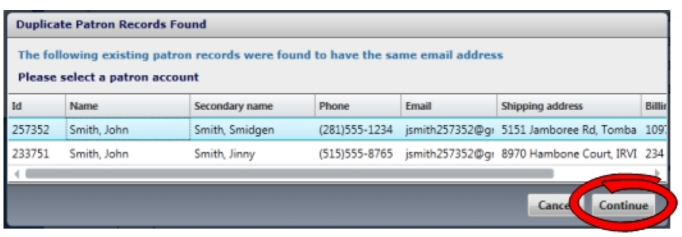
CRM displays the Inbox.



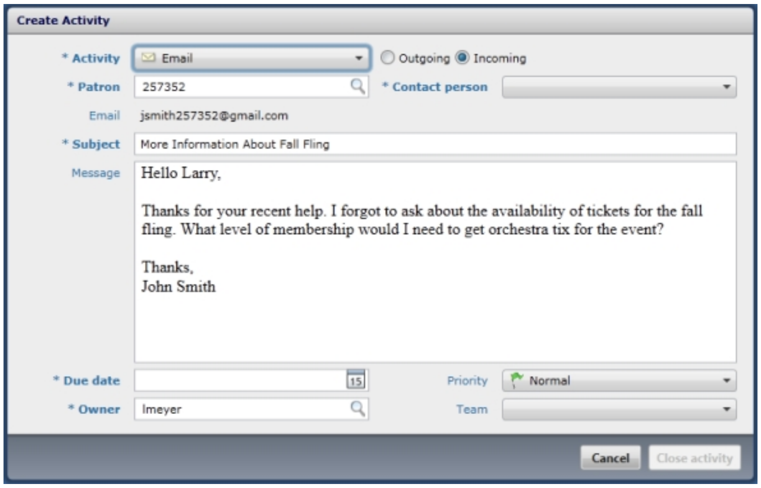
2. Select the email message you want to convert, click the **Convert** button, and then select **To new email activity** from the drop-down list.



If more than one patron has the sender's email address, CRM displays the Duplicate Records Found dialog box. If this dialog box displays, select the patron who sent the email, and then click the **Continue** button. You can also just double-click the patron row.



CRM displays the Create Activity form with the information from the patron record and the email message automatically entered in the form fields. If the message sender's email address is not already in a patron record, use the Patron Lookup to locate the sender's record. If the sender does not have a patron record, you can use the Patron Lookup to create one. For more information, see Using the Patron Lookup.



3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. Click the link below to display a table with usage information about the fields on this form.

   List of the fields with usage information.

Field	Usage Information
Activity	This field defaults to the **Email** activity type with the **Incoming** option selected. If you decide another activity type is more appropriate, you can change it in this field. However, unless you change the activity type to **Meeting**, you will lose the message body of the original email. For information about creating other activity types, see Manually Creating Activities.
Patron	This field is static and the lookup is unavailable if the email address of the sender is already associated with a patron record. If the email address does not belong to a patron, enter the patron ID or keyword, or use the Patron Lookup to select a patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons.
Patron Lookup	Click  to display the Patron Lookup. For information, see Using the Patron Lookup.
Contact person	Select the contact person from the patron record. Name #1 from the patron record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.

Field	Usage Information
Subject	Enter a brief description of the purpose of the activity.
Message	For email activities, enter the body of the message for the email.The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an activity can still be created with a non-assigned owner.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the activity. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Team	(Optional) Owners who are assigned to one or more teams can assign the activity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.
Cancel	Click this button to close the form without saving and return to the previous form.
Close activity	Click this button to close an activity. When you click **Close Activity**, any changes you've made will be saved, and then the activity status is changed from open to closed. You will also be given the choice of creating a follow-up activity or returning to the previous form.

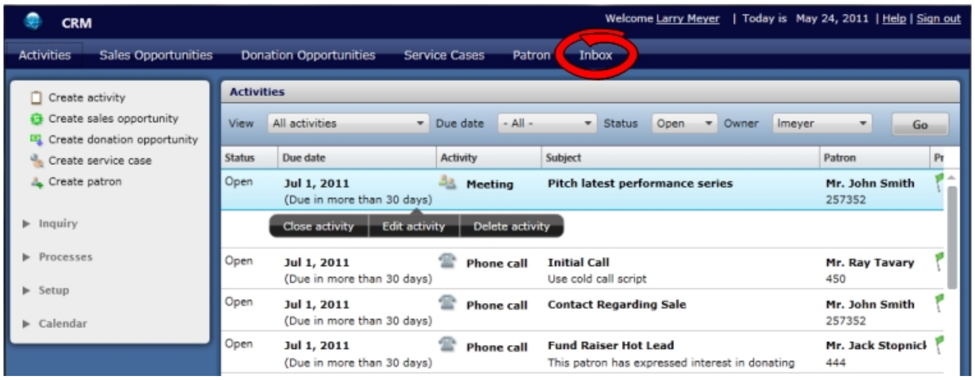
4. Do one of the following:
   - Click the **Close activity** button. CRM saves and then closes the email activity. CRM also gives you the option of creating a follow-up activity or going to the Activities hub.
   - Click the **Cancel** button. CRM closes the Create Activity form without saving any field entries and then redisplays the CRM Inbox.

Converting Email Messages to Sales Opportunities

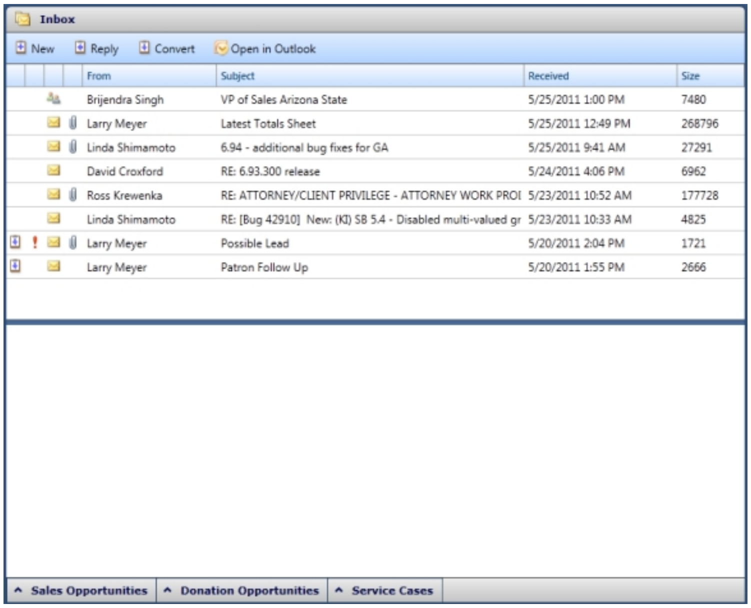
When you receive an email message that opens up an opportunity to make a sale, you can convert the message to a sales opportunity. This allows you to keep track of all subsequent communication activities you perform toward winning the opportunity. For more information about opportunities, see Working with Opportunities.

To convert an email message to a sales opportunity

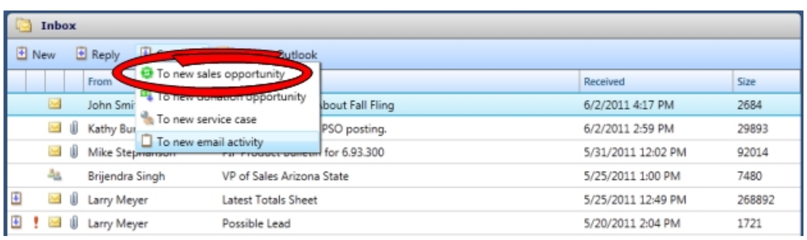
1. Click the **Inbox** button in the main navigation bar.



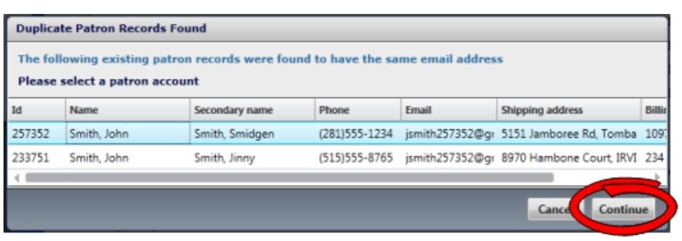
CRM displays the Inbox.



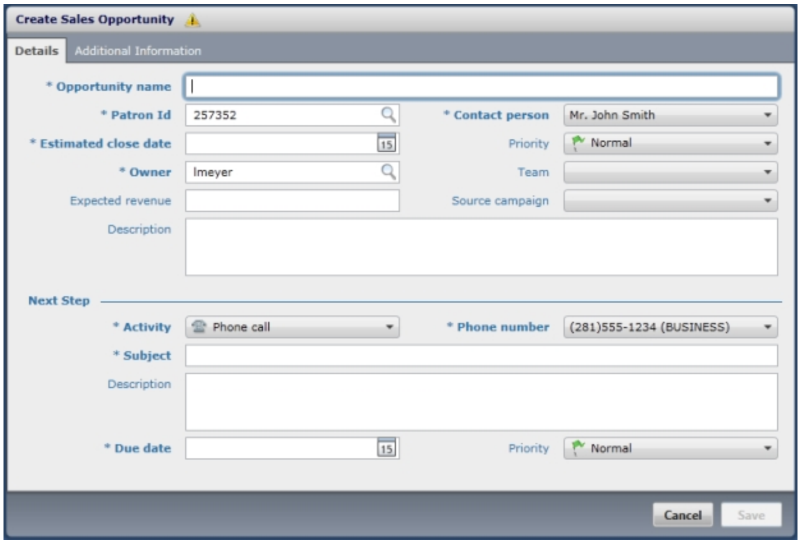
2. Select the email message you want to convert, click the **Convert** button, and then select **To new sales opportunity** from the drop-down list.



If more than one patron has the sender's email address, CRM displays the Duplicate Records Found dialog box. If this dialog box displays, select the patron who sent the email, and then click the **Continue** button. You can also just double-click the patron row.



CRM displays the Create Sales Opportunity form with information from the patron record entered in the appropriate fields and the email message attached to the opportunity as a rich text format (.rtf) file. If the sender's email address is associated with a patron record,the **Patron Id** field is static.



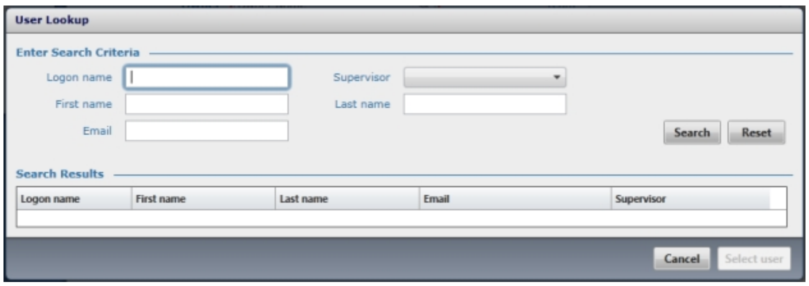
3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. See the table below for an alphabetical list of the fields that may be included on this form with usage information about each one.

   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	Select an activity type for the first step towards winning the opportunity. The activity is automatically assigned to the owner of the opportunity. For the Email activity type, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Additional Information tab	This tab contains data that is optional during sales opportunity creation, including probability to close, milestone selection, file attachments, and access restriction. All Additional Information tab fields are optional.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	The original email message text is attached to the opportunity or service case as a rich text format (.rtf) file. You can only attach one file, so you would have to remove the link to the .rtf file to attach another file. Supported file types include .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx.
Cancel	Click this button to close the form without saving and return to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the customer record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only

Field	Usage Information
	select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) In the first **Description** text box, enter a detailed description of the sales opportunity. In the **Description** text box in the Next Step area, enter a description of the next step activity.
Details tab	The default tab on the Create Sales Opportunity form. Use this tab to enter key information about the new opportunity. When you switch between this tab and the Additional Information tab, any entered or selected data is kept. You can navigate to the Additional Information tab even if you have entered invalid data on the Details tab.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Estimated close date	Enter or use the calendar popup to select the approximate date on which the owner will complete this opportunity. The estimated close date can be past, present or future.
Expected revenue	Enter the amount of money that you expect to be generated from the sales opportunity. The entry must be numeric and can include a decimal point and commas.
Fax Number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email activities, enter the body of the message for the email. The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Milestone	This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Next Step	The area of the Details tab where the activity required for the opportunity is entered. This is the first activity that must be completed to win the opportunity. This activity will display on the Activity hub of the opportunity owner

Field	Usage Information
	and that of the owner's supervisor.
Opportunity name	The descriptive name that is displayed wherever the opportunity is represented in CRM.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include ticketing data for sales opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner.



Field	Usage Information
Patron Id	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A sales opportunity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an opportunity . This is because CRM assumes the sales opportunity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity and the next step activity. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM func-

Field	Usage Information
	tionality, but you can use priority assignments for reporting.
Probability to close	The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Sales Opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the opportunity by clicking the **Create sales opportunity** button in the left navigation pane, CRM will display the Sales Opportunities hub. The **Save** button is enabled only if all required fields have valid entries.
Source campaign	(Optional) Select one of the predefined source campaigns from the drop-down list. CRM campaigns are used to group opportunities for reporting. They allow you to measure campaigns against each other or report on a single campaign with opportunities created from different patron lists. See Managing Source Campaigns.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

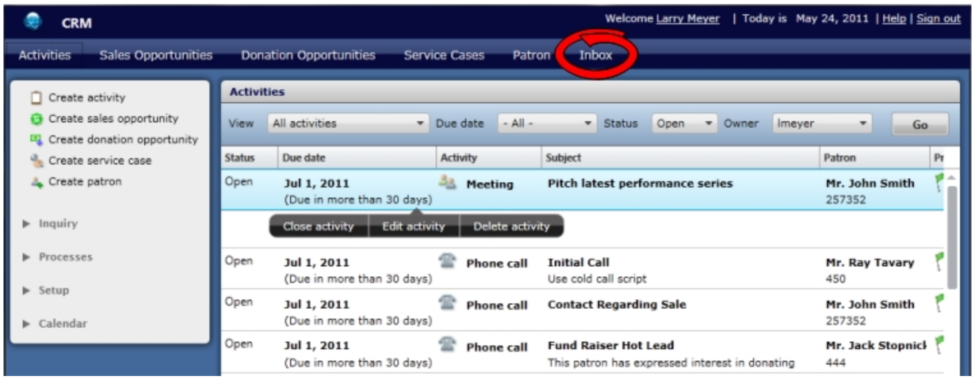
4. Click the **Save** button.

Converting Email Messages to Donation Opportunities

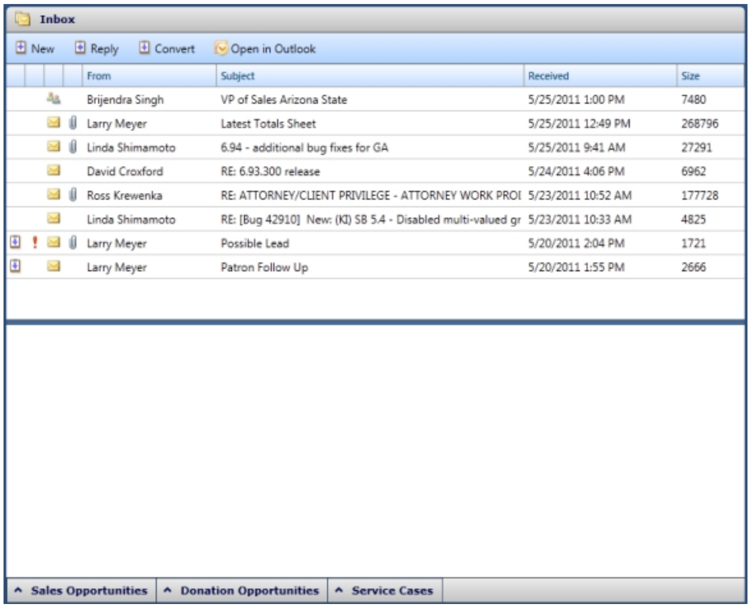
When you receive an email message that opens up an opportunity to solicit a donation, you can convert the message to a donation opportunity. This allows you to keep track of all subsequent communication activities you perform toward winning the opportunity. For more information about opportunities, see Working with Opportunities.

To convert an email message to a donation opportunity

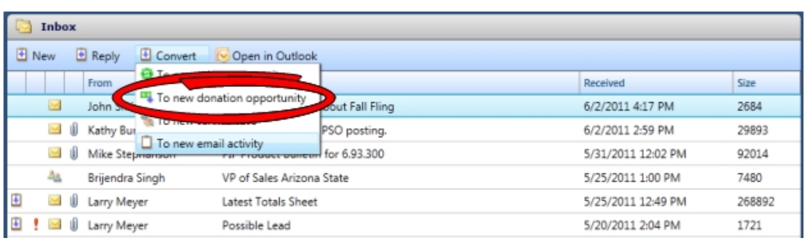
1. Click the **Inbox** button in the main navigation bar.



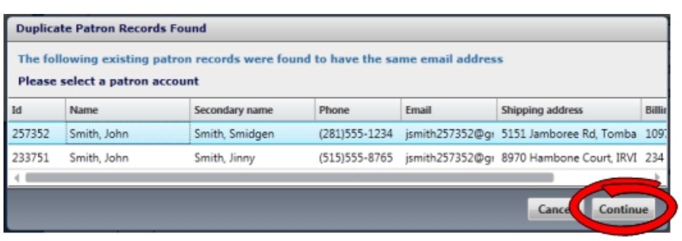
CRM displays the Inbox.



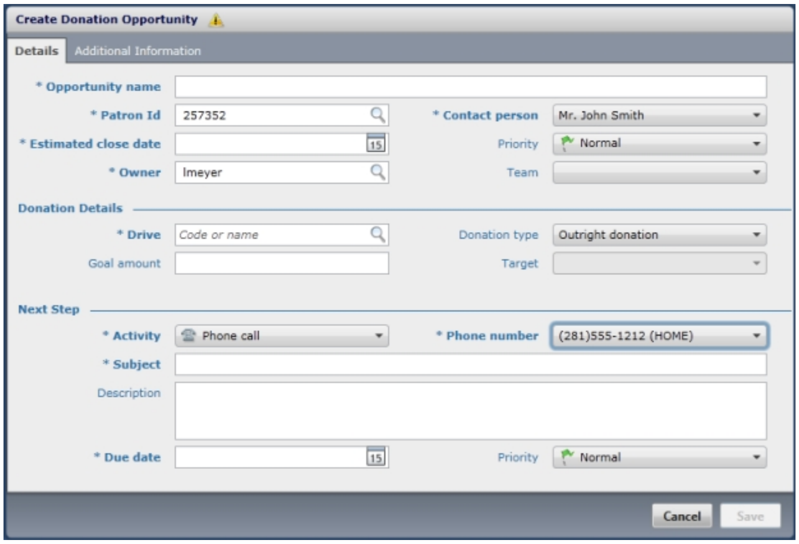
2. Select the email message you want to convert, click the **Convert** button, and then select **To new donation opportunity** from the drop-down list.



If more than one patron has the sender's email address, CRM displays the Duplicate Records Found dialog box. If this dialog box displays, select the patron who sent the email, and then click the **Continue** button. You can also just double-click the patron row.



CRM displays the Create Donation Opportunity form with information from the patron record entered in the appropriate fields and the email message attached to the opportunity as a rich text format (.rtf) file. If the sender's email address is associated with a patron record,the **Patron Id** field is static.

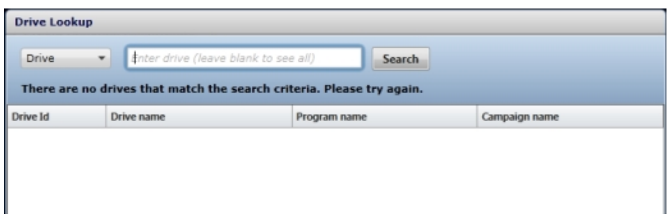


3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. See the table below for an alphabetical list of the fields that may be included on this form with usage information about each one.

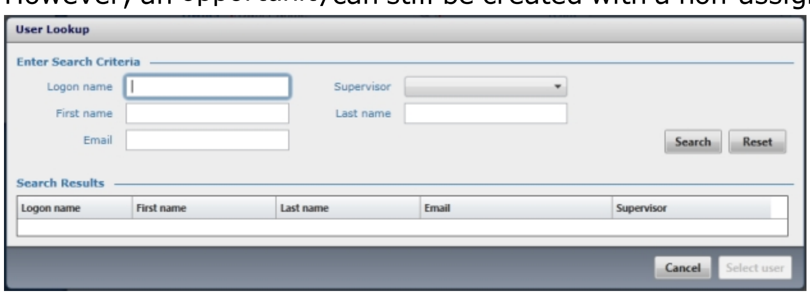
   See an alphabetical list of the fields with usage information.

Field	Usage Information
Activity	Select an activity type for the first step towards winning the opportunity. The activity is automatically assigned to the owner of the opportunity. For the Email activity type, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Additional Information tab	This tab contains data that is optional during donation opportunity creation, including probability to close, milestone selection, opportunity description, file attachments, and access restriction. All Additional Information tab fields are optional.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	The original email message text is attached to the opportunity or service case as a rich text format (.rtf) file. You can only attach one file, so you would have to remove the link to the .rtf file to attach another file. Supported file types include .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx.
Cancel	Click this button to close the form without saving and return to the previous form.
Contact person	Select the contact person from the patron record. Name #1 from the donor record in the back office is available by default in the drop-down list. If the record

Field	Usage Information
	has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	(Optional) In the **Description** text box on the Additional Information tab, enter a detailed description of the donation opportunity. In the **Description** text box in the Next Step area, enter a description of the next step activity.
Details tab	The default tab on the Create Donation Opportunity form. Use this tab to enter key information about the new opportunity. When you switch between this tab and the Additional Information tab, any entered or selected data is kept. You can navigate to the Additional Information tab even if you have entered invalid data on the Details tab.
Donation type	The donation type options include outright donation, pledge, and gift in kind. Donation types are not configurable.
Drive	Drives and campaigns are defined in the back office using tFund. Enter the drive or campaign name or click to use the Drive Lookup. If you don't remember the exact drive or campaign name, you can select one from a list by leaving the **Drive** search field empty and clicking the **Search** button.



Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Estimated close date	Enter or use the calendar popup to select the approximate date on which the owner will complete this opportunity. The estimated close date can be past, present or future.
Fax number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Goal amount	Enter the amount of money you hope to collect from the donor for this donation opportunity. The entry must be numeric and can include a decimal point and commas.

Field	Usage Information
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email activities, enter the body of the message for the email. The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Milestone	This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Next Step	The area of the Details tab where the activity required for the opportunity is entered. This is the first activity that must be completed to win the opportunity. This activity will display on the Activity hub of the opportunity owner and that of the owner's supervisor.
Opportunity name	The descriptive name that is displayed wherever the opportunity is represented in CRM.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates, as long as they are active users and their permissions include donor data for donation opportunities. For permissions information, see managing users.The owner cannot be changed once the opportunity is closed. Click in the **Owner** field to display the User Lookup, and then use the form to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an opportunitycan still be created with a non-assigned owner. 
Patron Id	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A donation opportunity can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an oppor-

Field	Usage Information
	tunity . This is because CRM assumes the donation opportunity is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone Number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list of the opportunity and the next step activity. Your organization can decide what these priority levels mean. When you change the opportunity priority during manual creation or editing, CRM automatically changes the Next Step activity priority as well. However, if you change the priority later, the existing next step activity's priority will not change. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Probability to close	The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Donation Opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the opportunity by clicking the **Create donation opportunity** button in the left navigation pane, CRM will display the Donation Opportunities hub. The **Save** button is enabled only if all required fields have valid entries.
Start Time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Subject	Enter a brief description of the purpose of the activity.
Target	If the drive you select has targets associated with it, select a target from this list. A target is used in the tFund system to represent a group of donors or patrons.
Team	(Optional) Owners who are assigned to one or more teams can assign the opportunity to one of those teams. Only teams to which the owner is assigned will be available in the drop-down list. If you are a manager, you can configure teams.

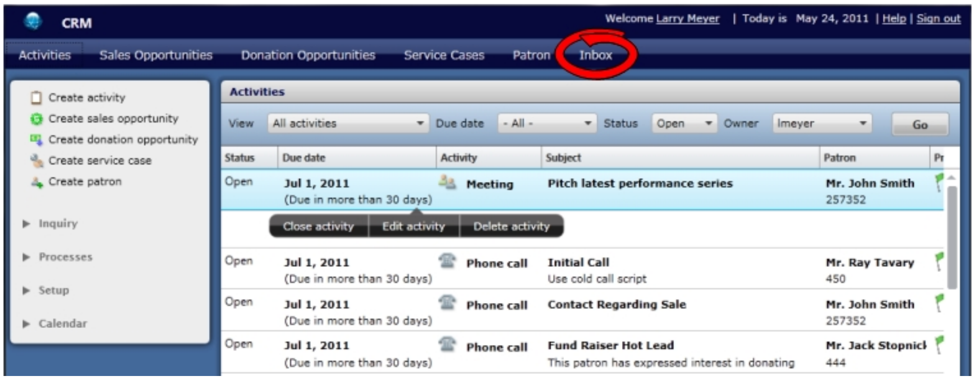
4. Click the **Save** button.

Converting Email Messages to Service Cases

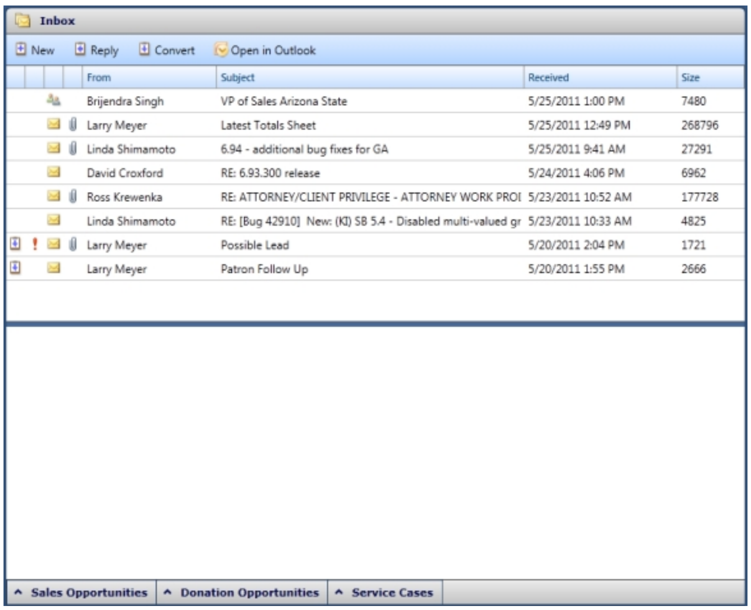
When you receive an email message that requires you to open a service case , you can convert the message to a service case. This allows you to keep track of all subsequent communication activities you perform to resolve the patron's issue. For more information about service cases, see Working with Service Cases.

To convert an email message to a service case

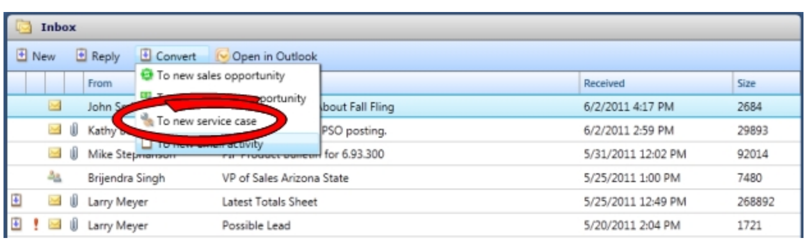
1. Click the **Inbox** button in the main navigation bar.



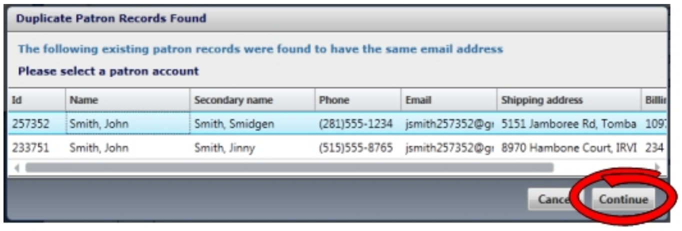
CRM displays the Inbox.



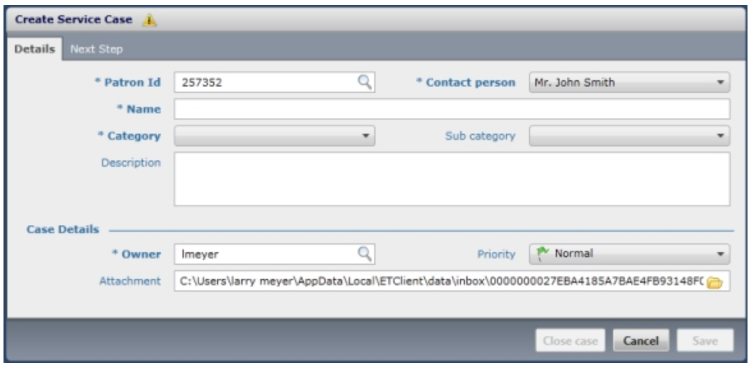
2. Select the email message you want to convert, click the **Convert** button, and then select **To new service case** from the drop-down list.



If more than one patron has the sender's email address, CRM displays the Duplicate Records Found dialog box. If this dialog box displays, select the patron who sent the email, and then click the **Continue** button. You can also just double-click the patron row.



CRM displays the Create Service Case form with information from the patron record entered in the appropriate fields and the email message attached to the service case as a rich text format (.rtf) file. If the sender's email address is associated with a patron record,the **Patron Id** field is static.



3. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields. See the table below for an alphabetical list of the fields that may be included on this form with usage information about each one.

   See an alphabetical list of the fields with usage information

Field	Usage Information
Activity	Select an activity type for the first next step towards addressing the customer complaint. The activity is automatically assigned to the owner of the service case. For the Email activity type, you must select either **Outgoing** or **Incoming**. Outgoing activities are initiated by internal personnel, whereas incoming activities are created in response to communication from external patrons. Outgoing and incoming do not apply to Meeting activities. If you change the activity type after entering information in other fields on this form, the information you entered will be kept.
Address	When creating a letter activity, select an address from this drop-down list. The addresses appear in the order they are entered during patron entry in the back office or CRM.
Attachment	The original email message text is attached to the opportunity or service case as a rich text format (.rtf) file. You can only attach one file, so you would have to remove the link to the .rtf file to attach another file. Supported file types include .rtf, .doc, .docx, .pdf, .jpg, .bmp, .xls, or .xlsx.
Cancel	Click this button to close the form without saving and return to the previous form.
Category	You must select a category for the service case. Categories for service cases include service areas about which customers may complain, such as parking, concessions, and restroom lines. Categories are used to generate CRM data views of service cases. Service case categories and subcategories are con-

Field	Usage Information
	figurable in CRM. See Configuring Service Case Categories.
Close case	If no further activity is required after entering the service case, you can click this button to save and close the service case. If you want the service case to remain open, click the **Save** button.
Contact person	Select the contact person from the patron record. Name #1 from the patron record in the back office is available by default in the drop-down list. If the record has a Name #2, that name can also be selected from the list. You can only select one contact person. If the patron is an organization, this field becomes a text box, and the company name is entered by default. Changes to an organizational contact must be entered manually. Changes to the **Contact person** text box are not saved to the patron record in the back office.
Description	There are two Description text boxes. On the Details tab, enter a detailed description of the customer complaint. On the Next Step tab, enter a description of the activity that must be completed to address the complaint.
Details tab	The fields on this tab capture the details of the customer's complaint.
Due date	Either enter a date in the field or click the calendar icon to select it from the popup calendar.
Email	When creating an email activity, the primary email address is displayed in this field. You cannot enter an alternate email address. CRM uses the address entered in the back office as email type E for the primary email address. If the patron does not have an email address type E entered in the back office or CRM, you cannot send the patron an email from CRM.
End Time	For meeting activities only, use this field to enter the start and end date and time. Click the calendar icon to select an end date from the popup calendar, and use the drop-down list to select the end time. If you select **All day event**, you do not need to enter an end time.
Fax number	The list of fax and phone numbers from the customer or donor record in the order they were entered in the back office. Since the fax phone type is not included in the list of phone numbers, you may need to view the patron record to select the appropriate fax number.
Location	For meeting activities only, enter a description of the meeting location. This field does not correspond to any meeting place or room addresses that are available in MS Outlook. The text entered in this field is for information purposes only.
Message	For email activities, enter the body of the message for the email. The **Message** field is not required, so CRM will send a message with no body if you do not enter the message body here.
Name	Enter a short, descriptive name for the service case. This is not related to the patron name.
Next Step tab	If you need to take action to address the customer complaint in the service case after it is created, use these fields to open a next step activity when the case is saved.
Owner	This field defaults to the sign in name of the creator. You can make any CRM user the owner, including your supervisor and subordinates. Click in the **Owner** field to display the User Lookup, and then use the form

Field	Usage Information
	to select an owner. Or, if you know the owner's sign in name, you can enter the name directly into the **Owner** field. If you only know part of the sign in name, you can enter it in the **Owner** field and then click to get search results in the User Lookup for the partial name. The User Lookup will find any CRM user. For more information about the User Lookup, see Selecting Users with the User Lookup. If the patron has an assigned representative and you enter a different owner, CRM will display a warning message to that effect. However, an service case can still be created with a non-assigned owner.
Patron Id	Enter the patron ID or keyword, or use the Patron Lookup to select a patron. A service case can only be associated with one patron. Once the patron ID is entered, the patrons from the record will be available in the **Contact person** field. If the patron has an assigned owner other than the one in the **Owner** field, CRM will display a warning message to that effect. For information about searching for and assigning owners to patrons, see Working with Patrons. The **Patron Id** field is static and the lookup is unavailable if this form is accessed from a patron profile or while converting an email to an service case. This is because CRM assumes the service case is being created for that patron.
Patron Lookup	Click to display the Patron Lookup. For information, see Using the Patron Lookup.
Phone number	Select the phone number to use to contact the patron. The list of fax and phone numbers from the customer or donor record are listed in the order they were entered in the back office. The phone numbers have their the phone types (home phone, cellular, etc.) displayed next to them.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority lists of the service case on the Details tab and the next step activity on the Next Step tab. The priority settings on the two tabs are independent of one another. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Save	Click this button to save changes, close the form, and return to the previous form. If you created the service case by clicking the **Create service case** button in the left navigation pane, CRM will display the Service Cases hub. The **Save** button is enabled only if all required fields have valid entries.
Start time	For meeting activities only, use this field to enter the start date and time. Click the calendar icon to select the start date from the popup calendar, and use the drop-down list to select the times. If the meeting will last the whole day, select **All day event** instead of entering start and end times.
Sub category	If the currently selected category has subcategories, you can select one from this list.
Subject	Enter a brief description of the purpose of the activity.

4. Do one of the following:
   - To save the service case and leave it open, click **Save**.
   - To save and immediately close the service case, click **Close case.**

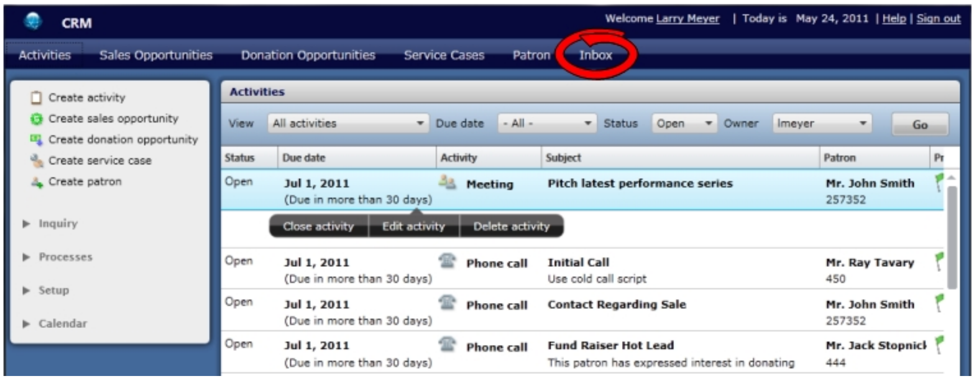
Associating Email Messages with CRM Items

If you receive an email message that pertains to an existing CRM item (opportunity or service case), you can associate the email with the item in the CRM Inbox. Associating email messages to

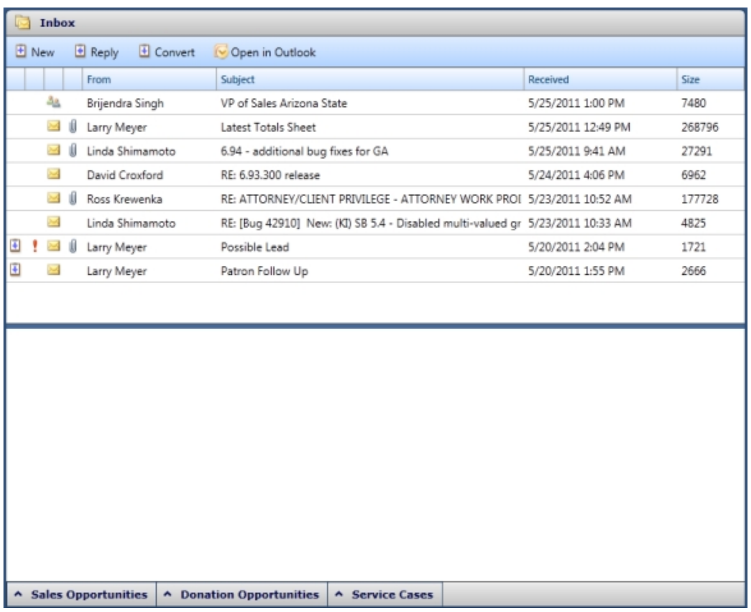
CRM items allows CRM to track all communication activities related to each opportunity and service case. When you associate an email message to a CRM item, CRM automatically creates a new email activity for the message. This activity is created for the CRM item and its patron.

To associate an email message with a sales opportunity

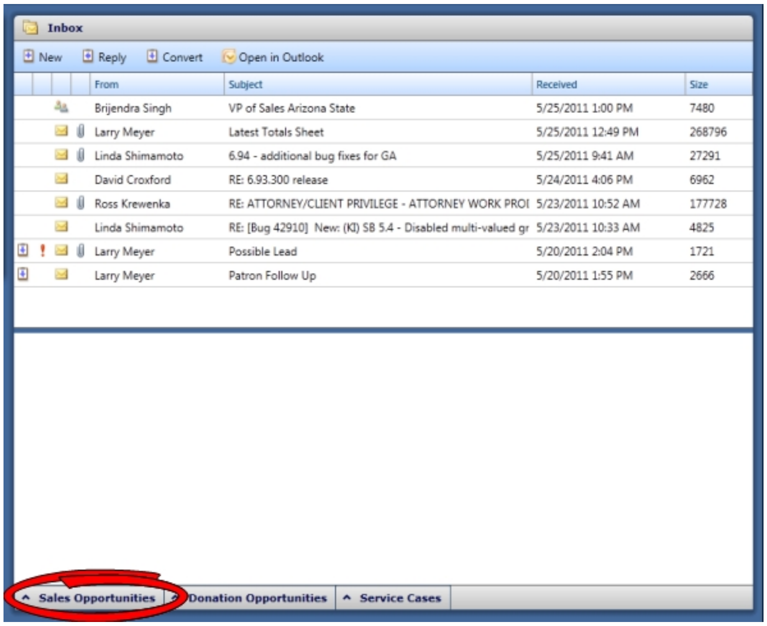
1. Click the **Inbox** button in the main navigation bar.



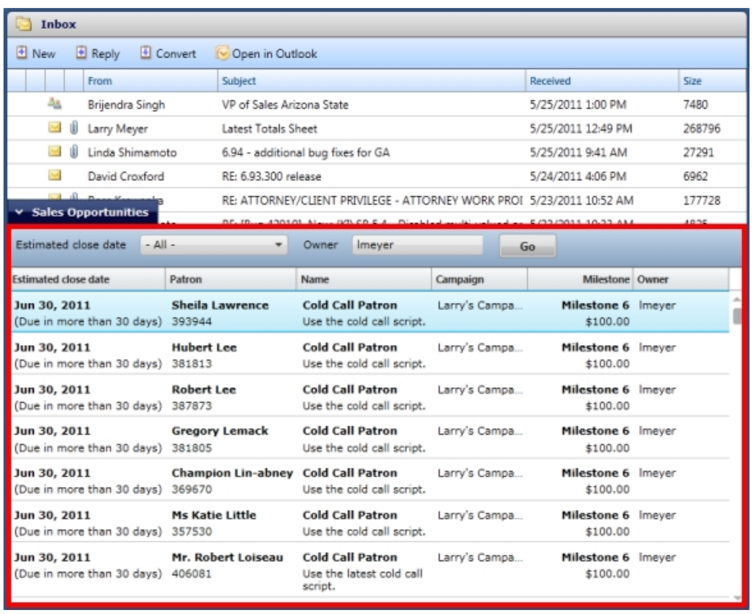
CRM displays the Inbox.



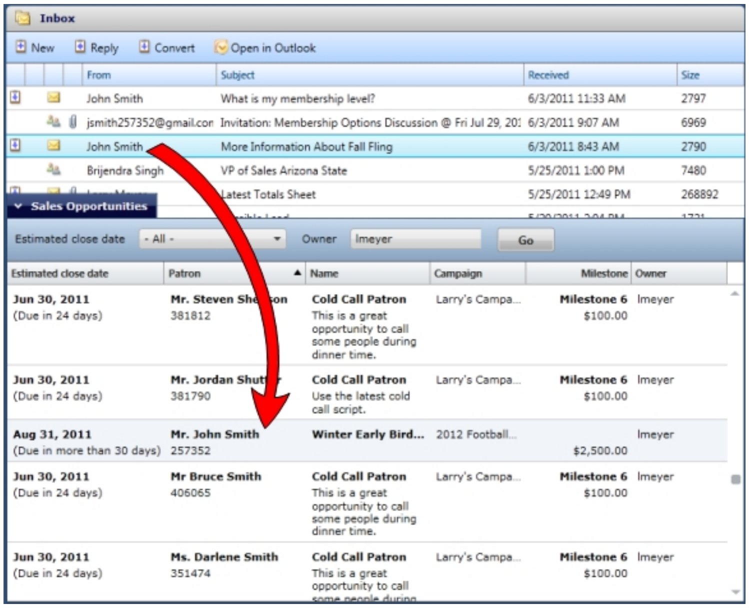
2. Click the **Sales Opportunities** tab at the bottom of the Inbox.



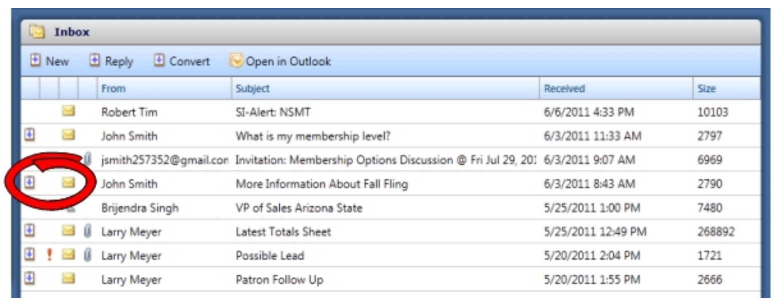
CRM displays the panel within the Inbox. When you want to minimize the opportunities, just click the **Sales Opportunities** tab again.



3. Drag the email message row onto the associated sales opportunity row.

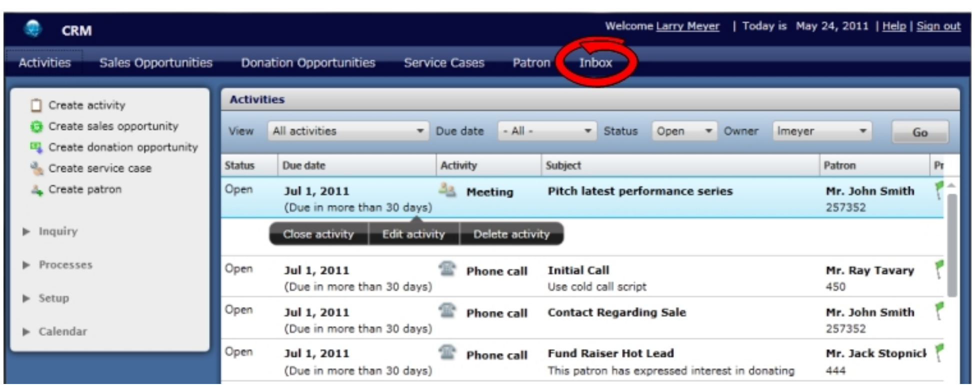


CRM converts the message to an email activity and associates the message with the CRM item (opportunity or service case) and its patron. You can tell that an email message has been converted to an email activity by the display of a download icon next to the email icon.

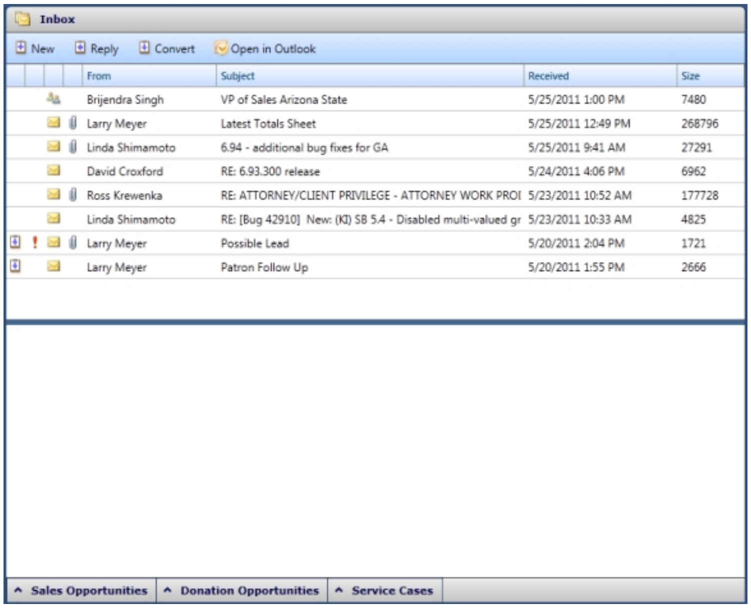


To associate an email message with a donation opportunity

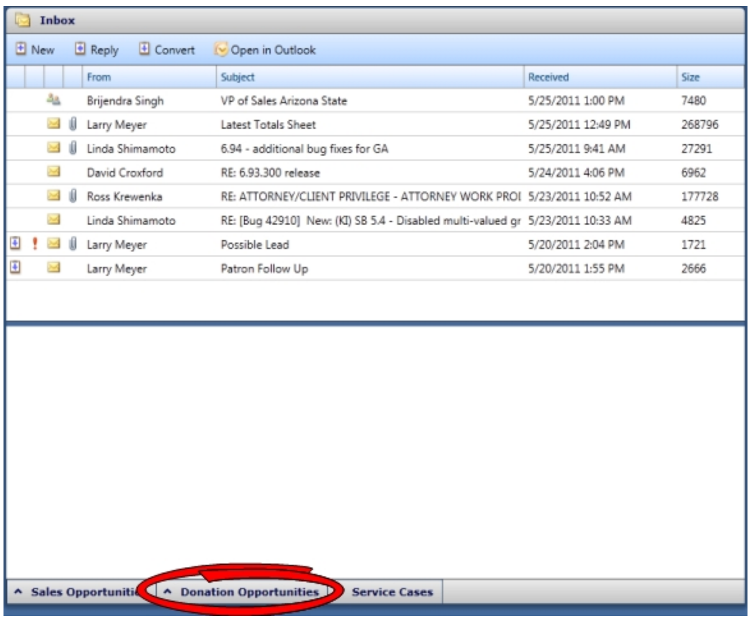
1. Click the **Inbox** button in the main navigation bar.



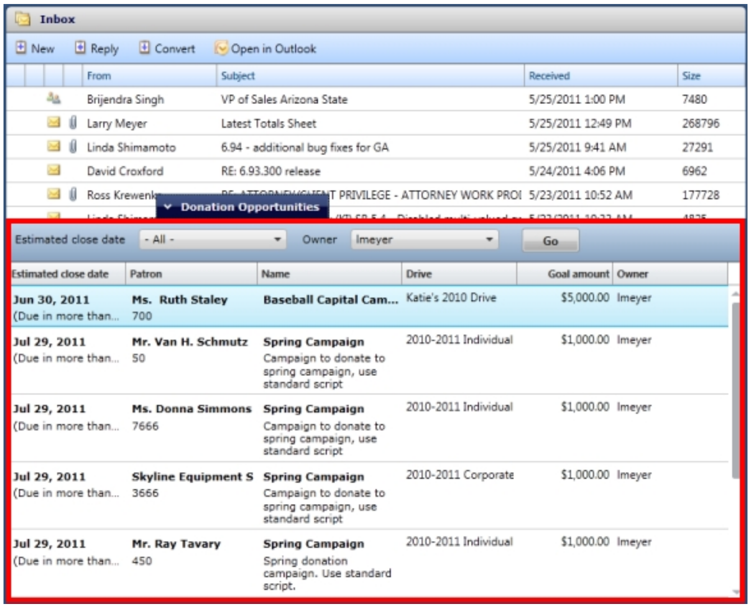
CRM displays the Inbox.



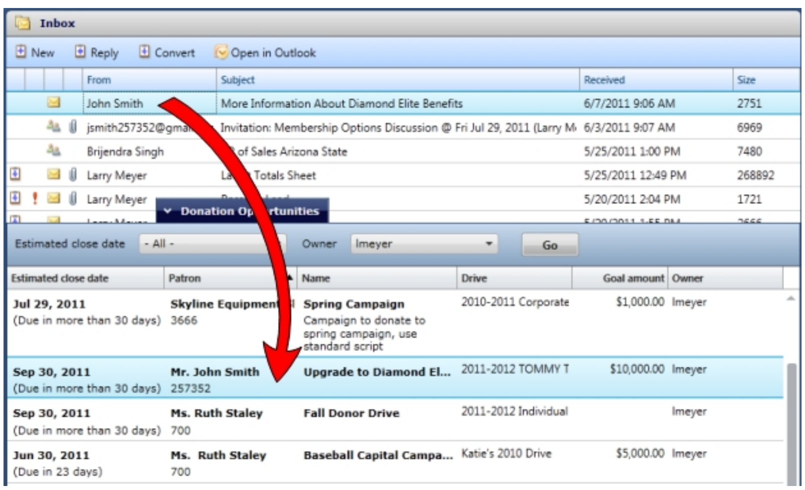
2. Click the **Donation Opportunities** tab at the bottom of the Inbox.



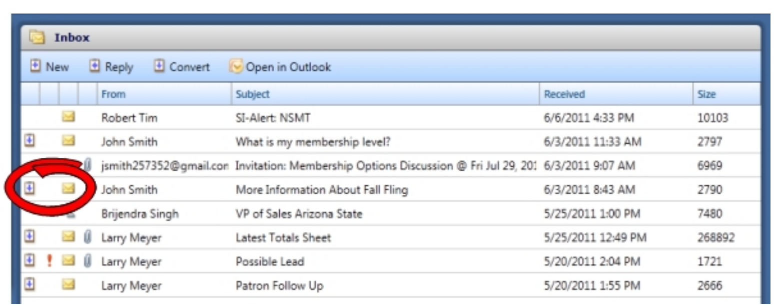
CRM displays the panel within the Inbox. When you want to minimize the panel, just click the **Donation Opportunities** tab again.



3. Drag the email message row onto the associated donation opportunity row.

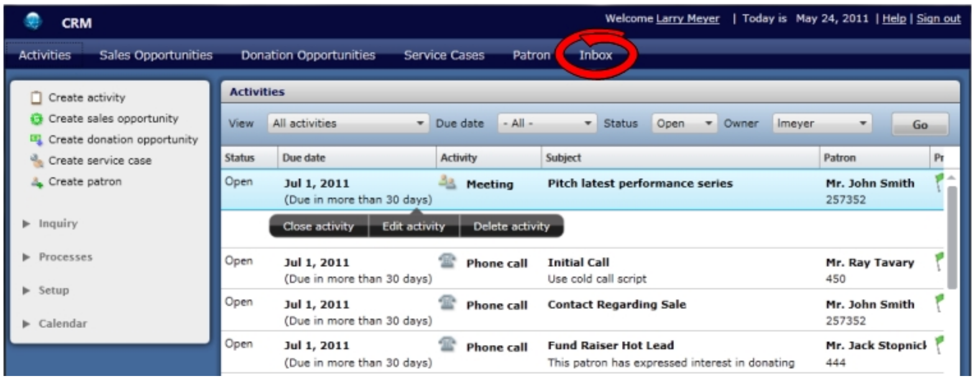


CRM converts the message to an email activity and associates the message with the CRM item (opportunity or service case) and its patron. You can tell that an email message has been converted to an email activity by the display of a download icon next to the email icon.

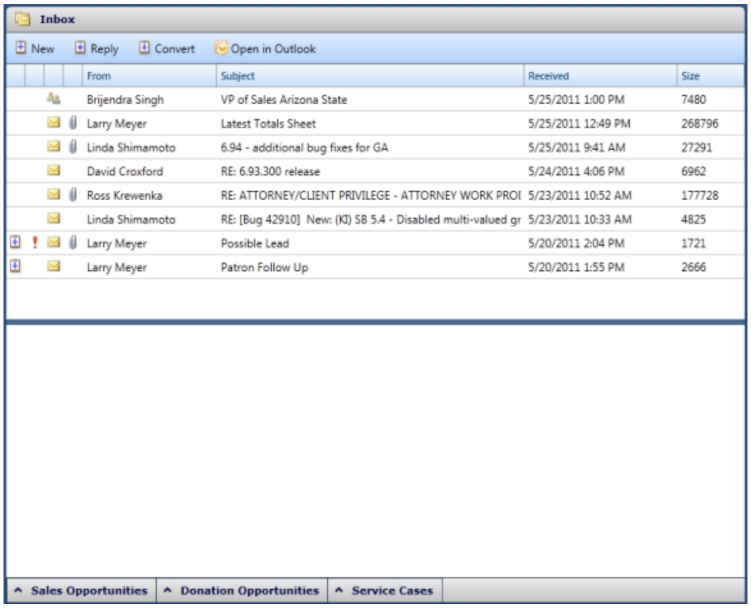


To associate an email message with a service case

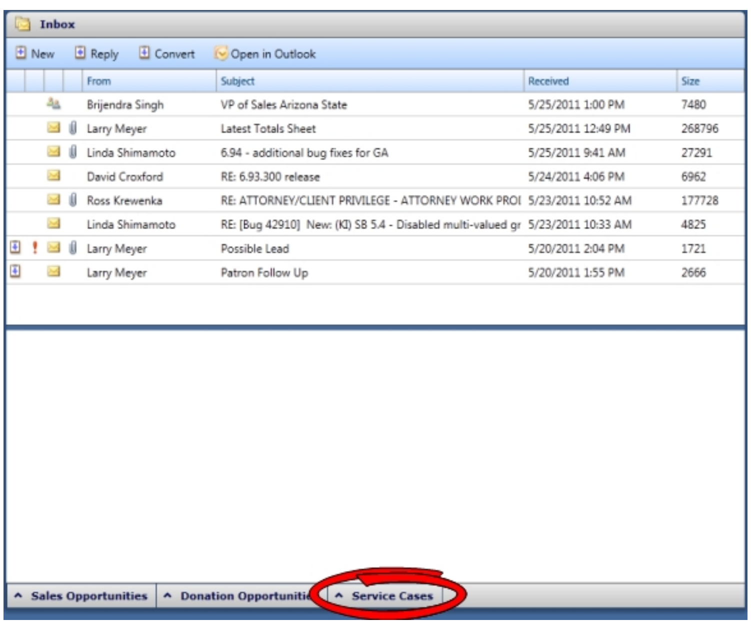
1. Click the **Inbox** button in the main navigation bar.



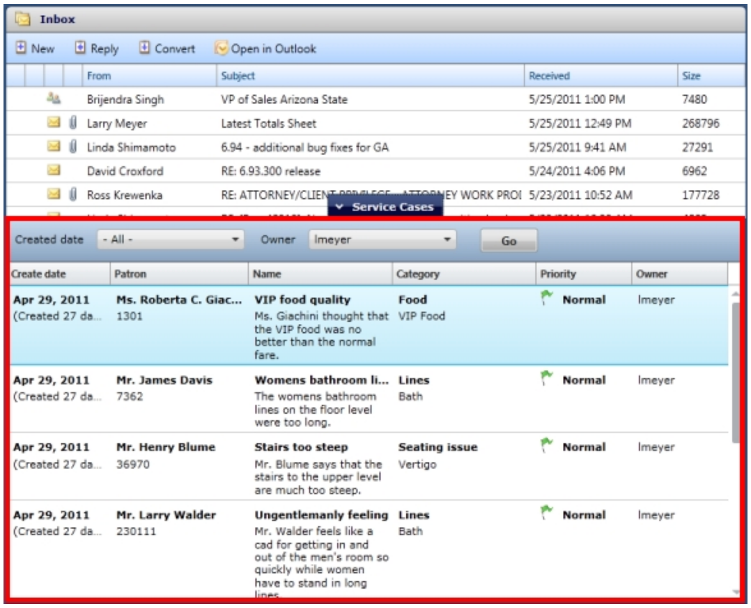
CRM displays the Inbox.



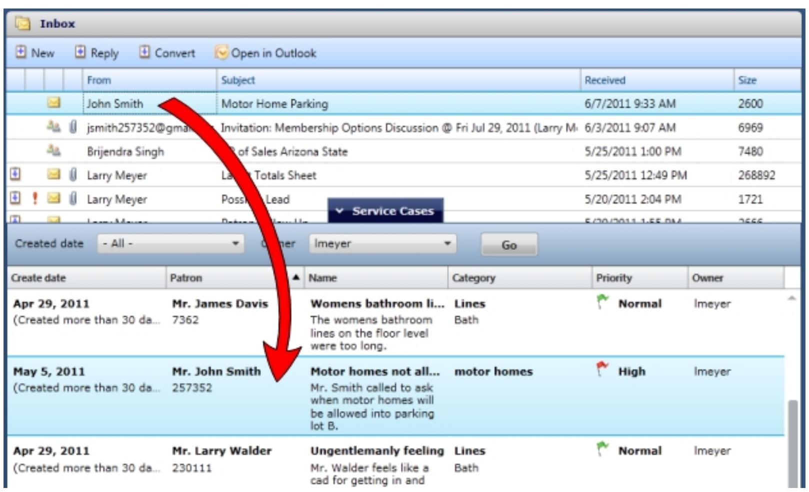
2. Click the **Service Cases** tab at the bottom of the Inbox.



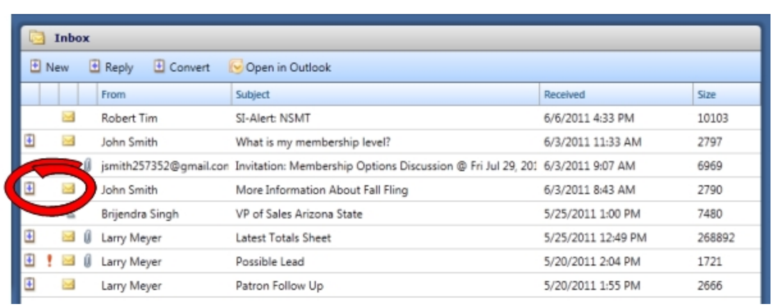
CRM displays the panel within the Inbox. If at some point you want to minimize the service cases, just click the **Service Cases** tab again.



3. Drag the email message row onto the associated service case row.



CRM converts the message to an email activity and associates the message with the CRM item (opportunity or service case) and its patron. You can tell that an email message has been converted to an email activity by the display of a download icon next to the email icon .



You can see associated activities by viewing the Activity History on the opportunity or service case hub or by viewing the activities for a patron on the Patron Summary form. For more information, see the following topics:

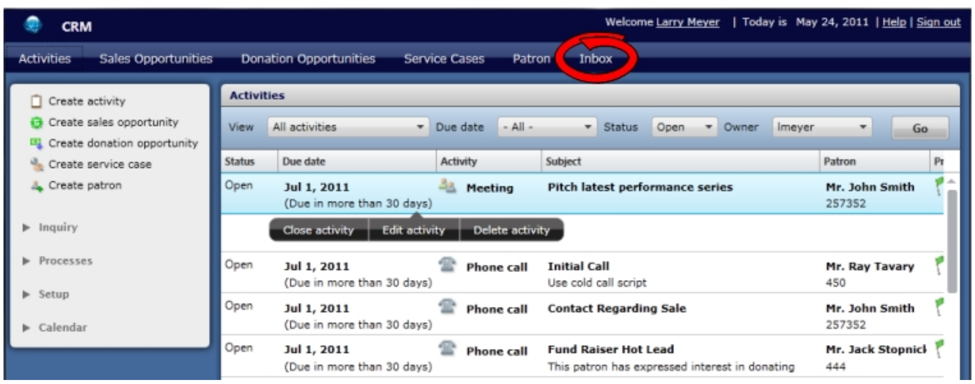
- Viewing the Activity History of a Sales Opportunity
- Viewing the Activity History of a Donation Opportunity
- Viewing the Activity History of a Service Case
- Viewing the Patron Summary

Deleting Email Messages

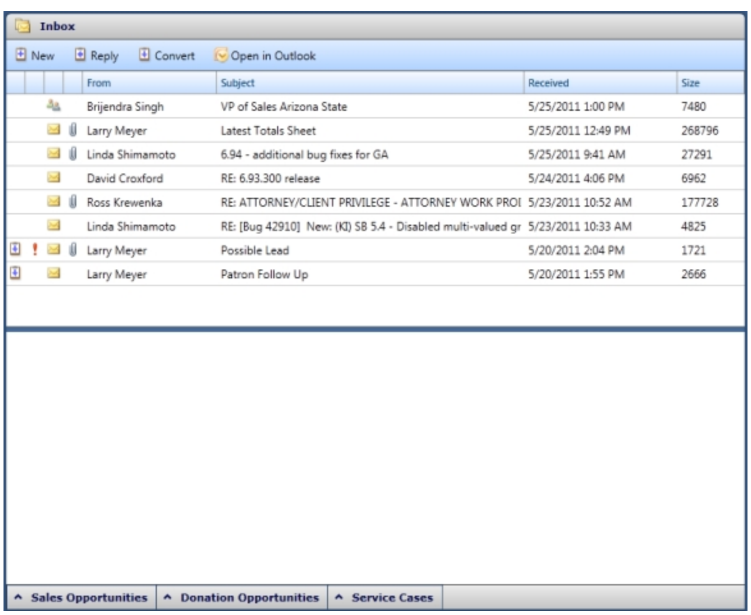
You cannot delete email messages from within the CRM Inbox. Instead, you can open the message in MS Outlook from the CRM Inbox, and then delete the message. You can also just delete the message in the MS Outlook Inbox as you normally would. When you delete an email message from the Outlook Inbox, it will automatically be removed from the CRM Inbox as well.

To delete an email message from the CRM Inbox

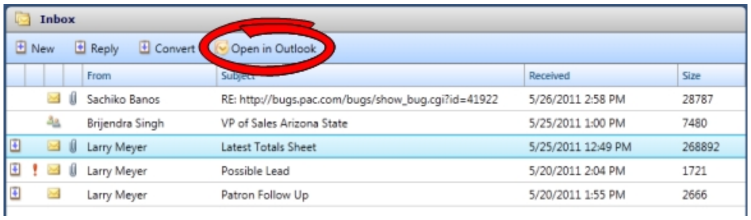
1. Click the **Inbox** button in the main navigation bar.



CRM displays the Inbox.

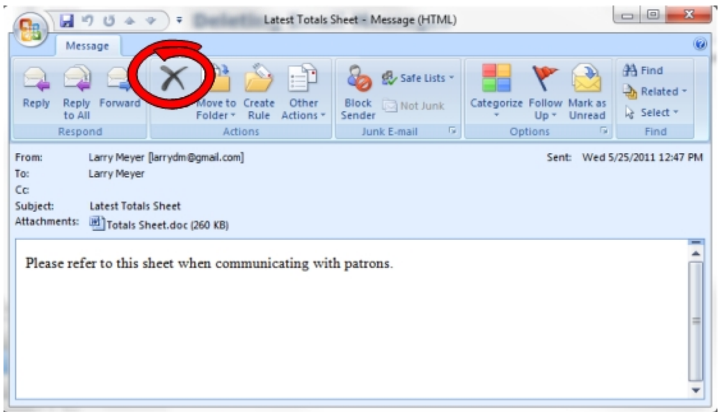


2. Select the email message, and then click the **Open in Outlook** button. You can also just double-click the email message row.



CRM opens the email message in MS Outlook.

3. Click the delete icon in the email message.

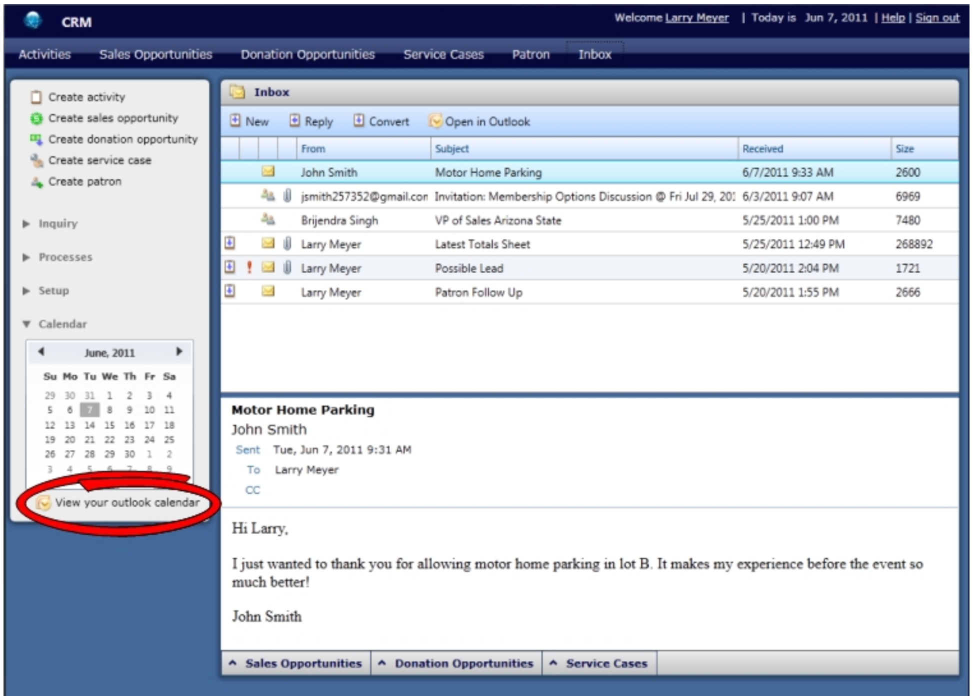


Using Your MS Outlook Calendar with CRM

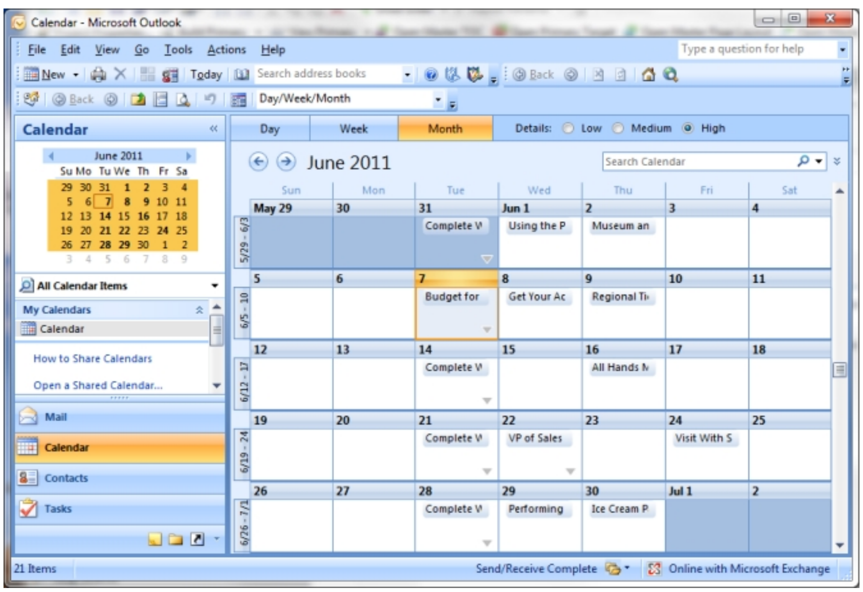
You can open your MS Outlook Calendar from within CRM at any time. You can also add meeting activities to your Outlook Calendar when creating meeting activities. And, if you want to change the meeting time or remind the patron of an upcoming meeting, you can send a meeting invitation email message from a meeting activity that has already been created.

To open your MS Outlook Calendar from within CRM

1. In the CRM navigation pane, click **Calendar**, and then click the **View your outlook calendar** button.

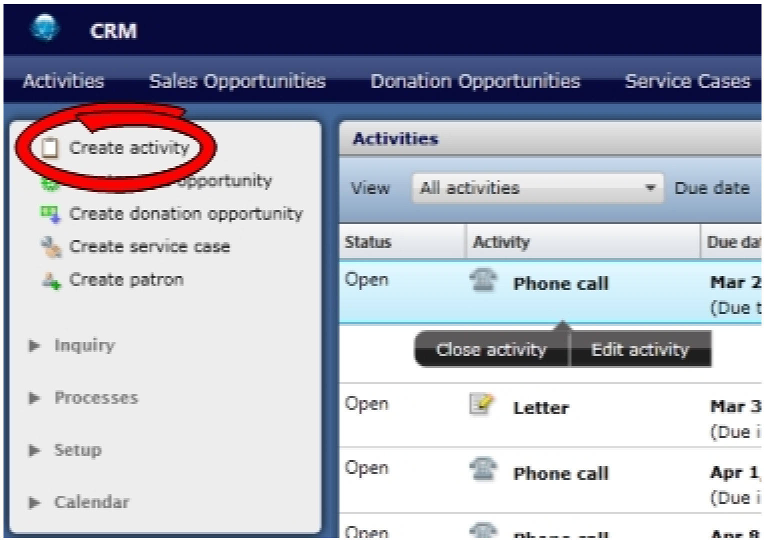


CRM opens your calendar in MS Outlook.

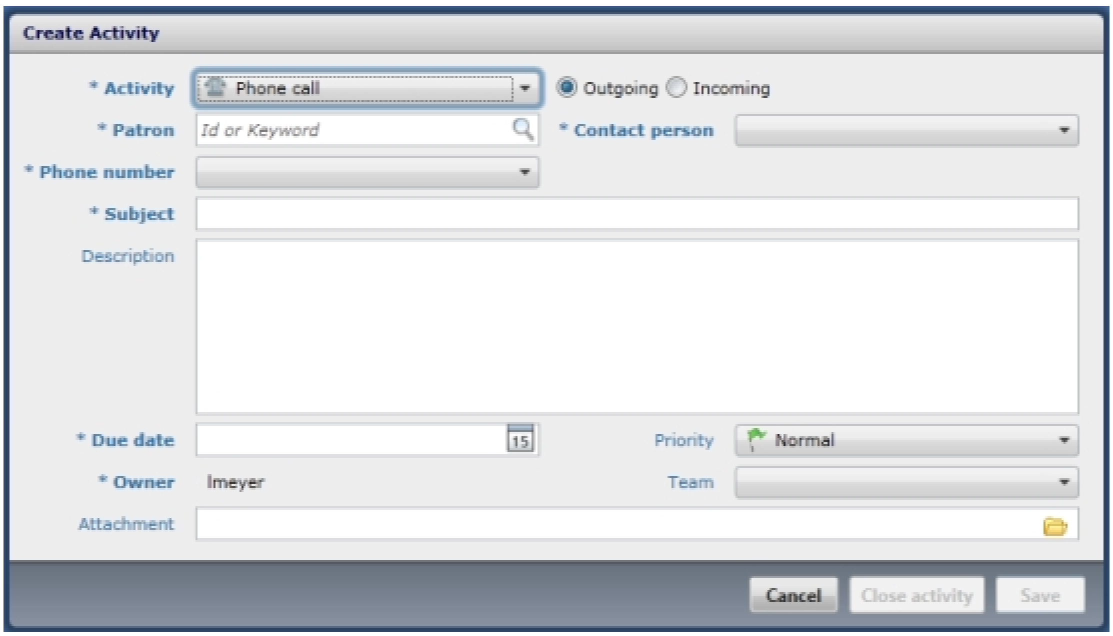


To add a meeting activity to your MS Outlook Calendar during activity creation

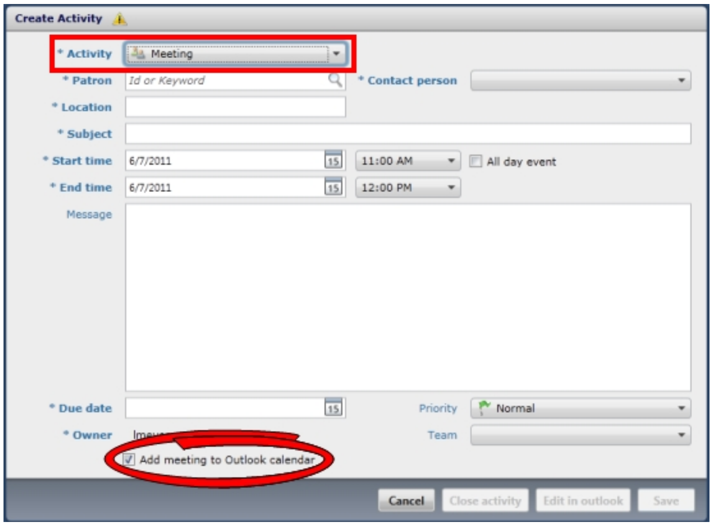
1. In the navigation pane, click **Create Activity**.



CRM displays the Create Activity form in the work area.



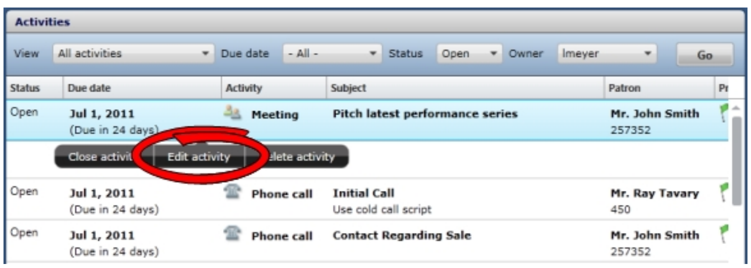
2. From the **Activity** drop-down list, select Meeting. CRM redisplays the Create Activity form with the meeting activity fields.
3. Select the **Add meeting to Outlook calendar** option.



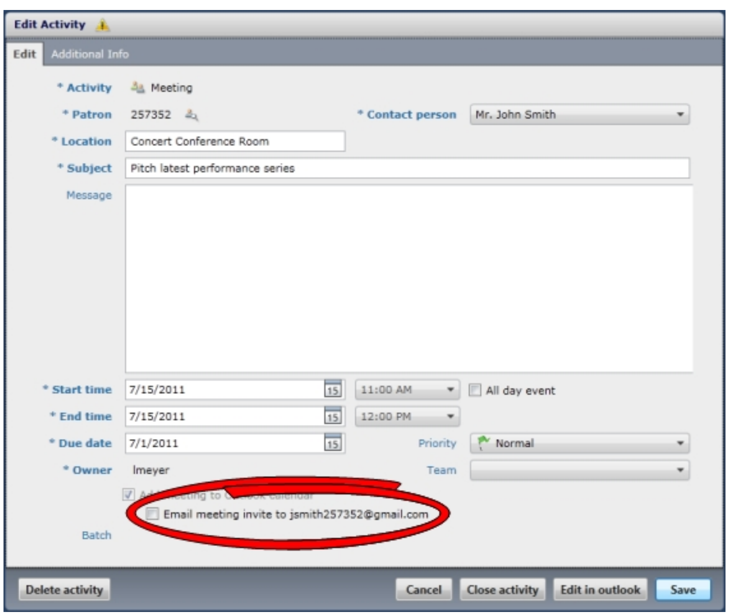
4. Finish the manual activity creation process. For more information, see Manually Creating Activities.

To send another meeting invitation from an existing meeting activity

1. On the Activities hub, click the meeting activity, and then click **Edit activity**. CRM displays the Edit Activity form.



2. Select the Email meeting invite option, and then click the **Save** button.



Outlook displays a Microsoft Office Outlook dialog box.

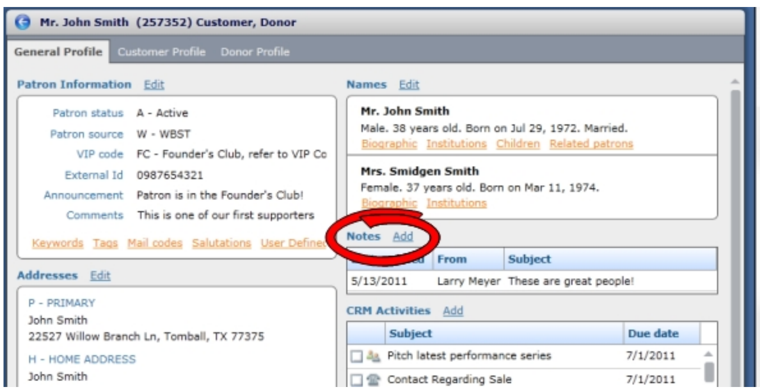
3. Select the **Save changes and send update** option, and then click **OK**. An updated email invitation message will be sent to the patron.

Using CRM Notes

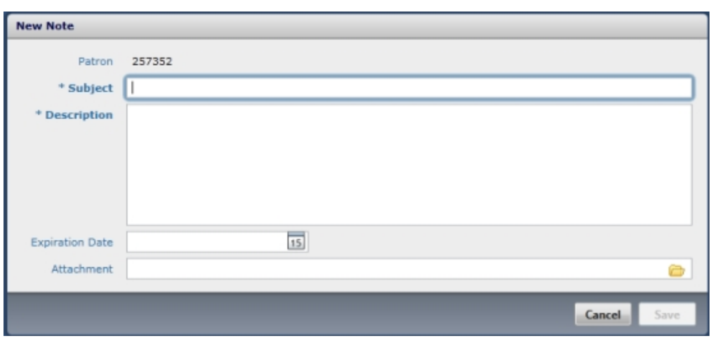
You may find that the standard patron edit fields do not capture all the pertinent information about a patron. To capture this information, you can use CRM notes to enter text and attach files. You can also set expiration dates for notes for when they will no longer be relevant to your work. When notes expire, they are no longer visible in CRM. After you create a note for a patron, you can view, edit, or delete the note at any time until it expires.

To add a CRM note

1. Display the Patron Summary form for the patron record to which you want to add the note. If you're not sure how to do this, see Searching for Patrons.
2. On the General Profile tab, click the Add link for the Notes section.



CRM displays the New Note form.

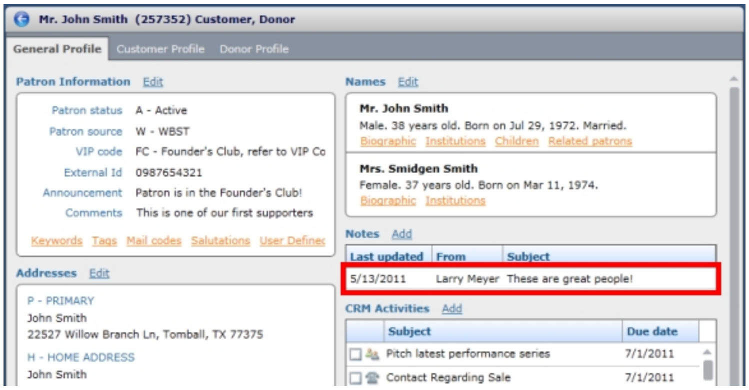


3. In the **Subject** and **Description** fields, enter the text for the note you are adding to this patron record.
4. If you want the note to expire, use the **Expiration Date** field to enter a date or click the calendar icon to select it from the popup calendar.
5. If you want to attach a file to the note, use the **Attachment** field to enter the file path or click the folder icon to select the file.

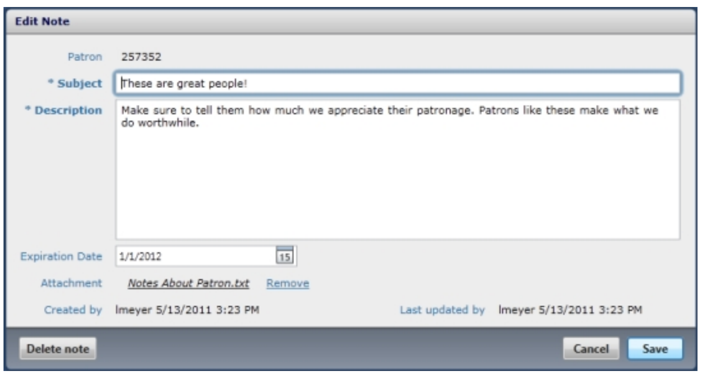
6. Click the **Save** button. CRM saves the note and displays it in the Notes section on the Patron Summary.

To view a CRM note

1. Display the Patron Summary form for the patron record with the note you want to view. If you're not sure how to do this, see Searching for Patrons.
2. In the Notes section, double-click the note.

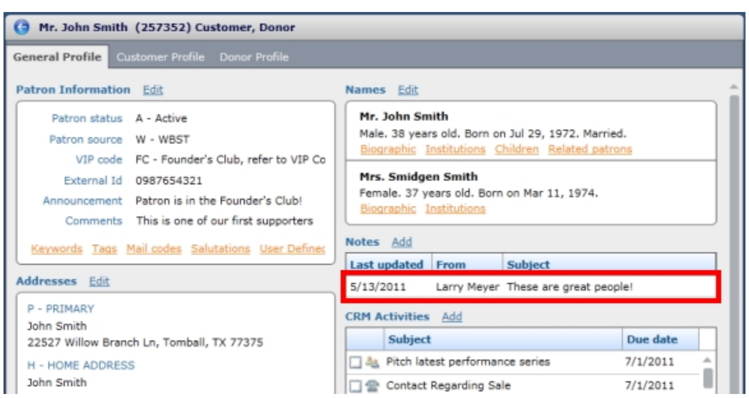


CRM displays the Edit Note form. If there is an attachment, you can download or view it by clicking its link.

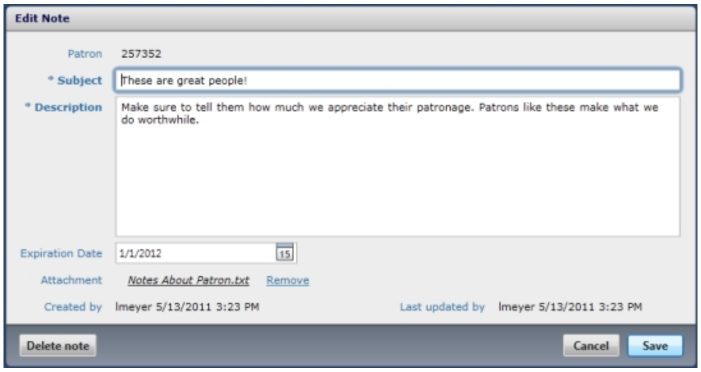


To edit a CRM note

1. Display the Patron Summary form for the patron record with the note you want to view. If you're not sure how to do this, see Searching for Patrons.
2. In the Notes section, double-click the note.



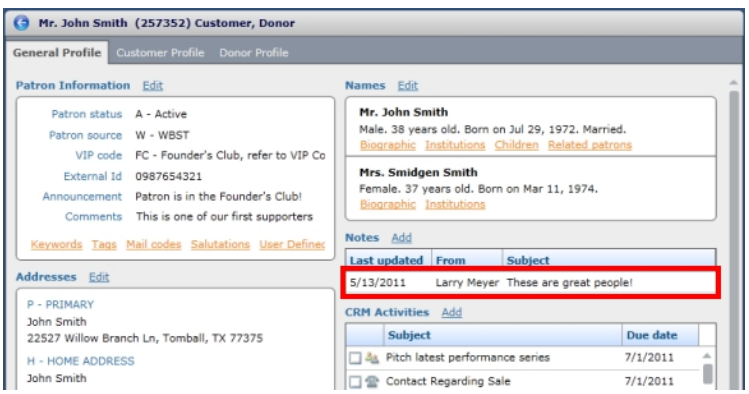
CRM displays the Edit Note form. If there is an attachment, you can download or view it by clicking its link.



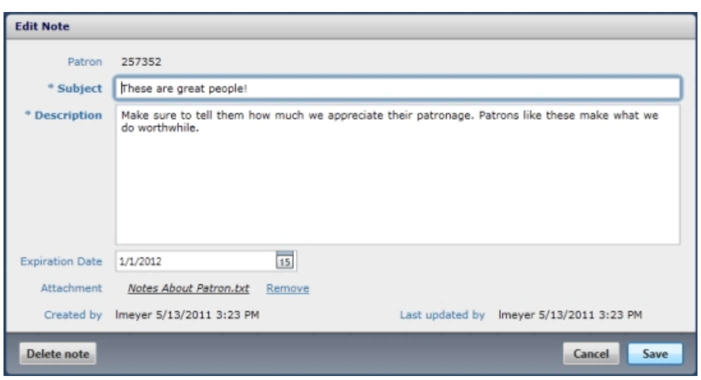
3. Edit the text fields, change the expiration date, and add or remove the attachment as desired.
4. Click the **Save** button.

To delete a CRM note

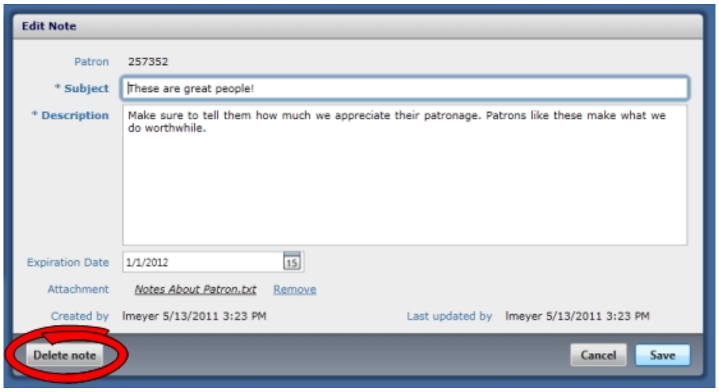
1. Display the Patron Summary form for the patron record with the note you want to view. If you're not sure how to do this, see Searching for Patrons.
2. In the Notes section, double-click the note.



CRM displays the Edit Note form. If there is an attachment, you can download or view it by clicking its link.



3. Click the **Delete note** button.



CRM displays an Information dialog box asking you to confirm that you want to delete the note.

4. Click **OK**. CRM redisplays the Patron Summary form with the note removed from the Notes section.

Chapter 3 Managing Data Views

CRM data views are the key to quickly accessing CRM data. They can be created and run for all the CRM items, including activities, sales and donation opportunities, and service cases. CRM allows you to manage your data views by creating new views, running and editing existing views, and sharing views with other CRM users. Data can be viewed within CRM or exported to Excel for more flexible viewing and manipulation.

The data available for viewing when running a data view is determined by your user permissions. You may be prevented from viewing restricted data, as well as data for sales or donation opportunities and their related activities. In addition, your viewing access may be limited by your supervisor's permissions. For more information about user permissions, see Managing Users.

CRM data view management includes the following:

- Creating Data Views
- Sharing Data Views
- Running Data Views
- Editing Data Views
- Exporting Data Views to Excel
- Deleting Data Views

Creating Data Views

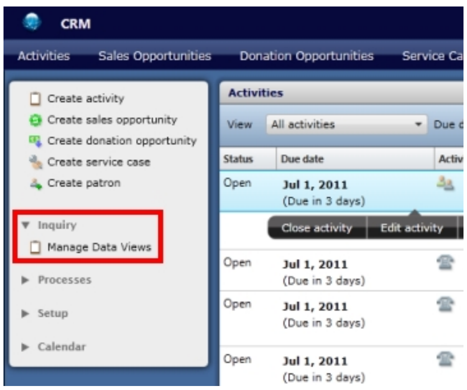
Data views allow you to view the information that is collected when CRM is used. This includes information about users' work with patrons, activities, opportunities, and service cases. Data views allow you to specify and view the parts of this information in which you are interested.

You create CRM data views by selecting a CRM item type (activities, sales opportunities, donation opportunities, or service cases) and then building data filters for all items of that type. Each data filter searches all the entries in a field of the CRM database for the values you specify. You can use multiple data filters to further refine your search. Entries that match the values specified in the data filters are included in the data view search results. However, restricted data may not be included in your search results, depending on your permissions.

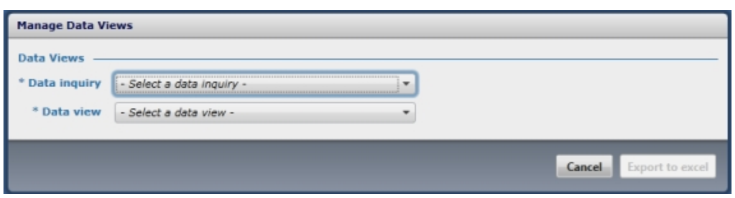
The database fields available when setting up data filters include many of the properties of CRM items, such as dates, ID numbers, patrons, owners, dollar amounts, statuses, etc. The properties available change based on the CRM item type for which you are building the data view.

To create a new data view

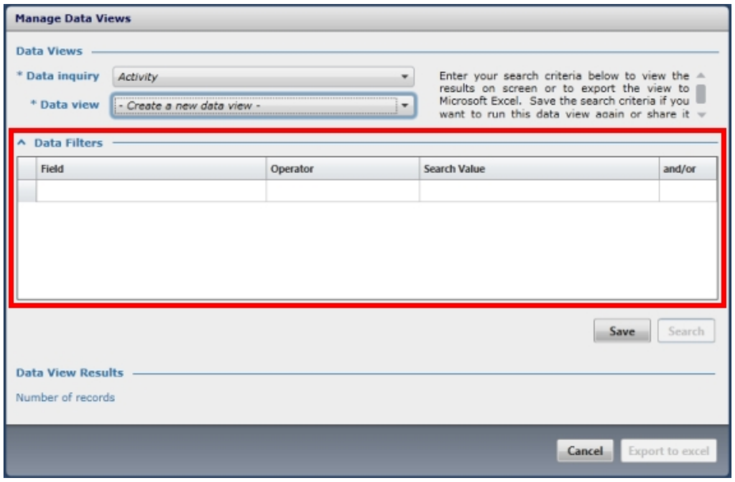
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



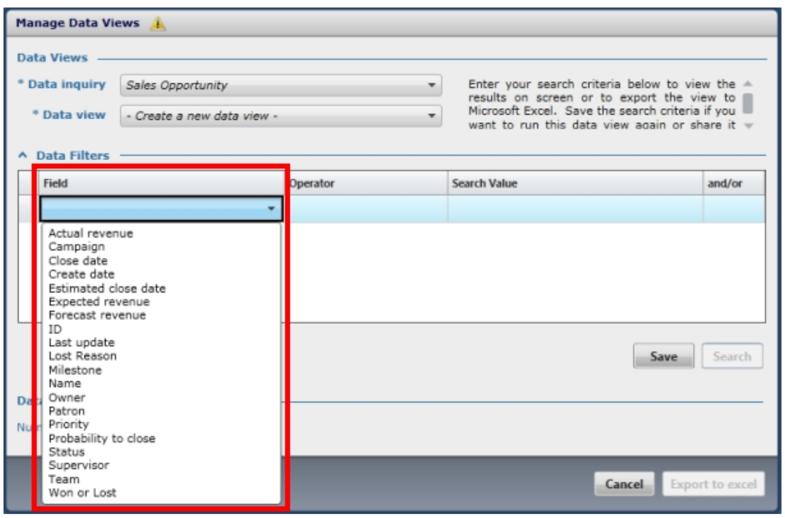
   CRM displays the Manage Data Views form.



2. From the **Data inquiry** drop-down list, select the CRM item type on which you want to base the data view. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select **Create a new data view**. CRM expands the form to include the **Data Filters** section.



4. In the **Data Filters** section, set the criteria for the data view by doing the following:
   a. In the **Field** column, click a cell to display the drop-down list, and then select one of the field options. The options in the list vary based on the CRM item type you selected in **Data inquiry**.



See an alphabetical list of all the possible fields with their operators and search values.

Field	**Data Inquiry Item Types**	**Operators**	**Search Values**
Actual amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Actual revenue	Sales Opp	is equal to, is not equal to, is less than, is less than	Enter a number.

Field	Data Inquiry Item Types	Operators	Search Values
		or equal to, is greater than, is greater than or equal to	
Activity type	Activity	is equal to, is not equal to	Select Phone call, Email, Fax, Letter, Meeting, Other.
Campaign	Sales Opp	is equal to, is not equal to	Select from the list of sales source campaigns configured in CRM. See Managing Source Campaigns.
Category	Service Case	is equal to, is not equal to	Select from the list of service case categories configured in CRM. See Managing Categories.
Close date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Create date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Donation type	Donation Opp	is equal to, is not equal to	Outright donation, Pledge Donation, Gift In Kind. Donation types are not configurable.
Drive	Donation Opp	is equal to, is not equal to	Enter the drive code/Id or click to select with the Drive Lookup. The Drive Lookup allows you to search for drives by the drive or campaign code or name. Drives are configured in tFund.
Due date	Activity	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Estimated close date	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is	Enter a date or click to select from a calendar.

Field	Data Inquiry Item Types	Operators	Search Values
		greater than or equal to	
Expected revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Goal amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
ID	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the unique number of a CRM item.
Incoming or Outgoing	Activity	is equal to, is not equal to	Select Incoming or Outgoing.
Last updated	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.

Field	Data Inquiry Item Types	Operators	Search Values
Link ID	Activity	is equal to	Enter the number of a link between CRM items and the activities associated with those CRM items. You can use a data filter with this field in conjunction with a data filter with the Link type field to find all the activities associated with a CRM item by Link ID.
Link type	Activity	is equal to, is not equal to	Select Sales opportunity, Donation opportunity, Service case, Patron, or Activity.
Lost reason	Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of lost reason codes configured in CRM. See Managing Lost Reason Codes.
Milestone	Donation Opp, Sales Opp	is equal to, is not equal to	The list of milestones configured in CRM. See Managing Milestones.
Name	Donation Opp, Sales Opp, Service Case	is equal to, starts with, contains	All or part of the text from the Name field of the opportunities or service cases you want to include. This field is case sensitive.
Owner	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Patron	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the patron ID number or click to select with the Patron Lookup. See Using the Patron Lookup.
Priority	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Low, Medium, Normal, or High.
Probability to close	Donation Opp, Sales	is equal to, is not equal to, is less than, is less than	Select one of the 10% increments from 0% to 100%.

Field	Data Inquiry Item Types	Operators	Search Values
	Opp	or equal to, is greater than, is greater than or equal to	
Status	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Open or Closed. This is the CRM item (activity, opportunity, or service case) status. You cannot search for deleted CRM items.
Subcategory	Service Case	is equal to, is not equal to	The list of service case subcategories configured in CRM
Subject	Activity	is equal to, starts with, contains	All or part of the text from the Subject field of the activities you want to include. This field is case sensitive.
Supervisor	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Target	Donation Opp	is equal to, is not equal to	Select a target from the list. The available targets are configured in tFund.
Team	Activity, Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of teams configured in CRM. See Managing Teams.
Won or lost	Donation Opp, Sales Opp	is equal to, is not equal to	Select Closed and Won, Closed and Lost, or Not Closed. Won or lost status is selected by the user that closes the opportunity.

b. From the cell in the **Operator** column, select an operator. The operator is used in conjunction with the search value to determine the entries that will be returned from the selected field.

c. For the cell in the **Search Value** column, select or enter the values for which you want to search. The combined setting of a field, an operator, and a search value in the same row is a data filter.

d. To further define the results of the data view, press the Enter key to add more rows, and then set up the data filter in each row.

e. If you have more than one data filter, set the condition of each data filter by selecting **and** or **or** from the **and/or** column cell of the previous data filter row. The data filter in the first row of the Data Filters table is treated as having an **and** condition. Search result data must meet the definition of all consecutive data filters preceded by an **and** condition.

If a row has an **or** condition, the results must either meet the definitions of all the preceding **and** conditions or meet the definitions of all the following **and** conditions until the next **or** condition.

See an example:

Data inquiry: Sales Opportunity

Data view: Data View Name

Data Filters

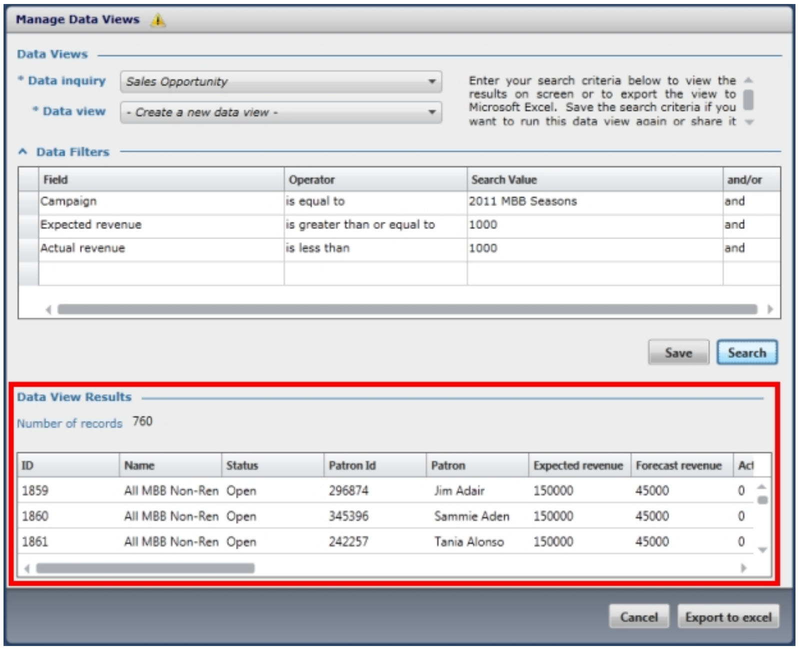
Field	Operator	Search Value	and/or
Campaign	is equal to	A	and
Actual revenue	is greater than	1000	or
Campaign	is equal to	B	and
Actual revenue	is greater than	1000	and
Expected revenue	is less than	500	or
Campaign	is equal to	C	and
Actual revenue	is greater than	1000	and

This set of data filters will generate data view results that include all sales opportunities for which *one or more* of the following is true:

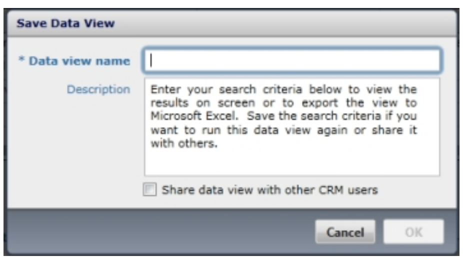
- Is part of campaign A and resulted in more than $1000 actual revenue.
- Is part of campaign B and resulted in more than $1000 actual revenue and had expected revenue less than $500.
- Is part of campaign C and resulted in more than $1000 actual revenue.

The **and** in the last row is ignored since there is no row below it.

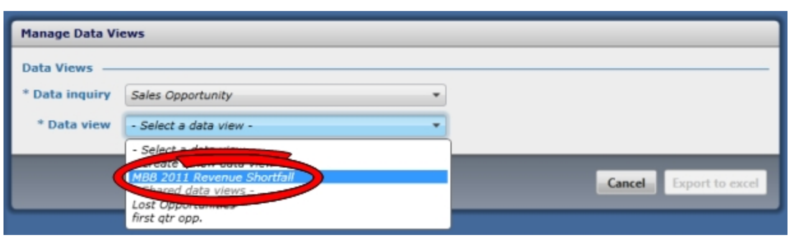
5. Click the **Search** button. CRM displays the search results from the data view in the **Data View Results** section. If you are not satisfied with the results, change the data filters, and then click **Search** again to view the new results. You may not have access to restricted data, depending on your user permissions.



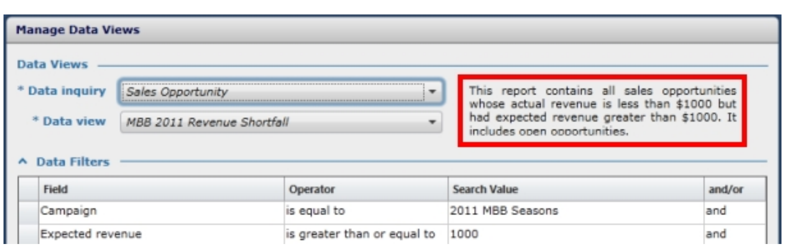
6. Click the **Save** button. CRM displays the Save Data View dialog box. When you save a data view, search results are not saved with it.



7. In **Data view name**, enter the name of the new data view. This name will be available from the **Data view** drop-down list on the Manage Data Views form.

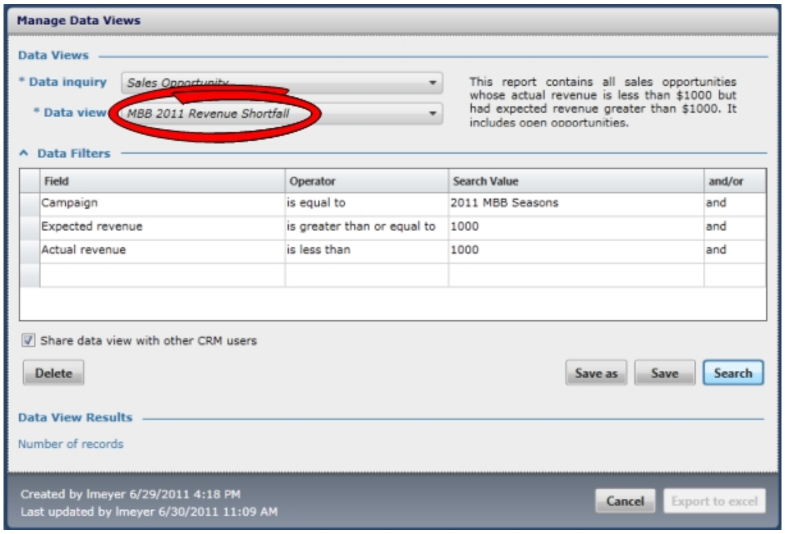


8. In **Description**, enter a meaningful description of the data view. This description will display on the Manage Data Views form when this data view is selected.



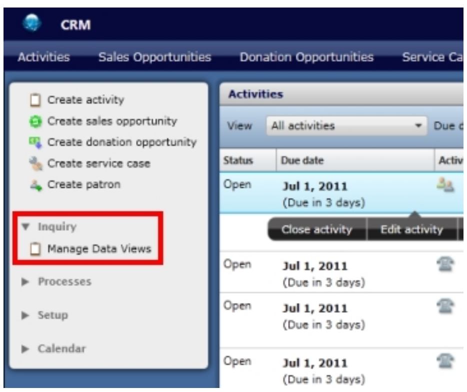
9. If you want other CRM users to have access to this data view, select **Share data view with other CRM users**.

10. Click the **OK** button. CRM redisplays the Manage Data Views form with the new data view selected in the **Data view** drop-down list.

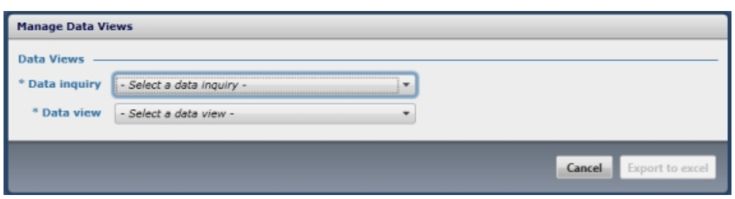


To create a data view from an existing data view

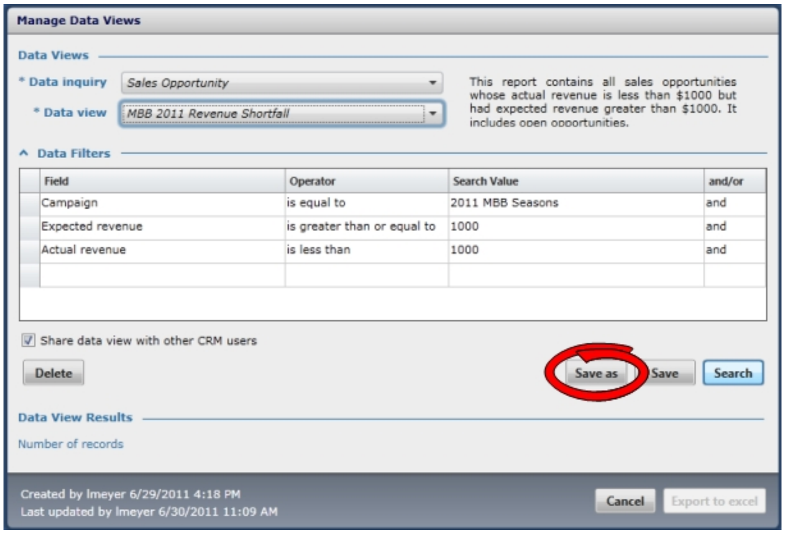
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



CRM displays the Manage Data Views form.

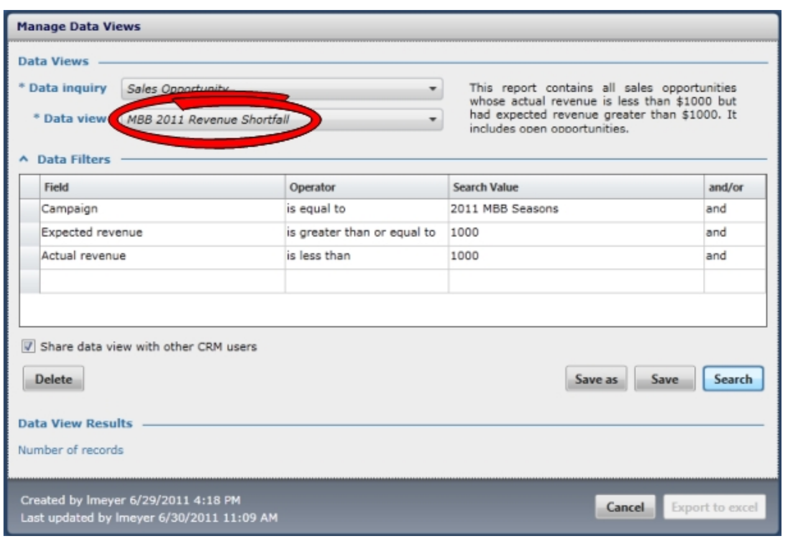


2. From the **Data inquiry** drop-down list, select the CRM item type on which you want to base the data view. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the Data view drop-down list, select the data view you want to use to create the new data view. CRM expands the Manage Data Views form to display the **Data Filters** and **Data View Results** sections.
4. Click the **Save as** button. When you save a data view, the search results are not saved.

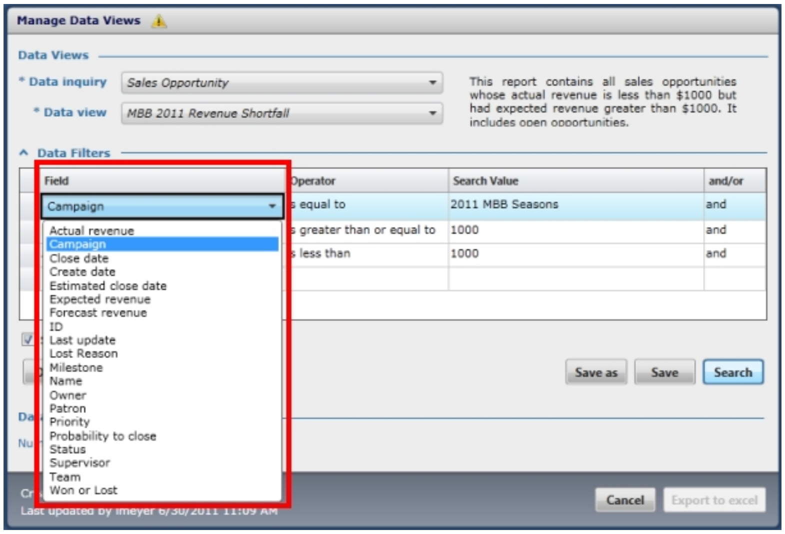


CRM displays the Save Data View dialog box.

5. Change the text in the **Data view name** and **Description** fields to reflect the new version of the report.
6. If you want to allow CRM users access to this data view, select **Share data view with other CRM users**.
7. Click the **OK** button. CRM redisplays the Manage Data Views form with the new data view selected in the **Data view** drop-down list.



8. In the Data Filters section, edit or add to the existing data filters using the following steps:
   a. In the **Field** column, click a cell to display the drop-down list, and then select one of the field options. The options in the list vary based on the CRM item type you selected in **Data inquiry**.



See an alphabetical list of all the possible fields with their operators and search values.

Field	Data Inquiry Item Types	Operators	Search Values
Actual amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Actual revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Activity type	Activity	is equal to, is not equal to	Select Phone call, Email, Fax, Letter, Meeting, Other.
Campaign	Sales Opp	is equal to, is not equal to	Select from the list of sales source campaigns configured in CRM. See Managing Source Campaigns.
Category	Service Case	is equal to, is not equal to	Select from the list of service case categories configured in CRM. See Managing Categories.
Close date	Activity, Donation Opp, Sales Opp, Service	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or	Enter a date or click to select from a calendar.

Field	Data Inquiry Item Types	Operators	Search Values
	Case	equal to	
Create date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Donation type	Donation Opp	is equal to, is not equal to	Outright donation, Pledge Donation, Gift In Kind. Donation types are not configurable.
Drive	Donation Opp	is equal to, is not equal to	Enter the drive code/Id or click to select with the Drive Lookup. The Drive Lookup allows you to search for drives by the drive or campaign code or name. Drives are configured in tFund.
Due date	Activity	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Estimated close date	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Expected revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast revenue	Sales Opp	is equal to, is not equal to, is less	Enter a number.

Field	Data Inquiry Item Types	Operators	Search Values
		than, is less than or equal to, is greater than, is greater than or equal to	
Goal amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
ID	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the unique number of a CRM item.
Incoming or Outgoing	Activity	is equal to, is not equal to	Select Incoming or Outgoing.
Last updated	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Link ID	Activity	is equal to	Enter the number of a link between CRM items and the activities associated with those CRM items. You can use a data filter with this field in conjunction with a data filter with the Link type field to find all the activities associated with a CRM item by Link ID.
Link type	Activity	is equal to, is not equal to	Select Sales opportunity, Donation opportunity, Service case, Patron, or Activity.
Lost reason	Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of lost reason codes configured in CRM. See Managing Lost Reason Codes.
Milestone	Donation Opp, Sales Opp	is equal to, is not equal to	The list of milestones configured in CRM. See Managing Milestones.
Name	Donation	is equal to, starts	All or part of the text from the Name field of

Field	Data Inquiry Item Types	Operators	Search Values
	Opp, Sales Opp, Service Case	with, contains	the opportunities or service cases you want to include. This field is case sensitive.
Owner	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Patron	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the patron ID number or click to select with the Patron Lookup. See Using the Patron Lookup.
Priority	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Low, Medium, Normal, or High.
Probability to close	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Select one of the 10% increments from 0% to 100%.
Status	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Open or Closed. This is the CRM item (activity, opportunity, or service case) status. You cannot search for deleted CRM items.
Subcategory	Service Case	is equal to, is not equal to	The list of service case subcategories configured in CRM
Subject	Activity	is equal to, starts with, contains	All or part of the text from the Subject field of the activities you want to include. This field is case sensitive.

Field	Data Inquiry Item Types	Operators	Search Values
Supervisor	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Target	Donation Opp	is equal to, is not equal to	Select a target from the list. The available targets are configured in tFund.
Team	Activity, Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of teams configured in CRM. See Managing Teams.
Won or lost	Donation Opp, Sales Opp	is equal to, is not equal to	Select Closed and Won, Closed and Lost, or Not Closed. Won or lost status is selected by the user that closes the opportunity.

b. From the cell in the **Operator** column, select an operator. The operator is used in conjunction with the search value to determine the entries that will be returned from the selected field.

c. For the cell in the **Search Value** column, select or enter the values for which you want to search. The combined setting of a field, an operator, and a search value in the same row is a data filter.

d. To further define the results of the data view, press the Enter key to add more rows, and then set up the data filter in each row.

e. If you have more than one data filter, set the condition of each data filter by selecting **and** or **or** from the **and/or** column cell of the previous data filter row. The data filter in the first row of the Data Filters table is treated as having an **and** condition. Search result data must meet the definition of all consecutive data filters preceded by an **and** condition. If a row has an **or** condition, the results must either meet the definitions of all the preceding **and** conditions or meet the definitions of all the following **and** conditions until the next **or** condition.

See an example:

Data inquiry: Sales Opportunity

Data view: Data View Name

Data Filters

Field	Operator	Search Value	and/or
Campaign	is equal to	A	and
Actual revenue	is greater than	1000	or
Campaign	is equal to	B	and

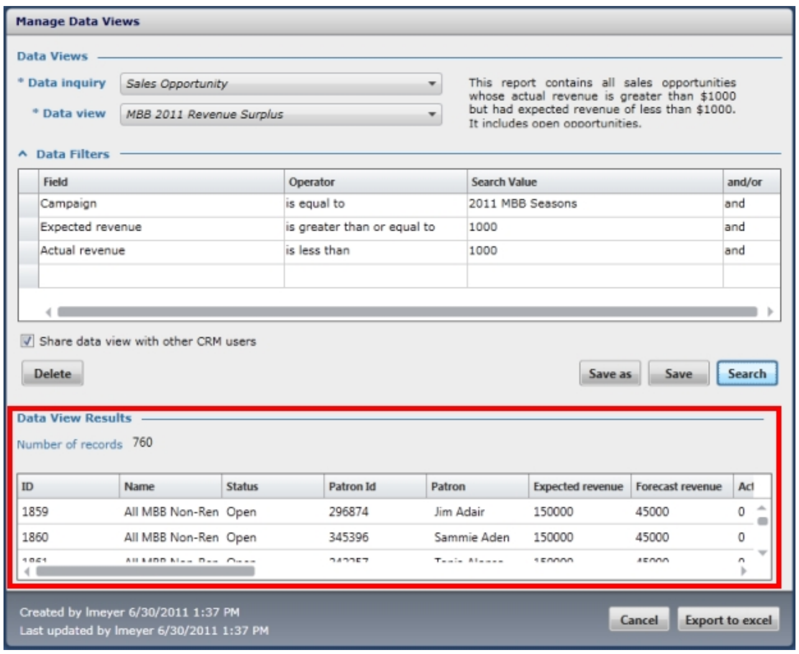
Field	Operator	Search Value	and/or
Actual revenue	is greater than	1000	and
Expected revenue	is less than	500	or
Campaign	is equal to	C	and
Actual revenue	is greater than	1000	and

This set of data filters will generate data view results that include all sales opportunities for which *one or more* of the following is true:

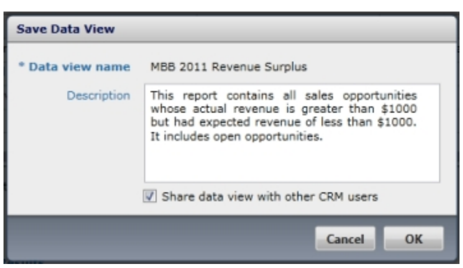
- Is part of campaign A and resulted in more than $1000 actual revenue.
- Is part of campaign B and resulted in more than $1000 actual revenue and had expected revenue less than $500.
- Is part of campaign C and resulted in more than $1000 actual revenue.

The **and** in the last row is ignored since there is no row below it.

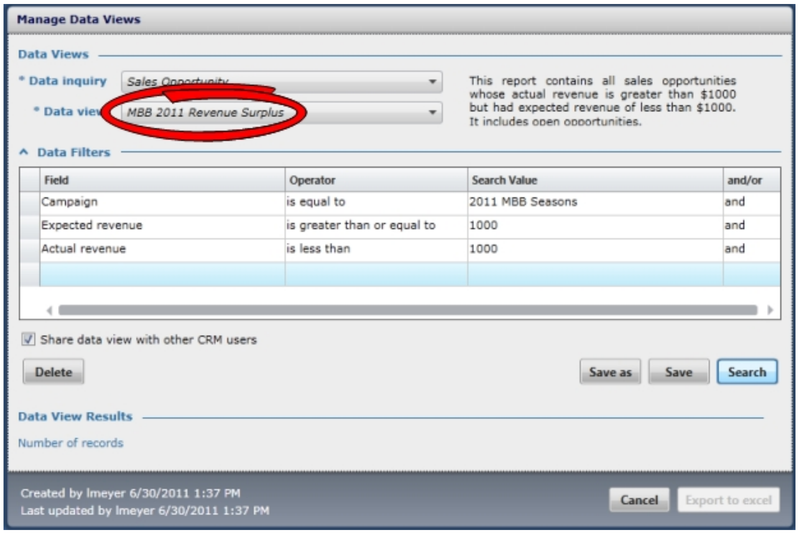
9. Click the **Search** button. CRM displays the search results from the data view in the **Data View Results** section. If you are not satisfied with the results, change the data filters and retry the search.



10. Click the **Save** button. CRM displays the Save Data View dialog box. When you save a data view, search results are not saved with it.



11. Click the **OK** button. CRM redisplays the Manage Data Views form with the new version of the data view selected in the **Data view** drop-down list.



Sharing Data Views

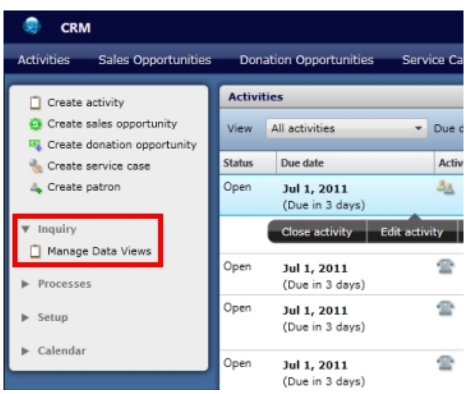
Data views allow you to view the information that is collected when CRM is used. This includes information about users' work with patrons, activities, opportunities, and service cases. Data views allow you to specify and view the parts of this information in which you are interested.

When you create or edit data views in CRM, you can choose whether you want other CRM users to be able to use the data view as well. Although other users will be able to run the data views you share, they are not allowed to edit or delete them. Only you and your supervisor can edit or delete your data views.

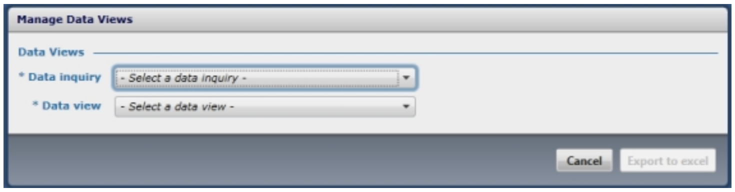
Note: Restricted data in the data view search results can only be viewed by user's with the correct permissions. Access to restricted data is set when Managing Users.

To create a shared a data view

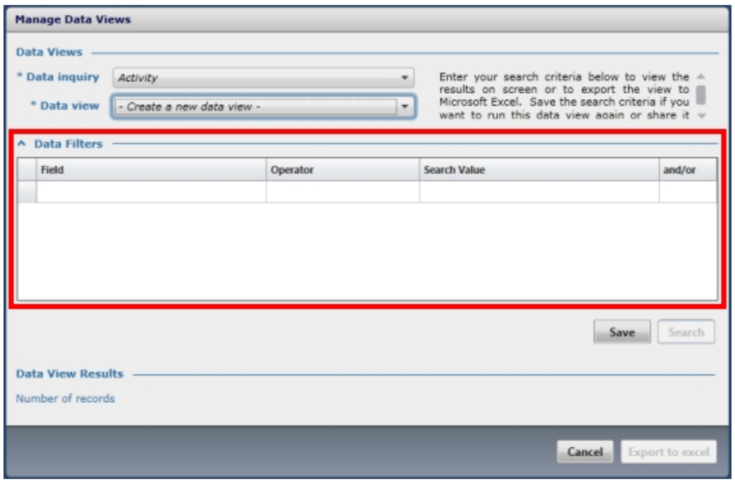
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



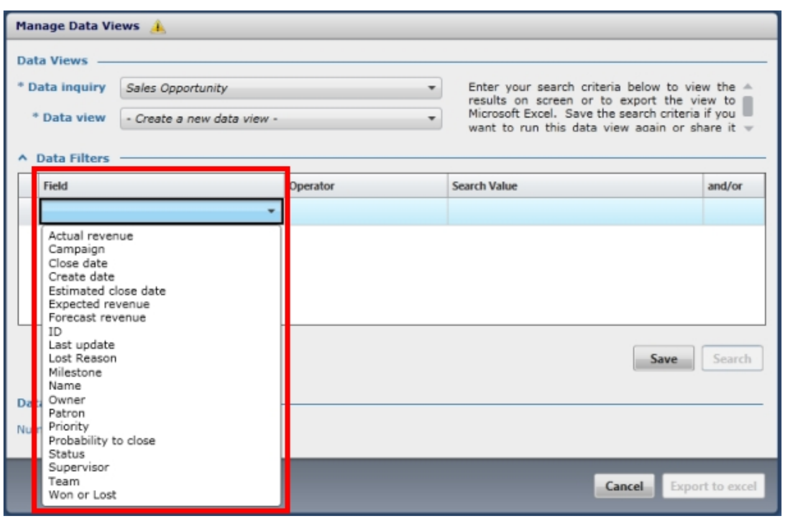
CRM displays the Manage Data Views form.



2. From the **Data inquiry** drop-down list, select the CRM item type of the data view you want to share. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select CRM expands the form to include the **Data Filters** section.



4. In the **Data Filters** section, set the criteria for the data view by doing the following:
   a. In the **Field** column, click a cell to display the drop-down list, and then select one of the field options. The options in the list vary based on the CRM item type you selected in **Data inquiry**.



See an alphabetical list of all the possible fields with their operators and search values.

Field	Data Inquiry Item Types	Operators	Search Values
Actual amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Actual revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Activity type	Activity	is equal to, is not equal to	Select Phone call, Email, Fax, Letter, Meeting, Other.
Campaign	Sales Opp	is equal to, is not equal to	Select from the list of sales source campaigns configured in CRM. See Managing Source Campaigns.
Category	Service Case	is equal to, is not equal to	Select from the list of service case categories configured in CRM. See Managing Categories.
Close date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Create date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Donation type	Donation Opp	is equal to, is not equal to	Outright donation, Pledge Donation, Gift In Kind. Donation types are not configurable.
Drive	Donation Opp	is equal to, is not equal to	Enter the drive code/Id or click to select with the Drive Lookup. The Drive Lookup allows you to search for drives by the drive or campaign code or name. Drives are configured in tFund.
Due date	Activity	is equal to, is not equal to, is less	Enter a date or click to select from a calendar.

Field	Data Inquiry Item Types	Operators	Search Values
		than, is less than or equal to, is greater than, is greater than or equal to	
Estimated close date	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Expected revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Goal amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
ID	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the unique number of a CRM item.

Field	Data Inquiry Item Types	Operators	Search Values
Incoming or Outgoing	Activity	is equal to, is not equal to	Select Incoming or Outgoing.
Last updated	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Link ID	Activity	is equal to	Enter the number of a link between CRM items and the activities associated with those CRM items. You can use a data filter with this field in conjunction with a data filter with the Link type field to find all the activities associated with a CRM item by Link ID.
Link type	Activity	is equal to, is not equal to	Select Sales opportunity, Donation opportunity, Service case, Patron, or Activity.
Lost reason	Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of lost reason codes configured in CRM. See Managing Lost Reason Codes.
Milestone	Donation Opp, Sales Opp	is equal to, is not equal to	The list of milestones configured in CRM. See Managing Milestones.
Name	Donation Opp, Sales Opp, Service Case	is equal to, starts with, contains	All or part of the text from the Name field of the opportunities or service cases you want to include. This field is case sensitive.
Owner	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Patron	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the patron ID number or click to select with the Patron Lookup. See Using the Patron Lookup.

Field	Data Inquiry Item Types	Operators	Search Values
Priority	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Low, Medium, Normal, or High.
Probability to close	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Select one of the 10% increments from 0% to 100%.
Status	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Open or Closed. This is the CRM item (activity, opportunity, or service case) status. You cannot search for deleted CRM items.
Subcategory	Service Case	is equal to, is not equal to	The list of service case subcategories configured in CRM
Subject	Activity	is equal to, starts with, contains	All or part of the text from the Subject field of the activities you want to include. This field is case sensitive.
Supervisor	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Target	Donation Opp	is equal to, is not equal to	Select a target from the list. The available targets are configured in tFund.
Team	Activity, Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of teams configured in CRM. See Managing Teams.
Won or lost	Donation Opp, Sales Opp	is equal to, is not equal to	Select Closed and Won, Closed and Lost, or Not Closed. Won or lost status is selected by the user that closes the opportunity.

b. From the cell in the **Operator** column, select an operator. The operator is used in conjunction with the search value to determine the entries that will be returned from the selected field.

c. For the cell in the **Search Value** column, select or enter the values for which you want to search. The combined setting of a field, an operator, and a search value in the same row is a data filter.

d. To further define the results of the data view, press the Enter key to add more rows, and then set up the data filter in each row.

e. If you have more than one data filter, set the condition of each data filter by selecting **and** or **or** from the **and/or** column cell of the previous data filter row. The data filter in the first row of the Data Filters table is treated as having an **and** condition. Search result data must meet the definition of all consecutive data filters preceded by an **and** condition. If a row has an **or** condition, the results must either meet the definitions of all the preceding **and** conditions or meet the definitions of all the following **and** conditions until the next **or** condition.

See an example:

Data inquiry: Sales Opportunity

Data view: Data View Name

Data Filters

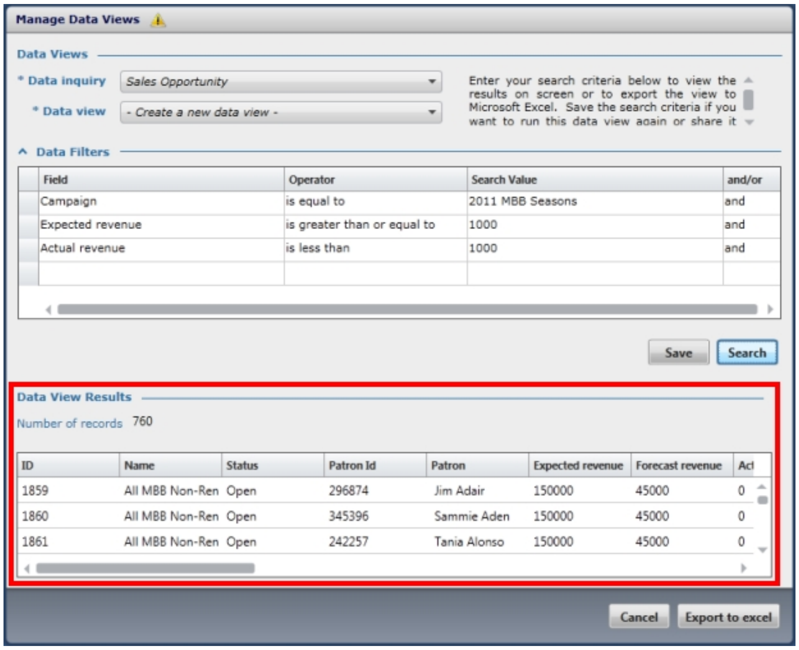
Field	Operator	Search Value	and/or
Campaign	is equal to	A	and
Actual revenue	is greater than	1000	or
Campaign	is equal to	B	and
Actual revenue	is greater than	1000	and
Expected revenue	is less than	500	or
Campaign	is equal to	C	and
Actual revenue	is greater than	1000	and

This set of data filters will generate data view results that include all sales opportunities for which *one or more* of the following is true:

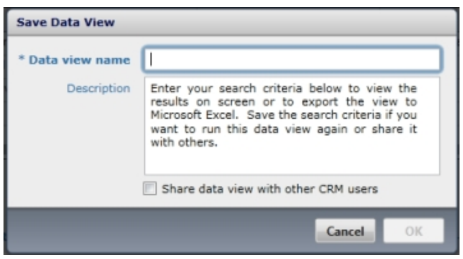
- Is part of campaign A and resulted in more than $1000 actual revenue.
- Is part of campaign B and resulted in more than $1000 actual revenue and had expected revenue less than $500.
- Is part of campaign C and resulted in more than $1000 actual revenue.

The **and** in the last row is ignored since there is no row below it.

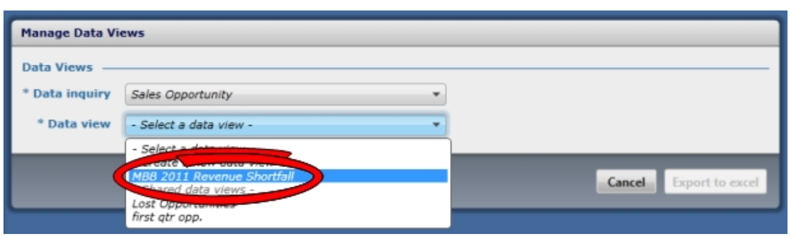
5. Click the **Search** button. CRM displays the search results from the data view in the **Data View Results** section. If you are not satisfied with the results, change the data filters, and then click **Search** again to view the new results. You may not have access to restricted data, depending on your user permissions.



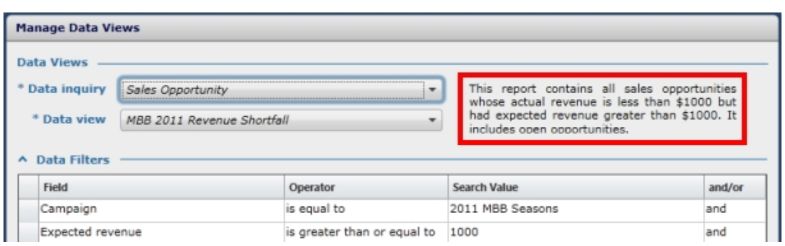
6. Click the **Save** button. CRM displays the Save Data View dialog box. When you save a data view, search results are not saved with it.



7. In **Data view name**, enter the name of the new data view. This name will be available from the **Data view** drop-down list on the Manage Data Views form.

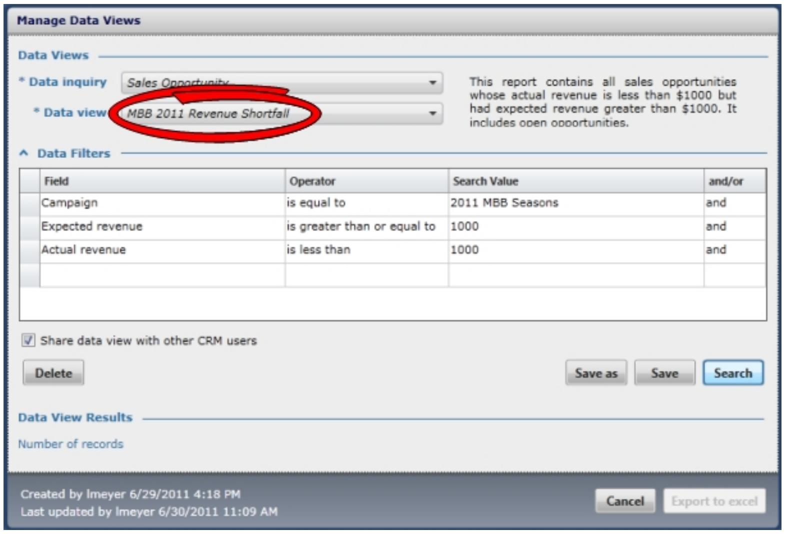


8. In **Description**, enter a meaningful description of the data view. This description will display on the Manage Data Views form when this data view is selected.



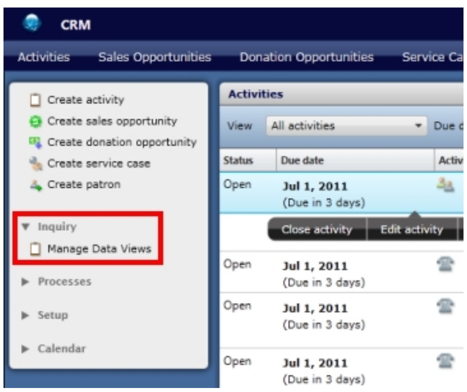
9. Select **Share data view with other CRM users**.

10. Click the **OK** button. CRM redisplays the Manage Data Views form with the new data view selected in the **Data view** drop-down list.

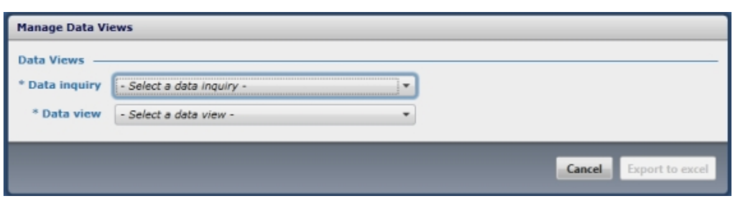


To share an existing data view

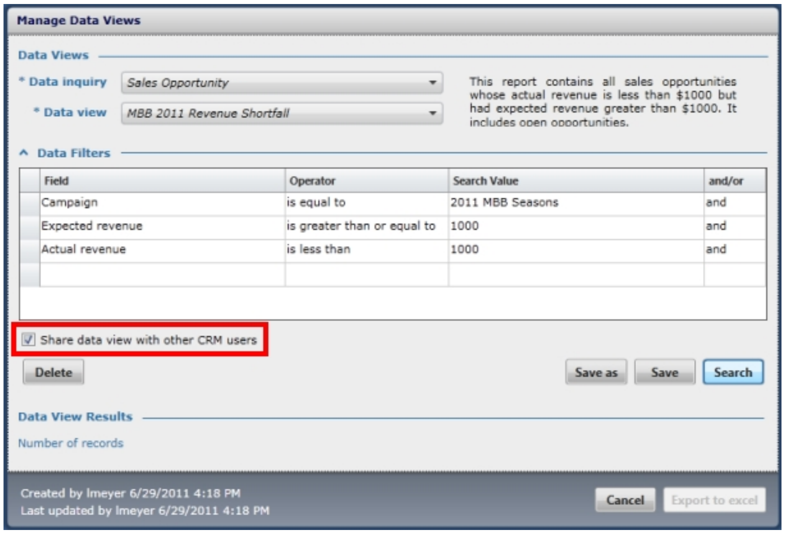
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



CRM displays the Manage Data Views form.



2. From the **Data inquiry** drop-down list, select the CRM item type of the data view you want to share. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select the data view that you want to share. CRM expands the form to show the details of the data view.
4. Select **Share data view with other CRM users**.

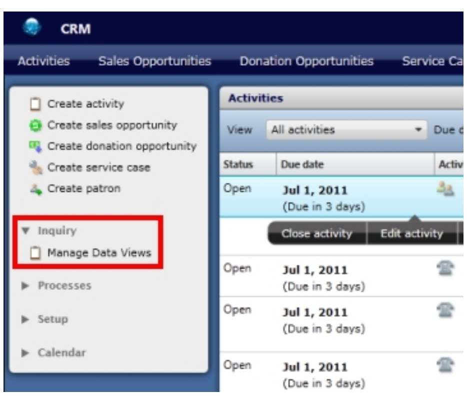


5. Click the **Save** button. CRM Displays the Save Data View dialog box. Make sure **Share data view with other CRM users** is selected.

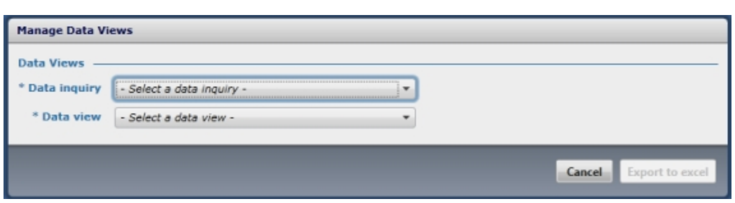
6. Click the **OK** button.

To view a shared data view

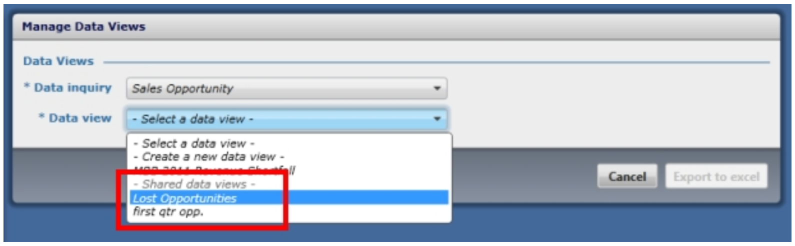
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



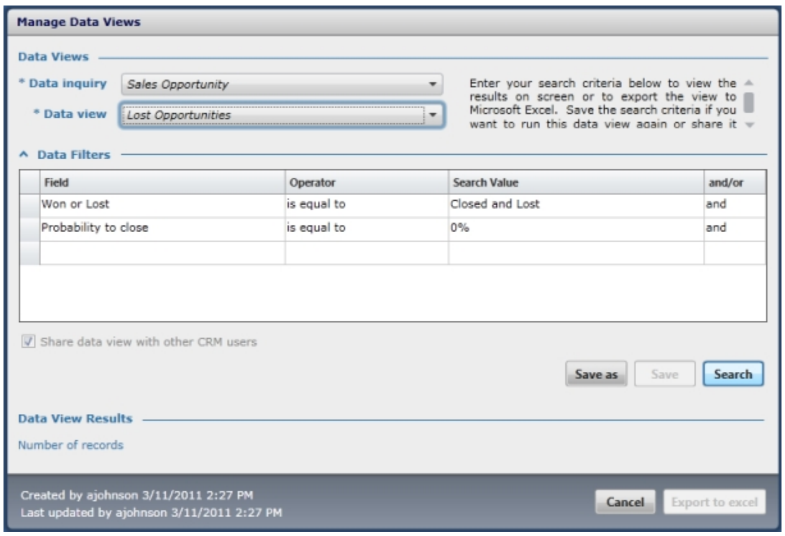
CRM displays the Manage Data Views form.



2. From the **Data inquiry** drop-down list, select the CRM item type containing the shared data view. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select a shared data view. Shared data views are grouped together in the list under **- Shared data views -**.



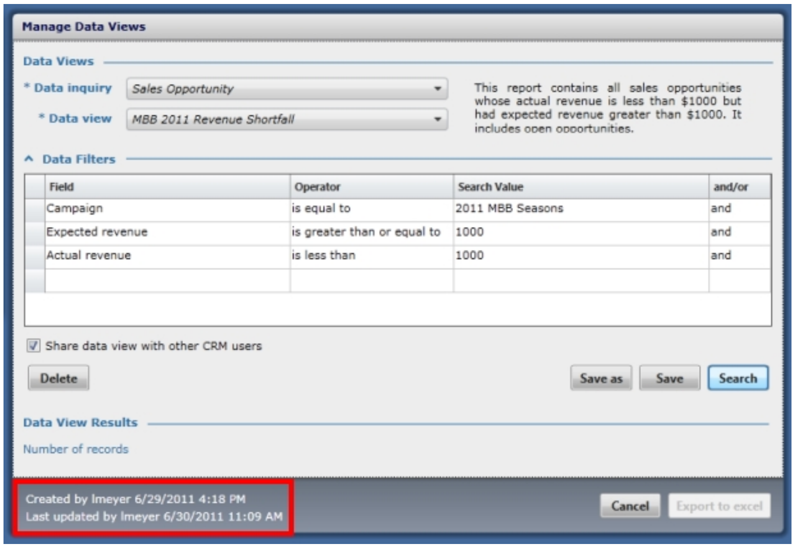
CRM expands the Manage Data Views form to display the shared data view.



Running Data Views

Data views allow you to view the information that is collected when CRM is used. This includes information about users' work with patrons, activities, opportunities, and service cases. Data views allow you to specify and view the parts of this information in which you are interested.

Once you've created your data views, you can run them at any time. The search results will not include restricted data, unless you are allowed access by your permissions. See Managing Users for more information. Some of the columns displayed in the search results will be different based on the data inquiry type (activity, sales opportunity, donation opportunity, or service case). For each data view, CRM displays the sign in (logon) name of the creator and the last user to update the view at the bottom of the Manage Data Views form.



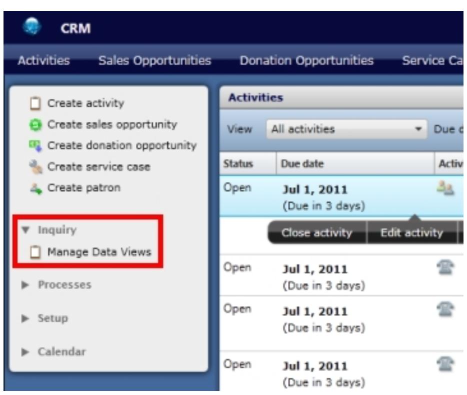
You may also be able to run other users' data views, depending on whether they have chosen to share them. If you are the creator or the creator's supervisor, you can also edit a data view before running it, and then choose whether you want to save the changes.

If you run a data view but you do not have access to restricted data that meet the data filter conditions, CRM will not display the results. Instead, a message that no results were found will be displayed. Before you can run a data view, it must have at least one data filter configured. This is because a search without data filtering would attempt to return all the records in the database.

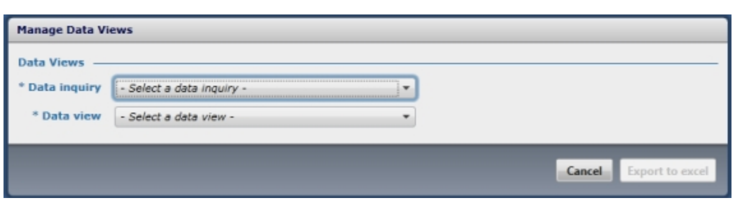
Tip: After running the data view, you can export the data to an MS Excel spreadsheet to more easily view and manipulate the results. See Exporting Data Views to Excel for more information.

To run a data view

1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.

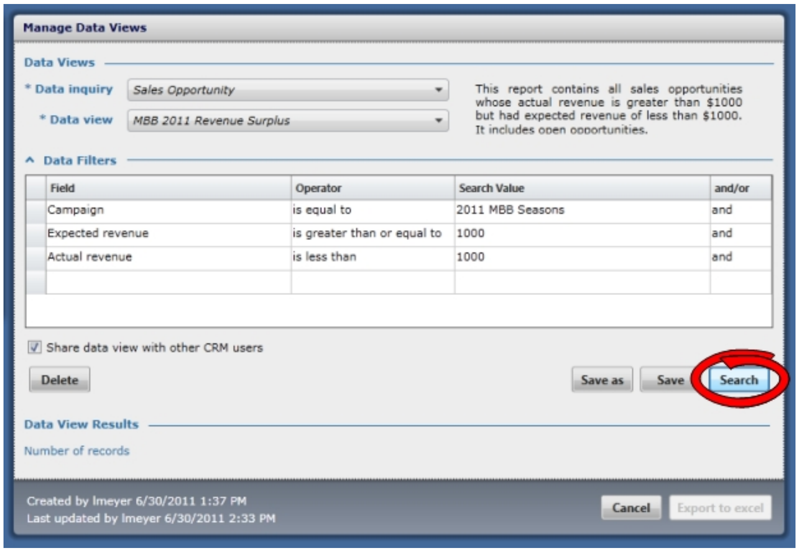
   

   CRM displays the Manage Data Views form.

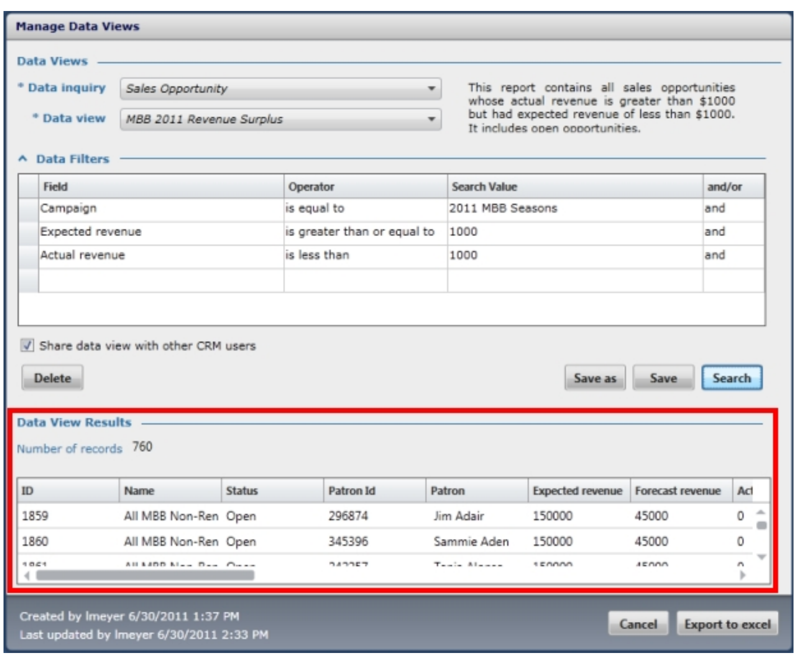
2. From the **Data inquiry** drop-down list, select the CRM item type of the data view you want to run. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.

3. From the **Data view** drop-down list, select the data view you want to run. CRM expands the Manage Data Views form to display the **Data Filters** and **Data View Results** sections.
4. Click the **Search** button.



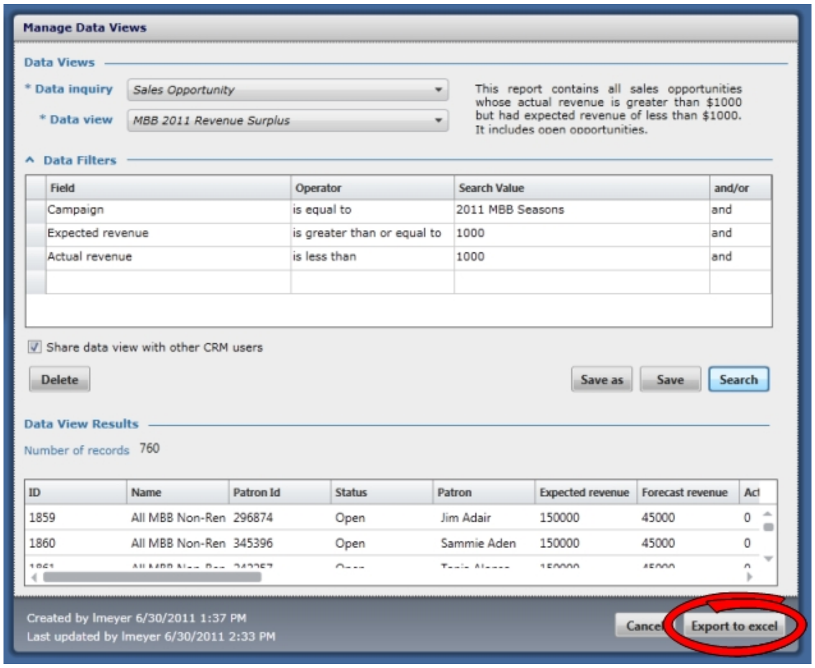
CRM starts the data view search. If you want to stop the search for any reason, click the X in the Processing bar. The search will stop and the results generated up until then will be displayed in the **Data View Results** section.

When the search is complete, CRM displays the results in the **Data View Results** section. Some of the columns in which the search results are displayed will be different based on the data inquiry type. For example, the **Expected revenue** column only displays for the **Sales Opportunity** data inquiry type.

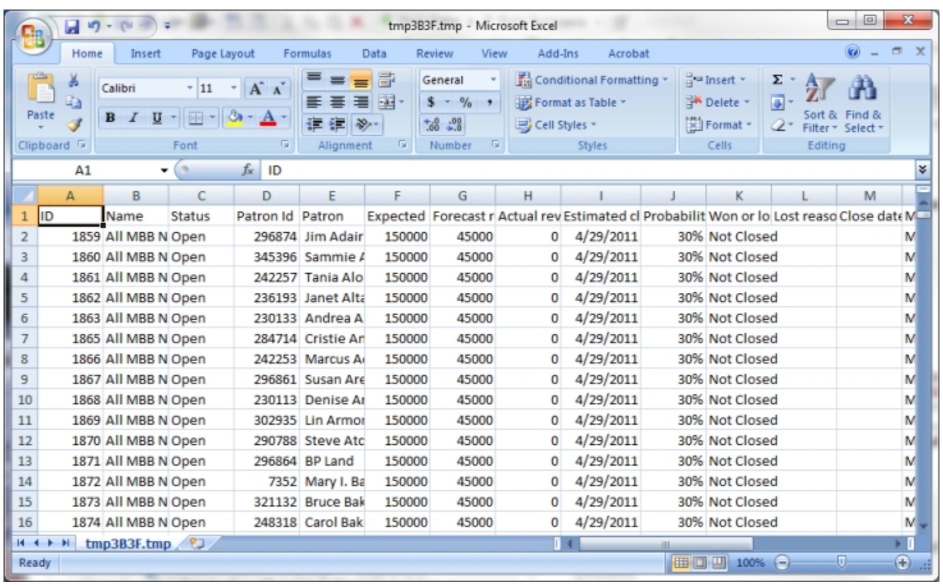


You can sort the data view results by column by clicking the column header. You can also change the column order in the results by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many data view results in the list to display in the list area, a scroll bar appears on the right side of the list.

5. If you want to view and manipulate the results in an MS Excel spreadsheet, click the **Export to Excel** button.



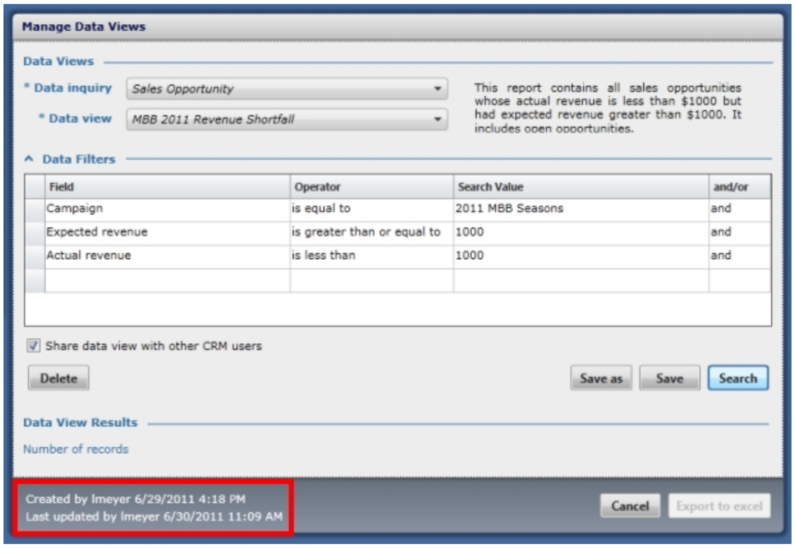
CRM starts MS Excel and populates the first sheet of a new spreadsheet with the data view results.



Editing Data Views

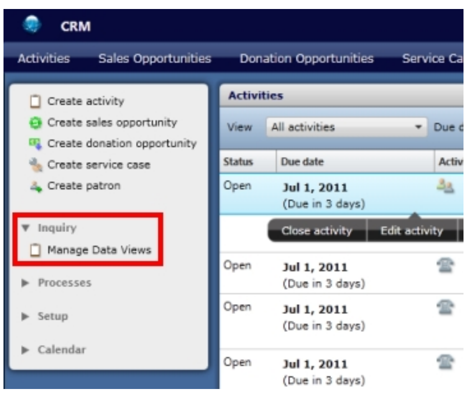
Data views allow you to view the information that is collected when CRM is used. This includes information about users' work with patrons, activities, opportunities, and service cases. Data views allow you to specify and view the parts of this information in which you are interested.

Once you've created your data views, you can edit them at any time to change the search results. You cannot edit a data view unless you are the creator or the creator's supervisor. The search results will not include restricted data, unless you are allowed access by your permissions. See Managing Users for more information. Some of the columns displayed in the search results will be different based on the data inquiry type (activity, sales opportunity, donation opportunity, or service case). For each data view, CRM displays the sign in (logon) name of the creator and the last user to update the view at the bottom of the Manage Data Views form.

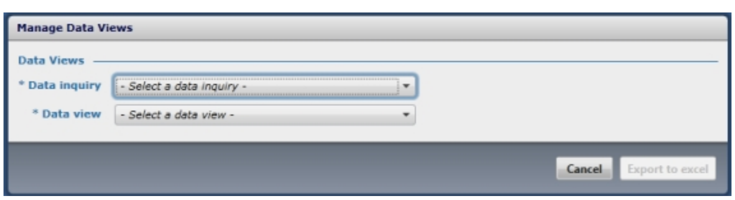


To edit a data view

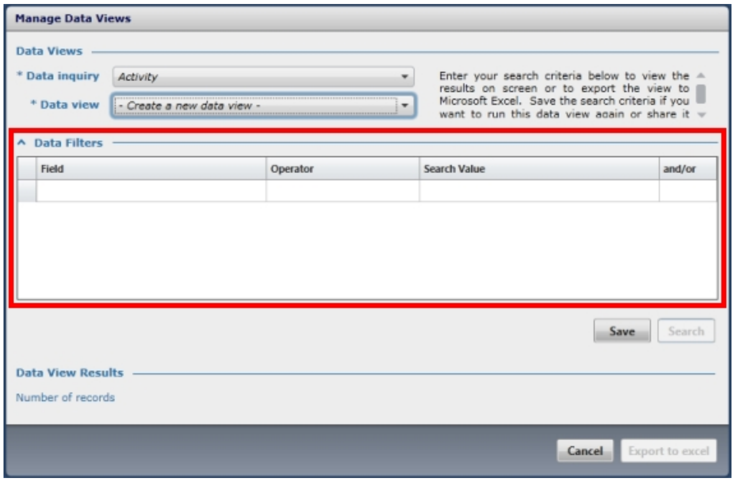
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



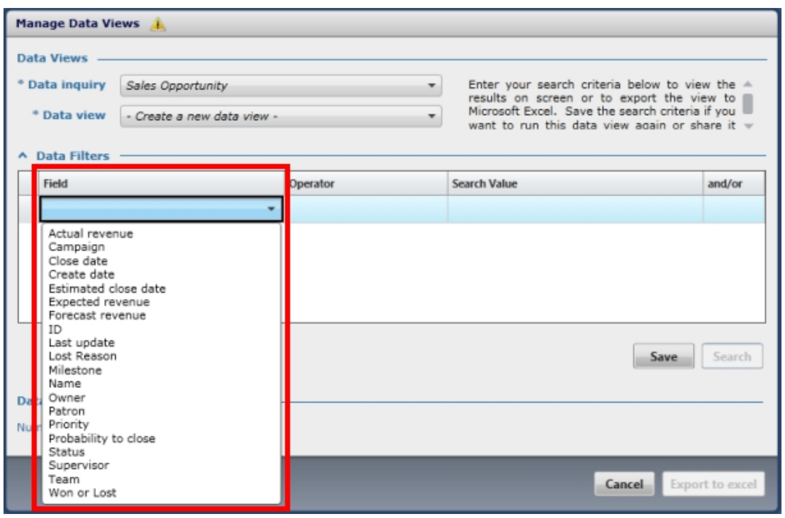
CRM displays the Manage Data Views form.



2. From the **Data inquiry** drop-down list, select the CRM item type of the data view you want to edit. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select the data view you want to edit. CRM expands the form to include the **Data Filters** section.



4. In the **Data Filters** section, set the criteria for the data view by doing the following for each data filter you want to change or add:
   a. In the **Field** column, click a cell to display the drop-down list, and then select one of the field options. The options in the list vary based on the CRM item type you selected in **Data inquiry**.



See an alphabetical list of all the possible fields with their operators and search values.

Field	Data Inquiry Item Types	Operators	Search Values
Actual amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Actual revenue	Sales Opp	is equal to, is not equal to, is less than, is less than	Enter a number.

Field	Data Inquiry Item Types	Operators	Search Values
		or equal to, is greater than, is greater than or equal to	
Activity type	Activity	is equal to, is not equal to	Select Phone call, Email, Fax, Letter, Meeting, Other.
Campaign	Sales Opp	is equal to, is not equal to	Select from the list of sales source campaigns configured in CRM. See Managing Source Campaigns.
Category	Service Case	is equal to, is not equal to	Select from the list of service case categories configured in CRM. See Managing Categories.
Close date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Create date	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Donation type	Donation Opp	is equal to, is not equal to	Outright donation, Pledge Donation, Gift In Kind. Donation types are not configurable.
Drive	Donation Opp	is equal to, is not equal to	Enter the drive code/Id or click to select with the Drive Lookup. The Drive Lookup allows you to search for drives by the drive or campaign code or name. Drives are configured in tFund.
Due date	Activity	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Estimated close date	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or	Enter a date or click to select from a calendar.

Field	Data Inquiry Item Types	Operators	Search Values
		equal to	
Expected revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Forecast revenue	Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
Goal amount	Donation Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a number.
ID	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the unique number of a CRM item.
Incoming or Outgoing	Activity	is equal to, is not equal to	Select Incoming or Outgoing.
Last updated	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or equal to	Enter a date or click to select from a calendar.
Link ID	Activity	is equal to	Enter the number of a link between CRM items and the activities associated with those

Field	Data Inquiry Item Types	Operators	Search Values
			CRM items. You can use a data filter with this field in conjunction with a data filter with the Link type field to find all the activities associated with a CRM item by Link ID.
Link type	Activity	is equal to, is not equal to	Select Sales opportunity, Donation opportunity, Service case, Patron, or Activity.
Lost reason	Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of lost reason codes configured in CRM. See Managing Lost Reason Codes.
Milestone	Donation Opp, Sales Opp	is equal to, is not equal to	The list of milestones configured in CRM. See Managing Milestones.
Name	Donation Opp, Sales Opp, Service Case	is equal to, starts with, contains	All or part of the text from the Name field of the opportunities or service cases you want to include. This field is case sensitive.
Owner	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Patron	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter the patron ID number or click to select with the Patron Lookup. See Using the Patron Lookup.
Priority	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Low, Medium, Normal, or High.
Probability to close	Donation Opp, Sales Opp	is equal to, is not equal to, is less than, is less than or equal to, is greater than, is greater than or	Select one of the 10% increments from 0% to 100%.

Field	Data Inquiry Item Types	Operators	Search Values
		equal to	
Status	Activity, Donation Opp, Sales Opp, Service Case	is equal to, is not equal to	Select Open or Closed. This is the CRM item (activity, opportunity, or service case) status. You cannot search for deleted CRM items.
Subcategory	Service Case	is equal to, is not equal to	The list of service case subcategories configured in CRM
Subject	Activity	is equal to, starts with, contains	All or part of the text from the Subject field of the activities you want to include. This field is case sensitive.
Supervisor	Activity, Donation Opp, Sales Opp, Service Case	is equal to	Enter a CRM user's sign in (logon) name or click to select with the User Lookup. See Selecting Users with the User Lookup.
Target	Donation Opp	is equal to, is not equal to	Select a target from the list. The available targets are configured in tFund.
Team	Activity, Donation Opp, Sales Opp	is equal to, is not equal to	Select from the list of teams configured in CRM. See Managing Teams.
Won or lost	Donation Opp, Sales Opp	is equal to, is not equal to	Select Closed and Won, Closed and Lost, or Not Closed. Won or lost status is selected by the user that closes the opportunity.

b. From the cell in the **Operator** column, select an operator. The operator is used in conjunction with the search value to determine the entries that will be returned from the selected field.

c. For the cell in the **Search Value** column, select or enter the values for which you want to search. The combined setting of a field, an operator, and a search value in the same row is a data filter.

d. To further define the results of the data view, press the Enter key to add more rows, and then set up the data filter in each row.

e. If you have more than one data filter, set the condition of each data filter by selecting **and** or **or** from the **and/or** column cell of the previous data filter row. The data filter in the first row of the Data Filters table is treated as having an **and** condition. Search result data must meet the definition of all consecutive data filters preceded by an **and** condition. If a row has an **or** condition, the results must either meet the definitions of all the preceding **and** conditions or meet the definitions of all the following **and** conditions until the next **or** condition.

See an example:

Data inquiry: Sales Opportunity

Data view: Data View Name

Data Filters

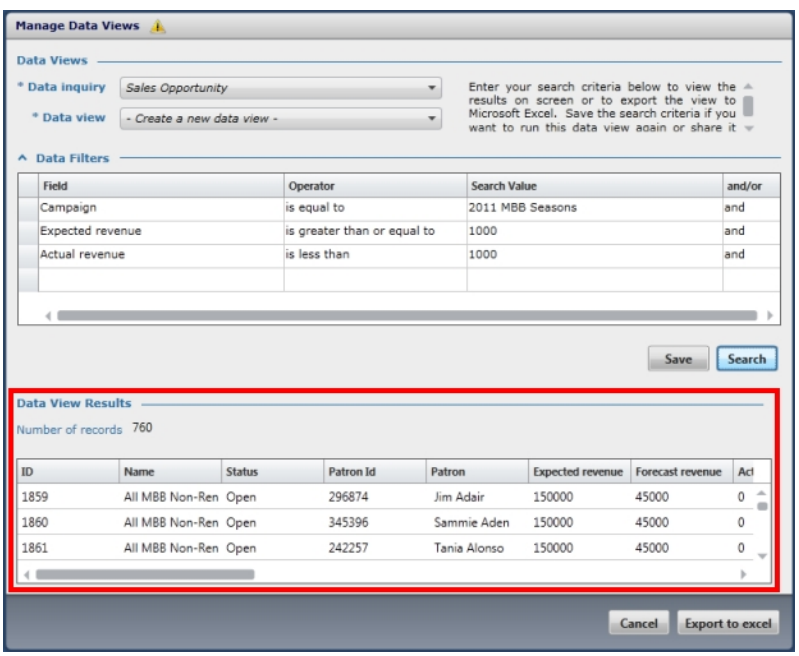
Field	Operator	Search Value	and/or
Campaign	is equal to	A	and
Actual revenue	is greater than	1000	or
Campaign	is equal to	B	and
Actual revenue	is greater than	1000	and
Expected revenue	is less than	500	or
Campaign	is equal to	C	and
Actual revenue	is greater than	1000	and

This set of data filters will generate data view results that include all sales opportunities for which *one or more* of the following is true:

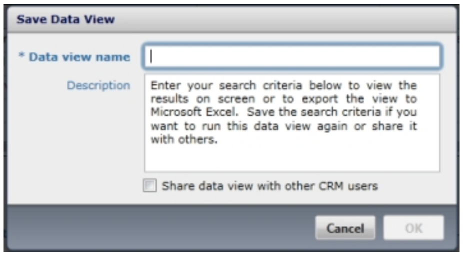
- Is part of campaign A and resulted in more than $1000 actual revenue.
- Is part of campaign B and resulted in more than $1000 actual revenue and had expected revenue less than $500.
- Is part of campaign C and resulted in more than $1000 actual revenue.

The **and** in the last row is ignored since there is no row below it.

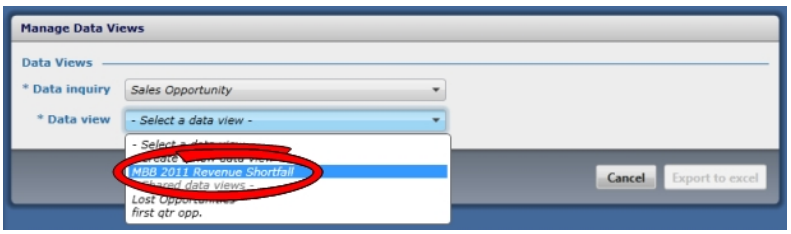
5. Click the **Search** button. CRM displays the search results from the data view in the **Data View Results** section. If you are not satisfied with the results, change the data filters, and then click **Search** again to view the new results. You may not have access to restricted data, depending on your user permissions.



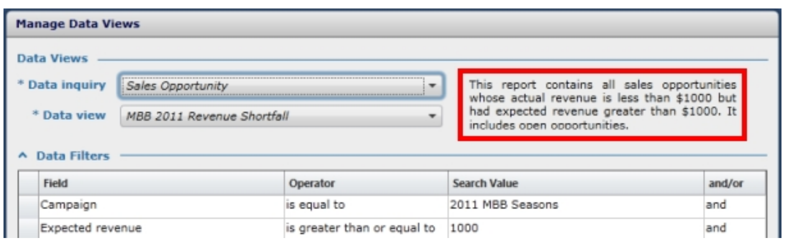
6. Click the **Save** button. CRM displays the Save Data View dialog box. When you save a data view, search results are not saved with it.



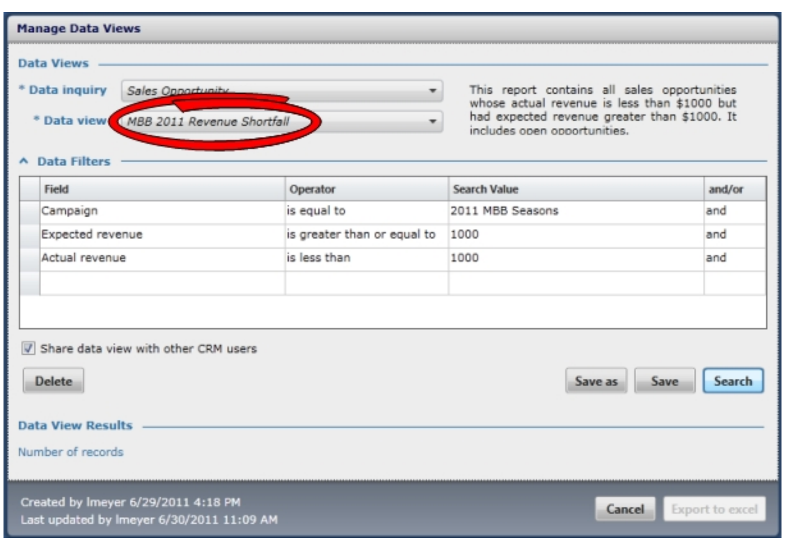
7. If you want to change the data view name, enter the new name of the data view in **Data view name**. This name will be available from the **Data view** drop-down list on the Manage Data Views form.



8. If you want to change the data view description, edit the text in the Description box. This description will display on the Manage Data Views form when this data view is selected.



9. If you want other CRM users to have access to this data view, select **Share data view with other CRM users**.
10. Click the **OK** button. CRM redisplays the Manage Data Views form with the edited data view selected in the **Data view** drop-down list.



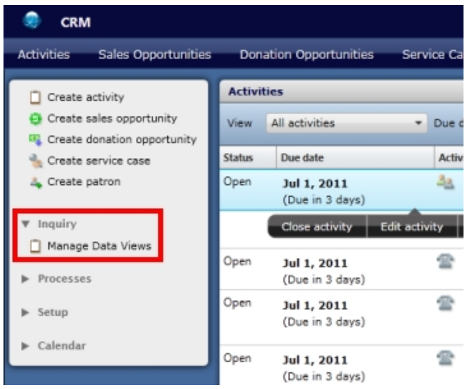
Exporting Data Views to Excel

Data views allow you to view the information that is collected when CRM is used. This includes information about users' work with patrons, activities, opportunities, and service cases. Data views allow you to specify and view the parts of this information in which you are interested.

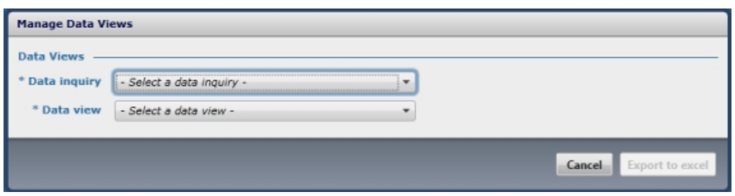
When you run a data view, you can export it to an MS Excel spreadsheet to more easily view and manipulate the data. The supported export file types are Excel versions 2007 and higher. Export is supported for the MS Windows operating system only (XP, Vista, and 7).

To export a data view to an MS Excel spreadsheet

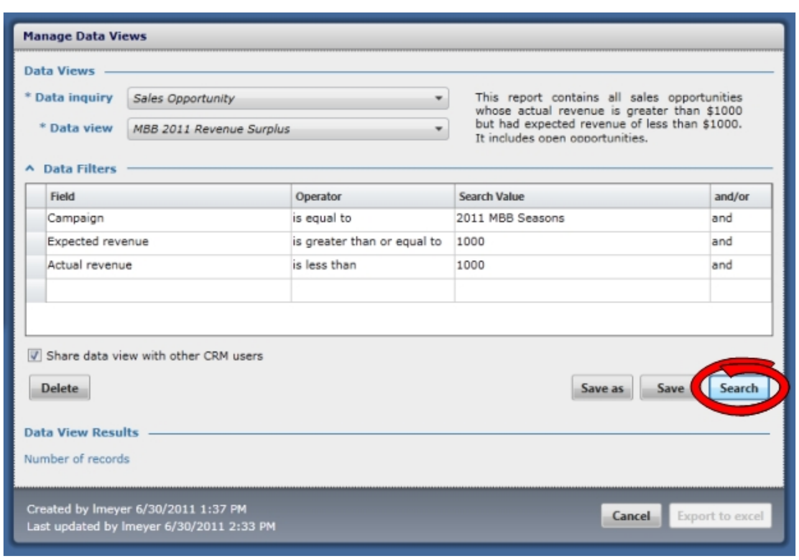
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



CRM displays the Manage Data Views form.

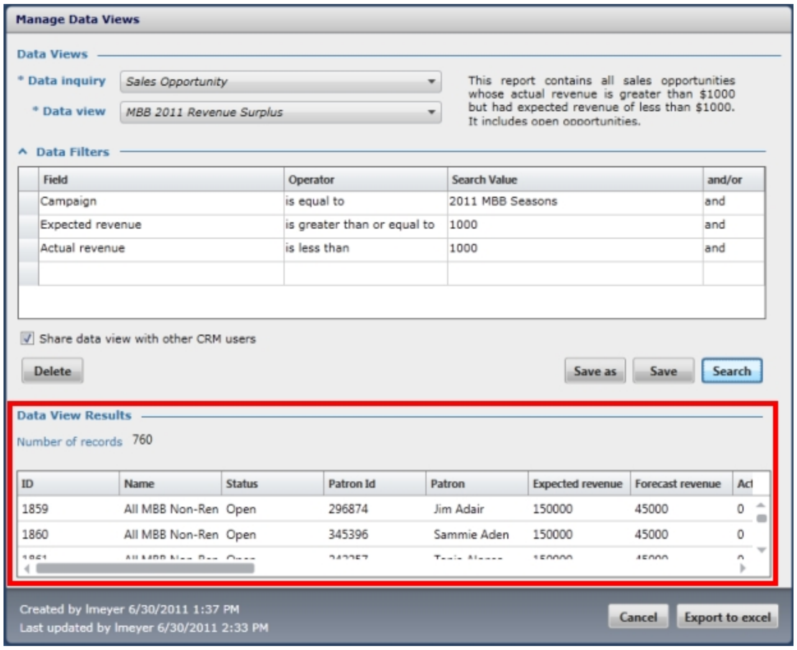


2. From the **Data inquiry** drop-down list, select the CRM item type of the data view you want to run. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select the data view you want to run. CRM expands the Manage Data Views form to display the **Data Filters** and **Data View Results** sections.
4. Click the **Search** button.



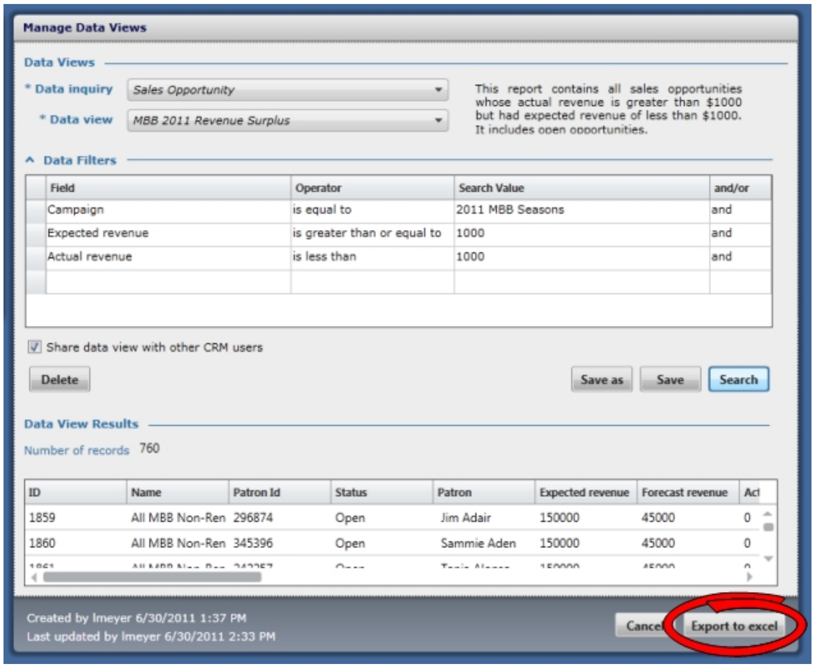
CRM starts the data view search. If you want to stop the search for any reason, click the X in the Processing bar. The search will stop and the results generated up until then will be displayed in the **Data View Results** section.

When the search is complete, CRM displays the results in the **Data View Results** section. Some of the columns in which the search results are displayed will be different based on the data inquiry type. For example, the **Expected revenue** column only displays for the **Sales Opportunity** data inquiry type.

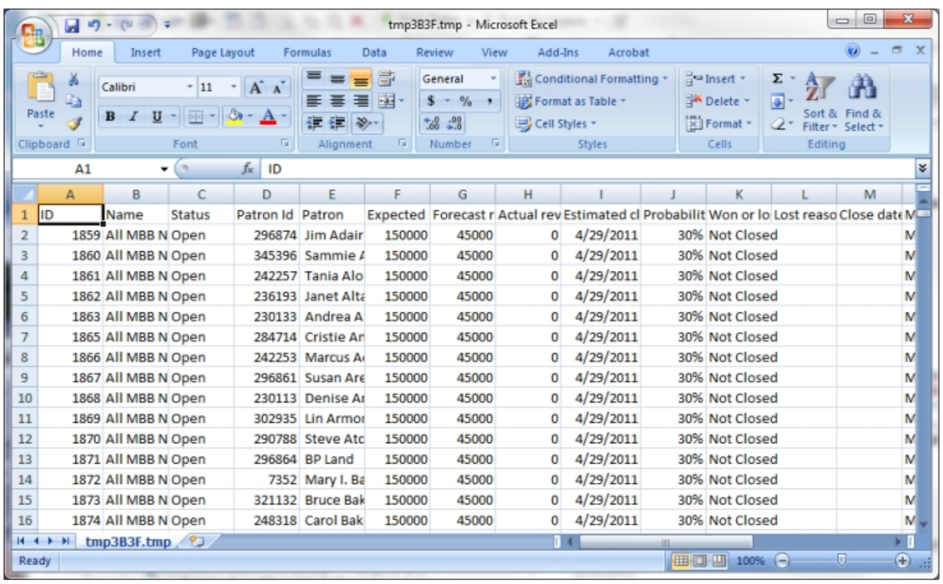


You can sort the data view results by column by clicking the column header. You can also change the column order in the results by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many data view results in the list to display in the list area, a scroll bar appears on the right side of the list.

5. Click the **Export to Excel** button.



CRM starts MS Excel and populates the first sheet of a new spreadsheet with the data view results.



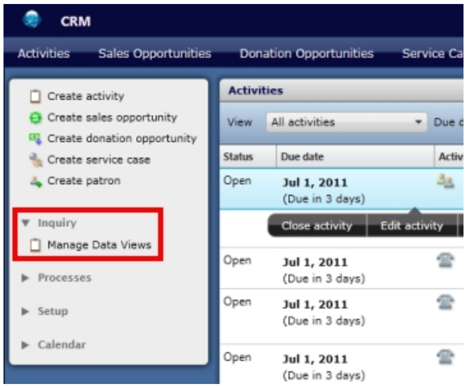
Deleting Data Views

Data views allow you to view the information that is collected when CRM is used. This includes information about users' work with patrons, activities, opportunities, and service cases. Data views allow you to specify and view the parts of this information in which you are interested.

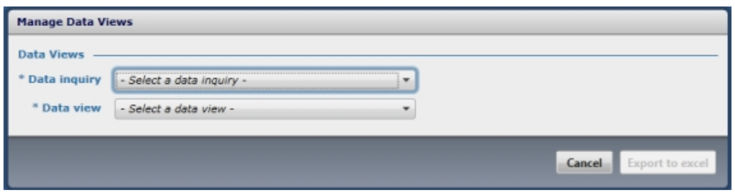
If you find you no longer need a data view that you or a subordinate created, you can delete it at any time. You cannot delete a data view unless you are the creator or the creator's supervisor.

To delete a data view

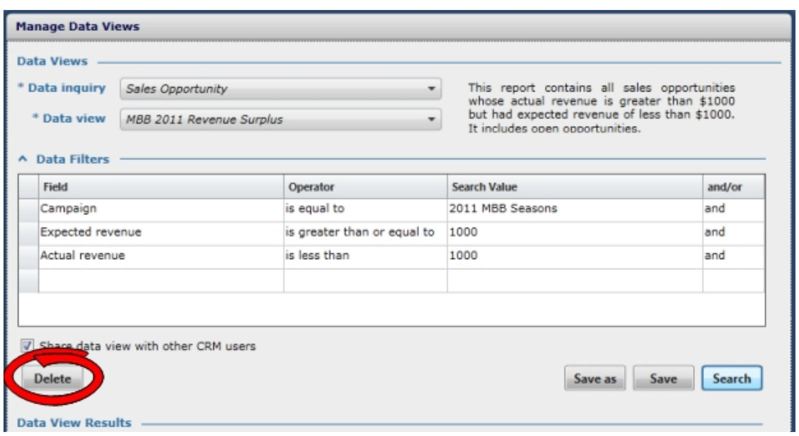
1. In the navigation pane, click **Inquiry**, and then click **Manage Data Views**.



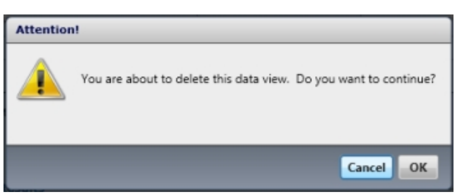
CRM displays the Manage Data Views form.



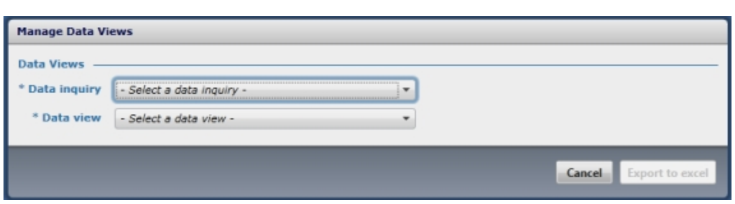
2. From the **Data inquiry** drop-down list, select the CRM item type of the data view you want to delete. The item types available in this list may be limited by your user permissions. For more information, see Managing Users.
3. From the **Data view** drop-down list, select the data view you want to delete. CRM expands the Manage Data Views form to display the **Data Filters** and **Data View Results** sections.
4. Click the **Delete** button.



CRM displays the Attention dialog box.



5. Click the **OK** button. CRM deletes the data view and redisplays the Manage Data Views form.



Chapter 4 Managing Users

The main CRM users include sales and service representatives, supervisors, and administrators. Executives may also use CRM to monitor overall sales, donations, and service case resolution.

CRM users are created using Paciolan WBST user administration. Once created in WBST, their user profiles are enabled and configured in CRM. A user profile includes permissions, place in the user hierarchy, MS Outlook user name, and team membership. Within CRM, a user may be a basic user, a supervisor, or an administrator.

Basic CRM users are sales, donation, or customer service representatives with no other users reporting to them. A supervisor is a user who has one or more direct reports and creates and assigns opportunities or service cases. An administrator is a user with access to all CRM functionality. Administrators create all the other CRM users.

When managing CRM users, you can do the following:

- Create and enable CRM users
- Select users with the User Lookup
- Set Up the user hierarchy
- Set user permissions
- Edit MS Outlook email addresses
- Disable user access to CRM

Creating CRM Users

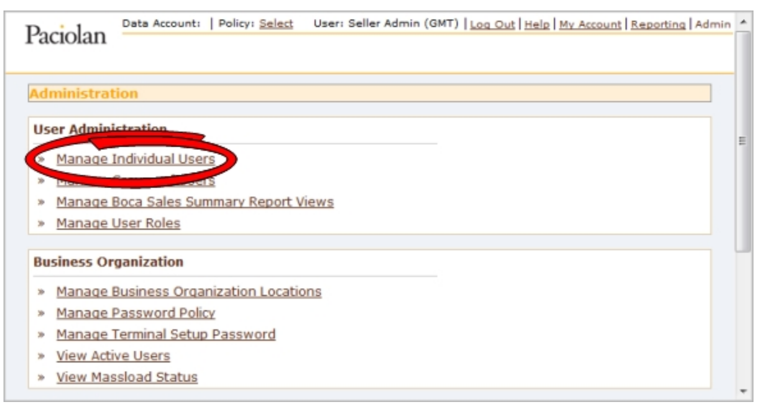
CRM users are created using the administrator tools in WBST, so WBST must be installed for your organization to use CRM. You must also have administrator access to your WBST installation. Each user you create must be assigned an operator code that is valid for the CRM data account and patron management policies you want available to the new user. Once you've created a user is WBST, you can set up the rest of the user's profile in CRM.

To create a CRM user in WBST

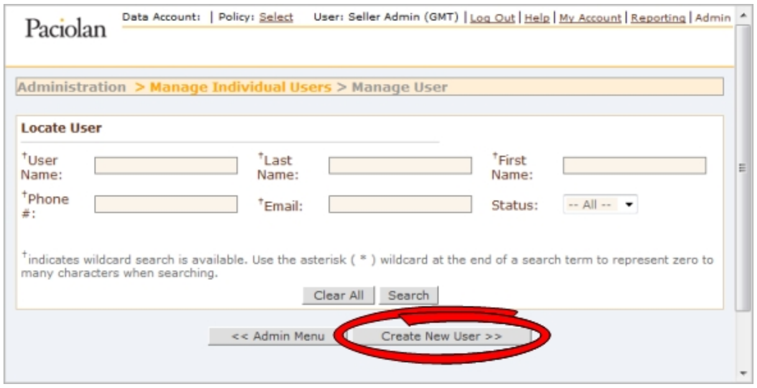
1. In your web browser, open the WBST site, and then sign in. If you do not know how to do this, contact your Paciolan representative.

2. In the WBST menu, click the **Admin** link. CRM displays the Administration page.

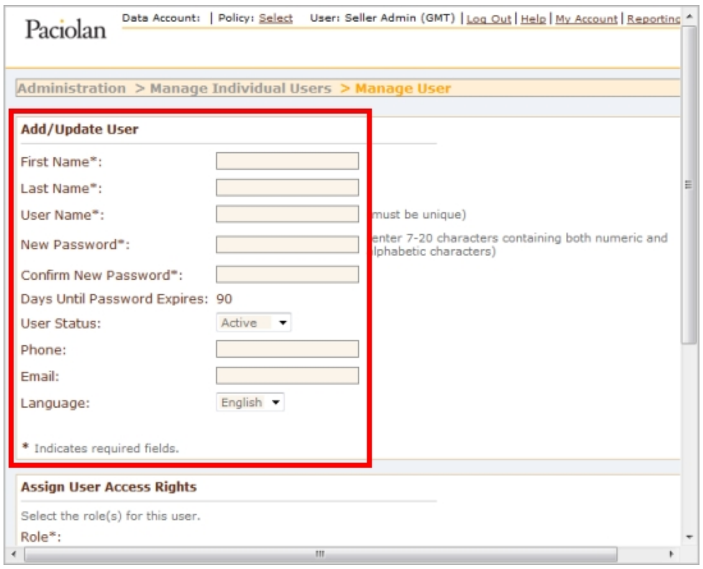
3. Click the **Manage Individual Users** link. CRM displays the Manage User page.



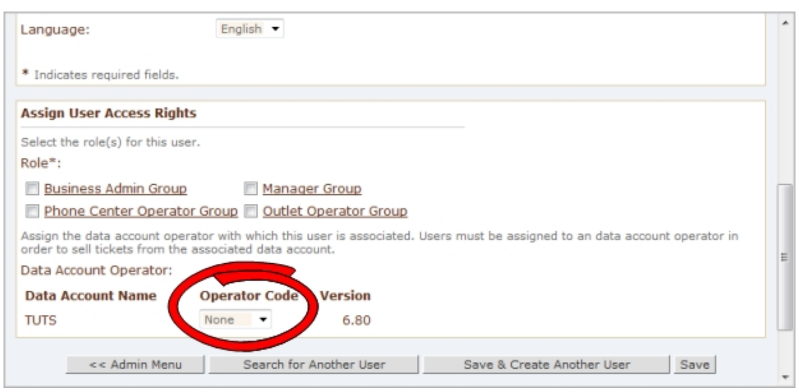
4. Click the **Create New User** button. CRM displays a new page with the Add/Update User and Assign User Access Rights forms.



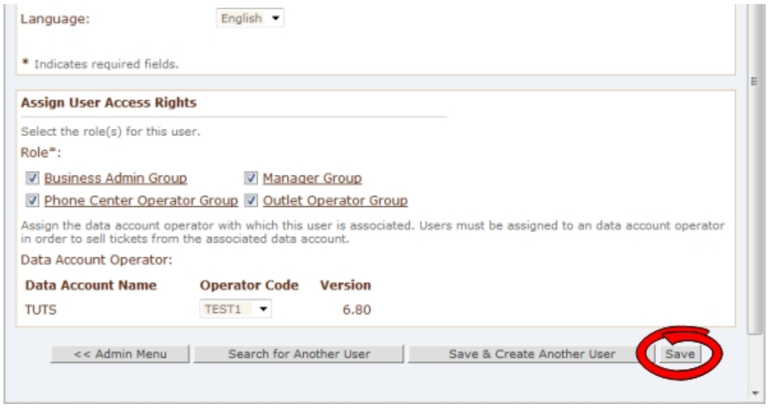
5. In the **Add/Update User** section, enter the new user's information. You will need to supply the user name and password, along with the seller ID, to the new user for signing in to CRM.



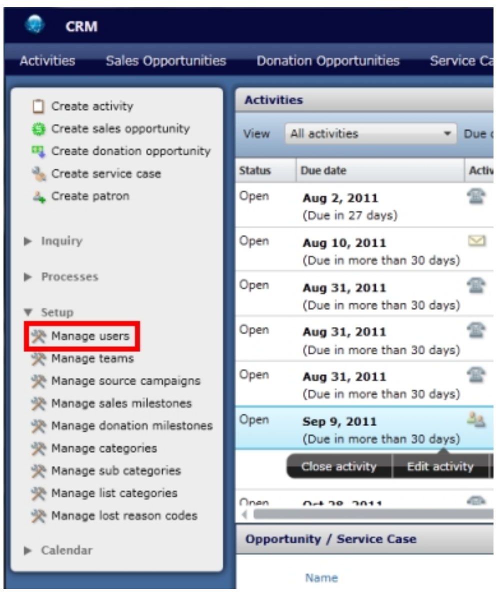
6. In the **Assign User Access Rights** section, do the following:
   a. Select at least one role for the user. This is required, although roles are not used for CRM.
   b. From the **Operator Code** drop-down list, select a valid operator code for the data account and patron management policies you are using for CRM.



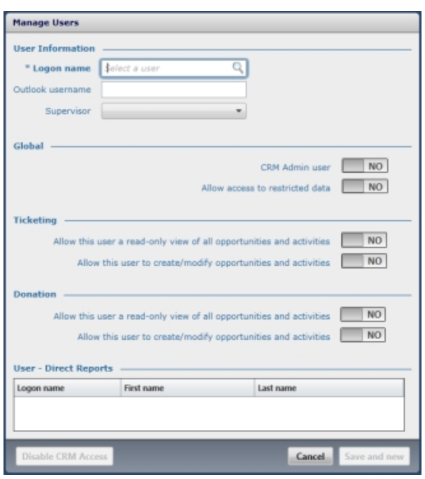
7. Click the **Save** button.



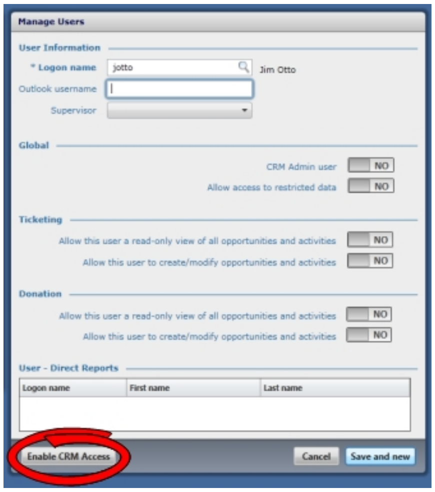
8. Sign in to CRM. You must have CRM admin user rights to complete this procedure
9. In the navigation pane, click **Setup**, and then click **Manage Users**.



CRM displays the Manage Users form.



10. In the **Logon name** field, enter the user name of the new user . If you don't know the user name, use the User Lookup.
11. Click the **Enable CRM Access** button. The new user can now sign in to CRM. You can also assign the user a supervisor and set the permissions for the new user.



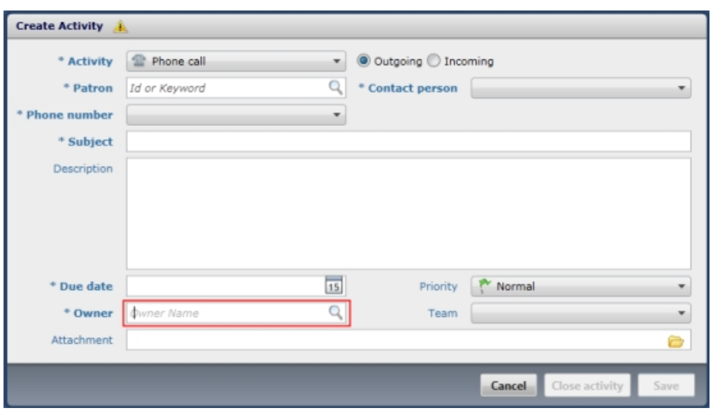
Selecting Users with the User Lookup

When working in CRM, you will periodically need to select other users from your organization. The most common situation is when assigning ownership of an activity, opportunity, or service case. Other examples include assigning a sales or donor rep or creating a data view using a CRM item owner for one of the search criteria.

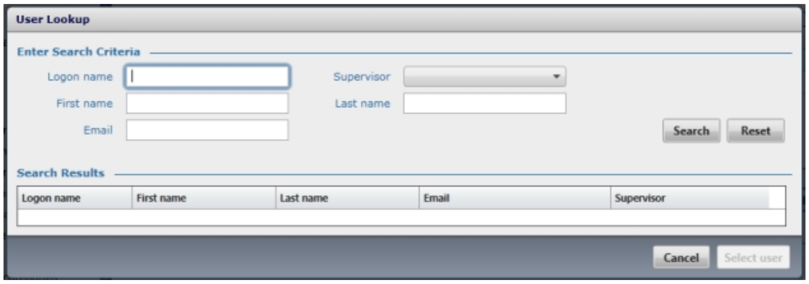
The User Lookup is initiated from any field in CRM that requires a CRM user to be specified. In each instance, you can just enter the user's sign in (logon) name if you know it. However, if you don't know the logon name, you launch the User Lookup to find it. The User Lookup allows you to search using a partial logon name, first name, last name, email, or supervisor.

To select a user with the User Lookup

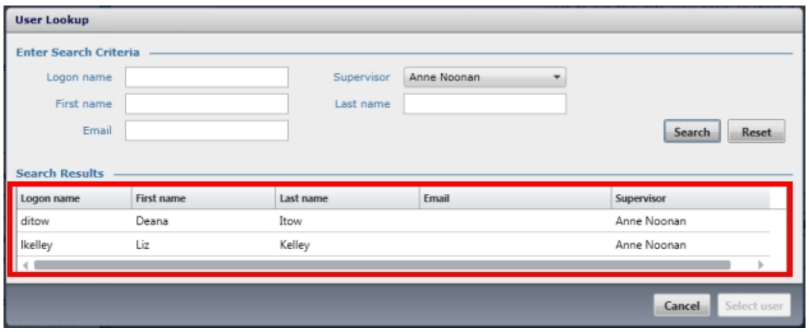
1. Click in the User Lookup field. In the example below, you are looking for a user to assign ownership of a new activity.



2. In the user field, click the icon. CRM displays the User Lookup.



3. Enter whatever information you know in the Enter Search Criteria fields, and then click the **Search** button. CRM displays all users who match the criteria in the Search Results table.



4. Select the row of the correct user, and then click the **Select User** button. You can also just double-click the user's row. CRM redisplays the form with the user in the user field.

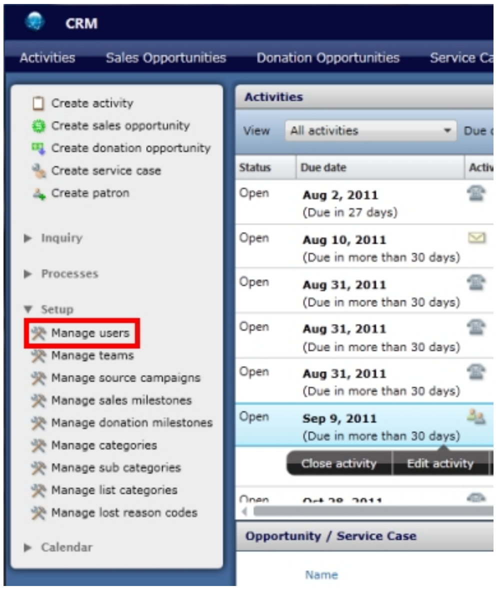
Setting Up the User Hierarchy

The CRM user hierarchy represents the manager to employee relationships in your organization. CRM uses the hierarchy to determine which users can assign tasks to other users and what information is available to them. To avoid confusion and mistakes, you should map out the user hierarchy you want before you begin setting it up in CRM.

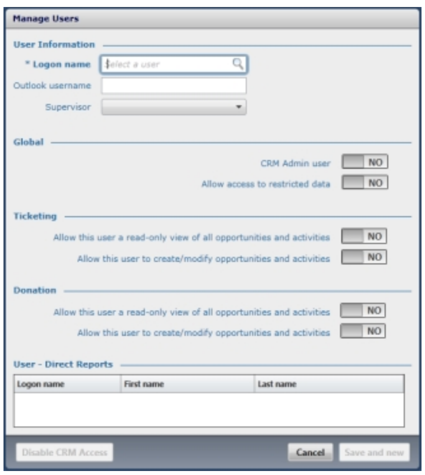
User hierarchy is set up in CRM by assigning supervisors to individual users. A user can only have one supervisor, but a supervisor can have any number of users as direct reports. The hierarchy cannot be circular, so a user cannot be the supervisor of a user who is their supervisor's supervisor. This is enforced by the system.

To assign a supervisor to a user

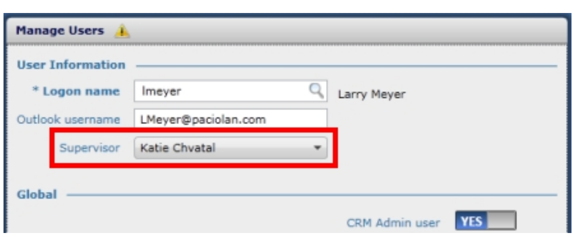
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



CRM displays the Manage Users form.

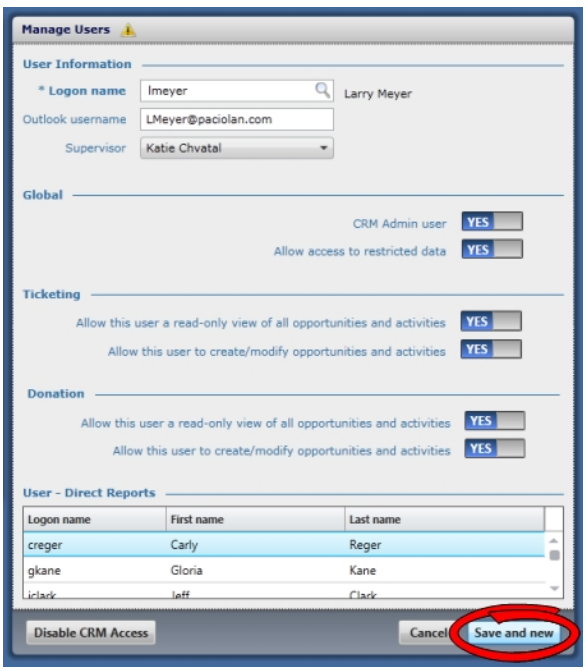


2. In the **Logon name** field, enter the sign in (user) name of the user to whom you want to assign a supervisor. If you don't know the user name, use the User Lookup.
3. From the **Supervisor** drop-down list, select the name of the supervisor.



If the name is not listed, the supervisor may not have a CRM user profile yet or may not be eligible for the assignment. If the supervisor has a user profile, make sure the supervisor is not a direct report of the user by checking the **User - Direct Reports** table. If the supervisor is not in this table, display the supervisor's profile using the Manage Users form, and then make sure that the supervisor's supervisor is not a direct report of the user.

4. Click the **Save and new** button. CRM saves the profile and redisplays the Manage Users form with no user information.



5. Repeat these steps for each user in the hierarchy.

Setting Up User Permissions

User permissions in CRM control access to restricted, ticketing, and donation data. Access to ticketing and donation data can be read-only or create and modify. Permissions are also used to designate users as CRM administrators. Regardless of permissions settings, users can always view their own opportunities, service cases, and activities. To set user permissions, your user profile must allow you CRM administrator rights.

Note: Users that are signed in to CRM when you change their permissions must sign out and sign in again for the changes to take effect.

See recommended permissions settings for CRM user types

We recommend that you set permissions for administrators, executives, supervisors, sales/donation representatives, and customer service representatives as shown in the table below.

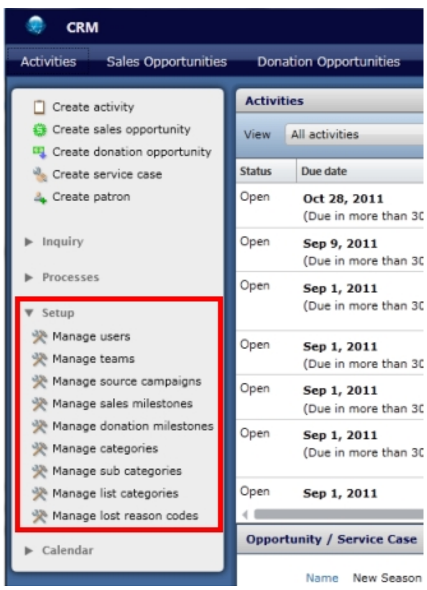
CRM user	Admin user	Restricted data	Read-only	Create/modify
Administrator	Yes	No	No	No
Executive	No	Yes	Yes	No
Supervisor	No	Yes	Yes	Yes
Sales/Donation Rep	No	No	No	Yes
Customer Service Rep	No	No	No	No

When setting up CRM user permissions, you can do the following:

- Configure a CRM Admin User
- Configure Access to Restricted Data
- Configure Access to Ticketing Data
- Configure Access to Donation Data

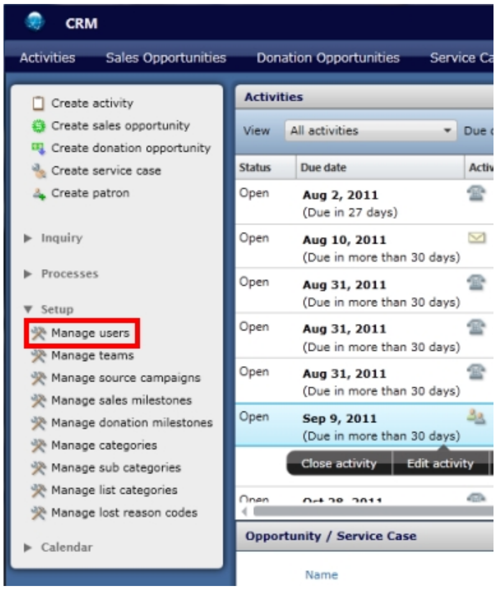
Configuring a CRM Admin User

A CRM admin user is responsible for managing user profiles and all the list selection items that can be configured for CRM forms. A CRM admin user may also assign batches of activities to users. Admin user permissions are required to access the management functions in the Setup menu on the left navigation pane. For information about using these functions, see CRM Form Options Setup.

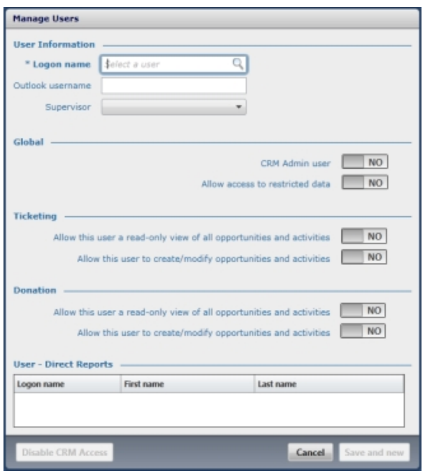


To set CRM admin permissions for a user

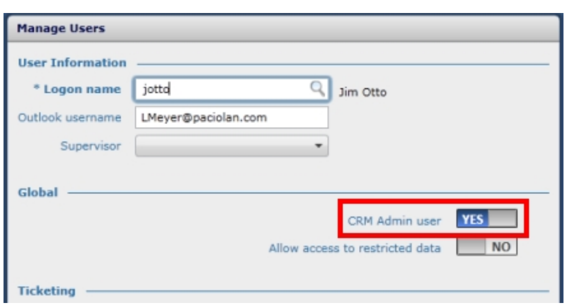
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



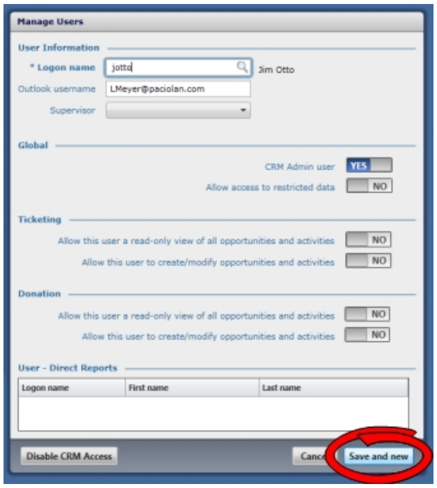
CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user that you want to have CRM admin user permissions. If you don't know the user name, use the User Lookup.
3. In the **Global** section, select **YES** for the **CRM Admin user** option.



4. Click the **Save and new** button.



Configuring Access to Restricted Data

Restricted data is sales and donation opportunities that have been marked as restricted by you or another user. Once an opportunity is restricted, only users with access to restricted data and the opportunity's owner will be able to view or edit the opportunity. Users must be configured for access to restricted data before they can make an opportunity restricted. Access to restricted data is limited by the user hierarchy as follows:

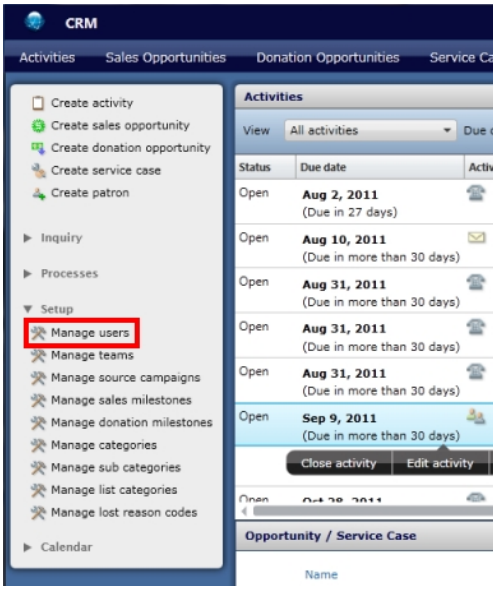
- If your supervisor does not have access to restricted data, you do not have access.
- If you are a supervisor with access to restricted data, you have access to your own restricted data and to that of all users below you in the hierarchy (that is, your direct reports, their direct reports, etc.). You can also make your subordinates' opportunities restricted.
- If you are not a supervisor and have access to restricted data, you only have access to your own restricted data.

Permissions for access to ticketing and donation data override the restricted data access setting. That is, if you don't have read-only or create/modify access to ticketing or donation data, having access to restricted data does not allow you read-only or create/modify access to the restricted data.

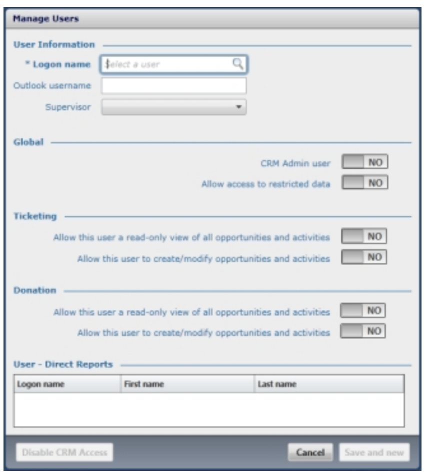
Note: If you disable a supervisor's access to restricted data, all of the users below the supervisor in the hierarchy have their access to restricted data automatically disabled as well. However, if you enable access for the supervisor, access is not automatically enabled for those below the supervisor in the hierarchy.

To set access to restricted data for a user

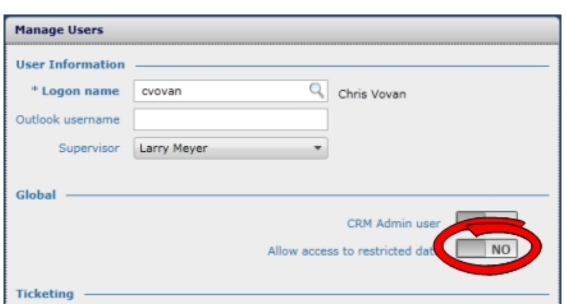
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



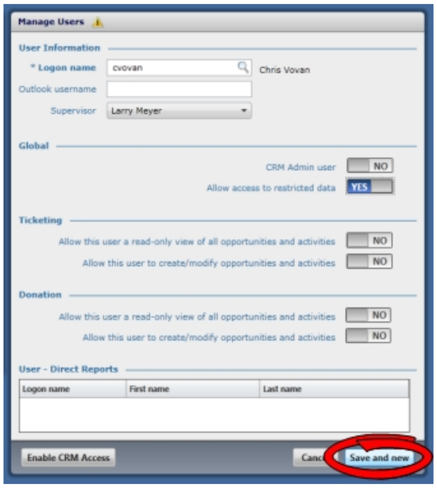
CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user for whom you want to set access to restricted data. If you don't know the user name, use the User Lookup.
3. For the **Allow access to restricted data** option in the **Global** section, do one of the following:
   - Select **YES** to allow the user access to restricted data.
   - Select **NO** to deny the user access to restricted data.



4. Click the **Save and new** button.



Configuring Access to Ticketing Data

CRM can allow users access to ticketing data in read-only, create/modify, or read-only and create/modify configurations. They may also be denied access to ticketing data. Read-only and create/modify access permissions are set separately for ticketing and donation data access.The user hierarchy does not affect the enablement of read-only or create/modify access permissions.

Ticketing data includes sales opportunities and the activities that are created in association with them. Users with read-only access to ticketing data can see the sales opportunities and associated activities for all users in CRM, except when they are limited by restricted data access. The user hierarchy does not affect a user's access to read-only ticketing data.

For users that have read-only access but not create/modify access, their permissions only allow them to see ticketing data through data views and the patron summary. With this configuration, CRM does not allow them access to the Sales Opportunities hub.

Users with create/modify access to ticketing data can access the Sales Opportunities hub. When using the hub, they have access to sales opportunities and their related activities, unless they are limited by restricted data access or their place in the hierarchy. Users can only create, modify, and delete sales opportunities for which they or their subordinates (that is, their direct reports, their direct reports direct reports, etc.) are the owner.

Users that have create/modify but not read-only access to ticketing data cannot generate data views for sales opportunities. They can view individual patrons' sales opportunities in the patron summary. They can also view their own sales opportunities and those of their subordinates on the Sales Opportunities hub.

Users that do not have read-only or create/modify access to ticketing data can only see a list of sales opportunities on the patron summary form. CRM will not display the View Sales Opportunity form. CRM also does not display the Sales Opportunities hub for this configuration.

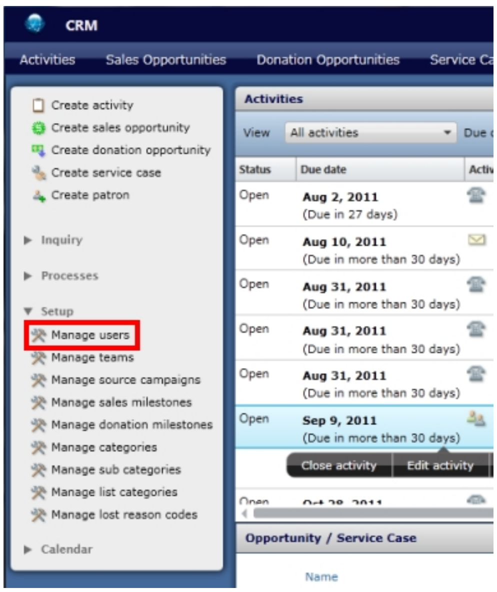
See a table summarizing the CRM functionality available for the ticketing data permissions configurations

CRM functionality	**Read-only - NO Create/modify - NO**	**Read-only - YES Create/modify - NO**	**Read-only - NO Create/modify - YES**	**Read-only - YES Create/modify - YES**
Sales Opportunities hub	Not available	Not available	Available	Available

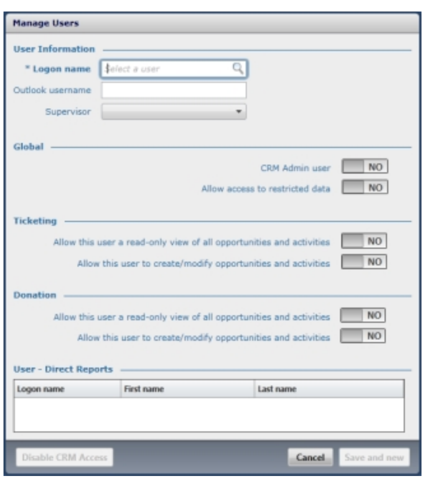
CRM functionality	Read-only - NO Create/modify - NO	Read-only - YES Create/modify - NO	Read-only - NO Create/modify - YES	Read-only - YES Create/modify - YES
Data View - Sales Opportunity data inquiry	Not available	Available	Not available	Available
Patron Summary form	Sales opportunity list but not details form	Available	Sales opportunity list but not details form	Available

To set ticketing data permissions for a user

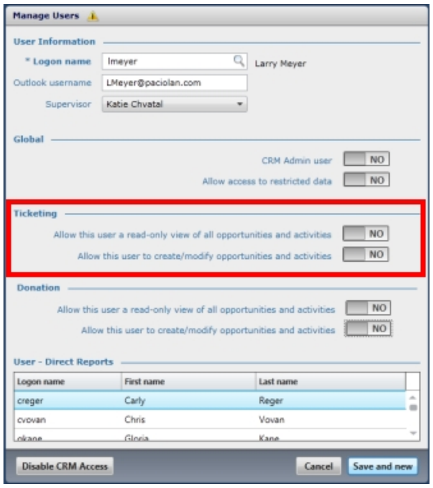
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user for whom you want to set ticketing data permissions. If you don't know the user name, use the User Lookup.
3. In the **Ticketing** section, set the read-only view and create/modify options.



4. Click the **Save and new** button.

Configuring Access to Donation Data

CRM can allow users access to donation data in read-only, create/modify, or read-only and create/modify configurations. They may also be denied access to donation data. Read-only and create/modify access permissions are set separately for donation and ticketing data access.The user hierarchy does not affect the enablement of read-only or create/modify access permissions.

Donation data includes donation opportunities and the activities that are created in association with them. Users with read-only access to donation data can see the donation opportunities and associated activities for all users in CRM, except when they are limited by restricted data access. The user hierarchy does not affect a user's access to read-only donation data.

For users that have read-only access but not create/modify access, their permissions only allow them to see donation data through data views and the patron summary. With this configuration, CRM does not allow them access to the Donation Opportunities hub.

Users with create/modify access to donation data can access the Donation Opportunities hub. When using the hub, they have access to donation opportunities and their related activities, unless they are limited by restricted data access or their place in the hierarchy. Users can only create, modify, and delete donation opportunities for which they or their subordinates (that is, their direct reports, their direct reports direct reports, etc.) are the owner.

Users that have create/modify but not read-only access to donation data cannot generate data views for donation opportunities. They can view individual patrons' donation opportunities in the patron summary. They can also view their own donation opportunities and those of their subordinates on the Donation Opportunities hub.

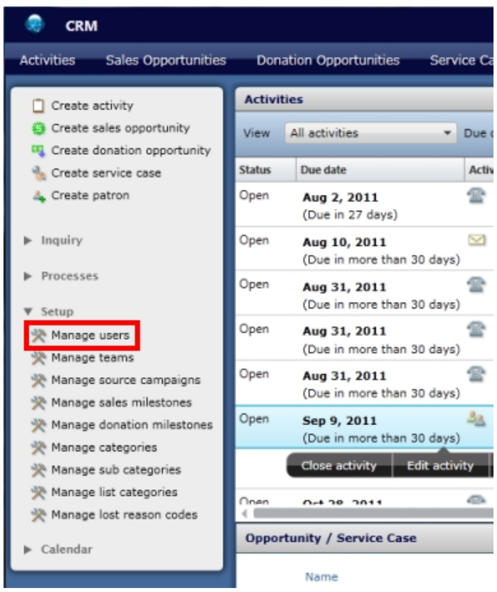
Users that do not have read-only or create/modify access to donation data can only see a list of donation opportunities on the patron summary form. CRM will not display the View Donation Opportunity form. CRM also does not display the Donation Opportunities hub for this configuration.

See a table summarizing the CRM functionality available for the donation data permissions configurations

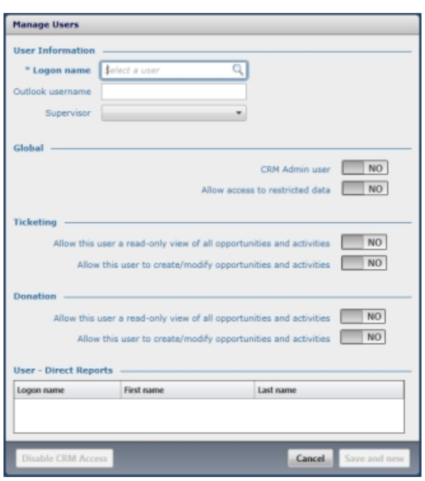
CRM functionality	Read-only - NO Create/modify - NO	Read-only - YES Create/modify - NO	Read-only - NO Create/modify - YES	Read-only - YES Create/modify - YES
Donation Opportunities hub	Not available	Not available	Available	Available
Data View - Donation Opportunity data inquiry	Not available	Available	Not available	Available
Patron Summary form	Donation opportunity list but not details form	Available	Donation opportunity list but not details form	Available

To set donation data permissions for a user

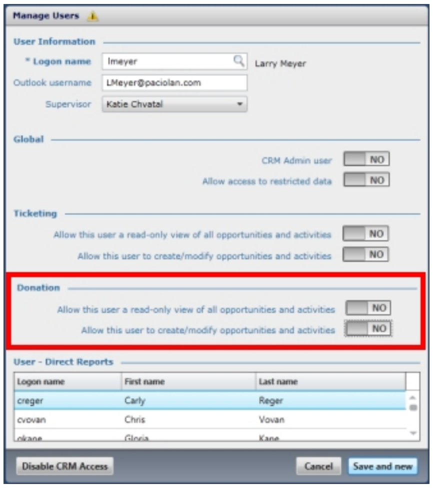
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user for whom you want to set donation data permissions. If you don't know the user name, use the User Lookup.
3. In the **Donation** section, set the read-only view and create/modify options.



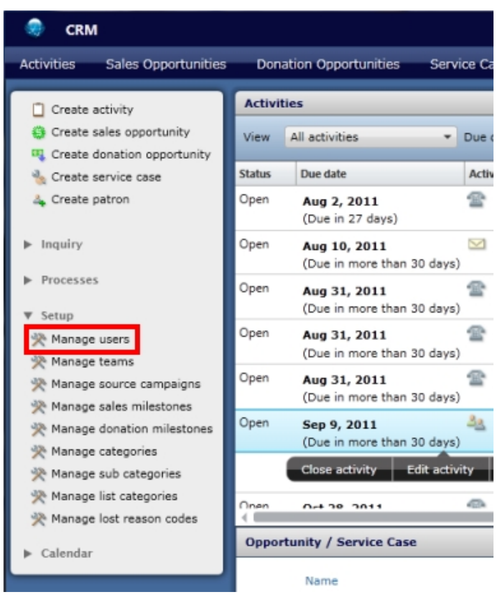
4. Click the **Save and new** button.

Editing Outlook Email Addresses for Users

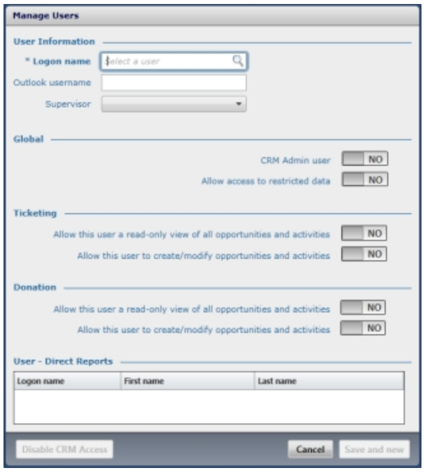
If you are using Paciolan CRM with integrated Outlook, CRM requires your users' Outlook email addresses to synchronize the CRM and Outlook inboxes. This is normally done automatically the first time they sign in to CRM after the Paciolan client and Outlook add-in have been installed. However, if one of your user's Outlook email address changes for some reason, you can change it any time. When you change the email address, the CRM Inbox and the Outlook Inbox of the new email address will synchronize the next time the user signs in to CRM.

To change a user's Outlook email address

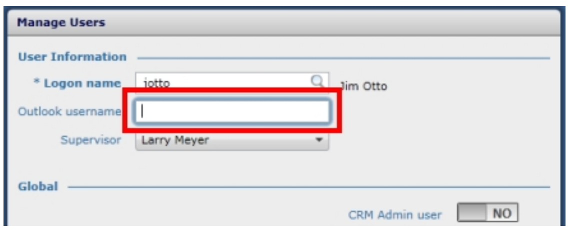
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



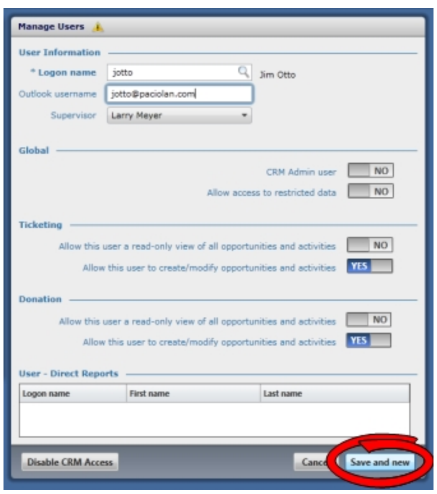
CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user whose Outlook email address you want to change. If you don't know the user name, use the User Lookup.
3. In the Outlook username field, enter the user's Outlook email address.



4. Click the Save and new button.



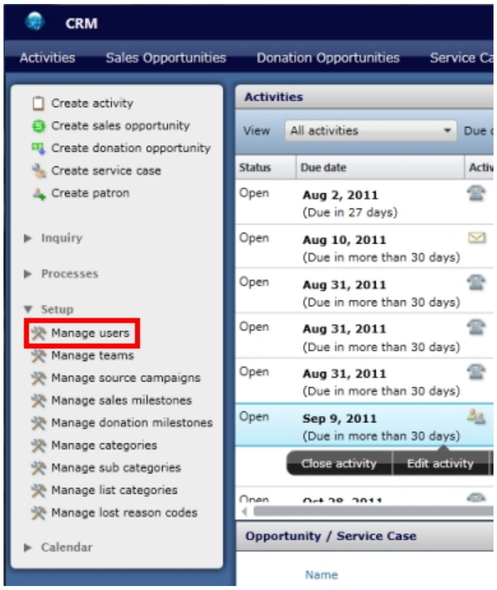
CRM saves the new email address.

Disabling User Access to CRM

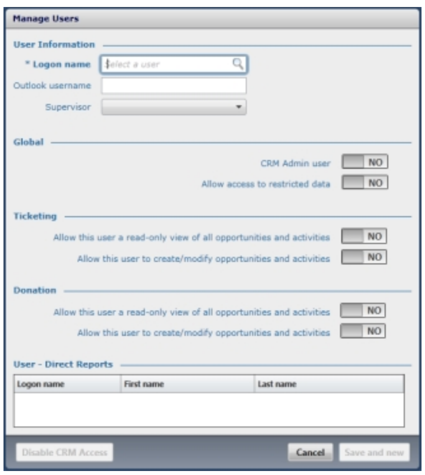
You can prevent a CRM user from having access to CRM at any time. You can also re-enable user access at any time after disabling it.

To disable user access to CRM

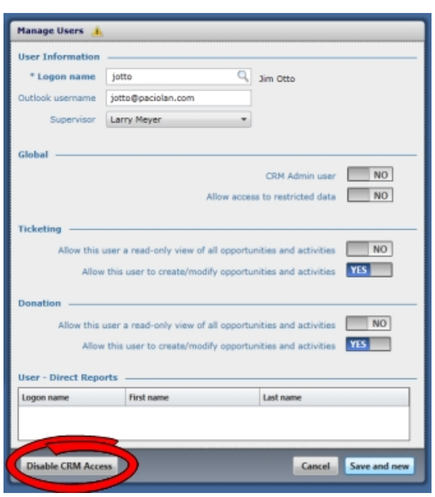
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



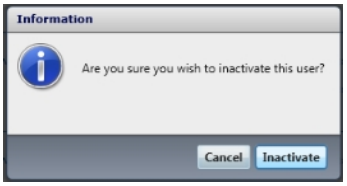
CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user whose access you want to disable. If you don't know the user name, use the User Lookup.
3. Click the **Disable CRM Access** button.



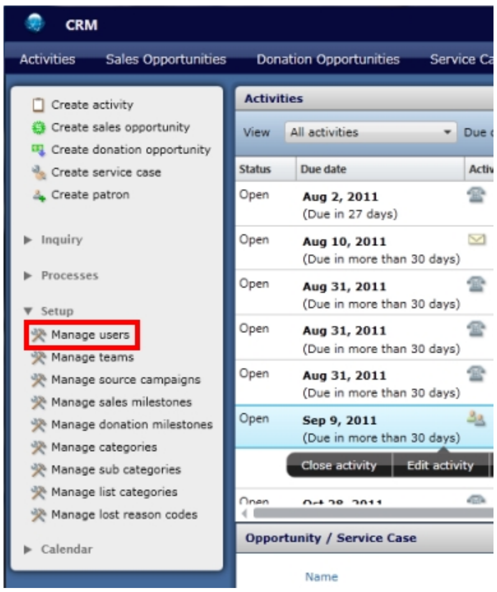
CRM displays a confirmation dialog box.



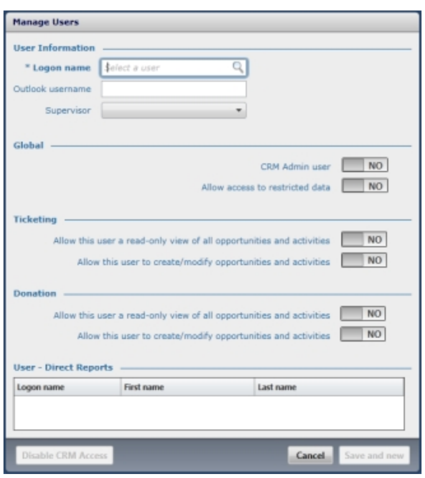
4. Click the **Inactivate** button. CRM disables the user's access.

To re-enable user access to CRM

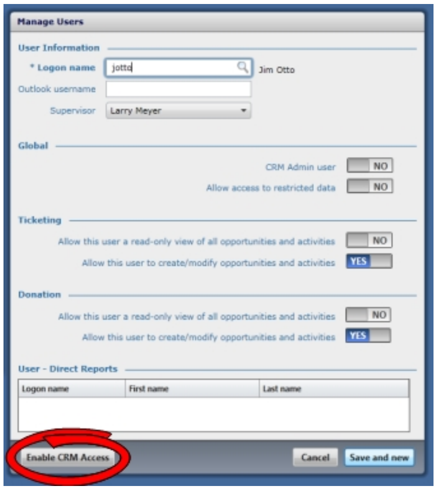
1. In the navigation pane, click **Setup**, and then click **Manage Users**.



CRM displays the Manage Users form.



2. In the **Logon name** field, enter the sign in (user) name of the user whose access you want to re-enable. If you don't know the user name, use the User Lookup.
3. Click the **Enable CRM Access** button.



CRM enables the user's access.

Chapter 5 Configuring CRM Form Options

Many of the drop-down list options on CRM forms are customizable in CRM or the back office. The options you configure in CRM are most often used to organize and report on CRM opportunities and service cases or for bulk processes. To customize these options in CRM, you must be a CRM user with administrative permissions.

The options set in the back office are mostly used to configure selections for individual patrons when using the Patron Detail form. Back office options are configured by the people in your organization who set up patron options in tRes and tPatron.

The table below contains the form options that are configurable in CRM and the back office.

CRM form options	Description of use
Teams	Groups of CRM users that are used for reporting with data views, bulk processing, and manual creation and editing of opportunities and activities. This option is configured in CRM.
Source campaigns	Categories for sales opportunities based on your sales processes or marketing campaigns. Source campaigns are used for reporting with data views. This option is configured in CRM.
Sales milestones	Categories of sales opportunities based on your sales processes and the progress of sales representatives. Sales milestones are used for reporting with data views. This option is configured in CRM.
Donation milestones	Categories of donation opportunities based on your fundraising processes and the progress of donation representatives. Donation milestones are used for reporting with data views. This option is configured in CRM.
Service case categories	Service case categories and subcategories used to organize customer support cases based on your customer support process. Service case categories are used for reporting with data views. This option is configured in CRM.
List categories	Categories of the patron lists that are used during the bulk creation process for opportunities or activities. This option is configured in CRM.
Lost reason codes	Categories that sales and donation representatives use to report the reasons why they lose their opportunities. Lost reason codes are used for reporting with data views. This option is configured in CRM.
Patron Detail Options	Patron Detail form options with selections that can be configured in tRes and tPatron.

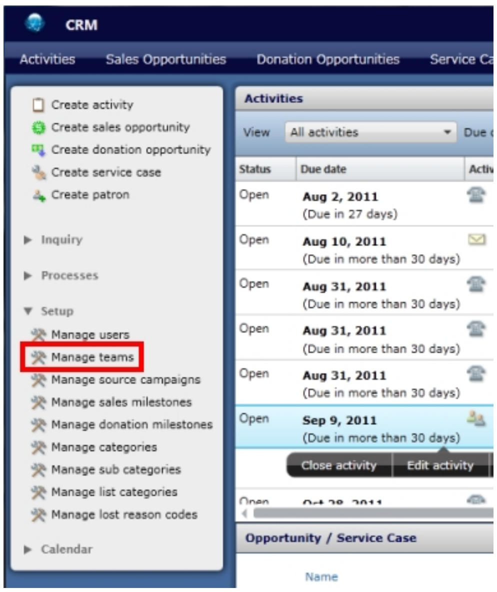
Managing Teams

CRM teams are groups of CRM users that are used for reporting with data views and as part of bulk opportunity and activity processing. During bulk processing, opportunities and activities can automatically be assigned to teams of users. In addition, users can assign teams to opportunities and activities when manually creating or editing them.

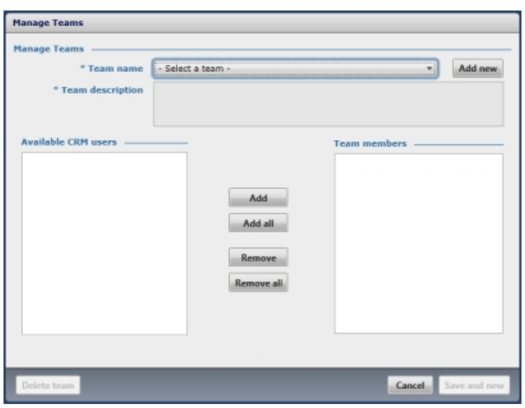
A team is composed of a name, description, and member list. CRM users can belong to more than one team at a time. However, multiple teams cannot be assigned to a single opportunity or activity. When manually creating or editing an opportunity or service case, users can only assign teams of which they are members. The team management procedures below can only be done by users with administrative privileges.

To create a team

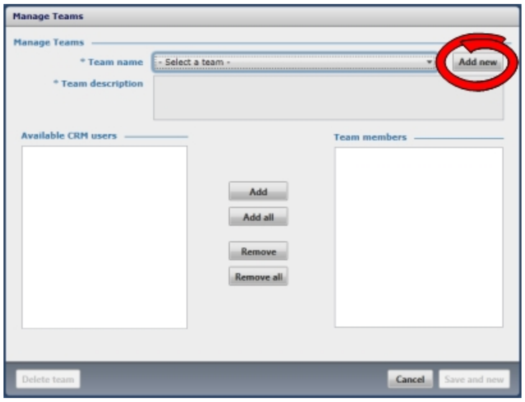
1. In the navigation pane, click **Setup**, and then click **Manage teams**.



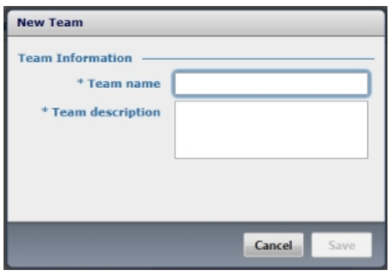
CRM displays the Manage Teams form.



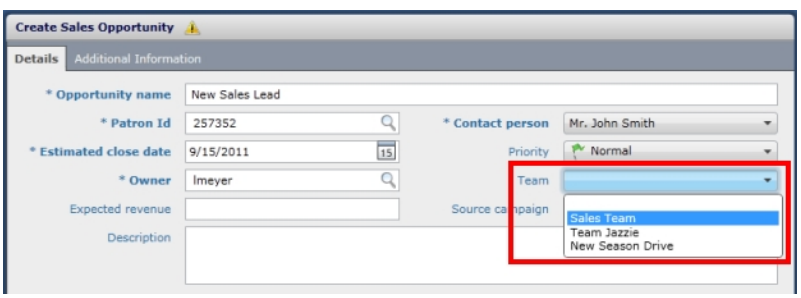
2. In the Manage Teams section, click the **Add new** button.



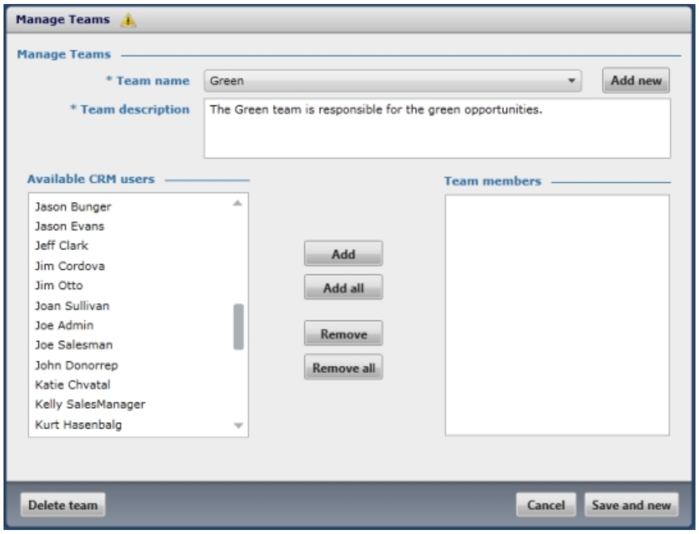
CRM displays the New Team dialog box.



3. In the **Team name** text box, enter a short descriptive name for the team. This is the item name that displays in the **Team** drop-down list when creating batch activities, assigning batch activities, and manually creating or editing opportunities and activities. You cannot change the team name once the new team is saved. In the example image below, the **Team** drop-down list is displayed during manual sales opportunity creation.



4. In the **Team description** text box, enter a useful description of the team. This description is only displayed on the Manage Teams form. You can edit this description at any time after creating the team.
5. Click the **Save** button. CRM redisplays the Manage Teams form with the new team name and description in **Team name** and **Team description**. CRM also displays all active, enabled CRM users in the **Available CRM users** list.



6. Move team members from the **Available CRM users** list to the **Team members** list. To do this, you can drag them or use the add and remove buttons.

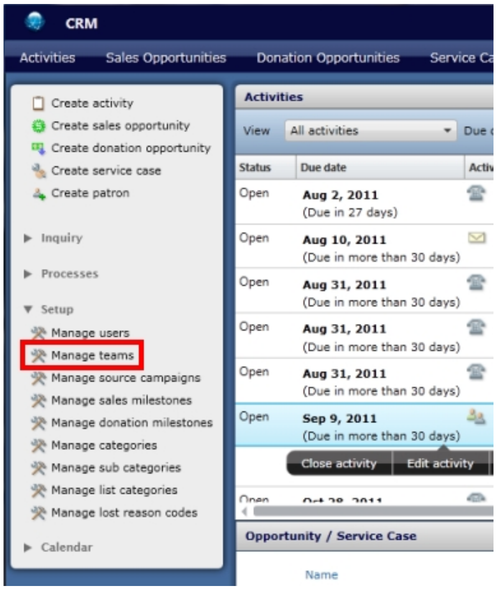
   See a table describing how to move users between lists.

Method	Usage information
Drag users	To move one user, drag the user from one list to the other list. To move more than one user at a time, hold down the `Ctrl` key, select each user, and then drag the selected users to the other list. The selected users will be dragged together. To move a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then drag the selected users to the other list.
Add	To add a user to the **Team members** list, select the user in the **Available CRM users** list and then click this button. To add more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To add a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then click this button.
Add all	Click this button to add all the users from the **Available CRM users** list to the team. If most of the available users are on the team, you can save time by clicking this button and then removing the users who are not on the team.
Remove	To remove a user from the **Team members** list, select the user and then click this button. To remove more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To remove a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then click this button.
Remove all	Click this button to remove all the users from the **Team members** list.

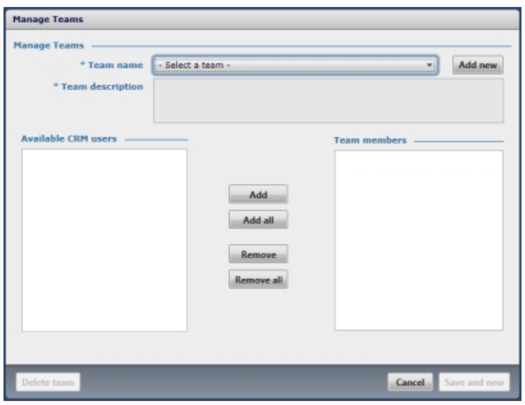
7. Click the **Save and new** button. CRM saves the team and redisplays the Manage Teams form empty.

To edit an existing team

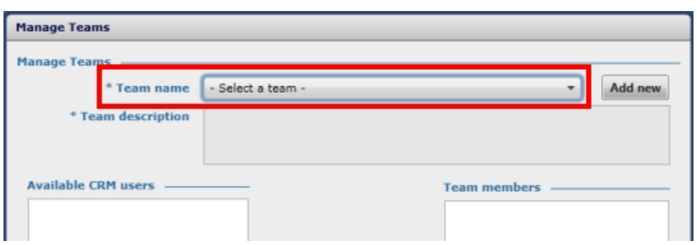
1. In the navigation pane, click **Setup**, and then click **Manage teams**.



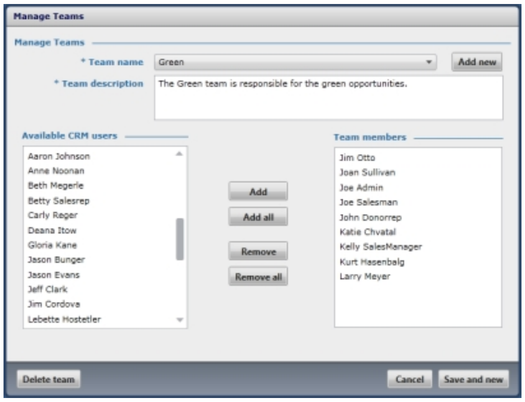
CRM displays the Manage Teams form.



2. From the **Team name** drop-down list, select the name of the team you want to edit.



CRM displays the team information.



3. To edit the team description, modify the text in the **Team description** text box.
4. To change the team members, move them between the **Available CRM users** list and the **Team members** list. To do this, you can drag them or use the add and remove buttons.

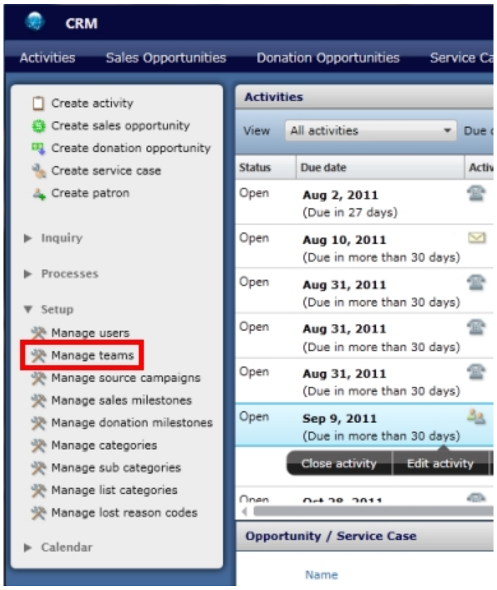
   See a table describing how to move users between lists.

Method	Usage information
Drag users	To move one user, drag the user from one list to the other list. To move more than one user at a time, hold down the `Ctrl` key, select each user, and then drag the selected users to the other list. The selected users will be dragged together. To move a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then drag the selected users to the other list.
Add	To add a user to the **Team members** list, select the user in the **Available CRM users** list and then click this button. To add more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To add a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then click this button.
Add all	Click this button to add all the users from the **Available CRM users** list to the team. If most of the available users are on the team, you can save time by clicking this button and then removing the users who are not on the team.
Remove	To remove a user from the **Team members** list, select the user and then click this button. To remove more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To remove a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then click this button.
Remove all	Click this button to remove all the users from the **Team members** list.

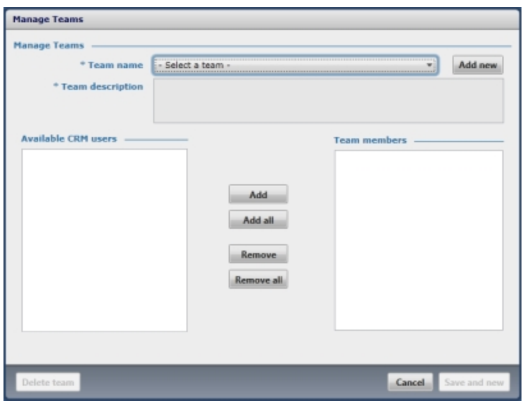
5. Click the **Save and new** button. CRM saves the team and redisplays the Manage Teams form empty.

To delete a team

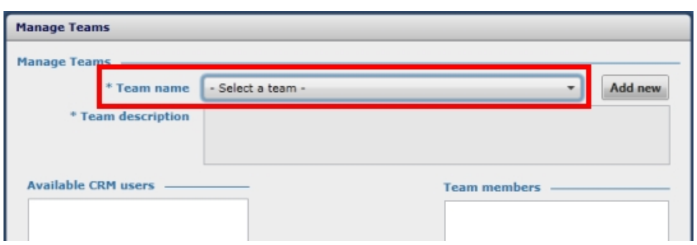
1. In the navigation pane, click **Setup**, and then click **Manage teams**.



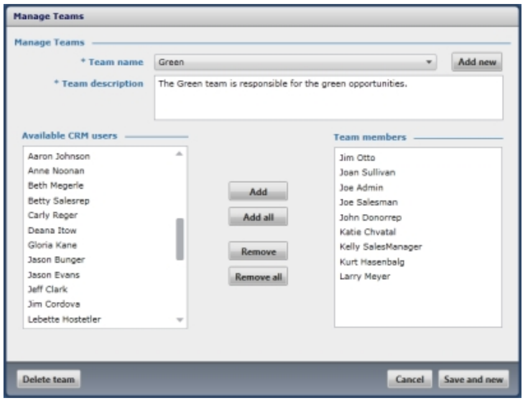
CRM displays the Manage Teams form.



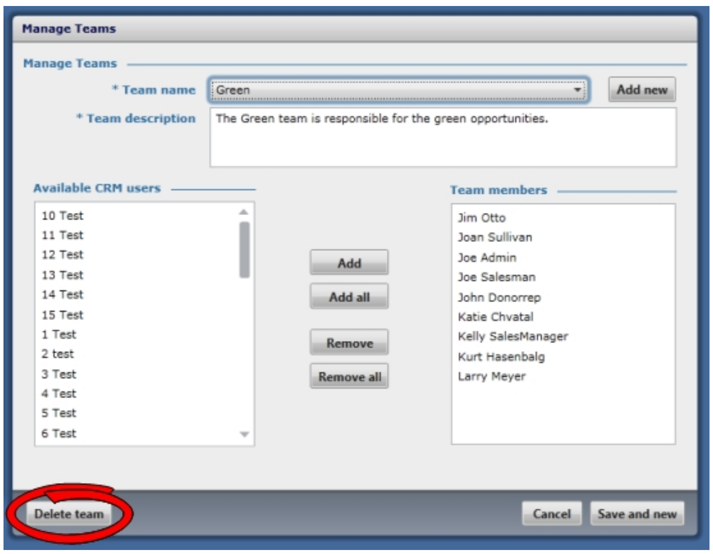
2. From the **Team name** drop-down list, select the name of the team you want to delete.



CRM displays the team information.



3. Click the **Delete team** button.



CRM displays the Attention! confirmation dialog box. The dialog box will warn you if there are open opportunities or activities assigned to the team. However, you can still delete teams with open assignments.

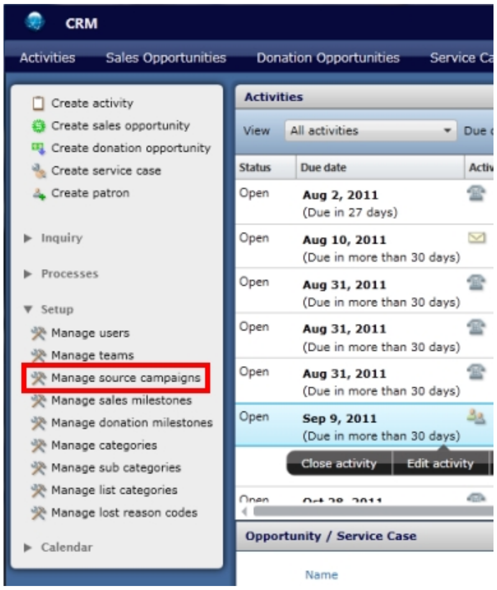
4. Click the **OK** button. CRM deletes the team and redisplays the Manage Teams form with the team removed from the **Team name** drop-down list.

Managing Source Campaigns

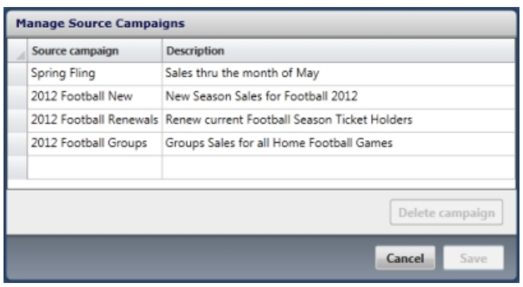
Source campaigns allow sales organizations to categorize their sales opportunities based on their own sales process and the marketing campaigns used to generate those opportunities. The source campaign can be set during batch activity creation and when manually creating or editing sales opportunities. In the sales opportunity data view, sales opportunities can be filtered or sorted by the source campaign. The source campaign management procedures below can only be done by users with administrative privileges.

To add a source campaign

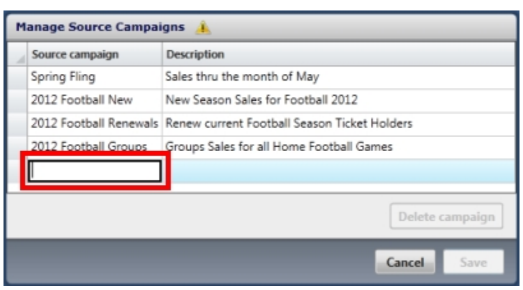
1. In the navigation pane, click **Setup**, and then click **Manage source campaigns**.



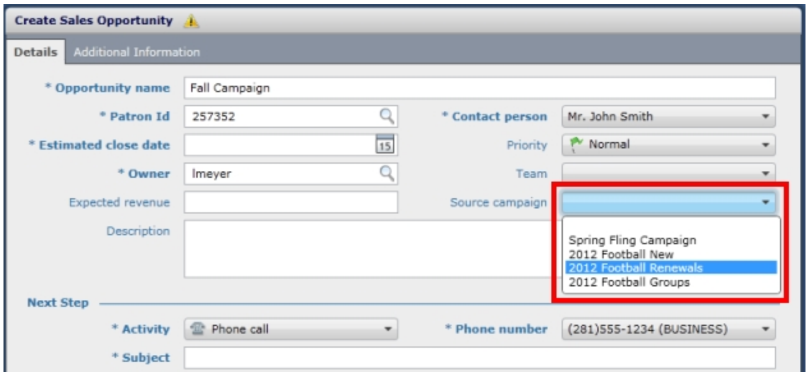
CRM displays the Manage Source Campaigns form.



2. In the **Source campaign** column, double-click in an empty cell. The cursor will display in the cell.



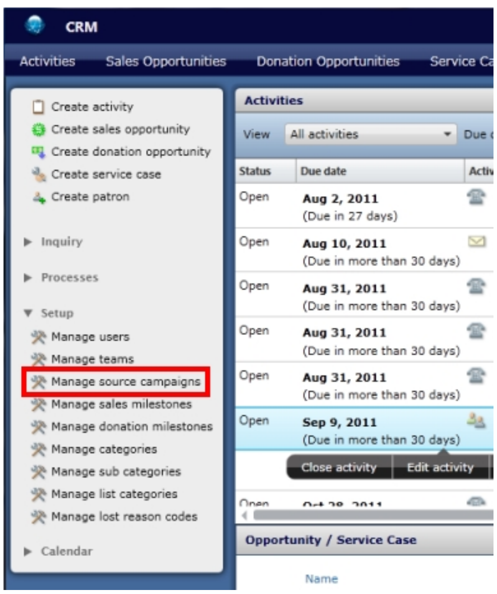
3. Enter a short descriptive name for the source campaign. This is the name that displays in the **Source campaign** drop-down list when creating batch activities and manually creating or editing sales opportunities. You can change this name at any time. In the example image below, the **Source campaign** drop-down list is displayed during manual sales opportunity creation.



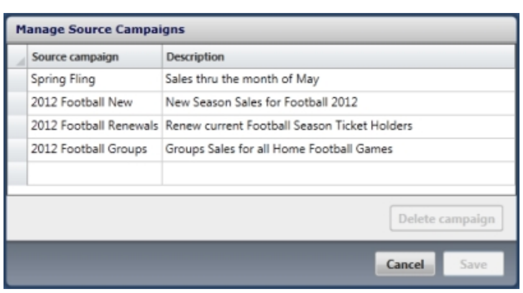
4. In the **Description** column, enter a brief description of the source campaign. This description is only displayed on the Manage Source Campaigns form. You can edit this description at any time.
5. If you want to change the order in which the source campaigns display in the **Source campaign** drop-down list, drag their rows up or down in the table.
6. Click the **Save** button. CRM saves the new source campaign and displays the Activities form.

To edit a source campaign

1. In the navigation pane, click **Setup**, and then click **Manage source campaigns**.



CRM displays the Manage Source Campaigns form.



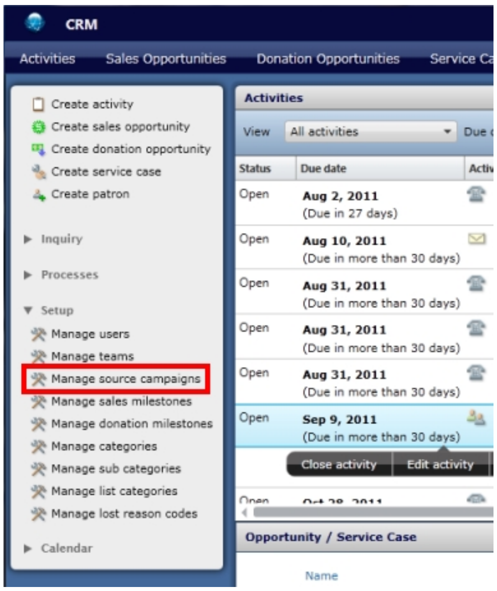
2. In the source campaign's row, select the source campaign name or description and make changes. Click once on a cell to select and replace all the text in the cell. Double-click a cell

to make changes to the existing text. Once saved, changes to the source campaign name will be immediately reflected in the **Source campaign** drop-down list of sales opportunities with that source campaign selected.

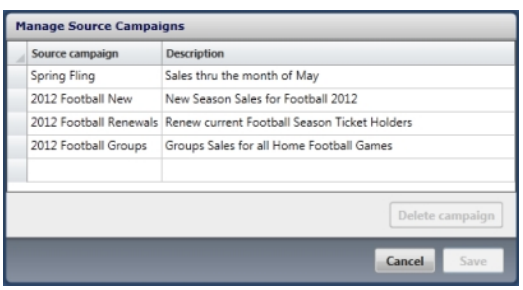
3. Click on other rows to make changes to additional source campaigns and to activate the **Save** button.
4. If you want to change the order in which the source campaigns display in the **Source campaign** drop-down list, drag their rows up or down in the table.
5. Click the **Save** button. CRM saves the changes and displays the Activities form.

To delete a source campaign

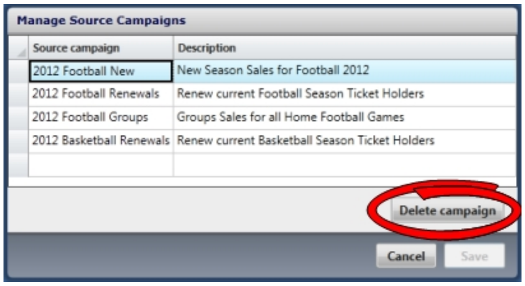
1. In the navigation pane, click **Setup**, and then click **Manage source campaigns**.



CRM displays the Manage Source Campaigns form.



2. Select the source campaign that you want to delete by clicking its row. If you want to select more than one source campaign at the same time, you can `Ctrl` + click each row. You can also select a sequential group of rows by clicking the first row in the sequence, and then `Shift` + clicking the last row in the sequence.
3. Click the **Delete campaign** button. The selected rows are removed from the source campaign table.



Note: There is no warning if there are sales opportunities that have already been assigned the source campaigns you are deleting. For those sales opportunities, there will no longer be a campaign selected in the **Source campaign** drop-down list.

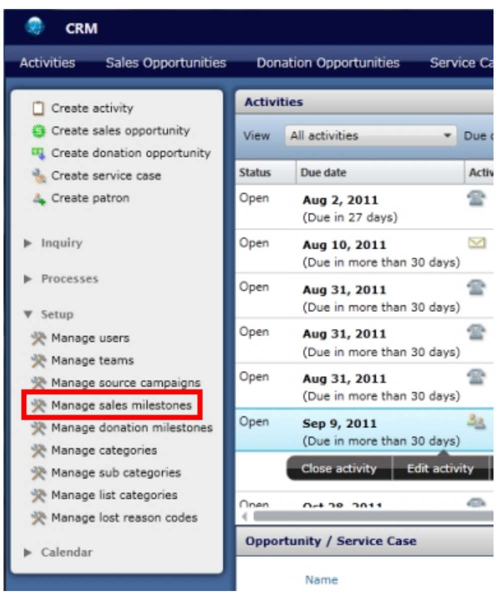
4. Click the **Save** button. CRM deletes the source campaigns and displays the Activities form.

Managing Sales Milestones

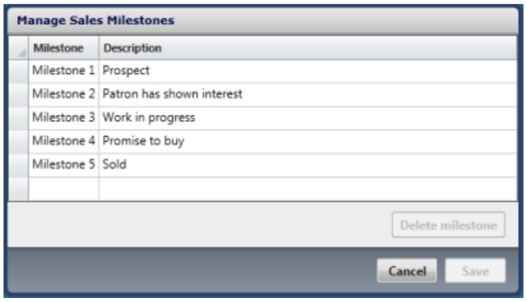
Sales milestones allow you to categorize sales opportunities based on your sales process and your sales representatives' progress toward winning the opportunities. Milestones for sales opportunities can be set during batch activity creation and when manually creating or editing sales opportunities. In the sales opportunity data view, sales opportunities can be filtered or sorted by sales milestone. The sales milestone management procedures below can only be done by users with administrative privileges.

To add a sales milestone

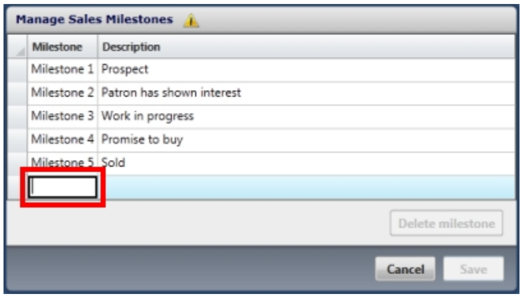
1. In the navigation pane, click **Setup**, and then click **Manage sales milestones**.



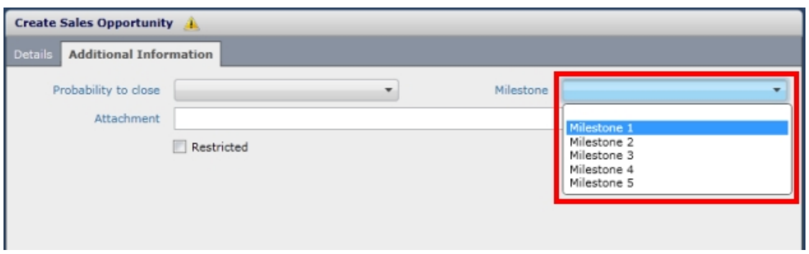
CRM displays the Manage Sales Milestones form.



2. In the **Milestone** column, double-click in an empty cell. The cursor will display in the cell.



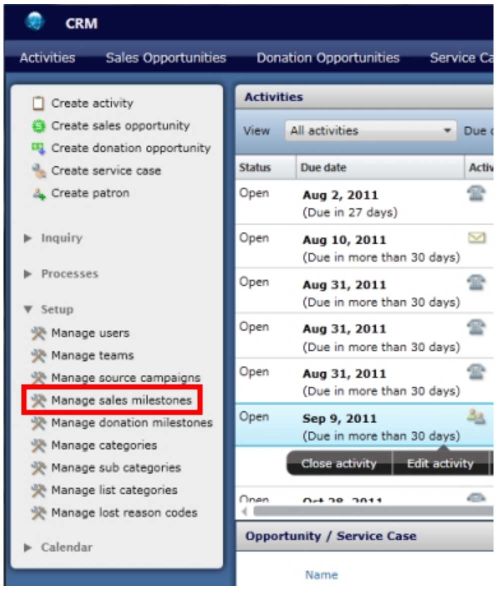
3. Enter a short descriptive name for the sales milestone. This is the name that displays in the **Milestone** drop-down list when creating batch activities and manually creating or editing sales opportunities. You can change this name at any time. In the example image below, the **Milestone** drop-down list is displayed during manual sales opportunity creation.



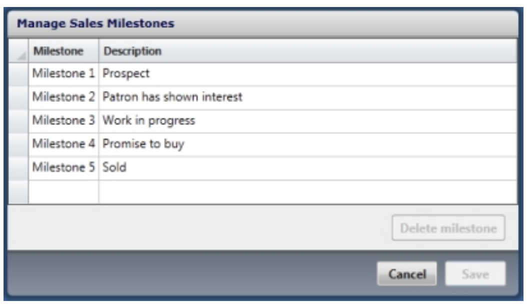
4. In the **Description** column, enter a brief description of the sales milestone. This description is only displayed on the Manage Sales Milestones form. You can edit this description at any time.
5. If you want to change the order in which the sales milestones display in the **Milestone** drop-down list, drag their rows up or down in the table.
6. Click the **Save** button. CRM saves the new sales milestone and displays the Activities form.

To edit a sales milestone

1. In the navigation pane, click **Setup**, and then click **Manage sales milestones**.



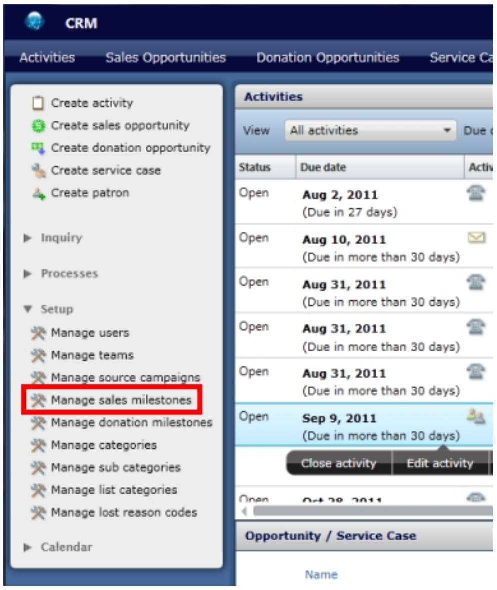
CRM displays the Manage Sales Milestones form.



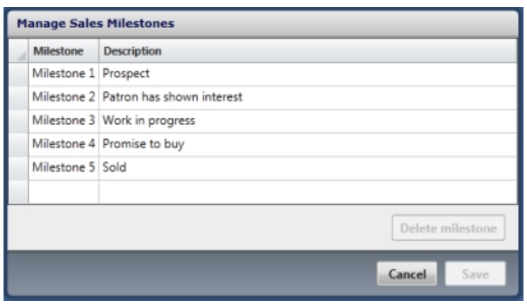
2. In the sales milestone's row, select the sales milestone name or description and make changes. Click once on a cell to select and replace all the text in the cell. Double-click a cell to make changes to the existing text. Once saved, changes to the sales milestone name will be immediately reflected in the **Milestone** drop-down list of sales opportunities with that milestone selected.
3. Click on other rows to make changes to additional sales milestones and to activate the **Save** button.
4. If you want to change the order in which the sales milestones display in the **Milestone** drop-down list, drag their rows up or down in the table.
5. Click the **Save** button. CRM saves the changes and displays the Activities form.

To delete a sales milestone

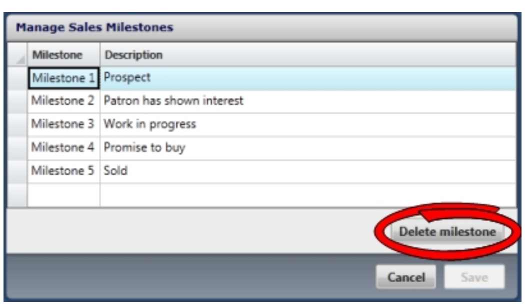
1. In the navigation pane, click **Setup**, and then click **Manage sales milestones**.



CRM displays the Manage Sales Milestones form.



2. Select the sales milestone that you want to delete by clicking its row. If you want to select more than one sales milestone at the same time, you can `Ctrl` + click each row. You can also select a sequential group of rows by clicking the first row in the sequence, and then `Shift` + clicking the last row in the sequence.
3. Click the **Delete milestone** button. The selected rows are removed from the sales milestone table.



Note: There is no warning if there are sales opportunities that have already been assigned the sales milestones you are deleting. For those sales opportunities, there will no longer be a milestone selected in the **Milestone** drop-down list.

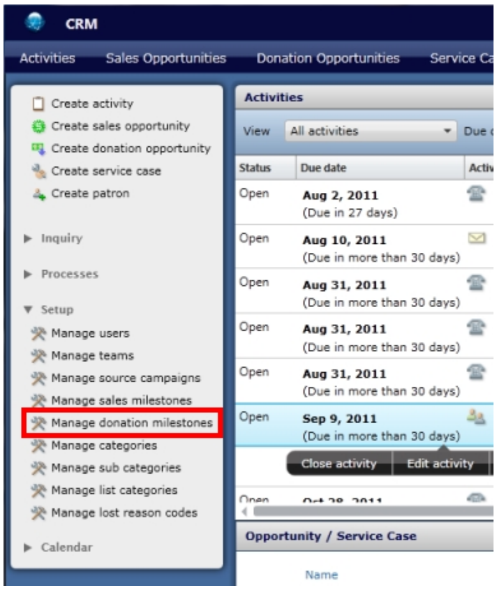
4. Click the **Save** button. CRM deletes the sales milestones and displays the Activities form.

Managing Donation Milestones

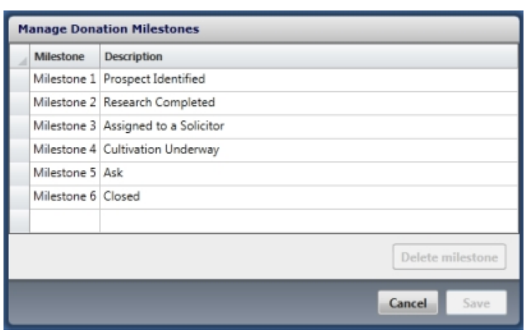
Donation milestones allow you to categorize donation opportunities based on your donation process and your donation representatives' progress toward winning the opportunities. Milestones for donation opportunities can be set during batch activity creation and when manually creating or editing donation opportunities. In the donation opportunity data view, donation opportunities can be filtered or sorted by donation milestone. The donation milestone management procedures below can only be done by users with administrative privileges.

To add a donation milestone

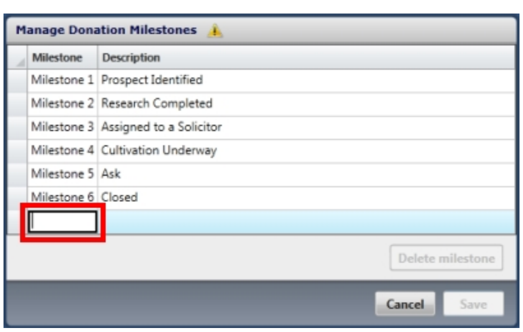
1. In the navigation pane, click **Setup**, and then click **Manage donation milestones**.



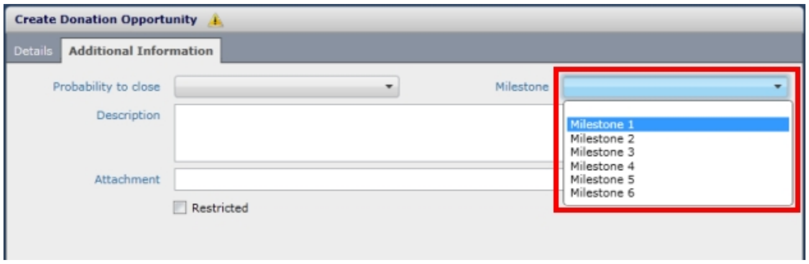
CRM displays the Manage Donation Milestones form.



2. In the **Milestone** column, double-click in an empty cell. The cursor will display in the cell.



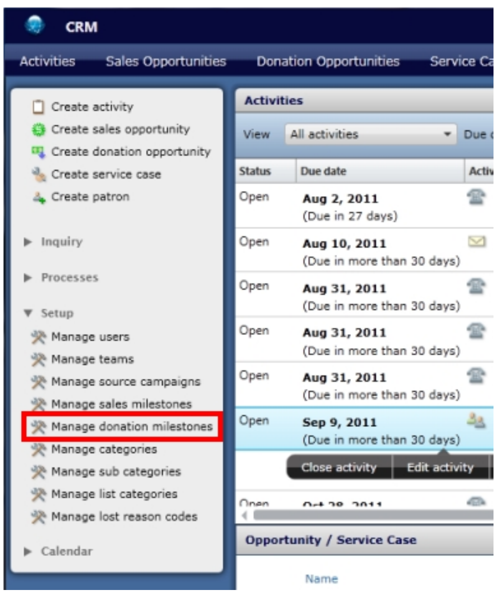
3. Enter a short descriptive name for the donation milestone. This is the name that displays in the **Milestone** drop-down list when creating batch activities and manually creating or editing donation opportunities. You can change this name at any time. In the example image below, the **Milestone** drop-down list is displayed during manual donation opportunity creation.



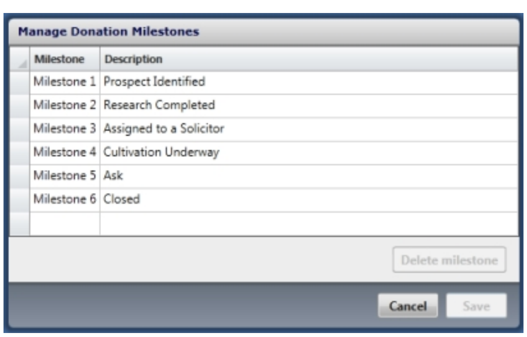
4. In the **Description** column, enter a brief description of the donation milestone. This description is only displayed on the Manage Donation Milestones form. You can edit this description at any time.
5. If you want to change the order in which the donation milestones display in the **Milestone** drop-down list, drag their rows up or down in the table.
6. Click the **Save** button. CRM saves the new donation milestone and displays the Activities form.

To edit a donation milestone

1. In the navigation pane, click **Setup**, and then click **Manage donation milestones**.



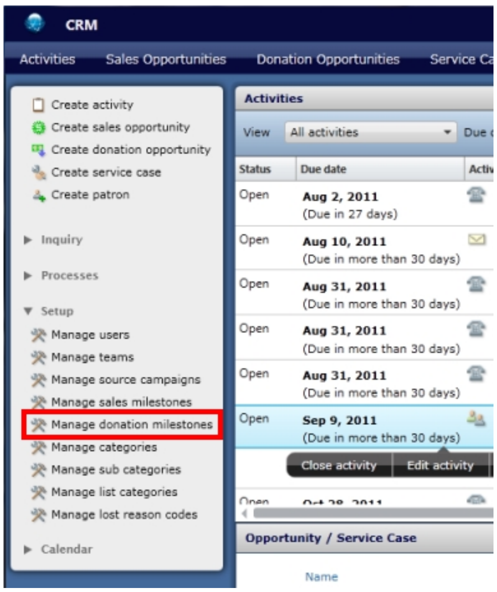
CRM displays the Manage Donation Milestones form.



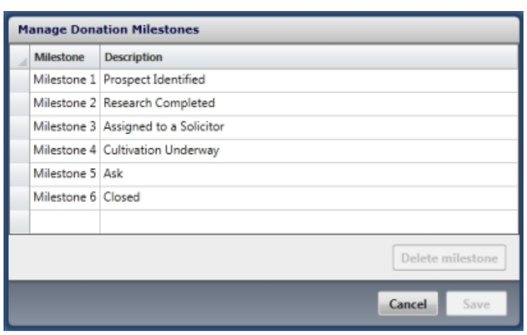
2. In the donation milestone's row, select the donation milestone name or description and make changes. Click once on a cell to select and replace all the text in the cell. Double-click a cell to make changes to the existing text. Once saved, changes to the donation milestone name will be immediately reflected in the **Milestone** drop-down list of donation opportunities with that milestone selected.
3. Click on other rows to make changes to additional donation milestones and to activate the **Save** button.
4. If you want to change the order in which the donation milestones display in the **Milestone** drop-down list, drag their rows up or down in the table.
5. Click the **Save** button. CRM saves the changes and displays the Activities form.

To delete a donation milestone

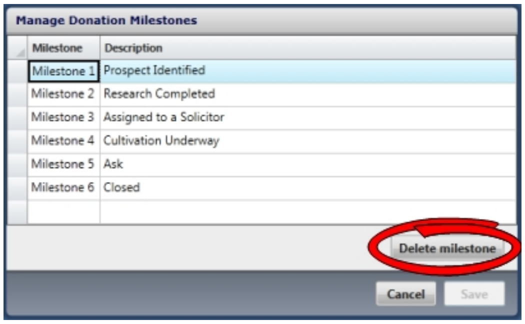
1. In the navigation pane, click **Setup**, and then click **Manage donation milestones**.



CRM displays the Manage Donation Milestones form.



2. Select the donation milestone that you want to delete by clicking its row. If you want to select more than one donation milestone at the same time, you can `Ctrl` + click each row. You can also select a sequential group of rows by clicking the first row in the sequence, and then `Shift` + clicking the last row in the sequence.
3. Click the **Delete milestone** button. The selected rows are removed from the donation milestone table.



Note: There is no warning if there are donation opportunities that have already been assigned the donation milestones you are deleting. For those donation opportunities, there will no longer be a milestone selected in the **Milestone** drop-down list.

4. Click the **Save** button. CRM deletes the donation milestones and displays the Activities form.

Managing Service Case Categories

Service case categories and subcategories allow you to organize customer support cases based on your customer support process. You can assign categories and subcategories when you create or edit a CRM service case. By making these assignments, you can better analyze customer support issues and ultimately provide better customer service. This analysis is accomplished using a service case data view. In a data view, service cases can be filtered or sorted by category and subcategory.

Before you begin configuring service case categories in CRM, you should map out the categories and subcategories for your customer support organization. Then, in CRM, you can create a category for each category and subcategory. Lastly, you set up subcategories by assigning groups of categories to individual (parent) categories. Once you have set up your service case categories and subcategories, you can edit or delete them at any time.

To set up service case categories and subcategories, do the following:

1. Add the categories and subcategories.
2. Configure the subcategories.

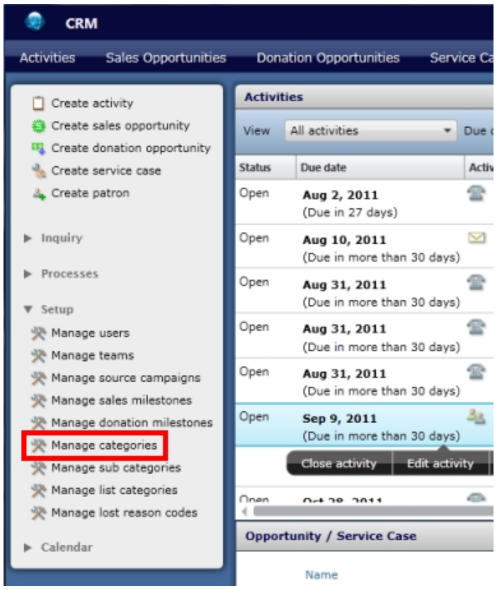
Configuring Service Case Categories

Service case categories and subcategories allow you to organize customer support cases based on your customer support process. You can assign categories and subcategories when you create or edit a CRM service case. By making these assignments, you can better analyze customer support issues and ultimately provide better customer service. This analysis is accomplished using a service case data view. In a data view, service cases can be filtered or sorted by category and subcategory.

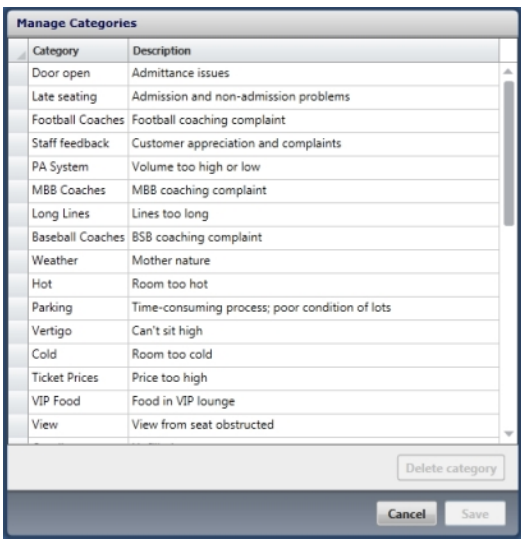
To make service case categories and subcategories available to your customer support representatives, you first need to add them in CRM as categories. Once you've added the categories, you can configure the subcategories. You can also edit and delete the categories at any time after you add them.

To add a service case category

1. In the navigation pane, click **Setup**, and then click **Manage categories**.



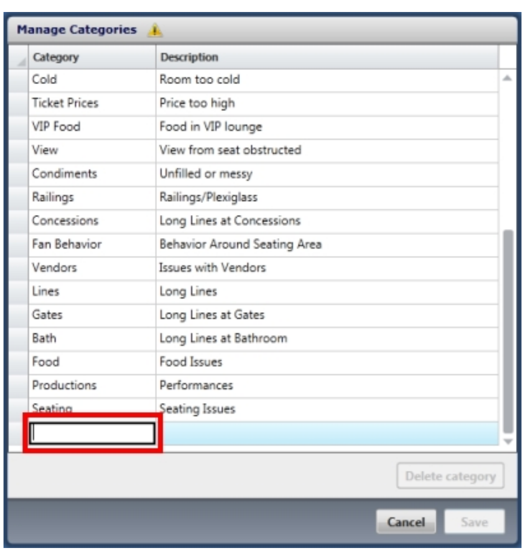
CRM displays the Manage Categories form.



Manage Categories

Category	Description
Door open	Admittance issues
Late seating	Admission and non-admission problems
Football Coaches	Football coaching complaint
Staff feedback	Customer appreciation and complaints
PA System	Volume too high or low
MBB Coaches	MBB coaching complaint
Long Lines	Lines too long
Baseball Coaches	BSB coaching complaint
Weather	Mother nature
Hot	Room too hot
Parking	Time-consuming process; poor condition of lots
Vertigo	Can't sit high
Cold	Room too cold
Ticket Prices	Price too high
VIP Food	Food in VIP lounge
View	View from seat obstructed

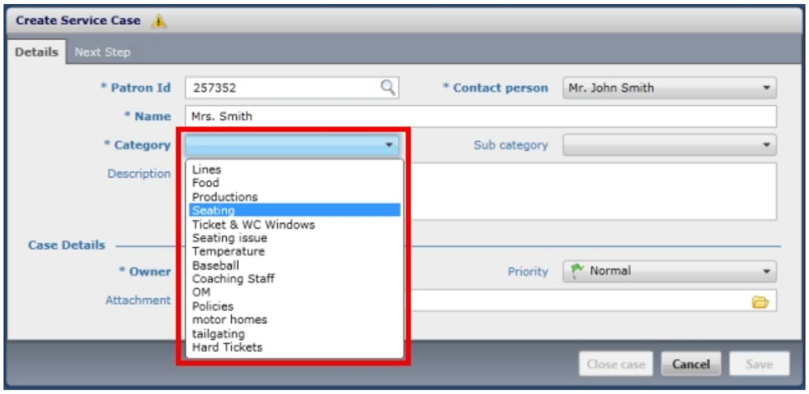
2. In the **Category** column, double-click in an empty cell. The cursor will display in the cell.



Manage Categories

Category	Description
Cold	Room too cold
Ticket Prices	Price too high
VIP Food	Food in VIP lounge
View	View from seat obstructed
Condiments	Unfilled or messy
Railings	Railings/Plexiglass
Concessions	Long Lines at Concessions
Fan Behavior	Behavior Around Seating Area
Vendors	Issues with Vendors
Lines	Long Lines
Gates	Long Lines at Gates
Bath	Long Lines at Bathroom
Food	Food Issues
Productions	Performances
Seating	Seating Issues

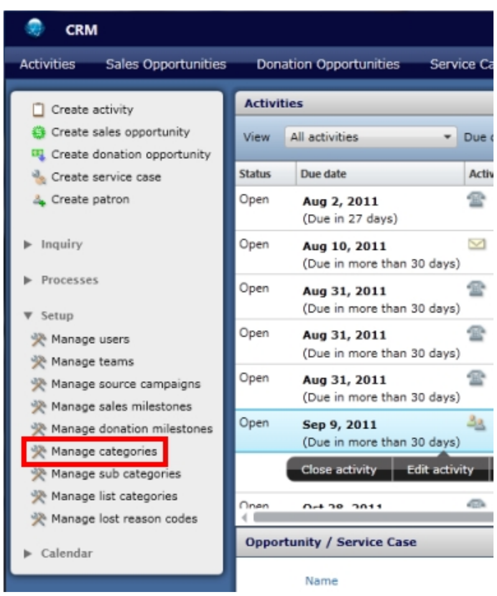
3. Enter a short descriptive name for the service case category. This is the name that displays in the **Category** drop-down list when creating or editing service cases. You can change this name at any time. In the example image below, the **Category** drop-down list is displayed during service case creation.



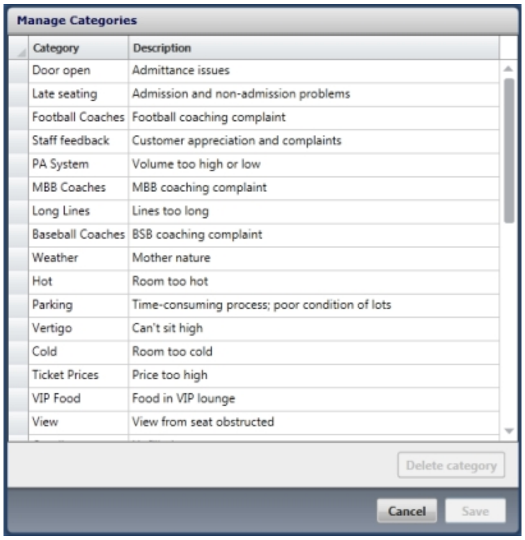
4. In the **Description** column, enter a brief description of the service case category. This description is displayed when you select the category on the Manage Sub Categories form (see Configuring Service Case Subcategories). You can edit this description at any time.
5. If you want to change the order in which the service case categories display in the **Category** drop-down list, drag their rows up or down in the table.
6. Click the **Save** button. CRM saves the new service case category and displays the Activities form. If you've used this procedure to add subcategories as well as categories, you can now configure the subcategories.

To edit a service case category

1. In the navigation pane, click **Setup**, and then click **Manage categories**.



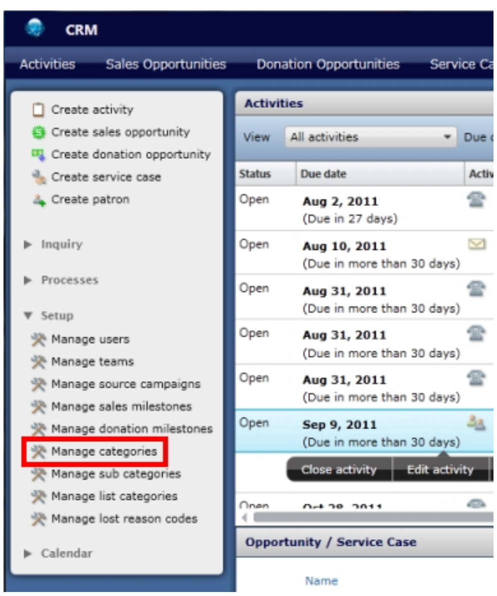
CRM displays the Manage Categories form.



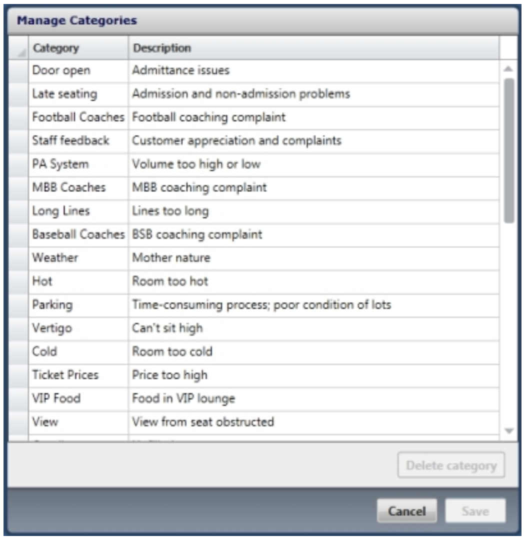
2. In the service case category's row, select the service case category name or description and make changes. Click once on a cell to select and replace all the text in the cell. Double-click a cell to make changes to the existing text. Once saved, changes to the service case category name will be immediately reflected in the **Category** drop-down list of service cases with that category selected.
3. Click on other rows to make changes to additional service case categories and to activate the **Save** button.
4. If you want to change the order in which the service case categories display in the **Category** drop-down list, drag their rows up or down in the table.
5. Click the **Save** button. CRM saves the changes and displays the Activities form.

To delete a service case category

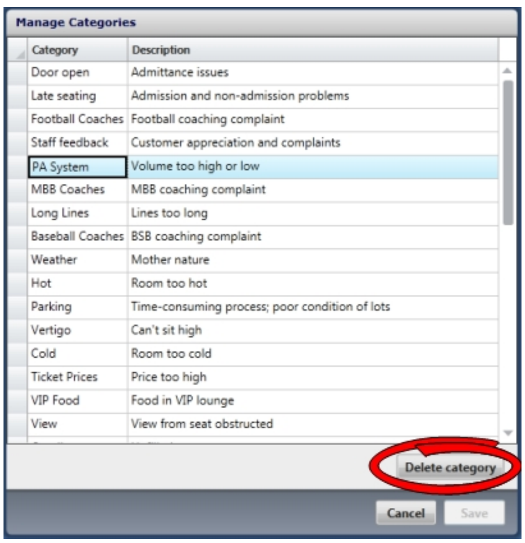
1. In the navigation pane, click **Setup**, and then click **Manage categories**.



CRM displays the Manage Categories form.



2. Select the service case category that you want to delete by clicking its row. If you want to select more than one service case category at the same time, you can `Ctrl` + click each row. You can also select a sequential group of rows by clicking the first row in the sequence, and then `Shift` + clicking the last row in the sequence.
3. Click the **Delete category** button. The selected rows are removed from the service case category table.



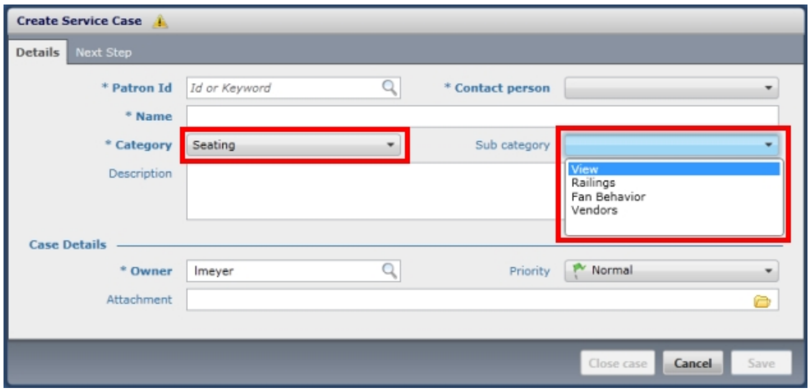
Note: There is no warning if there are service cases that have already been assigned the service case categories you are deleting. For those service cases, there will no longer be a category selected in the **Category** drop-down list.

4. Click the **Save** button. CRM deletes the service case categories and displays the Activities form.

Configuring Service Case Subcategories

Service case categories and subcategories allow you to organize customer support cases based on your customer support process. You can assign categories and subcategories when you create or edit a CRM service case. By making these assignments, you can better analyze customer support issues and ultimately provide better customer service. This analysis is accomplished using a service case data view. In a data view, service cases can be filtered or sorted by category and subcategory.

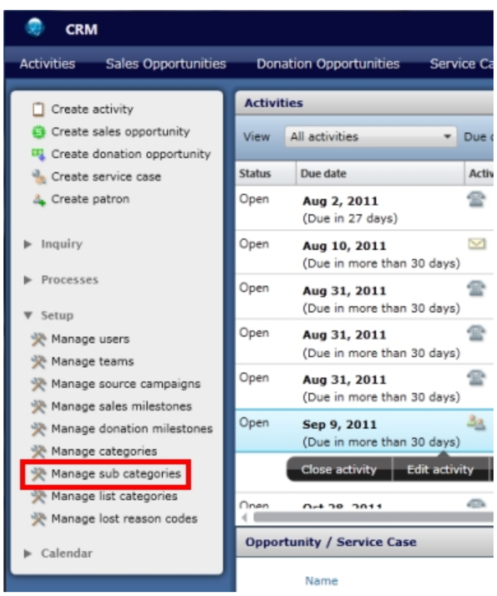
Once you have added both categories and subcategories, you need to assign the subcategories to parent categories. When a category is assigned to be a subcategory, it will display in the **Sub category** drop-down list when its parent category is selected in the **Category** drop-down list. In the example image below, the parent category Seating has the subcategories View, Railings, Fan Behavior, and Vendors. One of those subcategories can be selected for the service case being created.



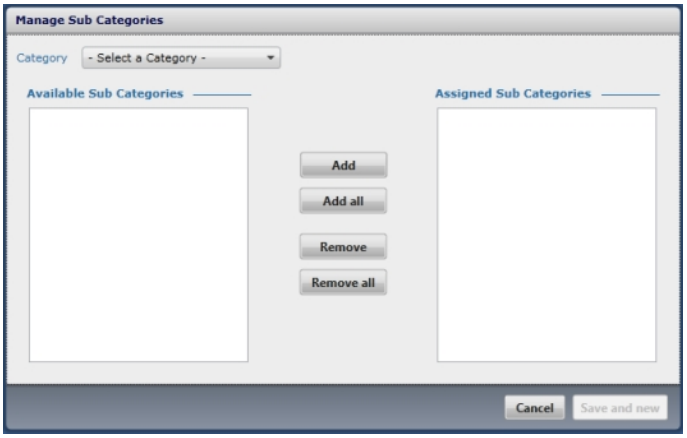
You cannot assign a subcategory to another subcategory. There are only two levels of categories--parent category and subcategory. Once a category becomes a parent category, it cannot also be a subcategory. After you configure your subcategories, you can change the subcategory assignments at any time.

To configure subcategories for a parent category

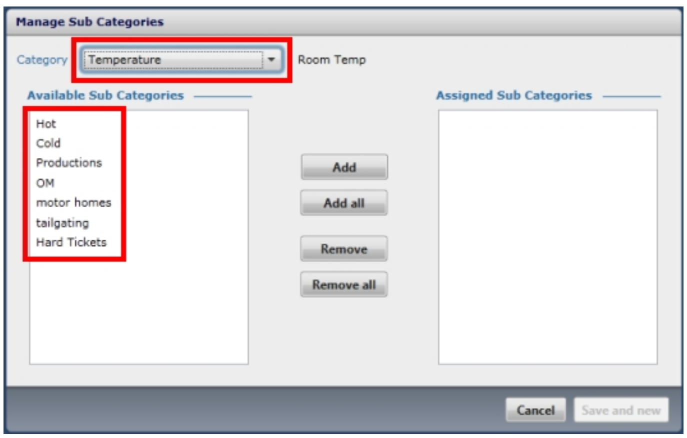
1. In the navigation pane, click **Setup**, and then click **Manage sub categories**.



CRM displays the Manage Sub Categories form.



2. In the **Category** drop-down list, select the parent category for which you want to add subcategories. In the **Available Sub Categories** list, CRM displays all the categories that are available as subcategories. Only categories that are not already configured as parent categories are in the **Available Sub Categories** list.



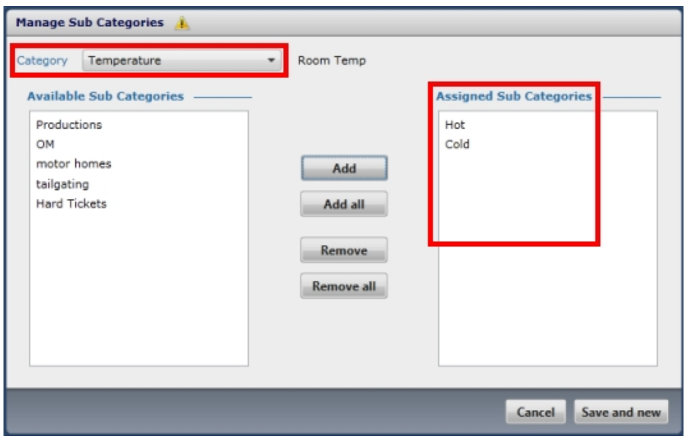
3. Move subcategories from the **Available Sub Categories** list to the **Assigned Sub Categories** list. To do this, you can drag them or use the add and remove buttons.

   See a table describing how to move subcategories between lists.

Method	**Usage information**
Drag users	To move one subcategory, drag the subcategory from one list to the other list. To move more than one subcategory at a time, hold down the `Ctrl` key, select each subcategory, and then drag the selected subcategories to the other list. The selected subcategories will be dragged together. To move a group of sequential subcategories quickly, select the first subcategory in the sequence, press the `Shift` key while selecting the last subcategory in the sequence, and then drag the selected subcategories to the other list.
	To add a subcategory to the **Assigned Sub Categories** list, select the subcategory in the **Available Sub Categories** list and then click this button. To add more than one subcategory at a time, hold down the `Ctrl` key, select each subcategory, and then click this button. To add a group of sequential subcategories quickly, select the first subcategory in the sequence, press the `Shift` key while selecting the last subcategory in the sequence, and then click this button.

Method	Usage information
Add all	Click this button to add all the subcategories from the **Available Sub Categories** list to the **Assigned Sub Categories** . If most of the available subcategories are subcategories for the selected parent category, you can save time by clicking this button and then removing the subcategories that don't belong.
Remove	To remove a subcategory from the **Assigned Sub Categories** list, select the subcategory and then click this button. To remove more than one subcategory at a time, hold down the `Ctrl` key, select each subcategory, and then click this button. To remove a group of sequential subcategories quickly, select the first subcategory in the sequence, press the `Shift` key while selecting the last subcategory in the sequence, and then click this button.
Remove all	Click this button to remove all the subcategories from the **Assigned Sub Categories** list.

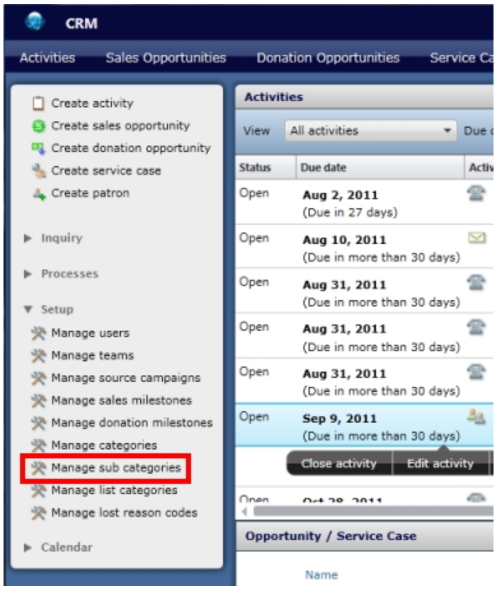
In the example image below, the Temperature parent category has been assigned the Hot and Cold subcategories.



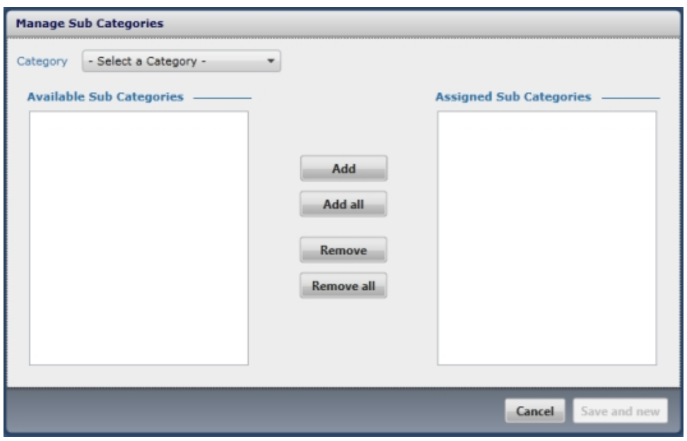
4. Click the **Save and new** button. CRM saves the subcategory configuration and redisplays the **Manage Sub Categories** form empty.

To change the subcategories that are assigned to a parent category

1. In the navigation pane, click **Setup**, and then click **Manage sub categories**.



CRM displays the Manage Sub Categories form.



2. In the **Category** drop-down list, select the parent category whose subcategories you want to change. CRM displays the available and assigned subcategories for the parent category. The **Available Sub Categories** list only contains categories that are not already configured as parent categories and are not currently assigned as subcategories.
3. Change the assigned subcategories by moving them between the **Available Sub Categories** list and the **Assigned Sub Categories** list. To do this, you can drag them or use the add and remove buttons.

   See a table describing how to move subcategories between lists.

Method	Usage information
Drag users	To move one subcategory, drag the subcategory from one list to the other list. To move more than one subcategory at a time, hold down the `Ctrl` key, select each subcategory, and then drag the selected subcategories to the other list. The selected subcategories will be dragged together. To move a group of sequential subcategories quickly, select the first subcategory in the sequence, press the `Shift` key while selecting the last subcategory in the sequence, and then drag the selected subcategories to the other list.

Method	Usage information
Add	To add a subcategory to the **Assigned Sub Categories** list, select the subcategory in the **Available Sub Categories** list and then click this button. To add more than one subcategory at a time, hold down the `Ctrl` key, select each subcategory, and then click this button. To add a group of sequential subcategories quickly, select the first subcategory in the sequence, press the `Shift` key while selecting the last subcategory in the sequence, and then click this button.
Add all	Click this button to add all the subcategories from the **Available Sub Categories** list to the **Assigned Sub Categories** . If most of the available subcategories are subcategories for the selected parent category, you can save time by clicking this button and then removing the subcategories that don't belong.
Remove	To remove a subcategory from the **Assigned Sub Categories** list, select the subcategory and then click this button. To remove more than one subcategory at a time, hold down the `Ctrl` key, select each subcategory, and then click this button. To remove a group of sequential subcategories quickly, select the first subcategory in the sequence, press the `Shift` key while selecting the last subcategory in the sequence, and then click this button.
Remove all	Click this button to remove all the subcategories from the **Assigned Sub Categories** list.

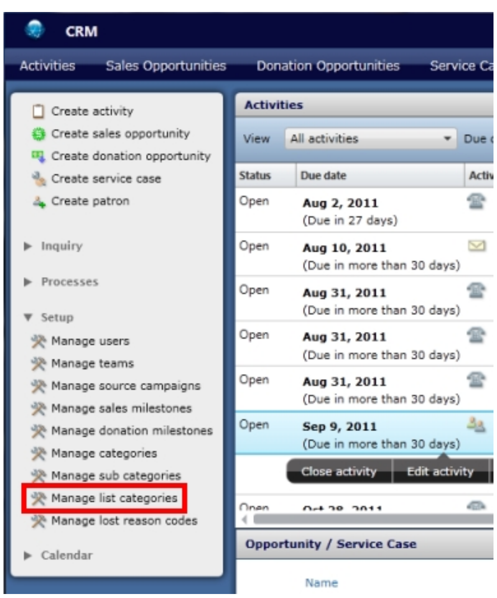
4. Click the **Save and new** button. CRM saves the subcategory configuration and redisplays the Manage Sub Categories form empty.

Managing List Categories

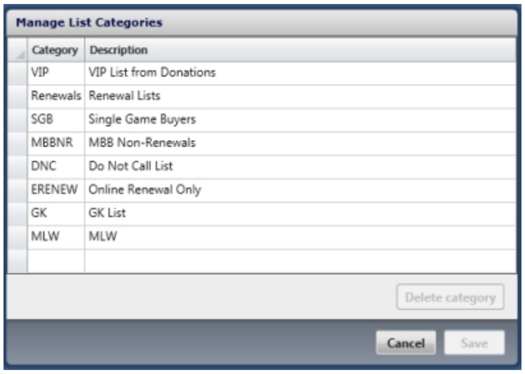
List categories allow your fundraising or sales organization to organize the lists that are used during the bulk creation process for opportunities or activities. You can use these categories to help you search for and select these lists for bulk processing.

To add a list category

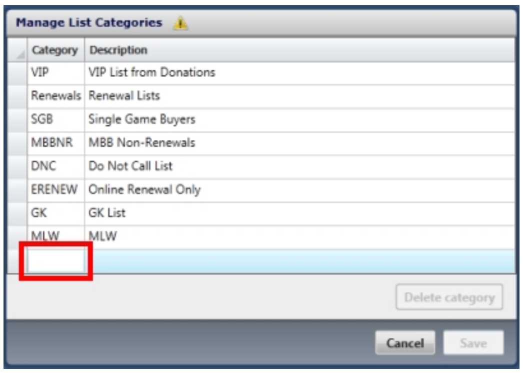
1. In the navigation pane, click **Setup**, and then click **Manage list categories**.



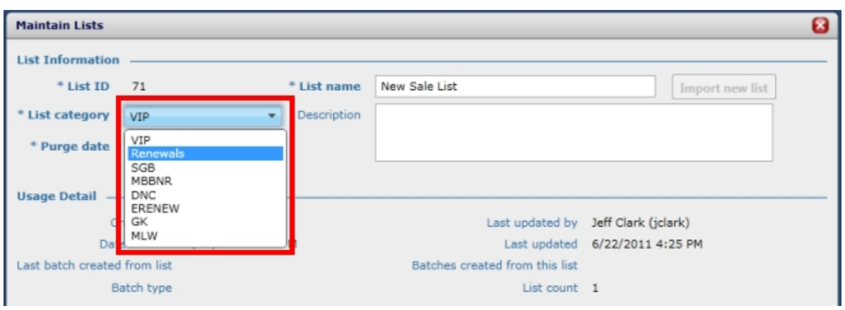
CRM displays the Manage List Categories form.



2. In the **Category** column, double-click in an empty cell. The cursor will display in the cell.



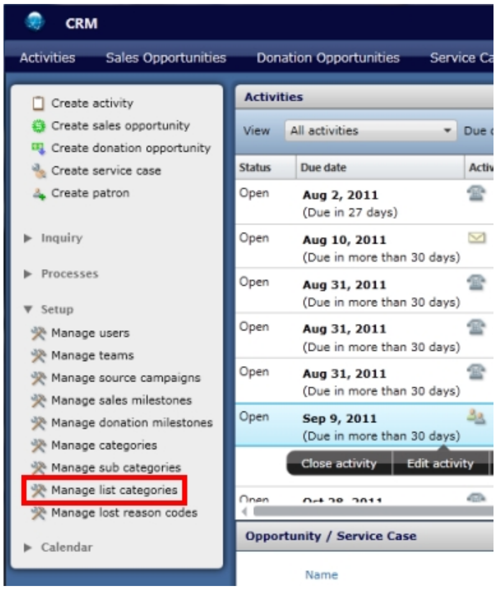
3. Enter a short descriptive name for the list category. This is the name that displays in the **List category** drop-down list when creating or editing lists. You can change this name at any time. In the example image below, the **List category** drop-down list is displayed during list maintenance.



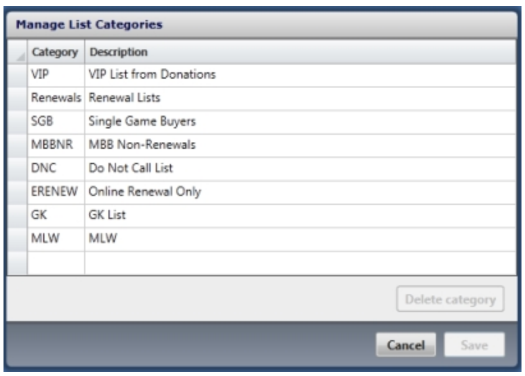
4. In the **Description** column, enter a brief description of the list category. This description is only displayed on the Manage List Categories form. You can edit this description at any time.
5. If you want to change the order in which the list categories display in the **List category** drop-down list, drag their rows up or down in the table.
6. Click the **Save** button. CRM saves the new list category and displays the Activities form.

To edit a list category

1. In the navigation pane, click **Setup**, and then click **Manage list categories**.



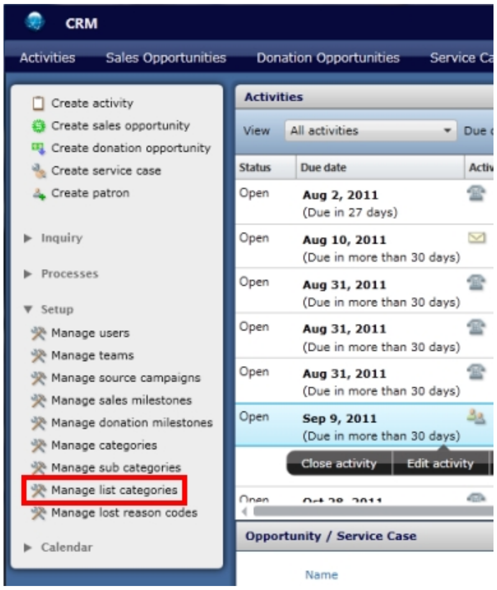
CRM displays the Manage List Categories form.



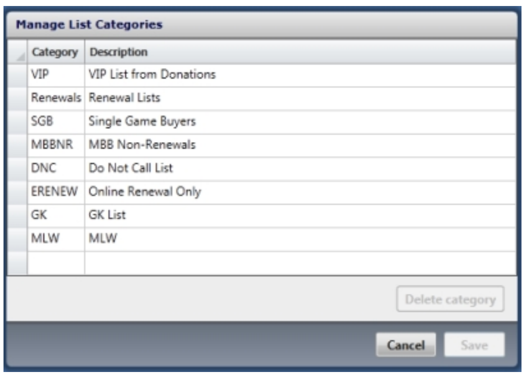
2. In the list category's row, select the list category name or description and make changes. Click once on a cell to select and replace all the text in the cell. Double-click a cell to make changes to the existing text. Once saved, changes to the list category name will be immediately reflected in the **List category** drop-down list of lists with that category selected.
3. Click on other rows to make changes to additional list categories and to activate the **Save** button.
4. If you want to change the order in which the list categories display in the **List category** drop-down list, drag their rows up or down in the table.
5. Click the **Save** button. CRM saves the changes and displays the Activities form.

To delete a list category

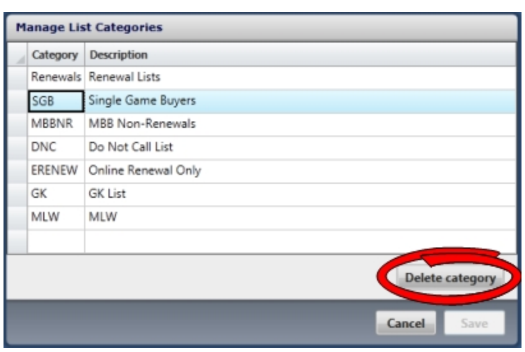
1. In the navigation pane, click **Setup**, and then click **Manage list categories**.



CRM displays the Manage List Categories form.



2. Select the list category that you want to delete by clicking its row. If you want to select more than one list category at the same time, you can `Ctrl` + click each row. You can also select a sequential group of rows by clicking the first row in the sequence, and then `Shift` + clicking the last row in the sequence.
3. Click the **Delete category** button. The selected rows are removed from the list category table.



Note: There is no warning if there are lists that have already been assigned the list categories you are deleting. For those lists, there will no longer be a category selected in the **List category** drop-down list.

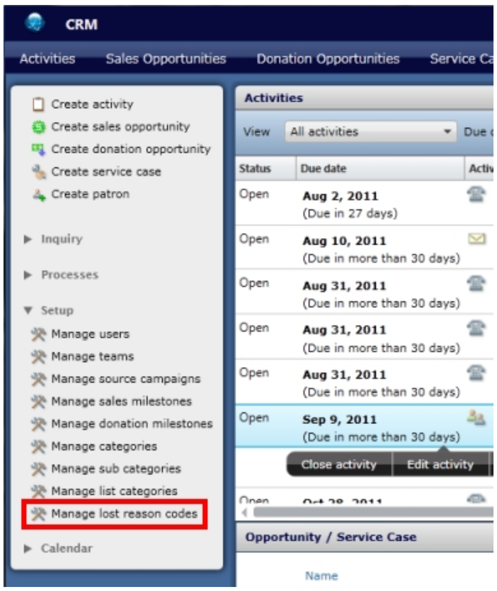
4. Click the **Save** button. CRM deletes the list categories and displays the Activities form.

Managing Lost Reason Codes

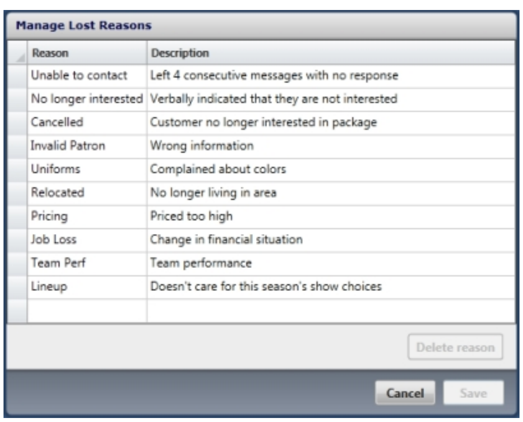
Lost reason codes allow you to categorize the reasons why sales or donation representatives lose their sales or donation opportunities. The lost reason codes are chosen when representatives close sales or donation opportunities and mark them as lost. You can use lost reason codes to filter or sort opportunities using data views.

To add a lost reason code

1. In the navigation pane, click **Setup**, and then click **Manage lost reason codes**.



CRM displays the Manage Lost Reasons form.



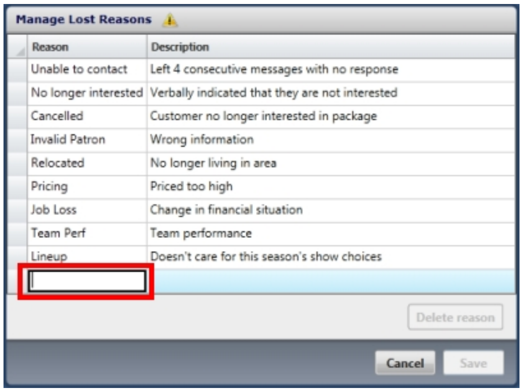
Manage Lost Reasons

Reason	Description
Unable to contact	Left 4 consecutive messages with no response
No longer interested	Verbally indicated that they are not interested
Cancelled	Customer no longer interested in package
Invalid Patron	Wrong information
Uniforms	Complained about colors
Relocated	No longer living in area
Pricing	Priced too high
Job Loss	Change in financial situation
Team Perf	Team performance
Lineup	Doesn't care for this season's show choices

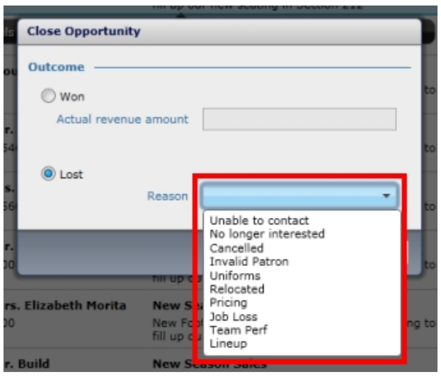
Delete reason

Cancel Save

2. In the **Reason** column, double-click in an empty cell. The cursor will display in the cell.



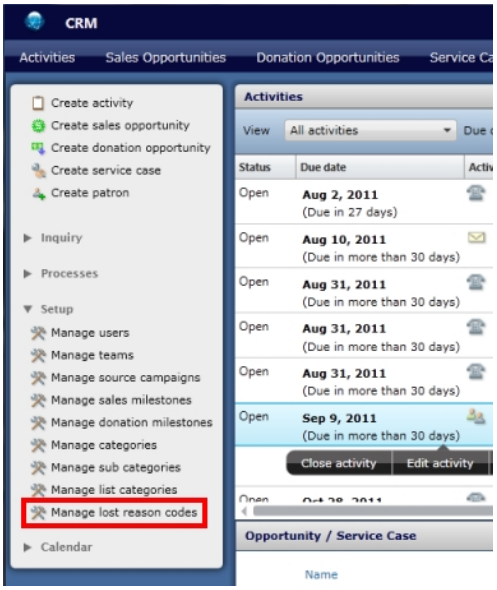
3. Enter a short descriptive name for the lost reason code. This is the name that displays in the **Reason** drop-down list when closing opportunities. You can change this name at any time. In the example image below, the **Reason** drop-down list is displayed when closing an opportunity.



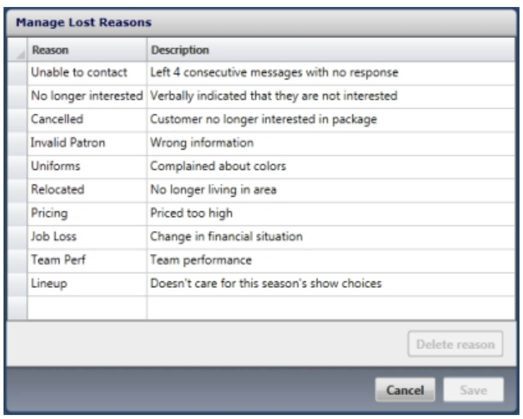
4. In the **Description** column, enter a brief description of the lost reason code. This description is only displayed on the Manage Lost Reasons form. You can edit this description at any time.
5. If you want to change the order in which the lost reason codes display in the **Reason** drop-down list, drag their rows up or down in the table.
6. Click the **Save** button. CRM saves the new lost reason code and displays the Activities form.

To edit a lost reason code

1. In the navigation pane, click **Setup**, and then click **Manage lost reason codes**.



CRM displays the Manage Lost Reasons form.



Manage Lost Reasons

Reason	Description
Unable to contact	Left 4 consecutive messages with no response
No longer interested	Verbally indicated that they are not interested
Cancelled	Customer no longer interested in package
Invalid Patron	Wrong information
Uniforms	Complained about colors
Relocated	No longer living in area
Pricing	Priced too high
Job Loss	Change in financial situation
Team Perf	Team performance
Lineup	Doesn't care for this season's show choices

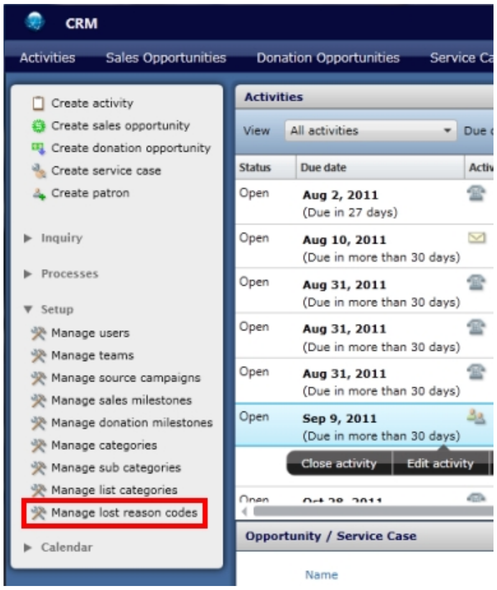
Delete reason

Cancel Save

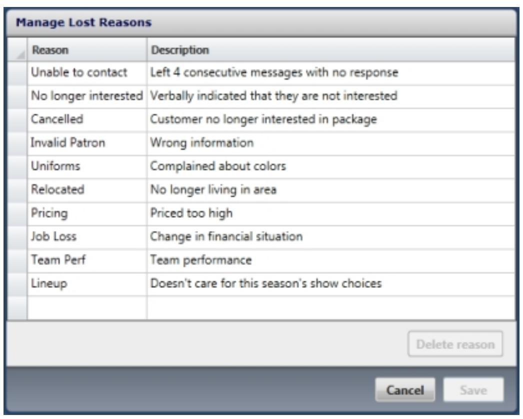
2. In the lost reason code's row, select the lost reason code name or description and make changes. Click once on a cell to select and replace all the text in the cell. Double-click a cell to make changes to the existing text. Once saved, changes to the lost reason code name will be immediately reflected in the **Reason** drop-down list of the Close Opportunity dialog box .
3. Click on other rows to make changes to additional lost reason codes and to activate the **Save** button.
4. If you want to change the order in which the lost reason codes display in the **Reason** drop-down list, drag their rows up or down in the table.
5. Click the **Save** button. CRM saves the changes and displays the Activities form.

To delete a lost reason code

1. In the navigation pane, click **Setup**, and then click **Manage lost reason codes**.



CRM displays the Manage Lost Reasons form.



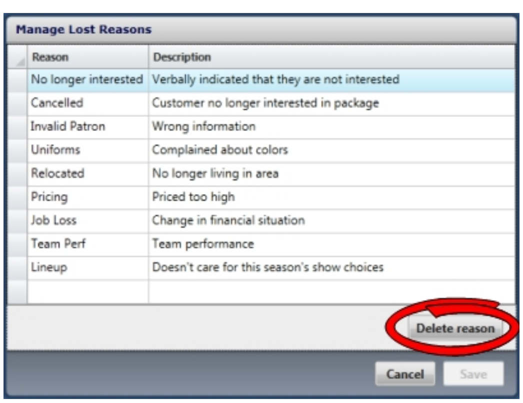
Manage Lost Reasons

Reason	Description
Unable to contact	Left 4 consecutive messages with no response
No longer interested	Verbally indicated that they are not interested
Cancelled	Customer no longer interested in package
Invalid Patron	Wrong information
Uniforms	Complained about colors
Relocated	No longer living in area
Pricing	Priced too high
Job Loss	Change in financial situation
Team Perf	Team performance
Lineup	Doesn't care for this season's show choices

Delete reason

Cancel Save

2. Select the lost reason code that you want to delete by clicking its row. If you want to select more than one lost reason code at the same time, you can `Ctrl` + click each row. You can also select a sequential group of rows by clicking the first row in the sequence, and then `Shift` + clicking the last row in the sequence.
3. Click the **Delete reason** button. The selected rows are removed from the lost reason code table.



Manage Lost Reasons

Reason	Description
No longer interested	Verbally indicated that they are not interested
Cancelled	Customer no longer interested in package
Invalid Patron	Wrong information
Uniforms	Complained about colors
Relocated	No longer living in area
Pricing	Priced too high
Job Loss	Change in financial situation
Team Perf	Team performance
Lineup	Doesn't care for this season's show choices

Delete reason

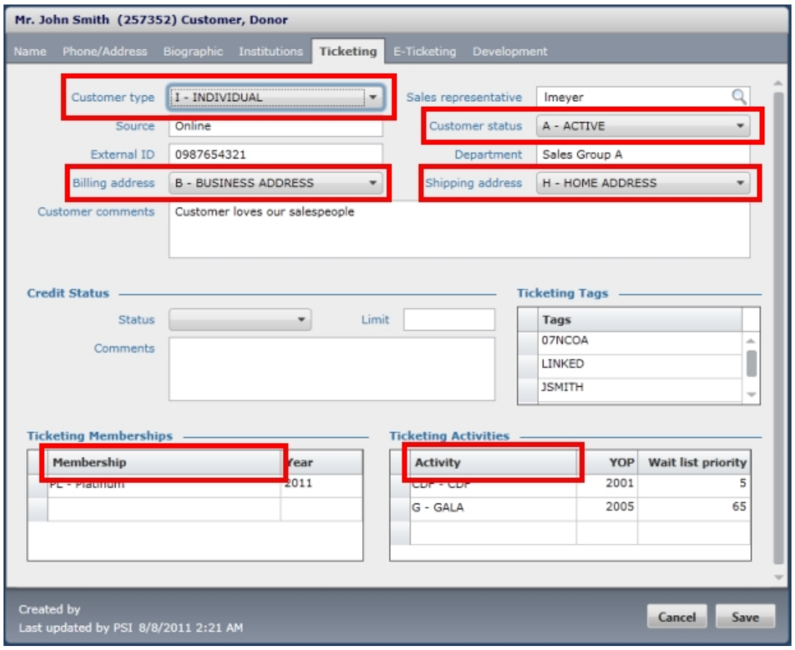
Cancel Save

Note: There is no warning if there are opportunities that have already been assigned the lost reason codes you are deleting. For those opportunities, there will no longer be a reason selected in the **Reason** drop-down list.

4. Click the **Save** button. CRM deletes the lost reason codes and displays the Activities form.

Configuring Patron Detail Form Options

In CRM you can edit or add patron information using the Patron Detail form. The selections for many of the options on this form are configured outside of CRM using tRes or tPatron. You can use this back office software to configure the drop-down list selections for these options. The example image below shows the patron options on the Ticketing tab that are configurable in the back office.



The tables below contain the patron options that can be configured in the back office, as well as the back office processes used for their configurations. Each table contains the configurable options for one of the tabs of the Patron Detail form. For some of the options, you can also configure the WBST patron policies (TK.PPOLICY.E) that limit the availability of list selections by operator code.

Name tab

List Option on the tab	Back Office Process Used for Setup*	Patron Policy (TK.PPOLICY.E) Setup**
VIP code	PD.VIP.E	Set the available list items by entering the codes in the **Accessible VIP Codes** table on the Other Patron Attributes sub-screen.
Status	PD.STATUS.E	Set the default selection by entering the code in **Patron Status** field.
Source	PD.SOURCE.E	Set the default selection by entering the code in **Patron Source** field.
Marital status	PD.MSTATUS.E	None. The list items entered in PD.MSTATUS.E are all available in the **Marital status** drop-down list.
Type - Salutation	PD.STYPE.E	Set the available list items by entering the codes in the **Accessible Salutation Types** table on the Other Patron Attributes

List Option on the tab	Back Office Process Used for Setup*	Patron Policy (TK.PPOLICY.E) Setup**
		subscreen.
Mail Code	PD.MTYPE.E	None. The list items entered in PD.MTYPE.E are all available in the **Mail Code** table drop-down list.

* These are the processes used to enter the items that display or can be configured to display in the drop-down lists of the Patron Detail form in CRM.

** In some cases the Patron Policy process (TK.PPOLICY.E) is used to limit the available option selections by operator code on this tab. This limits the available list items to a subset of the items in the entered in the back office process.

Phone/Address tab

List Option on the tab	Back Office Process Used for Setup*	Patron Policy (TK.PPOLICY.E) Setup**
Phone Type	PD.PTYPE.E	Set the available list items by entering the codes in the **Accessible Phone/Email Types** table on the Additional Settings subscreen.
Email Type	PD.PTYPE.E	Set the available list items by entering the codes in the **Accessible Phone/Email Types** table on the Additional Settings subscreen.
Address Type	PD.ATYPE.E	Set the available list items by entering the codes in the **Accessible Address Types** table on the Additional Settings subscreen. The address types on the Phone/Address, Ticketing, and Development tabs all use this setting.

* These are the processes used to enter the items that display or can be configured to display in the drop-down lists of the Patron Detail form in CRM.

** In some cases the Patron Policy process (TK.PPOLICY.E) is used to limit the available option selections by operator code on this tab. This limits the available list items to a subset of the items in the entered in the back office process.

Biographic tab

List Option on the tab	Back Office Process Used for Setup*
Relationship	PD.RTYPE.E
Other Relationship	PD.RTYPE.E
Ethnicity	PD.ETHNIC.E
Religion	PD.RELIGION.E
Household income	PD.INCOME.E
Attributes	PD.ATTRIBUTE.E
Interest	PD.INTEREST.E
Language	PD.LANGUAGE.E

* These are the processes used to enter the items that display in the drop-down lists of the Patron Detail form in CRM.

Institutions tab - Add Institution dialog box

List Option on the tab	Back Office Process Used for Setup*
Institution	PD.INST.E
Status	PD.INST.STAT.E

* These are the processes used to enter the items that display in the drop-down lists of the Patron Detail form in CRM.

Ticketing tab

List Option on the tab	Back Office Process Used for Setup*	Patron Policy (TK.PPOLICY.E) Setup**
Customer type	TK.CTYPE.E	None. The list items entered in TK.CTYPE.E are all available in the **Customer type** drop-down list.
Customer status	TK.STATUS.E	None. The list items entered in TK.CTYPE.E are all available in the **Customer status** drop-down list.
Billing address	PD.ATYPE.E	Set the available list items by entering the codes in the **Accessible Address Types** table on the Additional Settings subscreen. The address types on the Phone/Address, Ticketing, and Development tabs all use this setting.
Shipping address	PD.ATYPE.E	Set the available list items by entering the codes in the **Accessible Address Types** table on the Additional Settings subscreen. The address types on the Phone/Address, Ticketing, and Development tabs all use this setting.
Credit Status	List items cannot be changed	None. The credit status selection is either Warn, Deny, or nothing is selected.
Membership	TK.MEMBER.E	None. The list items entered in TK.MEMBER.E are all available in the **Membership** drop-down list.
Activity	TK.ACTIVITY.E	None. The list items entered in TK.ACTIVITY.E are all available in the **Activity** drop-down list.

* These are the processes used to enter the items that display or can be configured to display in the drop-down lists of the Patron Detail form in CRM.

** In some cases the Patron Policy process (TK.PPOLICY.E) is used to limit the available option selections by operator code on this tab. This limits the available list items to a subset of the items in the entered in the back office process.

E-Ticketing tab

List Option on the tab	Back Office Process Used for Setup*
Internet profile	PD.IPROFILE.E
Email preferences	EPD.PREF.E

* These are the processes used to enter the items that display in the drop-down lists of the Patron Detail form in CRM.

Development tab

List Option on the tab	Back Office Process Used for Setup*	Patron Policy (TK.PPOLICY.E) Setup**
Donor type	FD.TYPE.E	None. The list items entered in FD.TYPE.E are all available in the **Donor type** drop-down list.
Billing address	PD.ATYPE.E	Set the available list items by entering the codes in the **Accessible Address Types** table on the Additional Settings subscreen. The address types on the Phone/Address, Ticketing, and Development tabs all use this setting.
Shipping address	PD.ATYPE.E	Set the available list items by entering the codes in the **Accessible Address Types** table on the Additional Settings subscreen. The address types on the Phone/Address, Ticketing, and Development tabs all use this setting.
Mail Code	FD.MCODE.E	None. The list items entered in FD.MCODE.E are all available in the **Mail Code** drop-down list.
Credit Status	List items cannot be changed	None. The credit status selection is either **WP - Warning with password** or nothing is selected.

* These are the processes used to enter the items that display or can be configured to display in the drop-down lists of the Patron Detail form in CRM.

** In some cases the Patron Policy process (TK.PPOLICY.E) is used to limit the available option selections by operator code on this tab. This limits the available list items to a subset of the items in the entered in the back office process.

Chapter 6 Bulk Processing CRM Items

CRM allows you to create opportunities and activities (items) individually for patrons. However, this isn't practical when you have a large number of patrons for which you want to create items. For this reason, CRM also includes a bulk process that allows you to create items from a large list of patrons with just a few steps. During this process, you can also assign the items to your representatives and add due dates.

To create opportunities or standalone activities in bulk, you generally complete the following steps:

1. Import a list of patrons.
2. Create a batch of CRM items for the list of patrons.
3. Assign the batch to CRM users.

If you want the all the CRM items to be assigned to the batch creator, you can skip the batch assignment step. Once you've created a batch, you can also view batch details and edit batch attributes. If you decide that a batch you've created is incorrect or unnecessary, you can delete the batch and its batch items at any time.

Patron Lists Overview

Patron lists are required to create CRM opportunities and activities in bulk. A patron list is a set of patron record ID numbers generated from your back office account. Patron lists must be imported into CRM before you can use them for bulk processing.

Once you have imported patron lists, you can combine them or split them up to create other patron lists for bulk processing. You can also update the attributes that describe a list, including the list name, its description and category, and the purge date.

You can also view details of how a list has been used for bulk processing. When you're finished working with a list, you can export or delete it. CRM automatically deletes lists after 90 days. Patron list management is normally done by supervisors in CRM, although administrative permissions are required (see Setting Up User Permissions). Make sure to delete lists you are no longer using to make current lists easier to locate.

Reference the following procedures to use patron list features:

- Import patron lists.
- Use the List Lookup.
- Create patron lists from other patron lists.
- Edit patron list attributes.
- Export patron lists.
- Delete patron lists.

Importing Patron Lists

Patron lists are used to associate patrons with opportunities and activities during bulk processing. Patron lists are composed of patron record ID numbers that are generated from your back office account. The patrons in patron lists must be entered and active in the back office before they can be imported. Each patron list must be in a comma separated values (`.csv`) format file and contain no more than 5000 records.

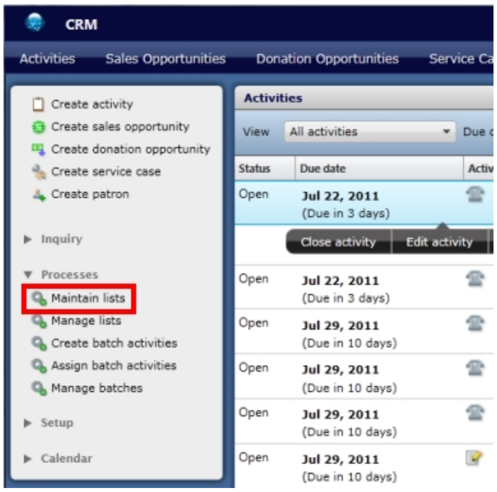
CRM validates each patron record during the import process. Each record must exist in the back office and be a unique number no more than 32 characters long. Patron record ID numbers cannot contain non-numerical characters.

Once CRM begins importing a patron list, you can stop the import process at any time until it is complete. If you stop the process, CRM will automatically un-import all the records that have been imported.

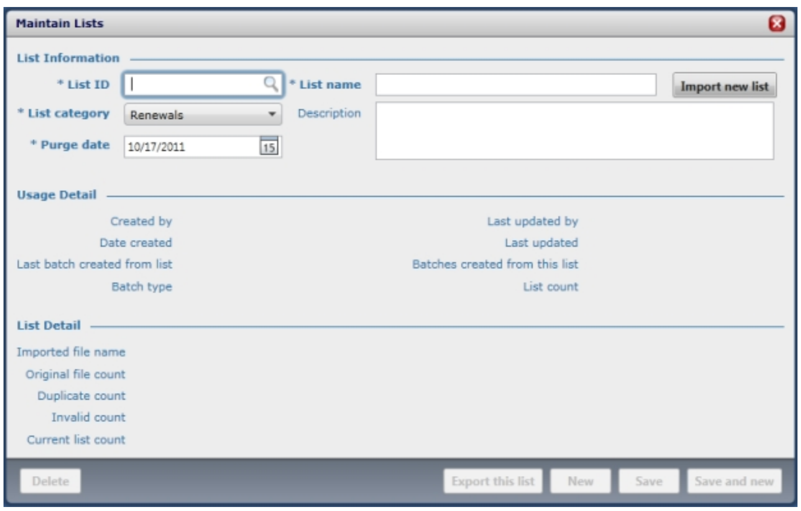
Once the import is complete, you can choose to accept the import results or cancel the entire operation. If you cancel the process, the imported patron records will not be written to the CRM database. If you accept the results, they are written to the database. CRM automatically deletes lists after 90 days.

To import a patron list

1. Generate the list of patron record ID numbers from the back office. The list must be .csv file with a single column of patron ID numbers only. Any other data will be ignored or cause invalid entries.
2. Sign in to CRM. You must have admin user permissions to import lists. For more information, see Setting Up User Permissions.
3. In the navigation pane, click **Processes**, and then click **Maintain lists**.



CRM displays the Maintain Lists form.

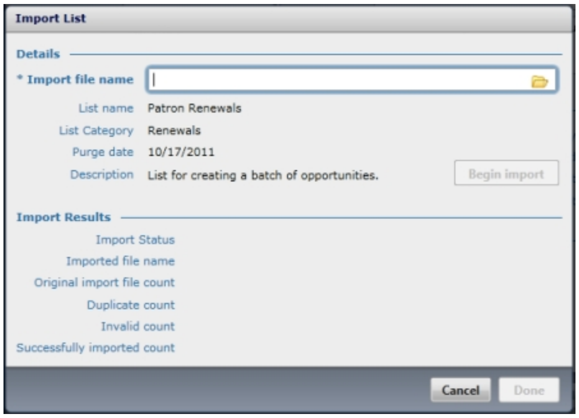


Do not enter anything in the **List ID** field. CRM will automatically assign an ID number to the imported list.

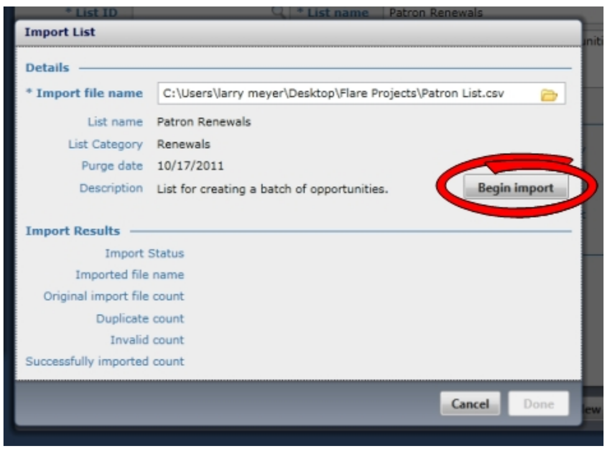
4. In **List category**, select the category associated with the new list. Categories are used to help you search for and select patron lists during bulk processing. For more information, see Managing List Categories.
5. In **Purge date**, either enter a date in the field or click to select the date from a popup calendar. The list will be automatically purged from the CRM database on this date. Contact Paciolan to set up the automatic purge process.
6. In **List name**, enter a descriptive name for the new list (up to 256 characters). Once the list is imported, the name will display when your are searching for and working with the list.
7. If you want to enter a more detailed description of the list's contents or its purpose, enter the text in the **Description** field (up to 4000 characters).

Note: The patron list `.csv` file must be closed before you begin the import process.

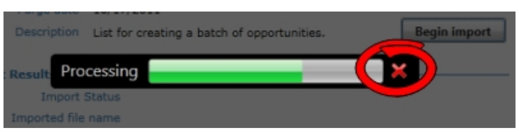
8. Click the **Import new list** button. CRM displays the Import List dialog box.



9. In **Import file name**, enter the path of the patron list `.csv` file, or click to select the file using the Open dialog box.
10. Click the **Begin import** button.



CRM begins the import process. During import, CRM displays a Processing bar with an X. If you click the X, the import process is stopped and imported records are un-imported. No records are written to the database.



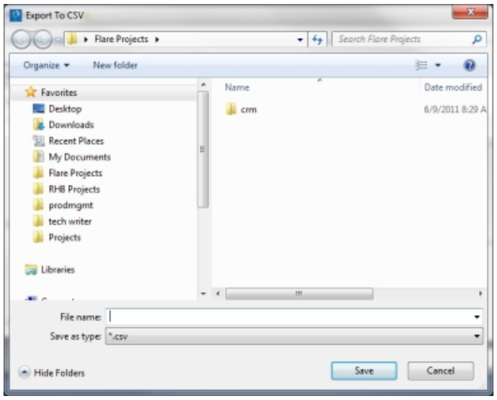
If any errors are encountered during the import process, CRM displays an Attention dialog box that gives you the option of viewing the errors.

If the Attention dialog box displays, click here for instructions.

- If you do not want to view the errors, click the **No thanks** button.

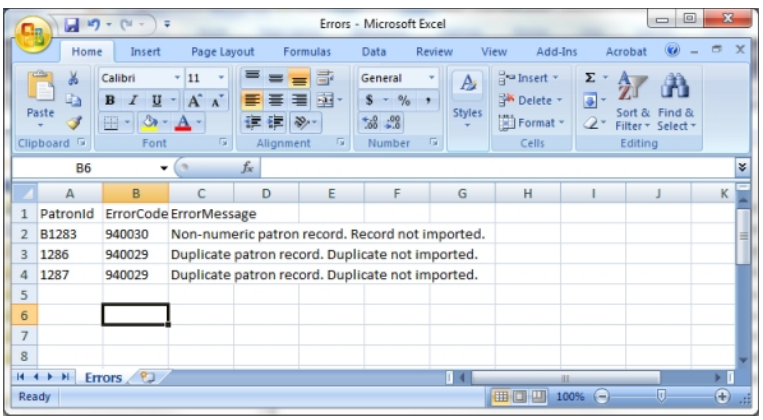
- If do want to view the errors, do the following:

a. Click the **View errors** button. CRM displays the Export to CSV dialog box.

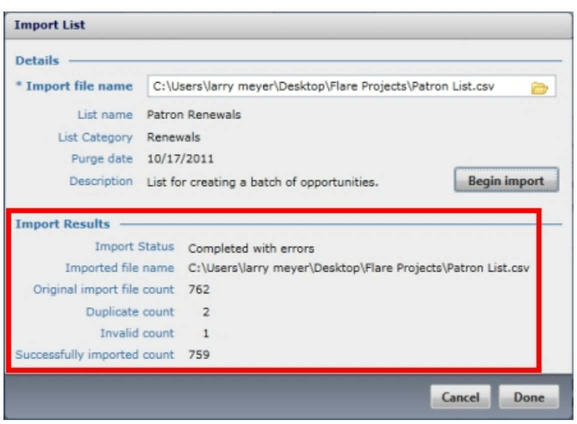


b. Navigate to the location where you want to save the error file.

c. In **File name**, enter a name for the error file, and then click the **Save** button. CRM saves the error file. To view the error details, open the `.csv` file in MS Excel.



When the import process is complete, CRM redisplays the Import List dialog box with the results in the **Import Results** section.



Click here for descriptions of each of the **Import Results** section fields.

Import Results	Description
Import Status	The status of the list import process. The import status is `Successfully completed` if there are no errors. The import status is `Completed with errors` if the process is completed but validation errors occurred, causing some records to not be imported. The import status is `Import failed` if the import process could not be completed. Any processing that was complete before the import failed will be displayed in the fields below.
Imported file name	The path and filename of the imported `.csv` file. For example, `c:\data\import.csv`.
Original import file count	The total number of records (rows with data) in the `.csv` file. The number of successfully imported records will always be equal to or less than this number, depending on whether any records cause errors. CRM ignores any data that is not in the first column of the `.csv` file.
Duplicate count	If the same patron ID number is included more than once, only the first occurrence is imported. Each extra occurrence is counted as a duplicate. Since CRM removes duplicates before validating records, some records counted as duplicates may also be invalid. However, these invalid records are only counted as duplicates.
Invalid count	Each record in the `.csv` file must be a number, no greater than 32 characters, and match a patron ID in the back office. Records that do not meet those qualifications are invalid. A record is also invalid if it has been merged into another patron record. Since CRM removes duplicates before validating records, some invalid records may be counted as duplicates instead.
Successfully imported count	The number of the original import records that were successfully imported. The sum of this count, the duplicate count, and the invalid count will always equal the original import file count. This is because records are only counted as duplicate, invalid, or successfully imported. A record that is both duplicate and invalid will only count as a duplicate, since CRM removes duplicate records before validating them.

11. In the Import List dialog box, do one of the following:
    - If you want to add the imported patron records to CRM, click the **Done** button.
    - If you do not want to add the records to CRM, click the **Cancel** button. If you cancel the process, the imported patron records will not be written to the CRM database.

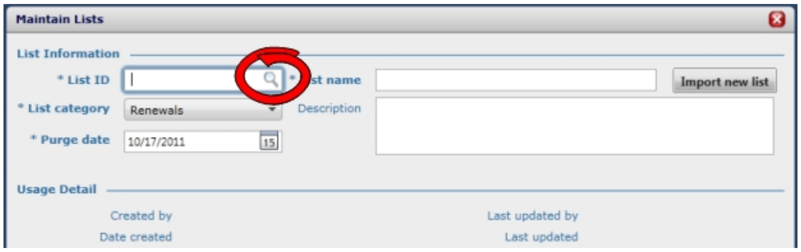
Using the List Lookup

When working with patron lists in CRM, you will periodically need to select an existing list. For example, you will need to select a list to edit its attributes and to create new lists. Of course, you can just enter the list ID number if you know it.

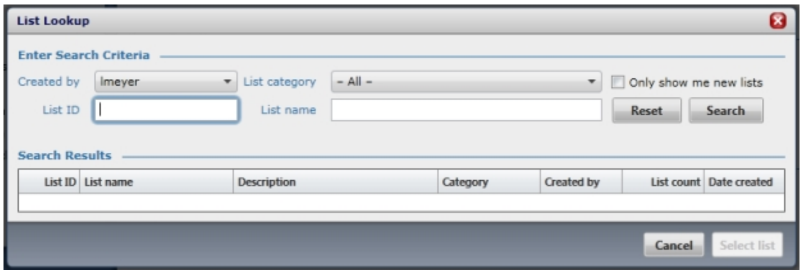
However, if you don't know the list ID number, you can launch the List Lookup to search for and select the correct list. The List Lookup allows you to search for lists by creator, list category, list ID, and list name. You can also limit the search to lists that have not yet been used to create batches.

To select a list with the List Lookup

1. In the **List ID** field, click the icon. In the example image below, you are looking for an existing patron list so you can view or edit it on the Maintain Lists form.



CRM displays the List Lookup.

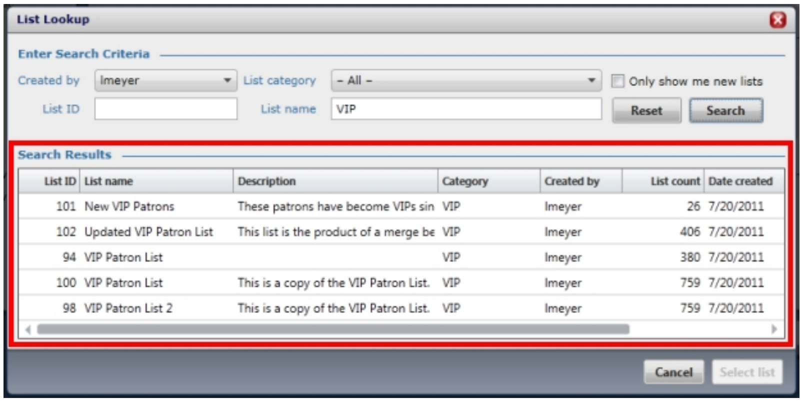


2. Enter some information on which to base the search in the Enter Search Criteria fields.

   Click here for descriptions of the search criteria fields

Search field	Description
Created by	Select the sign in name of the user who imported/created the list for which you are searching. The selection defaults to your sign in name, but all CRM users are available, regardless of their place in the CRM hierarchy.
List ID	Enter the list ID.
List category	Select the list category of the patron list for which you are searching. For more information, see Managing List Categories.
List name	Enter all or part of the list name. This search criteria is not case sensitive. For example, if the list name for which you are searching is `VIP Patron`, you could enter `VIP`, `VIP Patron`, `vip`, `Patron`, etc. to return the list in your search results.
Only show me new lists	Select this option if you only want to find lists that have not yet been used to create batches.
Reset	Click this button to clear your search criteria and start a new search.
Search	Click this button to begin a search based on your search criteria.

3. Click the **Search** button. CRM displays all patron lists that meet your search criteria in the table in the **Search Results** section.



You can sort the lists by column by clicking the column header. You can also change the column order in the list results by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many items in the list to display in the list area, a scroll bar appears on the right side of the list.

4. Select the row that contains the correct list, and then click the **Select list** button. You can also just double-click the list's row. CRM redisplays the form with the list selected.

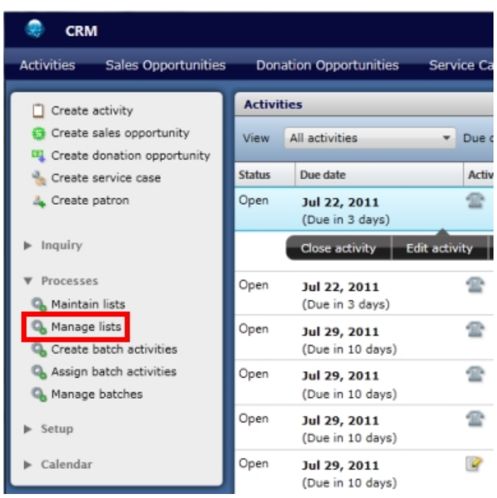
Creating Patron Lists from Other Patron Lists

Once you've imported patron lists into CRM, you can use them to create other patron lists as needed. You may do this to split a list so you can use two lists to create two smaller batches for bulk processing opportunities and activities. Or you may have two lists with duplicate patrons and need to create a single list with no duplicates.

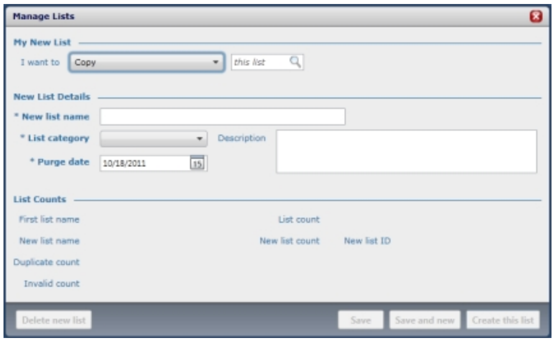
You can also create a list from the common elements of two lists or by subtracting the duplicate patrons of one list from a larger list. To set up one of these procedures, you may want to create a backup copy of a list first. To create patron lists, you must have administrative permissions (see Setting Up User Permissions).

To copy a patron list

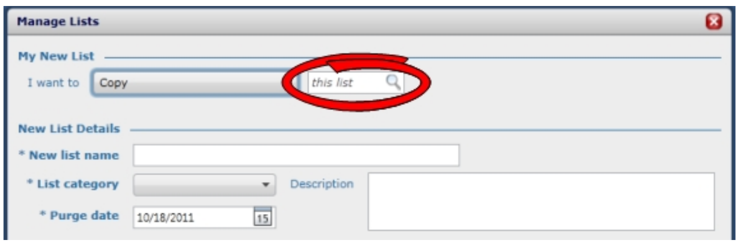
1. In the navigation pane, click **Processes**, and then click **Manage lists**.



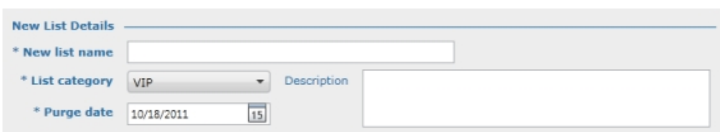
CRM displays the Manage Lists form.



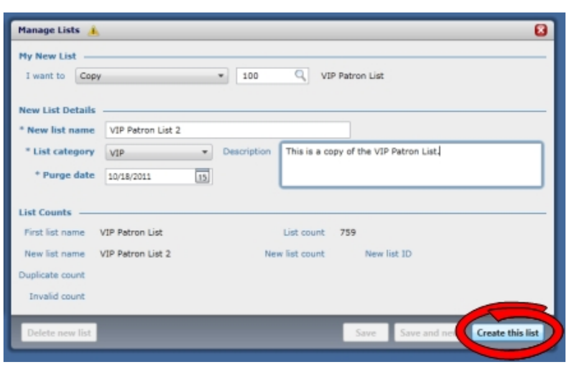
2. From the **I want to** drop-down list, select **Copy**.
3. In the **this list** box, enter the list ID number, or click and use the List Lookup to search for and select the list.



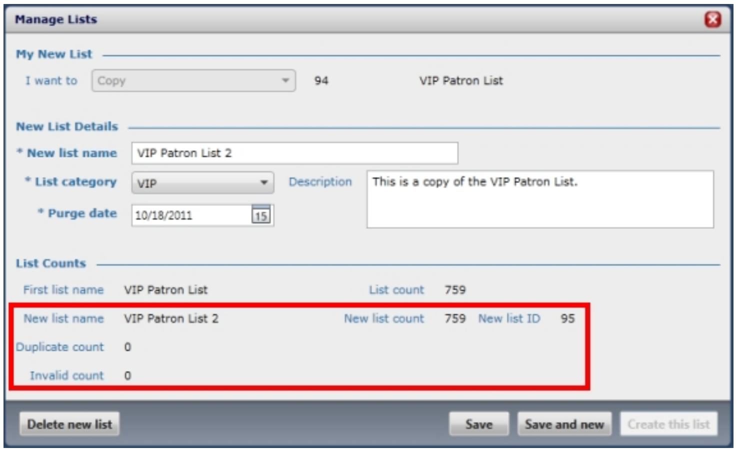
4. In the **New List Details** section, do the following:



   a. In the **New list name** box, enter a name for the new list.
   b. If you want the new list under a different list category, select the new category from **List category**. For more information, see Managing List Categories.
   c. If you want to change the date that the new list is purged from CRM, enter the new date in the **Purge date** box, or click to select the date from a popup calendar.
   d. If you want to include a description of the new list, enter it in the **Description** box.
5. Click the **Create this list** button.



CRM creates the list, saves it to the database, and then displays the new list details in the **List Counts** section. Note that the patron list is saved by the **Create this list** command. The **Save** and **Save and new** buttons at the bottom of the form are used to save any changes you make to the fields in the **New List Details** section after creating the list.



Click here for a table with descriptions of the **List Counts** section fields

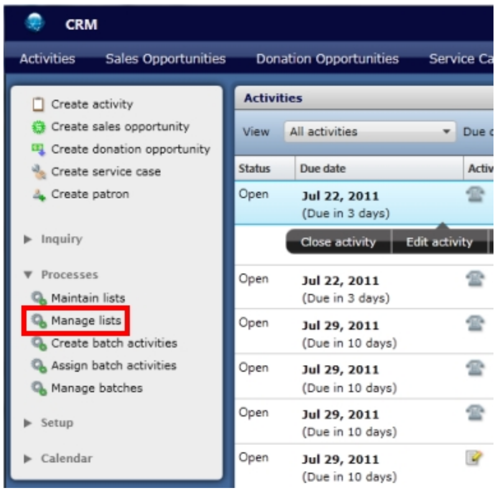
Field	Description
First list name	The name of the first list being used to create a new list.
List count	The total number of records in the first list.
New list name	The name you entered in **New list name** above.
New list count	The number of patron records in the new copy of the list. This number = (# in the original list) – (# of invalid records in the new list). Invalid records may occur in previously imported lists, even though all lists are validated during the import process. This is because patron records may be merged or become inactive after the list has been imported.
New list ID	The unique number that CRM has automatically assigned to the new list. Even if you delete the new list to which it is assigned, this number will not be used again.
Duplicate count	Any duplicates in the original list were removed during the import process. For this reason, the new list created by copying the original list will never have duplicates. This count is always `0`.
Invalid count	The number of invalid records. Invalid records are not copied into new lists. An imported record becomes invalid if it is merged with another record in the back office or if the patron's status becomes inactive. Although invalid records are not imported with patron lists, a record may become invalid after it has been imported.

6. Do one of the following:

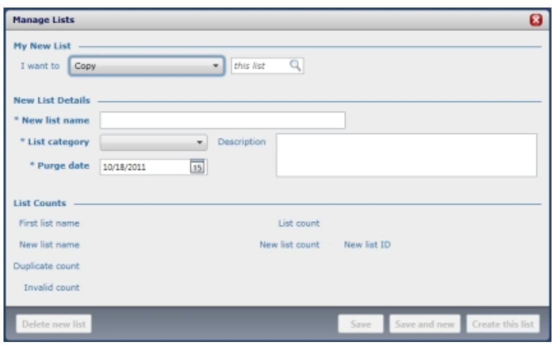
   - If you do not want to keep the new list, click the **Delete new list** button. When CRM displays the List Warning dialog box, click the **Delete this list** button. CRM deletes the list and clears the Manage Lists form.
   - If you do not want to create another list, click the **Save** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then displays the Activities hub. The list itself was saved when you clicked the **Create this list** button above.
   - If you want to create another list, click the **Save and new** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then clears the Manage Lists form. The list itself was saved when you clicked the **Create this list** button above.

To split a patron list

1. In the navigation pane, click **Processes**, and then click **Manage lists**.

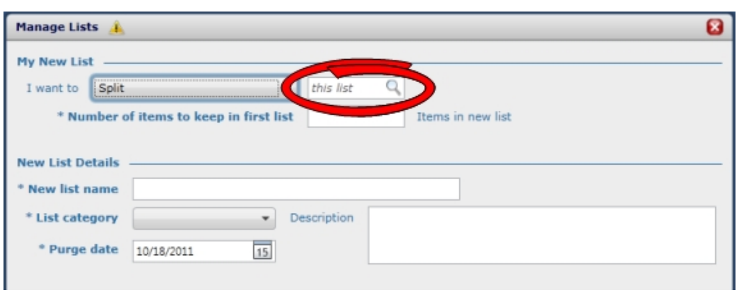


CRM displays the Manage Lists form.

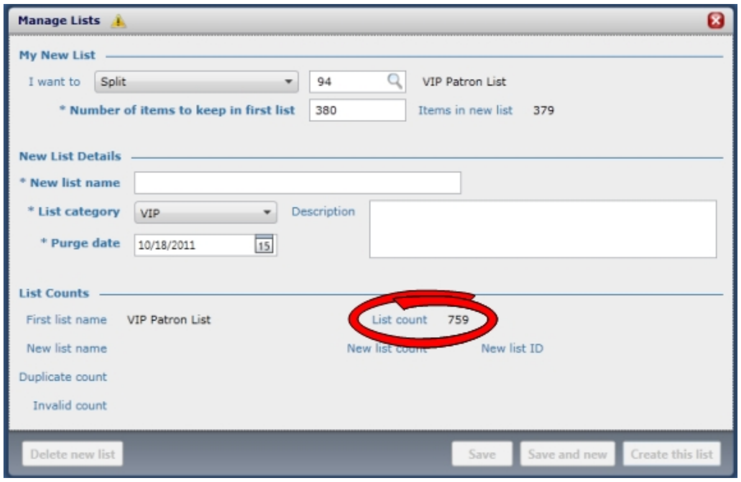


2. From the **I want to** drop-down list, select **Split**. CRM redisplays the Manage Lists form with split-specific fields.

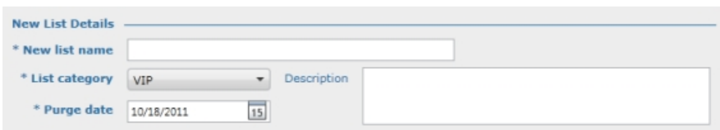
3. In the **this list** box, enter the list ID number, or click  and use the List Lookup to search for and select the list.



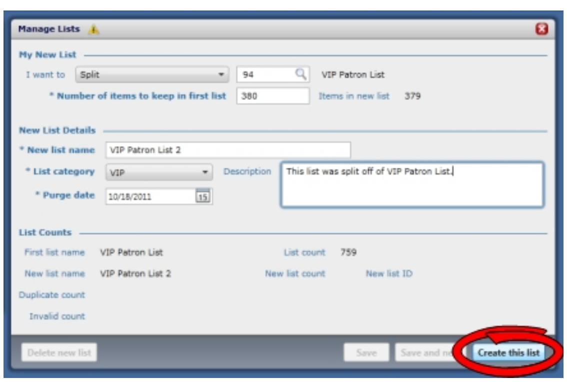
4. In the **Number of items to keep in first list** box, enter the number of records. The rest of the records will be used to create the new list. The total number of records in the list is shown in the List count field for the first list. In the example image below, there are 759 records in the first list and the first 380 will be kept in the first file. The new file will have the remaining 379 (759 minus 380) records.



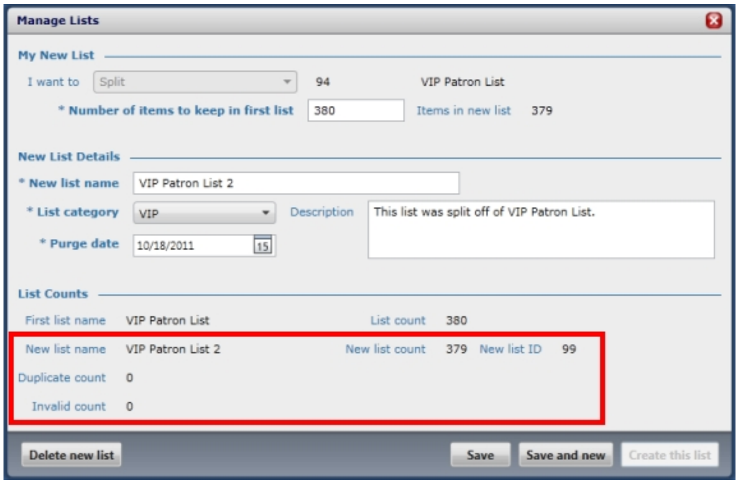
5. In the **New List Details** section, do the following:



   a. In the **New list name** box, enter a name for the new list.
   b. If you want the new list under a different list category, select the new category from **List category**. For more information, see Managing List Categories.
   c. If you want to change the date that the new list is purged from CRM, enter the new date in the **Purge date** box, or click to select the date from a popup calendar.
   d. If you want to include a description of the new list, enter it in the **Description** box.
6. Click the **Create this list** button.



CRM creates the list, saves it to the database, and then displays the new list details in the **List Counts** section. Note that the patron list is saved by the **Create this list** command. The **Save** and **Save and new** buttons at the bottom of the form are used to save any changes you make to the fields in the **New List Details** section after creating the list.



Click here for a table with descriptions of the **List Counts** section fields

Field	Description
First list name	The name of the first list being used to create a new list.
List count	The total number of records in the first list.
New list name	The name you entered in **New list name** above.
New list count	The number of patron records in the new split list. Number of records = (# in first list) – (# kept in first list) – (# of invalid records in the new list). Invalid records may occur in previously imported lists, even though all lists are validated during the import process. This is because patron records may be merged or become inactive after the list has been imported.
New list ID	The unique number that CRM has automatically assigned to the new list. Even if you delete the new list to which it is assigned, this number will not be used again.
Duplicate count	Any duplicates in the original list were removed during the import process. For this reason, the new lists created by splitting the original list will never have duplicates. This count is always `0`.
Invalid count	The number of invalid records. Invalid records are not copied into new split lists. An imported record becomes invalid if it is merged with another record in the back office or if the patron's status becomes inactive. Although invalid records are not imported with patron lists, a record may become invalid after it has been imported.

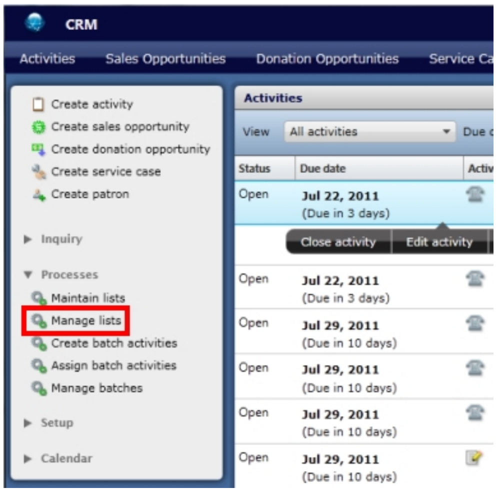
7. Do one of the following:

   - If you do not want to keep the new list, click the **Delete new list** button. When CRM displays the List Warning dialog box, click the **Delete this list** button. CRM deletes the list and clears the Manage Lists form.
   - If you do not want to create another list, click the **Save** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then displays the Activities hub. The list itself was saved when you clicked the **Create this list** button above.
   - If you want to create another list, click the **Save and new** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list

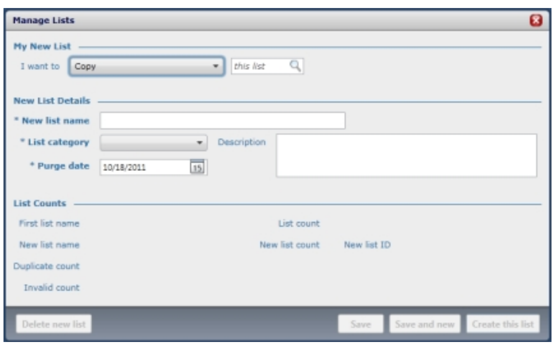
and then clears the Manage Lists form. The list itself was saved when you clicked the **Create this list** button above.

To merge two patron lists

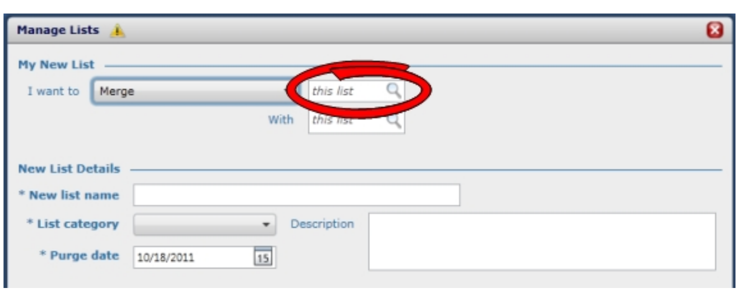
1. In the navigation pane, click **Processes**, and then click **Manage lists**.



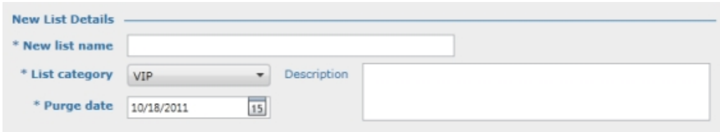
   CRM displays the Manage Lists form.



2. From the **I want to** drop-down list, select **Merge**. CRM redisplays the Manage Lists form with merge-specific fields.
3. In the first **this list** box, enter the ID number of one of the lists, or click and use the List Lookup to search for and select the list. This is one of the two lists you're merging.

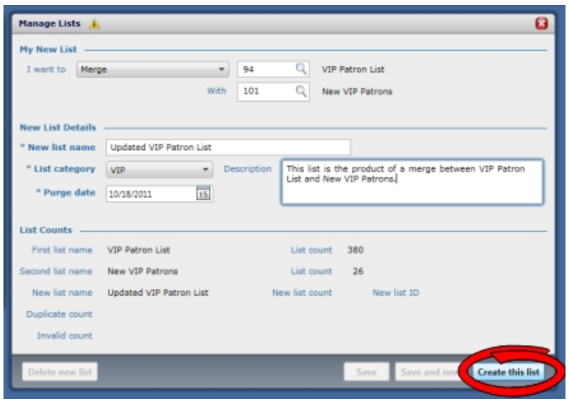


4. In the second **this list** box, enter the other list's ID number, or click and use the List Lookup to search for and select the list. This is the other list you're merging.
5. In the **New List Details** section, do the following:

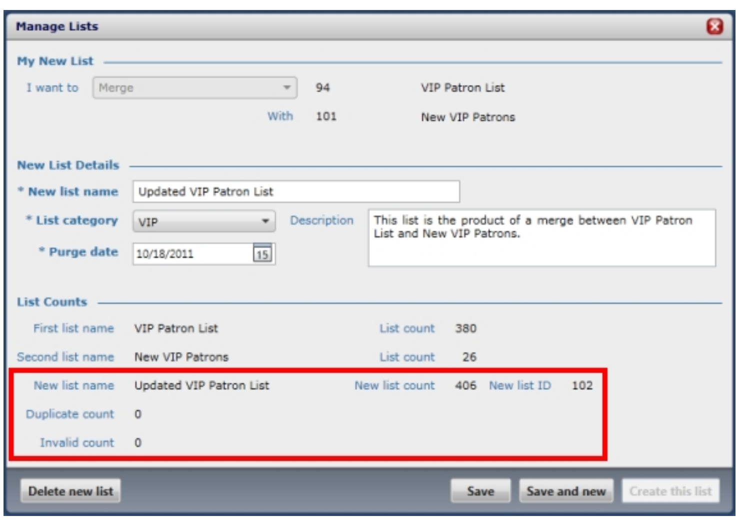


a. In the **New list name** box, enter a name for the new list.
b. If you want the new list under a different list category, select the new category from **List category**. For more information, see Managing List Categories.
c. If you want to change the date that the new list is purged from CRM, enter the new date in the **Purge date** box, or click ▦ to select the date from a popup calendar.
d. If you want to include a description of the new list, enter it in the **Description** box.

6. Click the **Create this list** button.



CRM creates the list, saves it to the database, and then displays the new list details in the **List Counts** section. Note that the patron list is saved by the **Create this list** command. The **Save** and **Save and new** buttons at the bottom of the form are used to save any changes you make to the fields in the **New List Details** section after creating the list.



Click here for a table with descriptions of the **List Counts** section fields

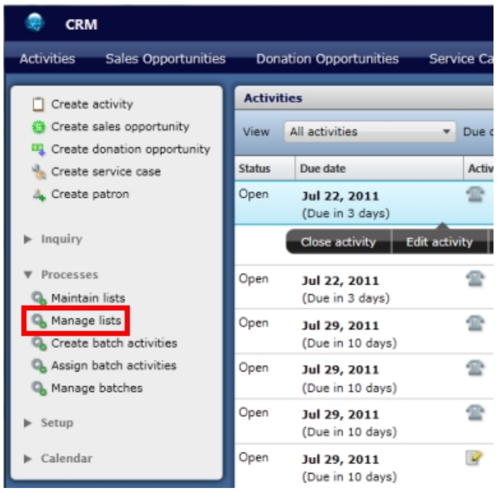
Field	Description
First list name	The name of the first list being used to create a new list.

Field	Description
List count	The total number of records in the first list.
Second list name	The name of the second list being used to create a new list.
List count	The total number of records in the second list.
New list name	The name you entered in **New list name** above.
New list count	The number of patron records in the new merged list. Number of records = (# in first list) + (# in second list) – (# of duplicates) – (# of invalid record in the new list). Invalid records may occur in previously imported lists, even though all lists are validated during the import process. This is because patron records may be merged or become inactive after the list has been imported.
New list ID	The unique number that CRM has automatically assigned to the new list. Even if you delete the new list to which it is assigned, this number will not be used again.
Duplicate count	The number of records that are in both of the patron lists being merged. Only one copy of each record is included in the merged list.
Invalid count	The number of invalid records. Invalid records are not copied into new merged lists. An imported record becomes invalid if it is merged with another record in the back office or if the patron's status becomes inactive. Although invalid records are not imported with patron lists, a record may become invalid after it has been imported.

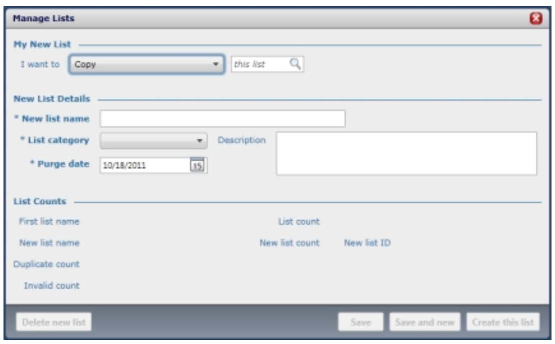
7. Do one of the following:
   - If you do not want to keep the new list, click the **Delete new list** button. When CRM displays the List Warning dialog box, click the **Delete this list** button. CRM deletes the list and clears the Manage Lists form.
   - If you do not want to create another list, click the **Save** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then displays the Activities hub. The list itself was saved when you clicked the **Create this list** button above.
   - If you want to create another list, click the **Save and new** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then clears the Manage Lists form. The list itself was saved when you clicked the **Create this list** button above.

To create a patron list with the common elements of two lists

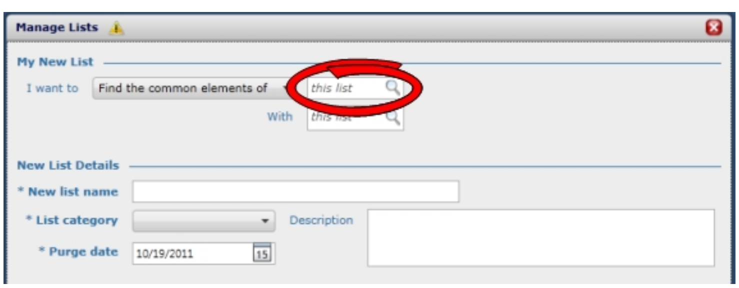
1. In the navigation pane, click **Processes**, and then click **Manage lists**.



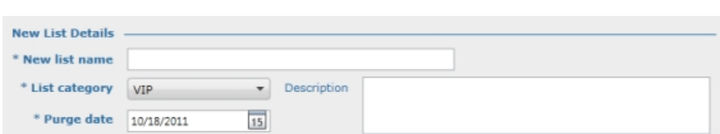
CRM displays the Manage Lists form.



2. From the **I want to** drop-down list, select **Find the common elements of**. CRM redisplays the Manage Lists form with the fields that are used to find common elements of two lists.
3. In the first **this list** box, enter the ID number of one of the lists, or click and use the List Lookup to search for and select the list. This is one of the two lists for which you are finding common records.



4. In the second **this list** box, enter the other list's ID number, or click and use the List Lookup to search for and select the list. This is the other list for which you are finding common records.
5. In the **New List Details** section, do the following:



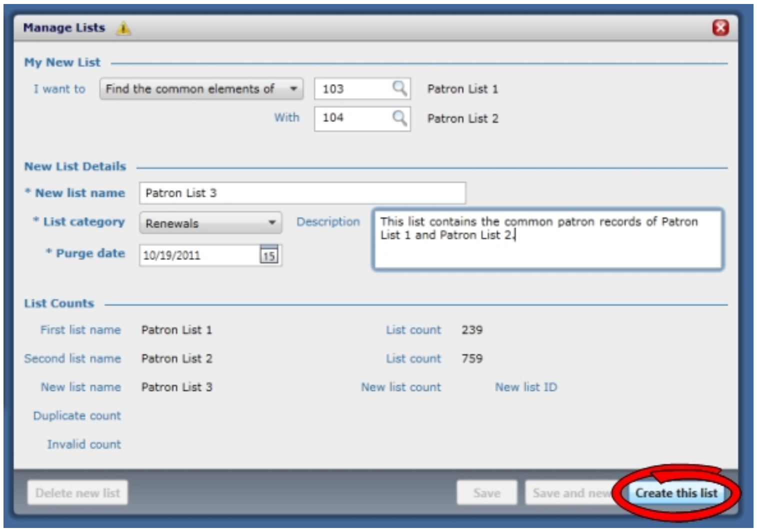
a. In the **New list name** box, enter a name for the new list.

b. If you want the new list under a different list category, select the new category from **List category**. For more information, see Managing List Categories.

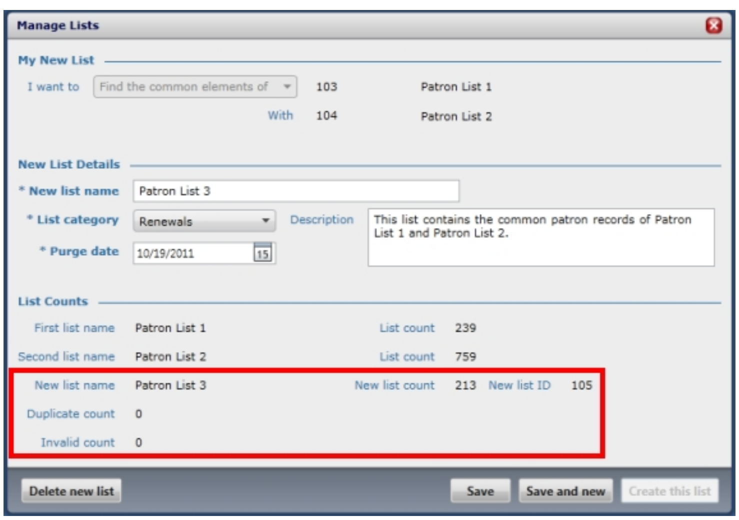
c. If you want to change the date that the new list is purged from CRM, enter the new date in the **Purge date** box, or click to select the date from a popup calendar.

d. If you want to include a description of the new list, enter it in the **Description** box.

6. Click the **Create this list** button.



CRM creates the list, saves it to the database, and then displays the new list details in the **List Counts** section. Note that the patron list is saved by the **Create this list** command. The **Save** and **Save and new** buttons at the bottom of the form are used to save any changes you make to the fields in the **New List Details** section after creating the list.



Click here for a table with descriptions of the **List Counts** section fields

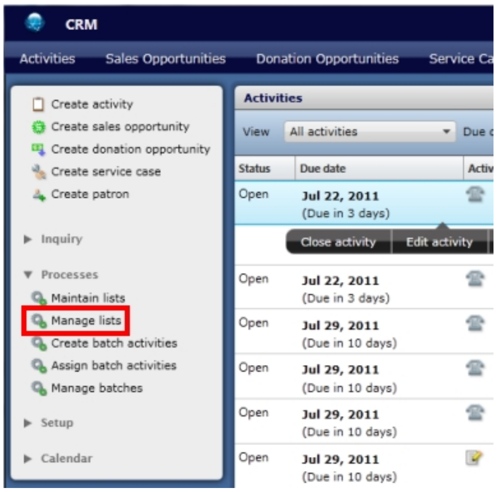
Field	Description
First list name	The name of the first list being used to create a new list.
List count	The total number of records in the first list.

Field	Description
Second list name	The name of the second list being used to create a new list.
List count	The total number of records in the second list.
New list name	The name you entered in **New list name** above.
New list count	The number of patron records in the new list of common elements. Number of records = (# of duplicates) – (# of invalid records in the new list). Invalid records may occur in previously imported lists, even though all lists are validated during the import process. This is because patron records may be merged or become inactive after the list has been imported.
New list ID	The unique number that CRM has automatically assigned to the new list. Even if you delete the new list to which it is assigned, this number will not be used again.
Duplicate count	Finding the common elements of two lists generates a new list from their duplicates, so the duplicates are counted in the **New list count**. For this reason, this count will always be `0`.
Invalid count	The number of invalid records. Invalid records are not copied into new lists. An imported record becomes invalid if it is merged with another record in the back office or if the patron's status becomes inactive. Although invalid records are not imported with patron lists, a record may become invalid after it has been imported.

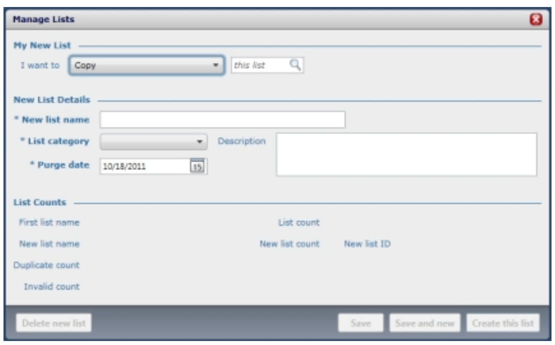
7. Do one of the following:
   - If you do not want to keep the new list, click the **Delete new list** button. When CRM displays the List Warning dialog box, click the **Delete this list** button. CRM deletes the list and clears the Manage Lists form.
   - If you do not want to create another list, click the **Save** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then displays the Activities hub. The list itself was saved when you clicked the **Create this list** button above.
   - If you want to create another list, click the **Save and new** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then clears the Manage Lists form. The list itself was saved when you clicked the **Create this list** button above.

To create a patron list by subtracting the patrons in one list from another list

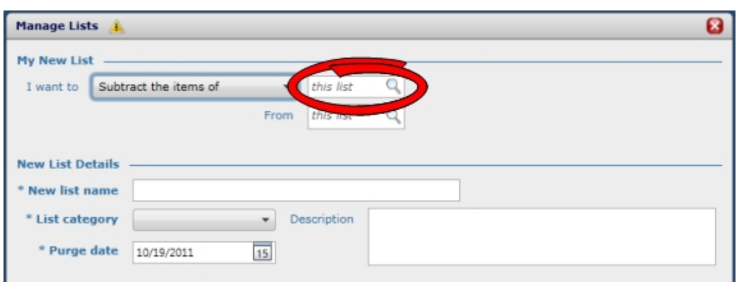
1. In the navigation pane, click **Processes**, and then click **Manage lists**.



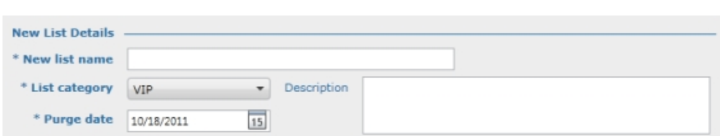
CRM displays the Manage Lists form.



2. From the **I want to** drop-down list, select **Subtract the items of**. CRM redisplays the Manage Lists form with the fields that are used to find difference between two lists.
3. In the first **this list** box, enter the ID number of the smaller list, or click and use the List Lookup to search for and select the list. This is the list whose records you will be subtracting from the other list.



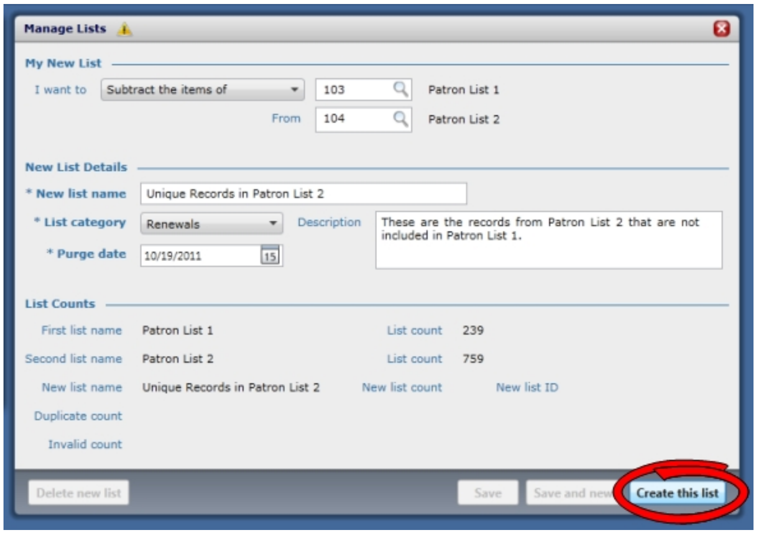
4. In the second **this list** box, enter the larger list's ID number, or click and use the List Lookup to search for and select the list. This is the list from which you will be subtracting the records in the first list.
5. In the **New List Details** section, do the following:



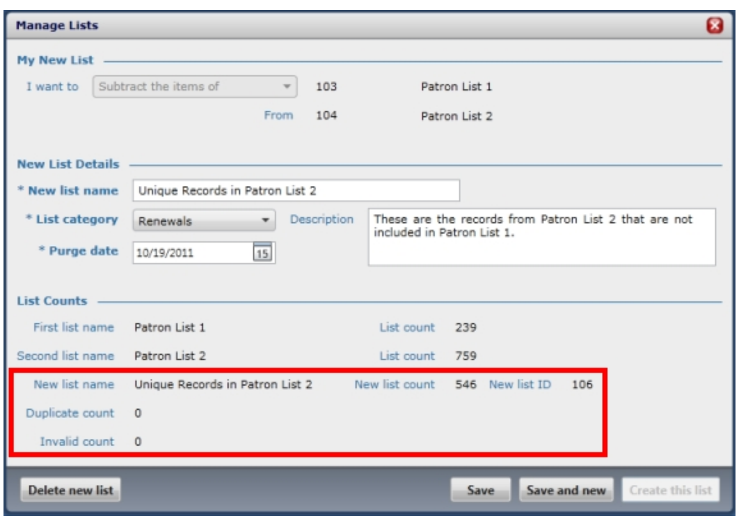
   a. In the **New list name** box, enter a name for the new list.

b. If you want the new list under a different list category, select the new category from **List category**. For more information, see Managing List Categories.
c. If you want to change the date that the new list is purged from CRM, enter the new date in the **Purge date** box, or click to select the date from a popup calendar.
d. If you want to include a description of the new list, enter it in the **Description** box.

6. Click the **Create this list** button.



CRM creates the list, saves it to the database, and then displays the new list details in the **List Counts** section. Note that the patron list is saved by the **Create this list** command. The **Save** and **Save and new** buttons at the bottom of the form are used to save any changes you make to the fields in the **New List Details** section after creating the list.



Click here for a table with descriptions of the **List Counts** section fields

Field	Description
First list name	The name of the first list being used to create a new list.
List count	The total number of records in the first list.

Field	Description
Second list name	The name of the second list being used to create a new list.
List count	The total number of records in the second list.
New list name	The name you entered in **New list name** above.
New list count	The number of patron records in the new subtracted list. Number of records = (# in second list) – (# in the first list) – (# of invalid records in the new list). Invalid records may occur in previously imported lists, even though all lists are validated during the import process. This is because patron records may be merged or become inactive after the list has been imported.
New list ID	The unique number that CRM has automatically assigned to the new list. Even if you delete the new list to which it is assigned, this number will not be used again.
Duplicate count	Finding the difference between two lists generates the new list by removing their duplicates. For this reason, this count will always be `0`.
Invalid count	The number of invalid records. Invalid records are not copied into new subtracted lists. An imported record becomes invalid if it is merged with another record in the back office or if the patron's status becomes inactive. Although invalid records are not imported with patron lists, a record may become invalid after it has been imported.

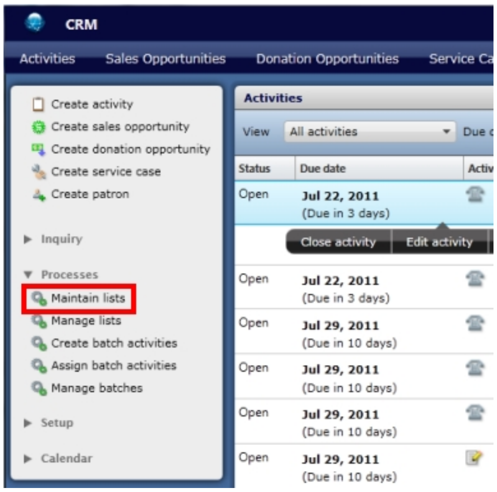
7. Do one of the following:
   - If you do not want to keep the new list, click the **Delete new list** button. When CRM displays the List Warning dialog box, click the **Delete this list** button. CRM deletes the list and clears the Manage Lists form.
   - If you do not want to create another list, click the **Save** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then displays the Activities hub. The list itself was saved when you clicked the **Create this list** button above.
   - If you want to create another list, click the **Save and new** button. CRM saves any changes you made to the attributes in the **New List Details** section after creating the list and then clears the Manage Lists form. The list itself was saved when you clicked the **Create this list** button above.

Editing Patron List Attributes

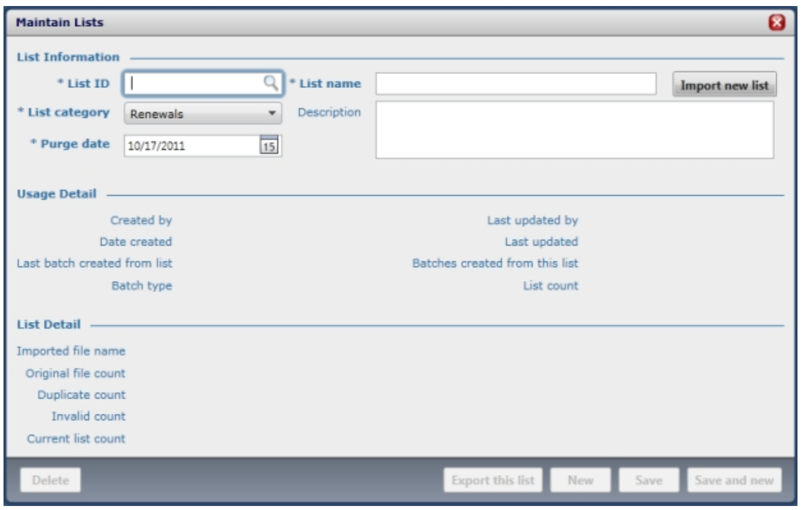
Once you've imported a list, you can edit its attributes at any time. List attributes include the name, description, categorization, and purge date of a list. You can also view details of how a list has been used for bulk processing. You cannot change the list ID of an imported list. You also cannot modify the patron records in an imported list.

To edit the attributes of a patron list

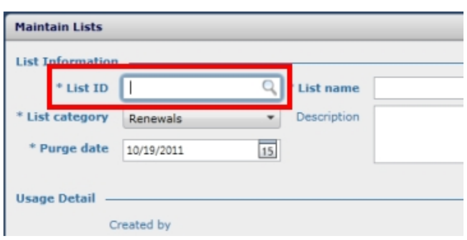
1. In the navigation pane, click **Processes**, and then click **Maintain lists**.



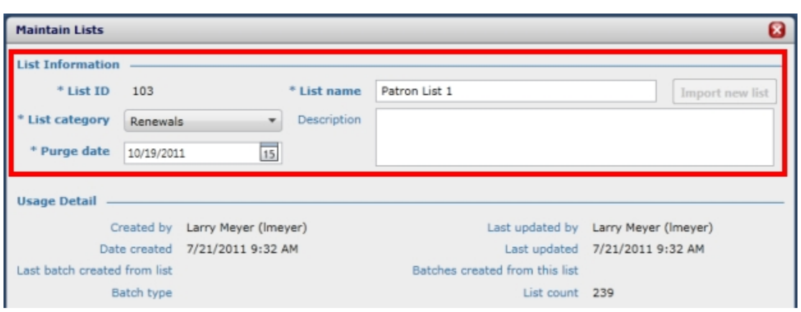
CRM displays the Maintain Lists form.



2. In the **List ID** box, enter the list ID number, or click and use the List Lookup to search for and select the list.



CRM displays the Maintain Lists form with the list attributes displayed in the **List Information** section.



3. Do one or more of the following:

   - In the **List name** box, edit the name of the list. The list name is displayed when you use the list on the Manage Lists form and when creating batches. You can also search for the list by this name when using the List Lookup.
   - If you want the list to be assigned a different list category, select the new category from **List category**. For more information, see Managing List Categories.
   - If you want to change the date that the list will be purged from CRM, enter the new date in the **Purge date** box, or click to select the date from a popup calendar. CRM will automatically delete the list on this date. Contact Paciolan for information about setting up automatic list purging.
   - If you want to add or edit the description of the new list, enter or edit it in the **Description** box.

4. Do one of the following:

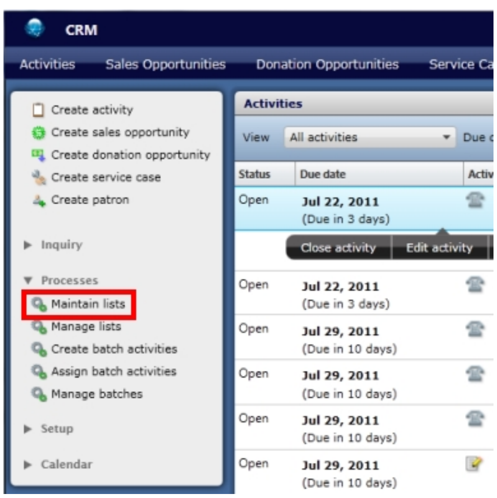
   - To save your changes and close the form, click the **Save** button. CRM displays the Activities hub.
   - To save your changes and edit or import a new list, click the **Save and new** button. CRM clears the Maintain Lists form.
   - To clear the form without making any changes to the list, click the **New** button. CRM clears the Maintain Lists form.

Exporting Patron Lists

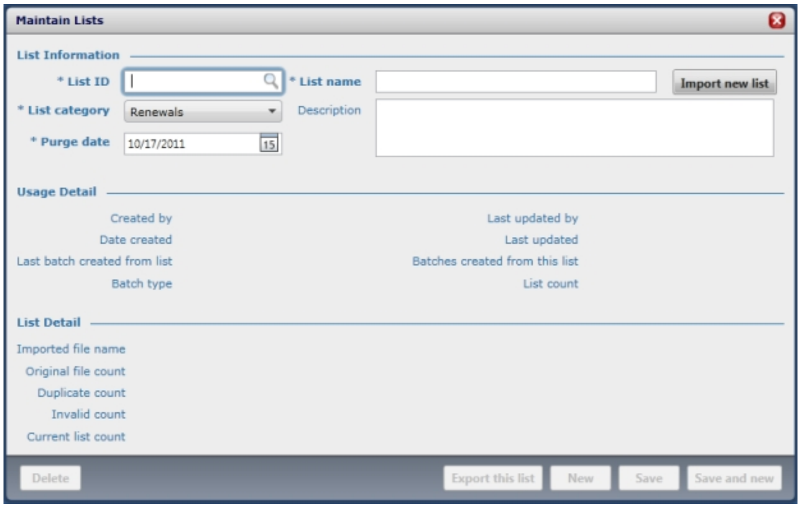
Once a patron list is imported into CRM, you can export the list to a `.csv` file at any time. However, CRM will only export the records from the original list that it successfully imported. For this reason, invalid and duplicate patron records that were in the list before it was imported into CRM will not be included in the export file. The exported file does not include any header or footer information.

To export a patron list

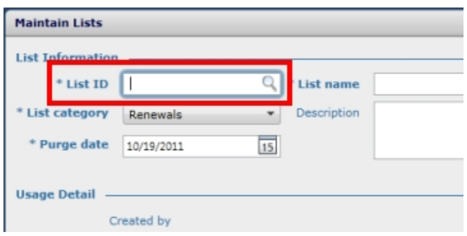
1. In the navigation pane, click **Processes**, and then click **Maintain lists**.



CRM displays the Maintain Lists form.

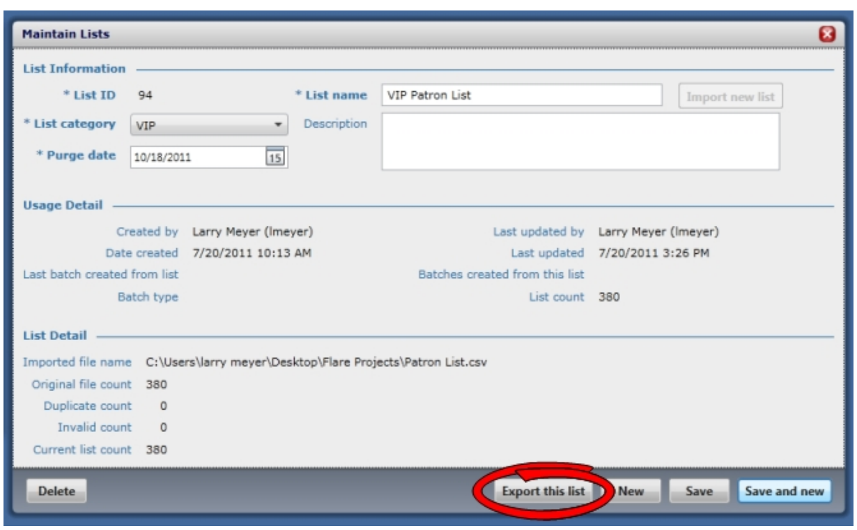


2. In the **List ID** box, enter the list ID number, or click and use the List Lookup to search for and select the list.

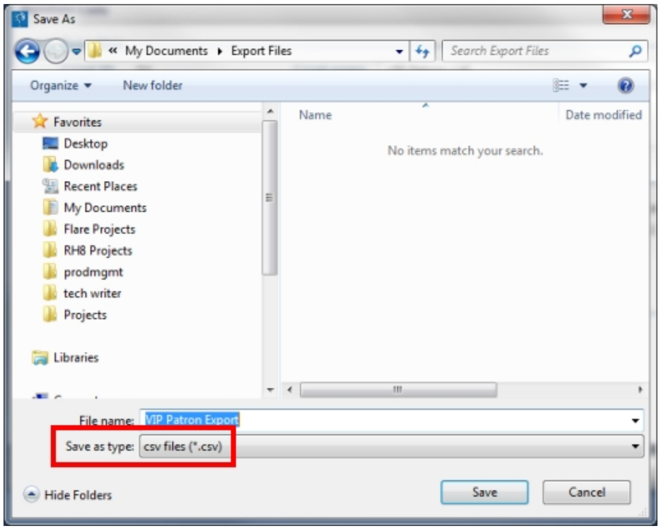


CRM displays the list attributes and usage information on the form.

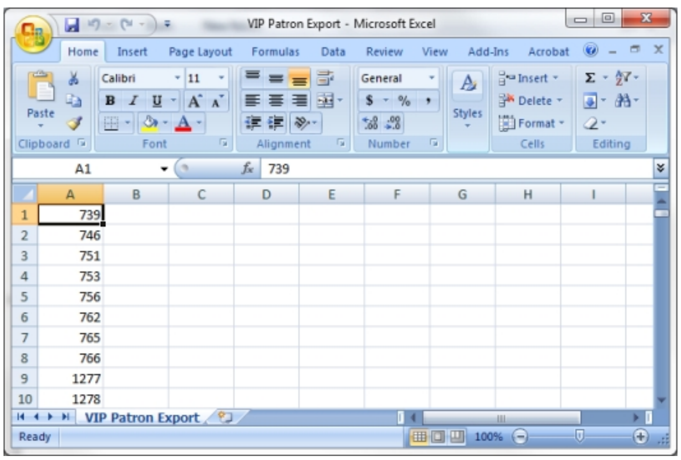
3. Click the **Export this list** button.



CRM displays the Windows Save As dialog box. Leave the **Save as type** set to **csv files (*.csv)**. CRM only exports to the `.csv` file format.



4. Navigate to the Windows folder where you want to export the file.
5. In **File name**, enter a name for the export file, and then click the **Save** button. CRM exports the `.csv` file. To work with the exported list, open the `.csv` file in MS Excel.

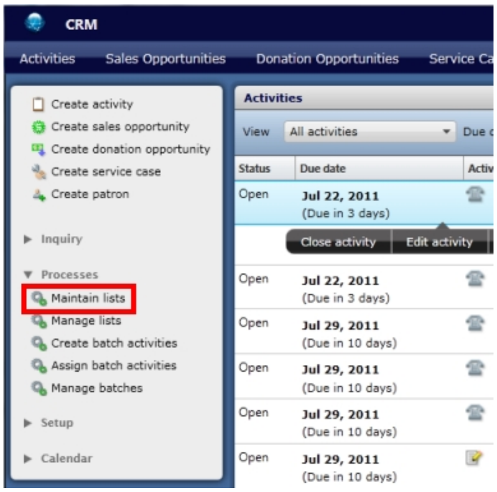


Deleting Patron Lists

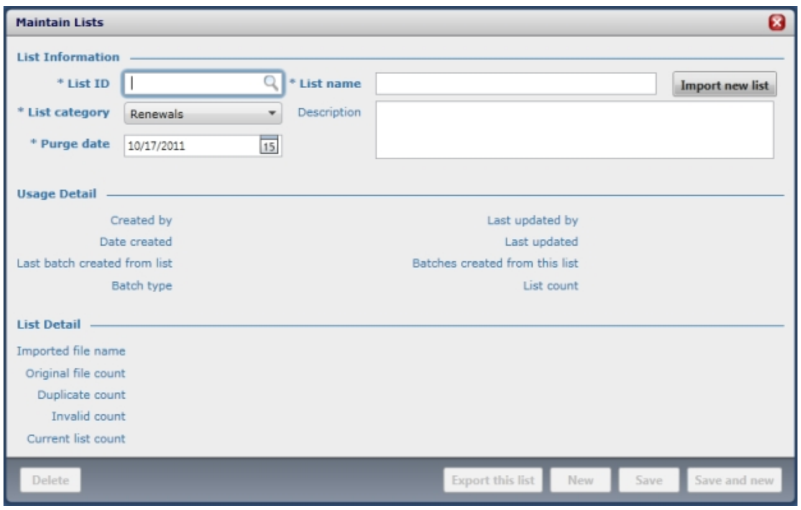
If you no longer need a patron list, you can delete it from CRM at any time. It is good practice to delete lists you are no longer using to make current lists easier to locate. Once deleted, the list is removed from the database and is not recoverable. Deleting a patron list has no affect on batches you have already created from the list. If you do not delete a list, CRM will automatically delete it after 90 days.

To delete a patron list

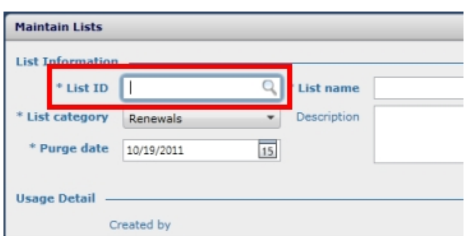
1. In the navigation pane, click **Processes**, and then click **Maintain lists**.



CRM displays the Maintain Lists form.

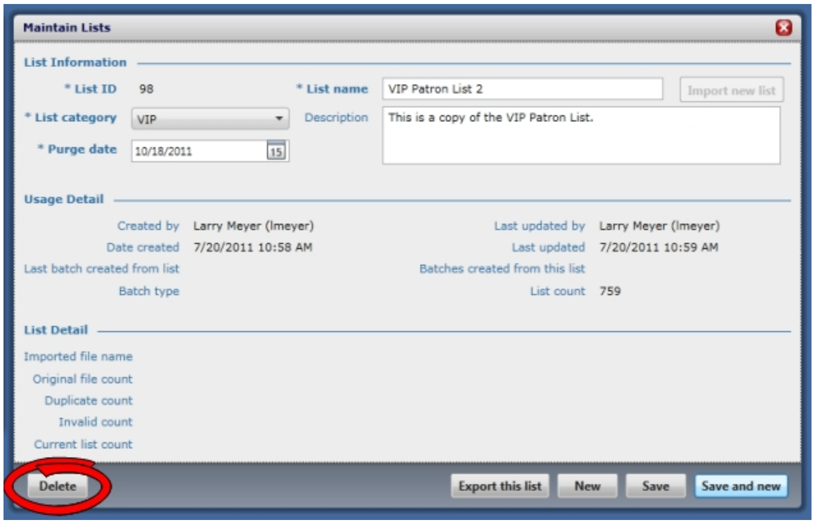


2. In the **List ID** box, enter the list ID number, or click and use the List Lookup to search for and select the list.

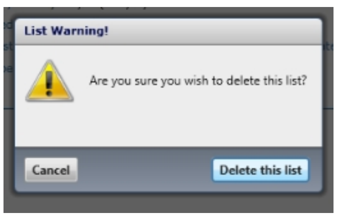


CRM displays the list attributes and usage information on the form.

3. Click the **Delete** button.



CRM displays the List Warning dialog box.



4. Click the **Delete this list** button. CRM deletes the list and clears the Maintain Lists form.

Creating Batches of CRM Items

In CRM, sales and donation opportunities, their associated activities, and stand-alone activities can be created individually or in bulk. To create the opportunities and activities in bulk, you use an imported list of patrons. The bulk process creates an opportunity or activity for each patron in the list. Only supervisors with administrator permissions can create opportunities and activities in bulk.

When setting up the bulk process, you enter some default information that is applied to all the opportunities and activities that are created. Each opportunity and activity in a batch will be created using these defaults, and every opportunity and activity generated from the settings will be part of a single batch.

If you are creating opportunities, an associated next step activity is also generated for each opportunity. If you are creating stand-alone activities, only activities are created. In an optional second step, you can assign the generated opportunities or activities to a group of sales or donation representatives and set the due dates for the created tasks.

If the optional batch assignment step is not done, the tasks generated during batch creation will be assigned to the owner of the batch. You can also choose to assign any team to which the owner belongs. All the tasks in the created batch will have a single due date.

When creating batches in CRM, do one or more of the following:

- Create a batch of sales opportunities.
- Create a batch of donation opportunities.
- Create a batch of standalone activities.

Note: To create batches of sales or donation opportunities, you must have access to ticketing or donation data, as well as administrative permissions. For more information, see Setting Up User Permissions.

Creating Batches of Sales Opportunities

You can create a batch of sales opportunities based on an imported list of patrons. An opportunity is created for each patron in the list. When the batch process is complete, you will be given the option to save an error list in a `.csv` format file. You can then view the errors in MS Excel. The newly created sales opportunities are available on the Sales Opportunities hub. They can also be assigned as a batch to other CRM users.

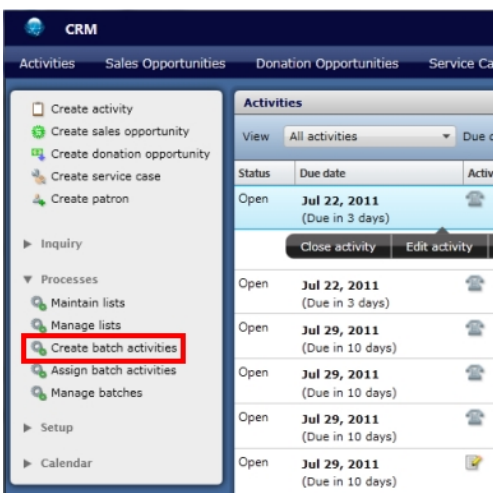
To set up a batch of opportunities, you must assign an owner and enter a name for the batch. You can also assign the opportunities to a team, but only if the owner is a team member. If you don't choose to batch assign the opportunities after batch creation, they will remain assigned to the owner and team you select.

To set up the activities that are associated with the opportunities, you specify the activity type (for example, a phone call), the phone or address type, the due date, and the subject line. The phone or address type determines the contact information that will be pulled from the patron record for the individual activities. Once the batch of associated activities is created, the activities are available on the Activities hub.

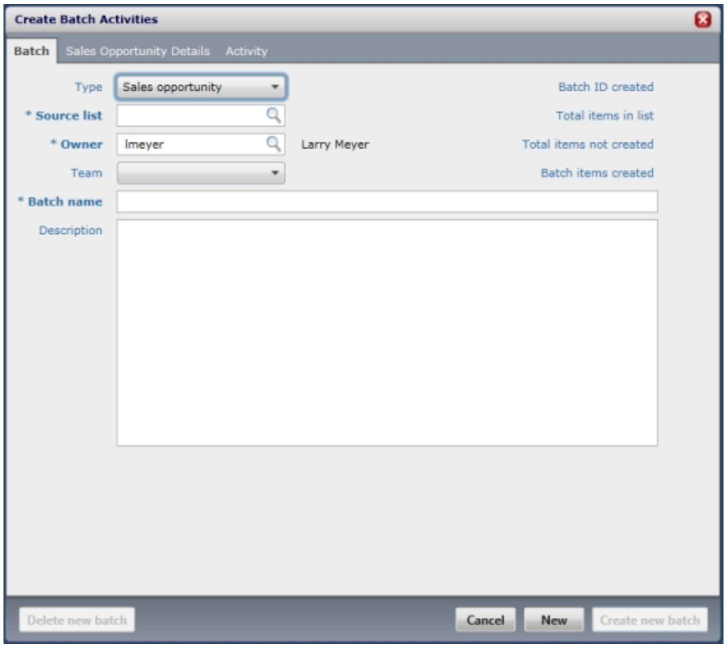
Note: To create batches of sales opportunities, you must have administrative and ticketing data user permissions.

To create a batch of sales opportunities

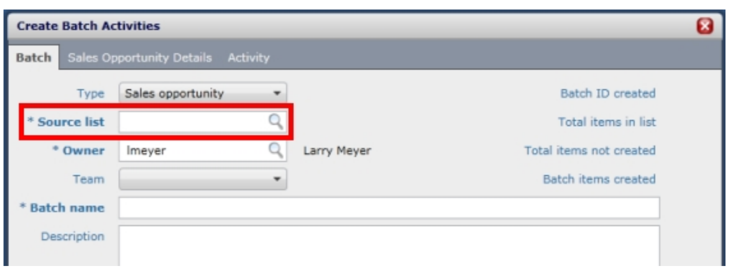
1. In the navigation pane, click **Processes**, and then click **Create batch activities**.



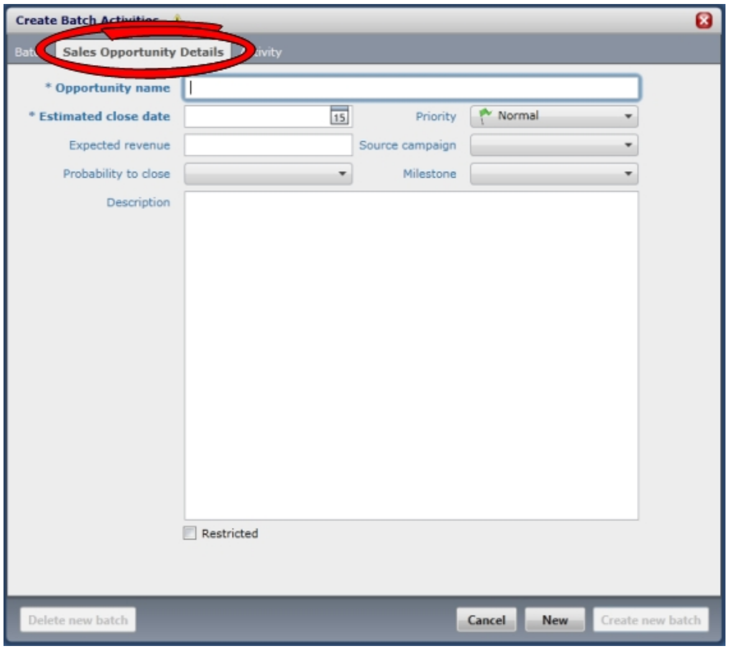
CRM displays the Create Batch Activities form.



2. From the **Type** drop-down list, select Sales opportunity.
3. In the **Source List** field, enter the patron list ID number, or click and use the List Lookup to search for and select the list. This is the list of patrons that CRM will use to generate the batch of opportunities. The selected source list is locked (unavailable to other users creating batches) until you are finished creating the batch.



4. In the **Owner** field, enter the sign in (user name) of the user who will be the owner of the batch of opportunities. If you don't know the user name, use the User Lookup. Ownership defaults to you, but you may choose to assign the batch to one of your subordinates in the user hierarchy. If you choose to assign the batch to a group of users during batch assignment, ownership will be changed to those users at that time.
5. If you want a team assigned to all the opportunities created in the batch, select the team name from the **Team** drop-down list. Only teams to which the owner belongs can be selected. You can change the team during batch assignment.
6. In the **Batch name** field, enter a short, descriptive name. You can use the batch name to help identify the batch during batch assignment and when editing batch attributes.
7. If you want to keep a more detailed description of the batch, enter the text in the **Description** field. The description can also help identify the batch when editing batch attributes.
8. Set up the batch opportunities by doing the following:
   a. Click the **Sales Opportunity Details** tab. CRM redisplays the form with the Sales Opportunity Details tab fields. These are the settings used to define the opportunities that will be created for the patrons.



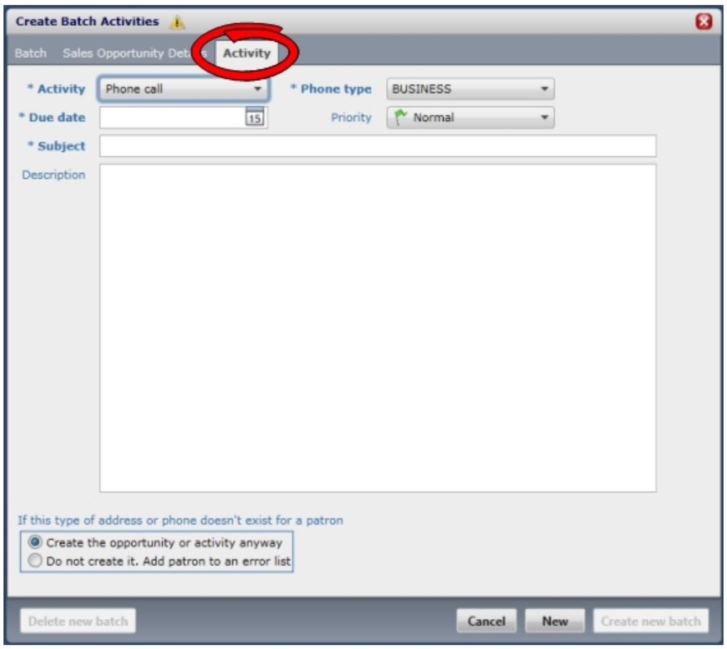
b. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields.

Click to see a list of the fields with usage information

Field	Usage Information
Opportunity name	Enter the name to use for all the opportunities in the batch. This name can be used to identify the opportunities on the Sales Opportunities hub and the Patron Summary form.
Estimated close date	Either enter a date in the field or click the calendar icon to select one from the popup calendar.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Expected revenue	(Optional) Enter the amount of money that you expect to be generated from the sales opportunity. The entry must be numeric and can include a decimal point and commas.
Source campaign	(Optional) Select one of the predefined source campaigns from the drop-down list. CRM campaigns are used to group opportunities for reporting. They allow you to measure campaigns against each other or report on a single campaign with opportunities created from different patron lists. See Managing Source Campaigns.
Probability to close	(Optional) The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Sales Opportunities.
Milestone	(Optional) This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5,

Field	Usage Information
	and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Description	(Optional) You can use this field to enter a more detailed description of the opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.

9. Set up the batch activities by doing the following:
   a. Click the **Activity** tab. CRM redisplays the form with the Activity tab fields. These are the settings used to define the activities that will be created for the patrons.



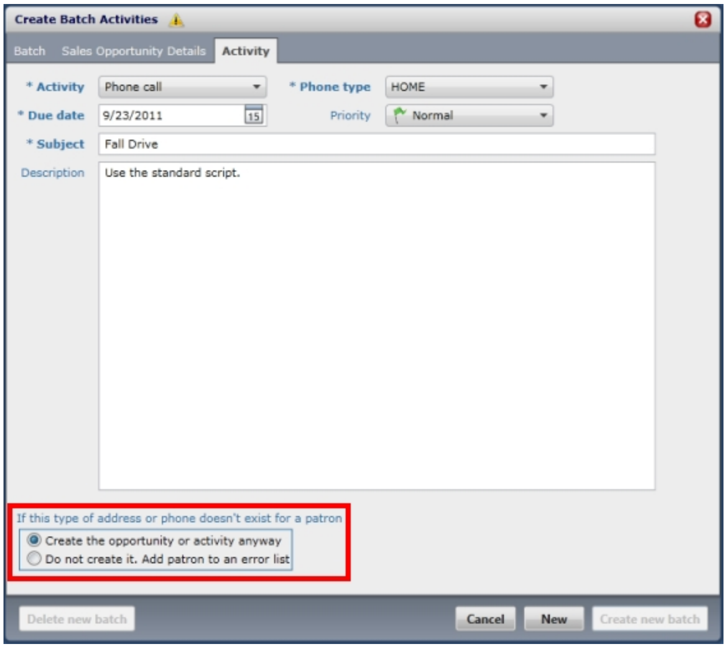
   b. From the **Activity** drop-down list, select the type of activities that you want to create. For batch creation, only the **Phone call**, **Email**, **Letter**, and **Other** activity types are available.
   c. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields.

   Click to see a list of the fields with usage information

Field	Usage Information
Activity	Select the type of activities you want to create for the batch. Only the phone call, email, and letter types are available. You cannot batch create meeting or fax activities. If you are using an unavailable activity type, select **Other**. This selection determines the type of contact information (phone, email, or address type) that will be included for the patron in each activity. The information is pulled from each patron record (the Phone/Address tab of the Patron Detail form). See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.

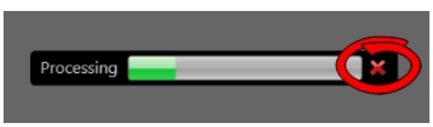
Field	Usage Information
Phone type	This displays only when **Phone call** is selected in the **Activity** drop-down list. Select the phone type to pull from the patron's record for each activity. Some common examples include home, business, or cellular. Phone types are configured by your organization in the Paciolan back office. Phone numbers are entered for one or more phone types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Email type	This displays only when **Email** is selected in the **Activity** drop-down list. Select the email type to pull from the patron's record for each activity. Some common examples include primary, alternate, or default. Email types are configured by your organization in the Paciolan back office. Email addresses are entered for one or more email types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Address type	This displays only when **Letter** is selected in the **Activity** drop-down list. Select the address type to pull from the patron's record for each activity. Some common examples include home, business, or billing. Address types are configured by your organization in the Paciolan back office. Addresses are entered for one or more address types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Due date	Either enter a date in the field or click the calendar icon to select one from the popup calendar.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Subject	Enter a short description of the purpose of the activity. This will help you identify activities from the batch on the Activities hub and on the Patron Summary.
Description	(Optional) This field displays if the activity type is a phone call, letter, or other communication type. You can use this field to enter a description of the phone call script or the message to be included in the letter.
Message	(Optional) This field displays if the activity type is an email message. You can use this field to enter the body of the message to be sent.

d. For **If this type of address or phone doesn't exist for a patron**, select one of the following:

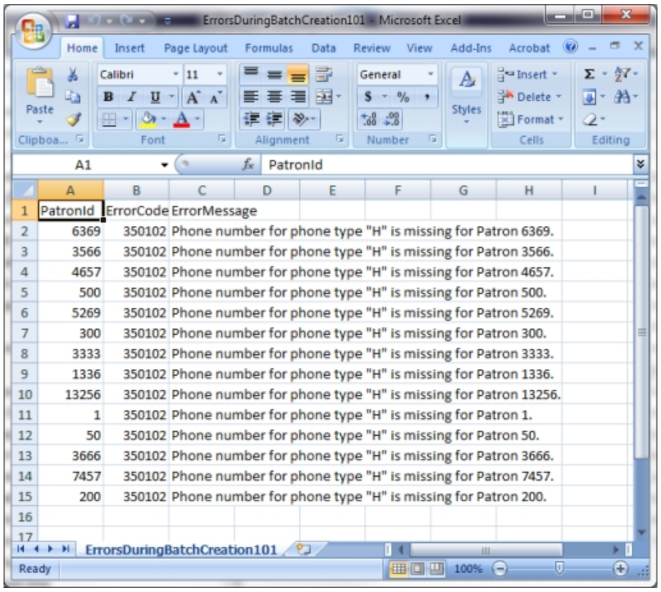


- **Create the opportunity or activity anyway**. This will create the activities with the **Address** or **Phone number** field empty for patron records that do not have the address or phone number type information. To complete the activity CRM users will have to change the activity type or enter the address or phone number in the Patron Detail (see Editing Patron Information).
- **Do not create it. Add patron to an error list**. This will not create activities for patrons that do not have the address or phone number type information. In this case, CRM will add the patron record and the reason it was not created to an error list. You will have the option to view the error list at the end of batch processing.

10. Click the **Create new batch** button. CRM begins processing the batch. During batch processing, CRM displays a Processing bar with an X. If you click the X, the process is stopped and no opportunities or associated activities are created. The Processing bar will close when the process is complete.



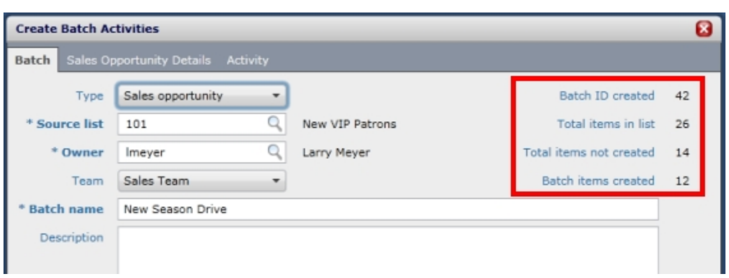
If you chose **Do not create it. Add patron to an error list** on the Activity tab and some patrons did not have the required address or phone type information, CRM will display an Attention dialog box that allows you to save a .csv error file. You can view the patron errors by opening the file in MS Excel.



PatronId	ErrorCode	ErrorMessage
6369	350102	Phone number for phone type "H" is missing for Patron 6369.
3566	350102	Phone number for phone type "H" is missing for Patron 3566.
4657	350102	Phone number for phone type "H" is missing for Patron 4657.
500	350102	Phone number for phone type "H" is missing for Patron 500.
5269	350102	Phone number for phone type "H" is missing for Patron 5269.
300	350102	Phone number for phone type "H" is missing for Patron 300.
3333	350102	Phone number for phone type "H" is missing for Patron 3333.
1336	350102	Phone number for phone type "H" is missing for Patron 1336.
13256	350102	Phone number for phone type "H" is missing for Patron 13256.
1	350102	Phone number for phone type "H" is missing for Patron 1.
50	350102	Phone number for phone type "H" is missing for Patron 50.
3666	350102	Phone number for phone type "H" is missing for Patron 3666.
7457	350102	Phone number for phone type "H" is missing for Patron 7457.
200	350102	Phone number for phone type "H" is missing for Patron 200.

When the process is complete, CRM displays the details of the new batch on the Batch tab of the Create Batch Activities form. Click here for field descriptions.

Field	Usage Information
Batch ID created	The batch ID number is automatically assigned by CRM as part of batch processing. This number is unique for all batches.
Total items in list	The number of patrons in the imported patron list used to create the batch.
Total items not created	The number of patrons for which no opportunity was created. This happens if you chose **Do not create it. Add patron to an error list** on the Activity tab, and the patrons do not have the required address or phone type information. Opportunities will also not be created for invalid patrons (for example, patrons with merged or inactive records). The `.csv` error file contains an entry for each patron that describes why no opportunity was created. CRM gives you the option of creating this file when batch processing is complete.
Batch items created	The number of opportunities successfully created for the new batch.

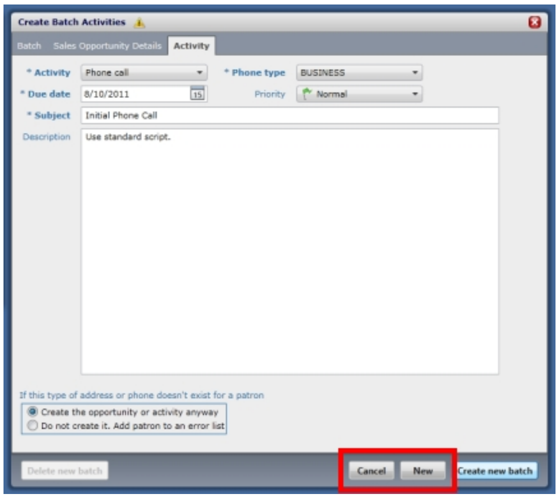


The opportunities that have been successfully created are now available on the Sales Opportunities hub. The activities that were created for the opportunities are available on the Activities hub. If you want to reassign the opportunities in bulk, see Assigning Batches to Users.

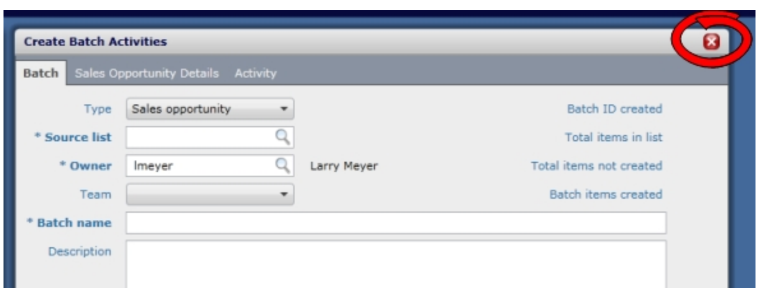
Note: You cannot save and reuse the settings to create another batch. However, the settings will be available for reference during batch management.

11. If you decide that you don't want the batch that you've setup or created, click one of the following buttons:

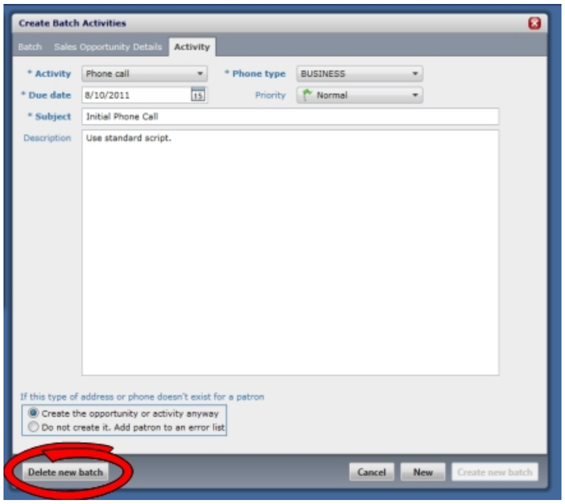
- **New**. This will clear the batch settings on all of the Create Batch Activities form tabs so that you can begin creating a new batch. The cleared form remains displayed. If you have already processed a new batch by clicking the **Create new batch** button, clicking the **New** button does not delete any of the opportunities or associated activities that were created.



- **Cancel**. This will clear the current batch settings and close the Create Batch Activities form. If you have already processed a new batch by clicking the **Create new batch** button, clicking **Cancel** will not delete any of the opportunities or associated activities that were created. You can also cancel by clicking the X on the upper-right of the form.



- **Delete new batch**. If you have just processed a new batch by clicking the **Create new batch** button, clicking **Delete new batch** will delete the new opportunities and associated activities that were created and clear all of the Create Batch Activities form tabs. Once you click the **Cancel** or **New** buttons, or navigate to a hub or another form, you can no longer delete a newly created batch on this form. For information about deleting previously run batches of opportunities and associated activities, see Deleting Batches.



Creating Batches of Donation Opportunities

You can create a batch of donation opportunities based on an imported list of patrons. An opportunity is created for each patron in the list. When the batch process is complete, you will be given the option to save an error list in a `.csv` format file. You can then view the errors in MS Excel. The newly created donation opportunities are available on the Donation Opportunities hub. They can also be assigned as a batch to other CRM users.

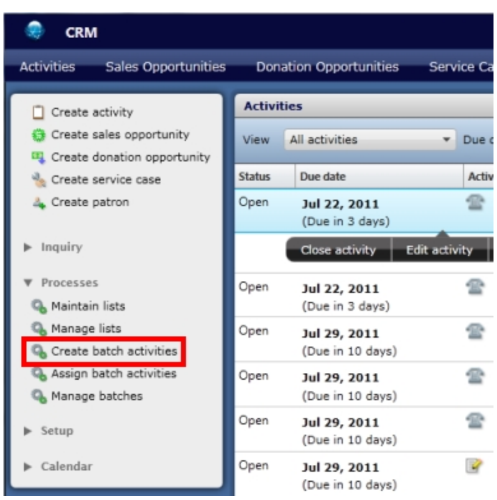
To set up a batch of opportunities, you must assign an owner and enter a name for the batch. You can also assign the opportunities to a team, but only if the owner is a team member. If you don't choose to batch assign the opportunities after batch creation, they will remain assigned to the owner and team you select.

To set up the activities that are associated with the opportunities, you specify the activity type (for example, a phone call), the phone or address type, the due date, and the subject line. The phone or address type determines the contact information that will be pulled from the patron record for the individual activities. Once the batch of associated activities is created, the activities are available on the Activities hub.

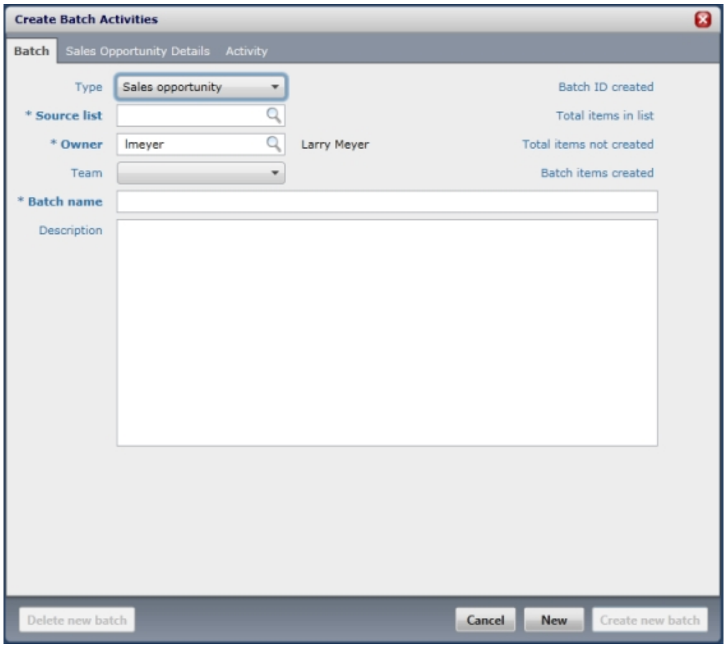
Note: To create batches of donation opportunities, you must have administrative and donation data user permissions.

To create a batch of donation opportunities

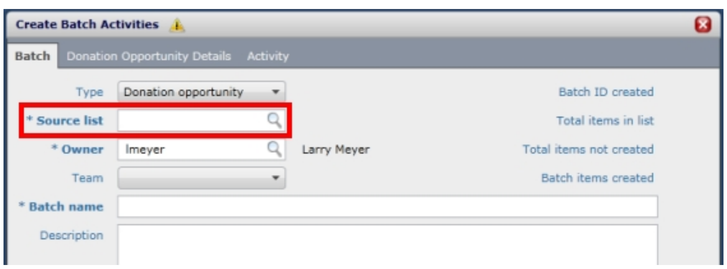
1. In the navigation pane, click **Processes**, and then click **Create batch activities**.



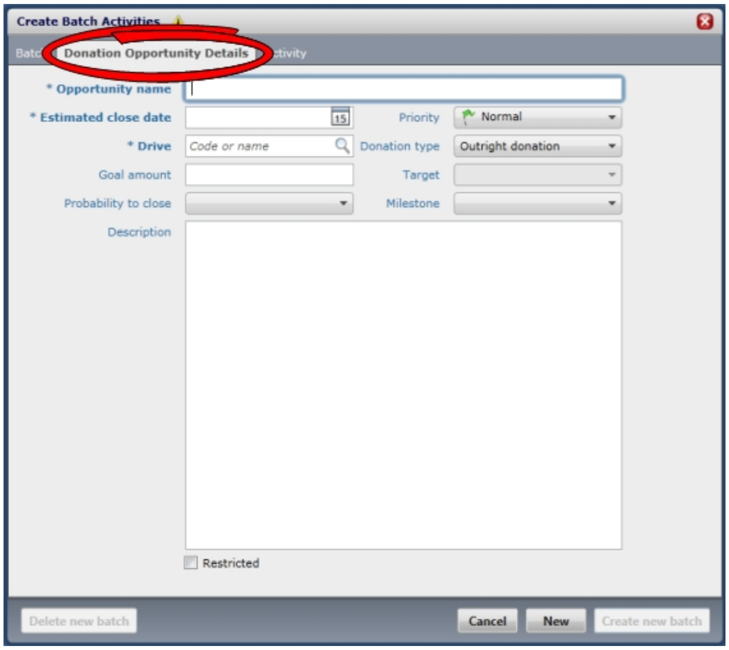
CRM displays the Create Batch Activities form.



2. From the **Type** drop-down list, select Donation opportunity.
3. In the **Source List** field, enter the patron list ID number, or click and use the List Lookup to search for and select the list. This is the list of patrons that CRM will use to generate the batch of opportunities. The selected source list is locked (unavailable to other users creating batches) until you are finished creating the batch.



4. In the **Owner** field, enter the sign in (user name) of the user who will be the owner of the batch of opportunities. If you don't know the user name, use the User Lookup. Ownership defaults to you, but you may choose to assign the batch to one of your subordinates in the user hierarchy. If you choose to assign the batch to a group of users during batch assignment, ownership will be changed to those users at that time.
5. If you want a team assigned to all the opportunities created in the batch, select the team name from the **Team** drop-down list. Only teams to which the owner belongs can be selected. You can change the team during batch assignment.
6. In the **Batch name** field, enter a short, descriptive name. You can use the batch name to help identify the batch during batch assignment and when editing batch attributes.
7. If you want to keep a more detailed description of the batch, enter the text in the **Description** field. The description can also help identify the batch when editing batch attributes.
8. Set up the batch opportunities by doing the following:
   a. Click the **Donation Opportunity Details** tab. CRM redisplays the form with the Donation Opportunity Details tab fields. These are the settings used to define the opportunities that will be created for the patrons.



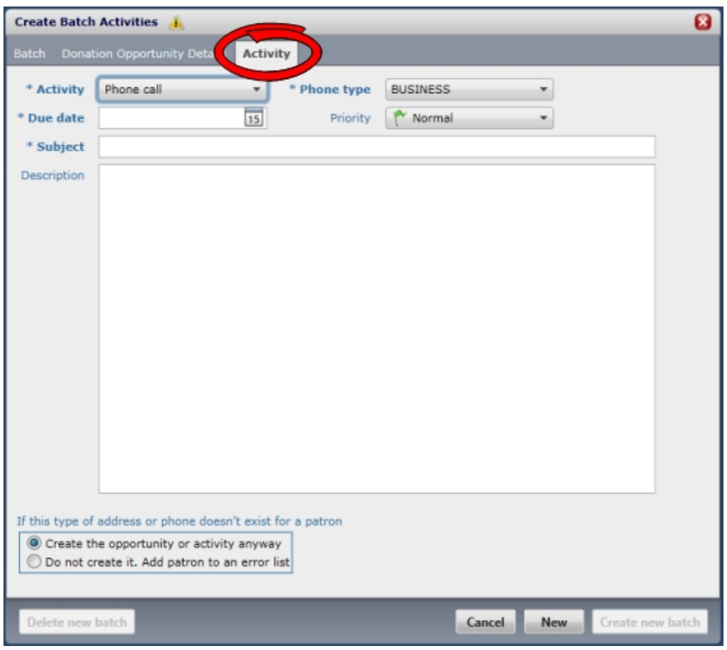
b. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields.

Click to see a list of the fields with usage information

Field	Usage Information
Opportunity name	Enter the name to use for all the opportunities in the batch. This name can be used to identify the opportunities on the Donation Opportunities hub and the Patron Summary form.
Estimated close date	Either enter a date in the field or click the calendar icon to select one from the popup calendar.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Drive	Drives and campaigns are defined in the back office using tFund. Enter the drive or campaign name or click  to use the Drive Lookup. If you don't remember the exact drive or campaign name, you can select one from a list by leaving the **Drive** search field empty and clicking the **Search** button.
Donation type	The donation type options include outright donation, pledge, and gift in kind. Donation types are not configurable.
Goal amount	Enter the amount of money you hope to collect from the donor for this donation opportunity. The entry must be numeric and can include a decimal point and commas.
Target	If the drive you select has targets associated with it, select a target from this list. A target is used in the tFund system to represent a group of donors or patrons.
Probability to close	(Optional) The likelihood that an opportunity will be successfully closed (won). This field is used for reporting only. The available values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%. When you close

Field	Usage Information
	an opportunity and mark it as won or lost, this value is automatically changed to 100% for won or 0% for lost. For more information, see Closing Donation Opportunities.
Milestone	(Optional) This a customizable field that is used for reporting. The default names are: Milestone 1, Milestone 2, Milestone 3, Milestone 4, Milestone 5, and Milestone 6. Donation opportunities and sales opportunities each have their own set of milestone names. Contact Paciolan for assistance with customization.
Description	(Optional) You can use this field to enter a more detailed description of the opportunities.
Restricted	Select this option to limit viewing of the opportunity to users with permissions that allow them access to restricted data. For more information, see Setting Up User Permissions. You can only set this option if you or one of your subordinates is the owner of the opportunity.

9. Set up the batch activities by doing the following:
   a. Click the **Activity** tab. CRM redisplays the form with the Activity tab fields. These are the settings used to define the activities that will be created for the patrons.



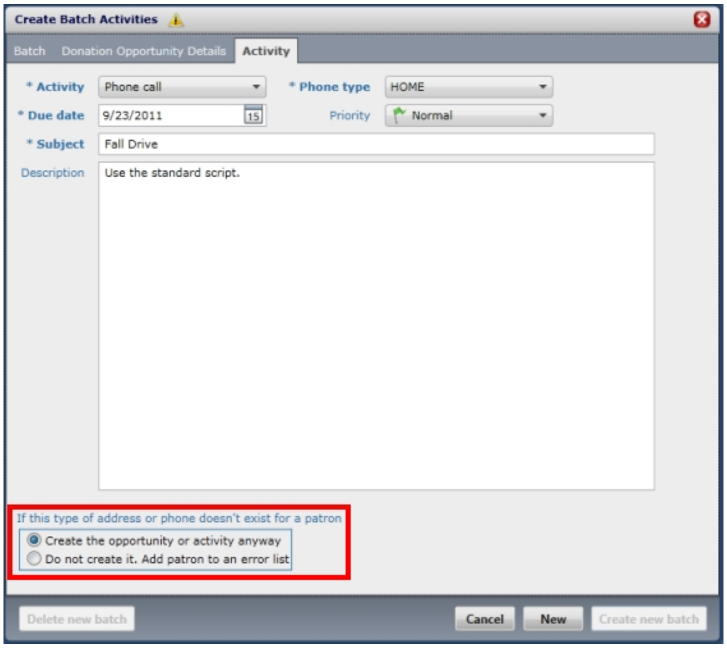
   b. From the **Activity** drop-down list, select the type of activities that you want to create. For batch creation, only the **Phone call**, **Email**, **Letter**, and **Other** activity types are available.
   c. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields.

   Click to see a list of the fields with usage information

Field	Usage Information
Activity	Select the type of activities you want to create for the batch. Only the phone call, email, and letter types are available. You cannot batch create meeting or fax activities. If you are using an unavailable activity type, select **Other**.

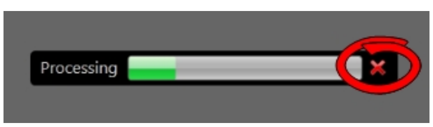
Field	Usage Information
	This selection determines the type of contact information (phone, email, or address type) that will be included for the patron in each activity. The information is pulled from each patron record (the Phone/Address tab of the Patron Detail form). See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Phone type	This displays only when **Phone call** is selected in the **Activity** drop-down list. Select the phone type to pull from the patron's record for each activity. Some common examples include home, business, or cellular. Phone types are configured by your organization in the Paciolan back office. Phone numbers are entered for one or more phone types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Email type	This displays only when **Email** is selected in the **Activity** drop-down list. Select the email type to pull from the patron's record for each activity. Some common examples include primary, alternate, or default. Email types are configured by your organization in the Paciolan back office. Email addresses are entered for one or more email types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Address type	This displays only when **Letter** is selected in the **Activity** drop-down list. Select the address type to pull from the patron's record for each activity. Some common examples include home, business, or billing. Address types are configured by your organization in the Paciolan back office. Addresses are entered for one or more address types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Due date	Either enter a date in the field or click the calendar icon to select one from the popup calendar.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Subject	Enter a short description of the purpose of the activity. This will help you identify activities from the batch on the Activities hub and on the Patron Summary.
Description	(Optional) This field displays if the activity type is a phone call, letter, or other communication type. You can use this field to enter a description of the phone call script or the message to be included in the letter.
Message	(Optional) This field displays if the activity type is an email message. You can use this field to enter the body of the message to be sent.

d. For **If this type of address or phone doesn't exist for a patron**, select one of the following:

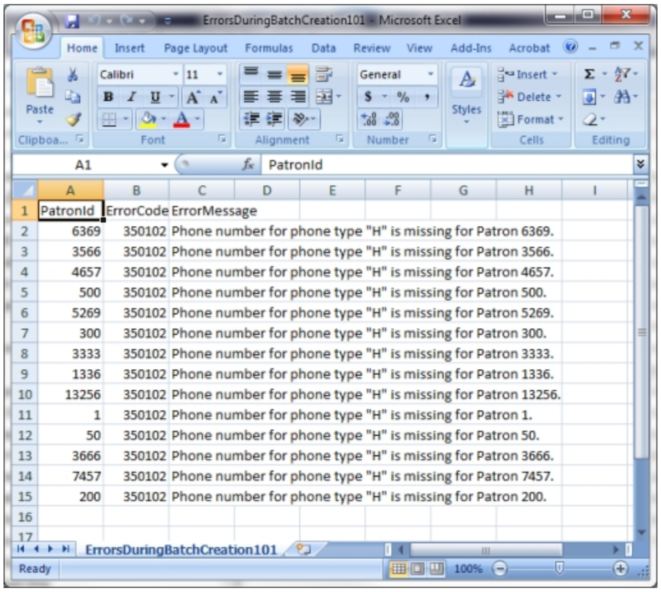


- **Create the opportunity or activity anyway**. This will create the activities with the **Address** or **Phone number** field empty for patron records that do not have the address or phone number type information. To complete the activity CRM users will have to change the activity type or enter the address or phone number in the Patron Detail (see Editing Patron Information).
- **Do not create it. Add patron to an error list**. This will not create activities for patrons that do not have the address or phone number type information. In this case, CRM will add the patron record and the reason it was not created to an error list. You will have the option to view the error list at the end of batch processing.

10. Click the **Create new batch** button. CRM begins processing the batch. During batch processing, CRM displays a Processing bar with an X. If you click the X, the process is stopped and no opportunities or associated activities are created. The Processing bar will close when the process is complete.

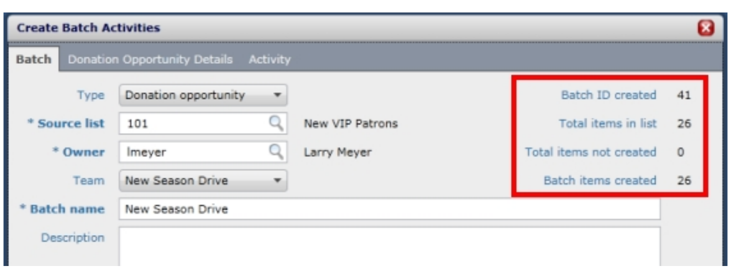


If you chose **Do not create it. Add patron to an error list** on the Activity tab and some patrons did not have the required address or phone type information, CRM will display an Attention dialog box that allows you to save a .csv error file. You can view the patron errors by opening the file in MS Excel.



When the process is complete, CRM displays the details of the new batch on the Batch tab of the Create Batch Activities form. Click here for field descriptions.

Field	Usage Information
Batch ID created	The batch ID number is automatically assigned by CRM as part of batch processing. This number is unique for all batches.
Total items in list	The number of patrons in the imported patron list used to create the batch.
Total items not created	The number of patrons for which no opportunity was created. This happens if you chose **Do not create it. Add patron to an error list** on the Activity tab, and the patrons do not have the required address or phone type information. Opportunities will also not be created for invalid patrons (for example, patrons with merged or inactive records). The `.csv` error file contains an entry for each patron that describes why no opportunity was created. CRM gives you the option of creating this file when batch processing is complete.
Batch items created	The number of opportunities successfully created for the new batch.

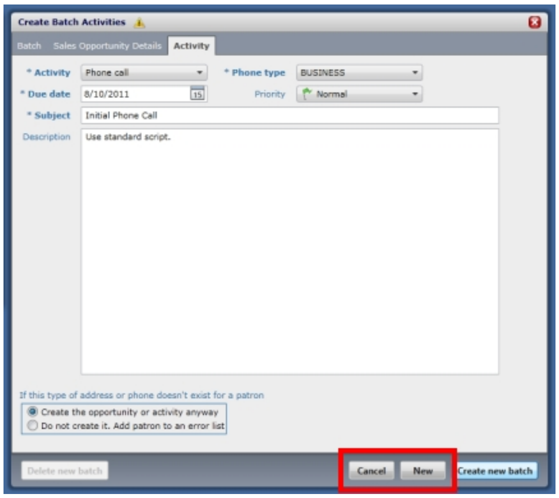


The opportunities that have been successfully created are now available on the Donation Opportunities hub. The activities that were created for the opportunities are available on the Activities hub. If you want to reassign the opportunities in bulk, see Assigning Batches to Users.

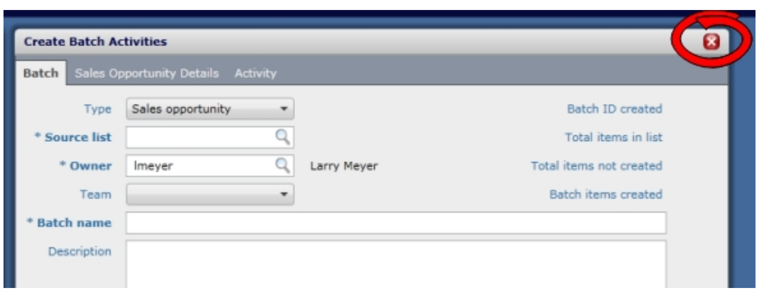
Note: You cannot save and reuse the settings to create another batch. However, the settings will be available for reference during batch management.

11. If you decide that you don't want the batch that you've setup or created, click one of the following buttons:

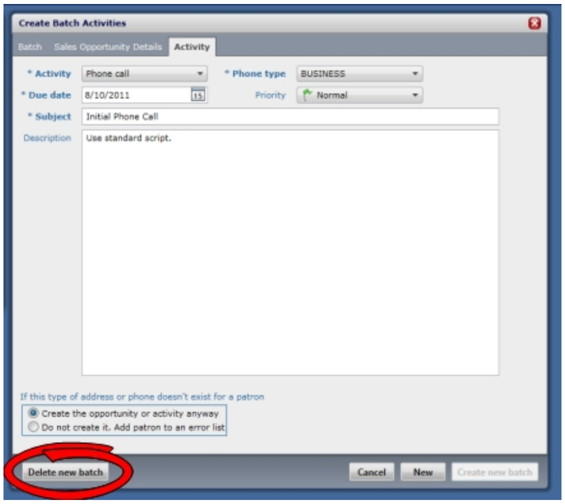
- **New**. This will clear the batch settings on all of the Create Batch Activities form tabs so that you can begin creating a new batch. The cleared form remains displayed. If you have already processed a new batch by clicking the **Create new batch** button, clicking the **New** button does not delete any of the opportunities or associated activities that were created.



- **Cancel**. This will clear the current batch settings and close the Create Batch Activities form. If you have already processed a new batch by clicking the **Create new batch** button, clicking **Cancel** will not delete any of the opportunities or associated activities that were created. You can also cancel by clicking the X on the upper-right of the form.



- **Delete new batch**. If you have just processed a new batch by clicking the **Create new batch** button, clicking **Delete new batch** will delete the new opportunities and associated activities that were created and clear all of the Create Batch Activities form tabs. Once you click the **Cancel** or **New** buttons, or navigate to a hub or another form, you can no longer delete a newly created batch on this form. For information about deleting previously run batches of opportunities and associated activities, see Deleting Batches.



Creating Batches of Standalone Activities

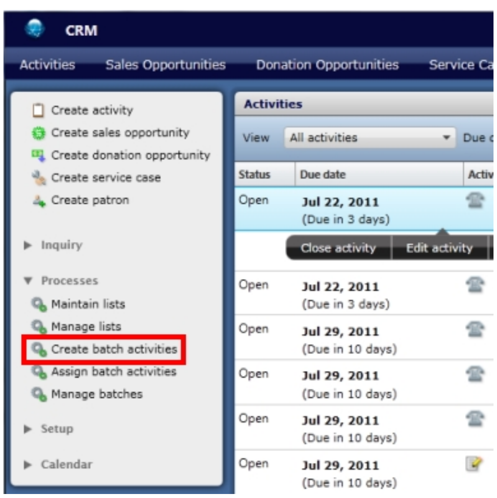
You can create a batch of standalone activities based on an imported list of patrons. An activity is created for each patron in the list. When the batch process is complete, you will be given the option to save an error list in a `.csv` format file. You can then view the errors in MS Excel. The newly created standalone activities are available on the Activities hub. They can also be assigned as a batch to other CRM users.

To set up the activities in a batch, you specify the activity type (for example, a phone call), the phone or address type, the due date, and the subject line. The phone or address type determines the contact information that will be pulled from the patron record for the individual activities.

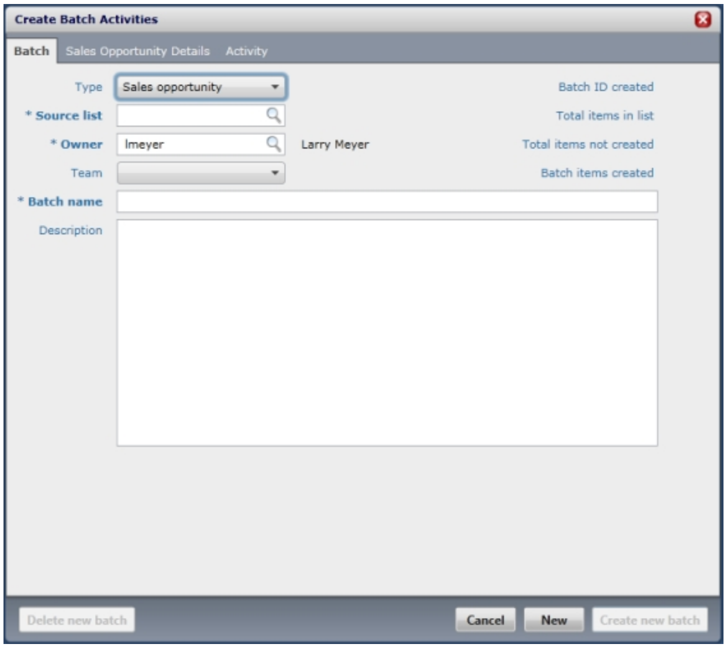
Note: To create batches of activities, you must have administrative user permissions.

To create a batch of standalone activities

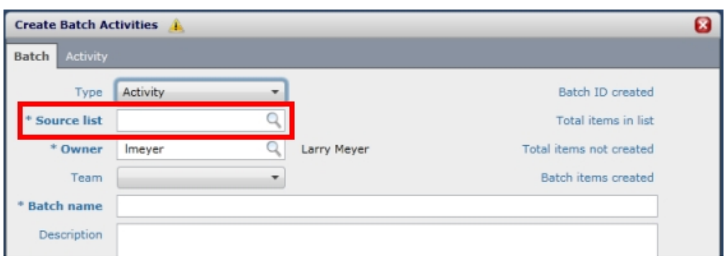
1. In the navigation pane, click **Processes**, and then click **Create batch activities**.



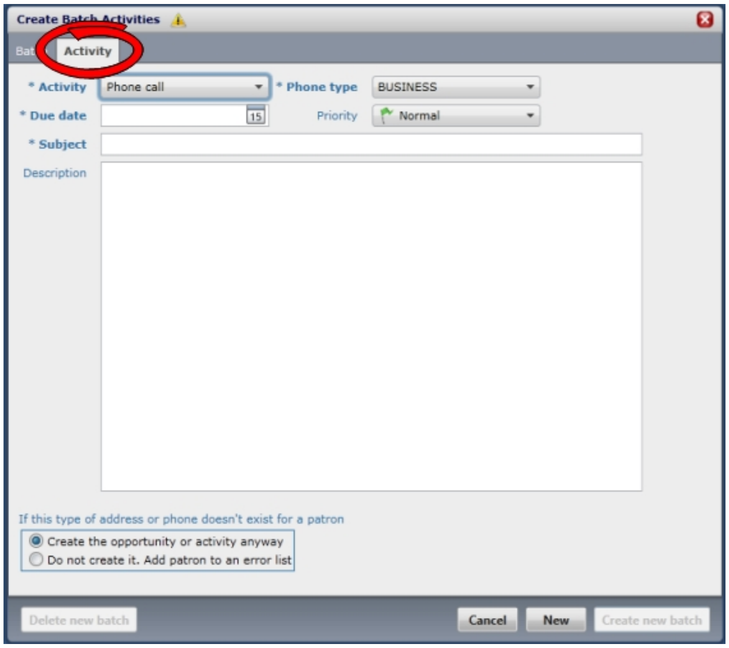
CRM displays the Create Batch Activities form.



2. From the **Type** drop-down list, select Activity.
3. In the **Source List** field, enter the patron list ID number, or click and use the List Lookup to search for and select the list. This is the list of patrons that CRM will use to generate the batch of activities. The selected source list is locked (unavailable to other users creating batches) until you are finished creating the batch.



4. In the **Owner** field, enter the sign in (user name) of the user who will be the owner of the batch of activities. If you don't know the user name, use the User Lookup. Ownership defaults to you, but you may choose to assign the batch to one of your subordinates in the user hierarchy. If you choose to assign the batch to a group of users during batch assignment, ownership will be changed to those users at that time.
5. If you want a team assigned to all the activities created in the batch, select the team name from the **Team** drop-down list. Only teams to which the owner belongs can be selected. You can change the team during batch assignment.
6. In the **Batch name** field, enter a short, descriptive name. You can use the batch name to help identify the batch during batch assignment and when editing batch attributes.
7. If you want to keep a more detailed description of the batch, enter the text in the **Description** field. The description can also help identify the batch when editing batch attributes.
8. Set up the batch activities by doing the following:
   a. Click the **Activity** tab. CRM redisplays the form with the Activity tab fields. These are the settings used to define the activities that will be created for the patrons.



b. From the **Activity** drop-down list, select the type of activities that you want to create. For batch creation, only the **Phone call**, **Email**, **Letter**, and **Other** activity types are available.

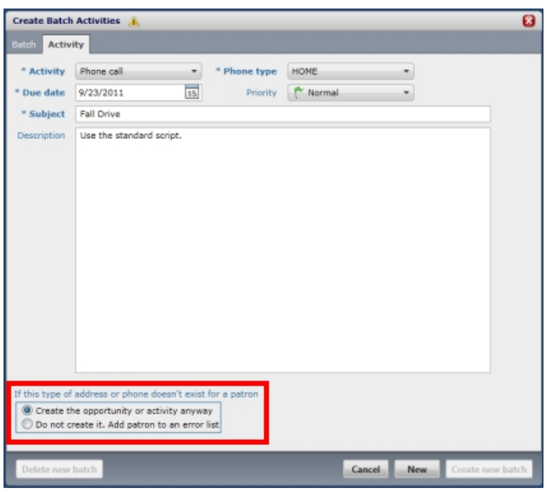
c. Set values for each field with an asterisk (required), and optionally enter values for any of the remaining fields.

Click to see a list of the fields with usage information

Field	Usage Information
Activity	Select the type of activities you want to create for the batch. Only the phone call, email, and letter types are available. You cannot batch create meeting or fax activities. If you are using an unavailable activity type, select **Other**. This selection determines the type of contact information (phone, email, or address type) that will be included for the patron in each activity. The information is pulled from each patron record (the Phone/Address tab of the Patron Detail form). See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Phone type	This displays only when **Phone call** is selected in the **Activity** drop-down list. Select the phone type to pull from the patron's record for each activity. Some common examples include home, business, or cellular. Phone types are configured by your organization in the Paciolan back office. Phone numbers are entered for one or more phone types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Email type	This displays only when **Email** is selected in the **Activity** drop-down list. Select the email type to pull from the patron's record for each activity. Some common examples include primary, alternate, or default. Email types are configured by your organization in the Paciolan back office. Email addresses are entered for one or more email types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Address	This displays only when **Letter** is selected in the **Activity** drop-down list.

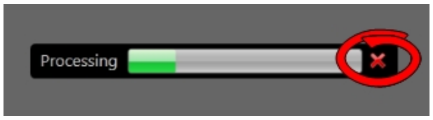
Field	Usage Information
type	Select the address type to pull from the patron's record for each activity. Some common examples include home, business, or billing. Address types are configured by your organization in the Paciolan back office. Addresses are entered for one or more address types in each patron record. See Editing Patron Information for the locations and descriptions of this information on the Patron Detail form.
Due date	Either enter a date in the field or click the calendar icon to select one from the popup calendar.
Priority	(Optional) Select **Low**, **Medium**, **Normal**, or **High** from the priority list. Your organization can decide what these priority levels mean. The priority setting has no effect on CRM functionality, but you can use priority assignments for reporting.
Subject	Enter a short description of the purpose of the activity. This will help you identify activities from the batch on the Activities hub and on the Patron Summary.
Description	(Optional) This field displays if the activity type is a phone call, letter, or other communication type. You can use this field to enter a description of the phone call script or the message to be included in the letter.
Message	(Optional) This field displays if the activity type is an email message. You can use this field to enter the body of the message to be sent.

d. For **If this type of address or phone doesn't exist for a patron**, select one of the following:

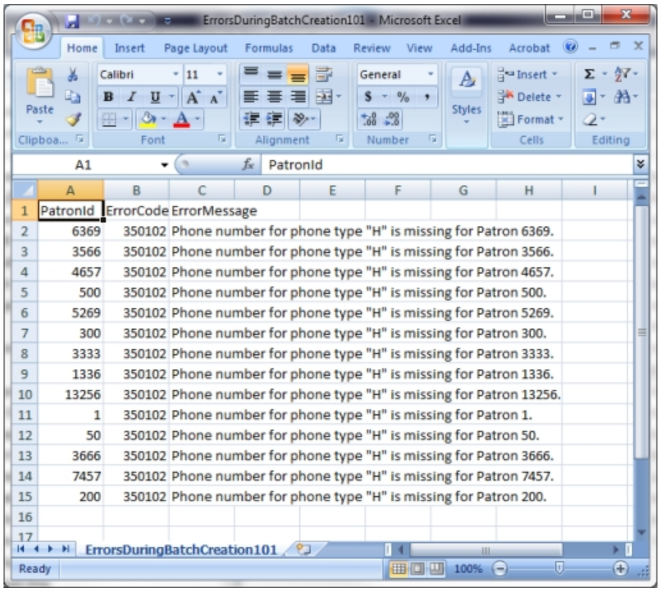


- **Create the opportunity or activity anyway**. This will create the activities with the **Address** or **Phone number** field empty for patron records that do not have the address or phone number type information. To complete the activity CRM users will have to change the activity type or enter the address or phone number in the Patron Detail (see Editing Patron Information).
- **Do not create it. Add patron to an error list**. This will not create activities for patrons that do not have the address or phone number type information. In this case, CRM will add the patron record and the reason it was not created to an error list. You will have the option to view the error list at the end of batch processing.

9. Click the **Create new batch** button. CRM begins processing the batch. During batch processing, CRM displays a Processing bar with an X. If you click the X, the process is stopped and no activities are created. The Processing bar will close when the process is complete.

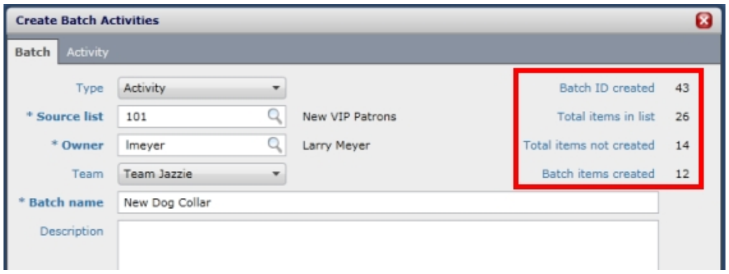


If you chose **Do not create it. Add patron to an error list** on the Activity tab and some patrons did not have the required address or phone type information, CRM will display an Attention dialog box that allows you to save a .csv error file. You can view the patron errors by opening the file in MS Excel.



When the process is complete, CRM displays the details of the new batch on the Batch tab of the Create Batch Activities form. Click here for field descriptions.

Field	Usage Information
Batch ID created	The batch ID number is automatically assigned by CRM as part of batch processing. This number is unique for all batches.
Total items in list	The number of patrons in the imported patron list used to create the batch.
Total items not created	The number of patrons for which no activity was created. This happens if you chose **Do not create it. Add patron to an error list** on the Activity tab, and the patrons do not have the required address or phone type information. Activities will also not be created for invalid patrons (for example, patrons with merged or inactive records). The `.csv` error file contains an entry for each patron that describes why no activity was created. CRM gives you the option of creating this file when batch processing is complete.
Batch items created	The number of activities successfully created for the new batch.

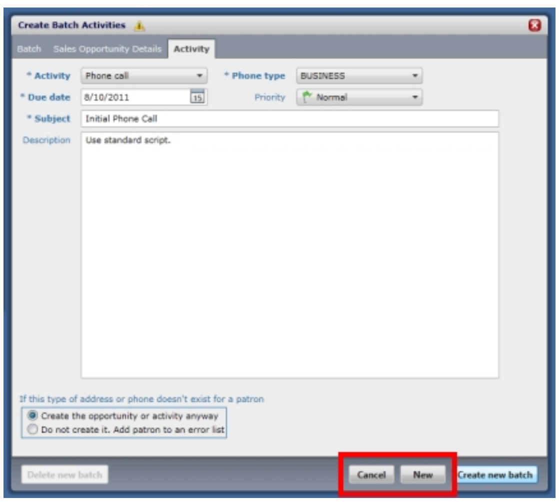


The activities that have been successfully created are now available on the Activities hub. If you want to reassign the activities in bulk, see Assigning Batches to Users.

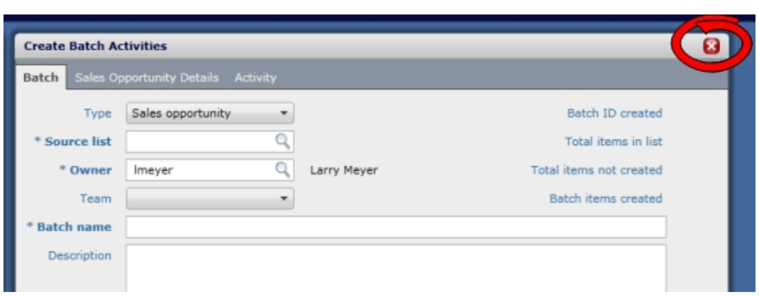
Note: You cannot save and reuse the settings to create another batch. However, the settings will be available for reference during batch management.

10. If you decide that you don't want the batch that you've setup or created, click one of the following buttons:

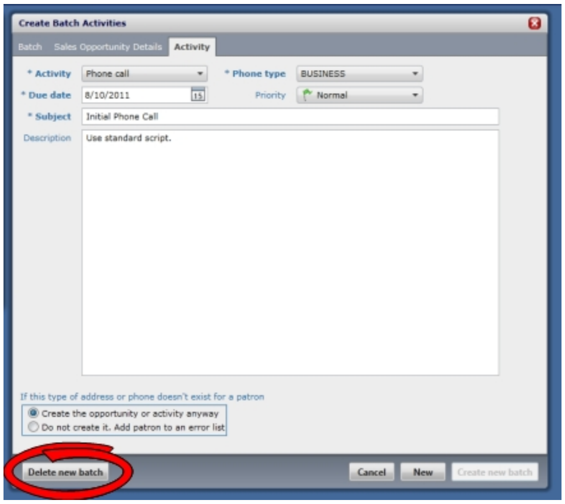
- **New**. This will clear the batch settings on all of the Create Batch Activities form tabs so that you can begin creating a new batch. The cleared form remains displayed. If you have already processed a new batch by clicking the **Create new batch** button, clicking the **New** button does not delete any of the activities that were created.



- **Cancel**. This will clear the current batch settings and close the Create Batch Activities form. If you have already processed a new batch by clicking the **Create new batch** button, clicking **Cancel** will not delete any of the activities that were created. You can also cancel by clicking the X on the upper-right of the form.



- **Delete new batch**. If you have just processed a new batch by clicking the **Create new batch** button, clicking **Delete new batch** will delete the new activities that were created and clear all of the Create Batch Activities form tabs. Once you click the **Cancel** or **New** buttons, or navigate to a hub or another form, you can no longer delete a newly created batch on this form. For information about deleting previously run batches of activities, see Deleting Batches.



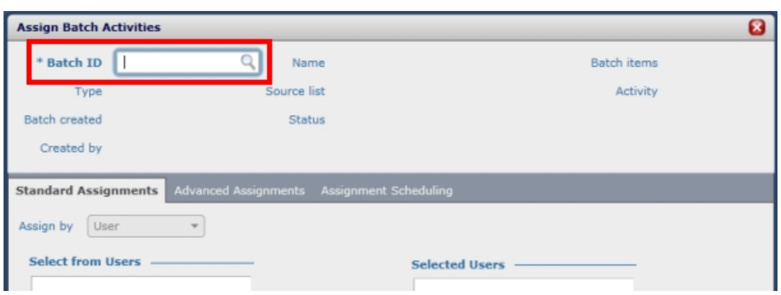
Using the Batch Lookup

When working with batches of opportunities and activities in CRM, you will periodically need to select an existing batch. For example, you may need to select a batch to assign the opportunities in the batch to users. Of course, you can just enter the batch ID number if you know it.

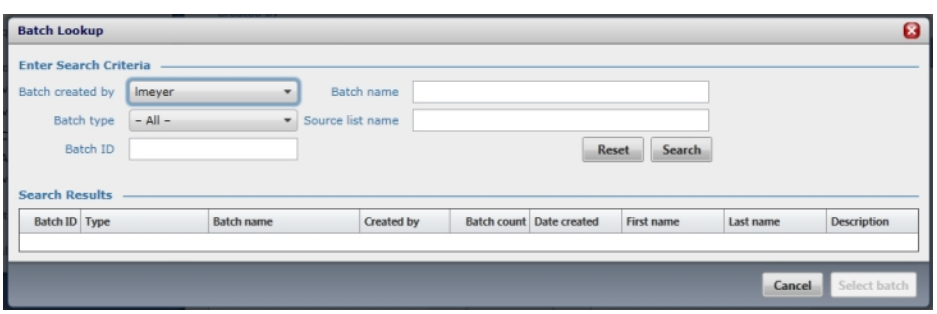
However, if you don't know the batch ID number, you can launch the Batch Lookup to search for and select the correct batch. The Batch Lookup allows you to search for batches by creator, batch name, batch type, source list name, and batch ID. A source list is a list of patrons that has been used to create batches.

To select a batch with the Batch Lookup

1. In the **Batch ID** field, click the icon. In the example image below, you are looking for the batch whose items you want to assign to users.



CRM displays the Batch Lookup.

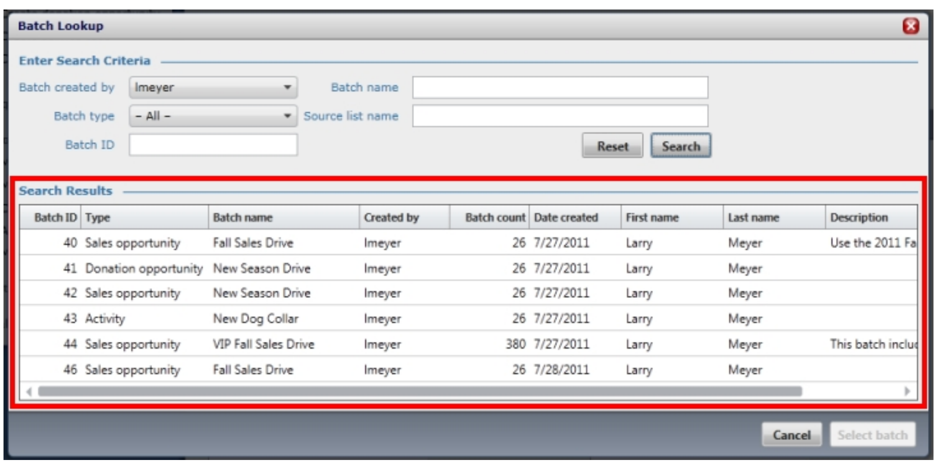


2. Enter some information on which to base the search in the Enter Search Criteria fields.

   Click here for descriptions of the search criteria fields

Search field	Description
Batch created by	Select the sign in name of the user who created the batch for which you are searching. The selection defaults to your sign in name, but all CRM users are available, regardless of their place in the CRM hierarchy.
Batch ID	Enter the batch ID.
Batch name	Enter all or part of the batch name. This search criteria is not case sensitive. For example, if the batch name for which you are searching is `VIP Patron`, you could enter `VIP`, `VIP Patron`, `vip`, `Patron`, etc. to return the batch in your search results.
Batch type	Select **Sales opportunity**, **Donation opportunity**, or **Activity** to limit the search to batches of one of those types.
Source list name	Enter all or part of the patron list that was used to create the batch for which you are searching. For example, if the source list is `VIP Patron`, you could enter `VIP`, `VIP Patron`, `vip`, `Patron`, etc. to search for batches with that source list.
Reset	Click this button to clear your search criteria and start a new search.
Search	Click this button to begin a search based on your search criteria.

3. Click the **Search** button. CRM displays all batches that meet your search criteria in the table in the **Search Results** section.



   You can sort the batches by column by clicking the column header. You can also change the column order in the batch results by dragging the column headers. The columns will remain in the new order for all your user sessions until you change the order. In addition, you can change a column's width by dragging the column borders. If there are too many batches in the list to display in the list area, a scroll bar appears on the right side of the list.

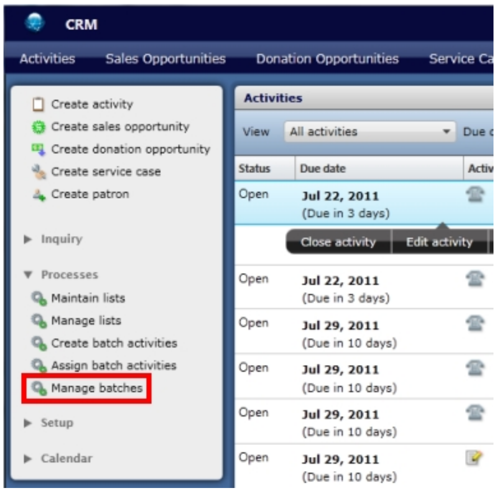
4. Select the row that contains the correct batch, and then click the **Select list** button. You can also just double-click the list's row. CRM redisplays the form with the batch selected.

Viewing Batch Details

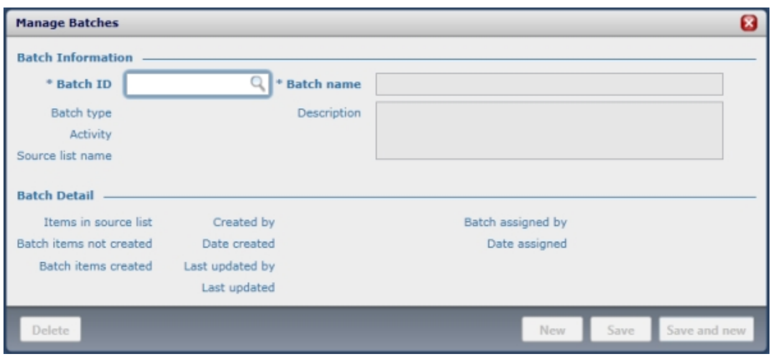
Once a batch is created, you can view details about the batch at any time until it is deleted. Batch details include the number of items in the batch and its source list, dates associated with its creation and use, and users that have worked with the batch.

To view batch details

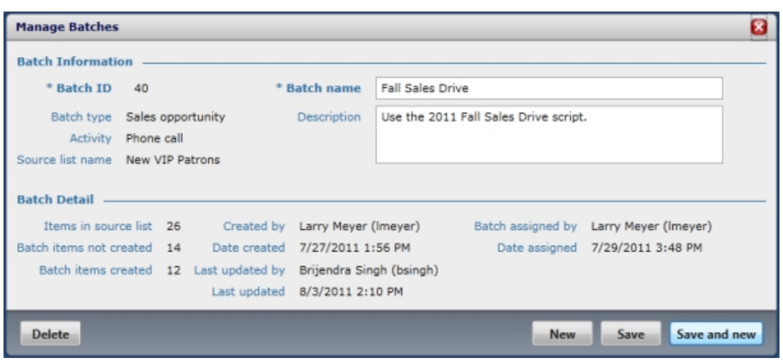
1. In the navigation pane, click **Processes**, and then click **Manage batches**.



CRM displays the Manage Batches form.



2. In the **Batch ID** field, enter the ID number of the batch whose details you want to view. If you do not know the number, click to use the Batch Lookup to locate the batch. CRM displays the batch details.



Click here for descriptions of each of the Manage Batches form fields.

Form field	Description
Batch ID	This is the numeric ID of the batch. This key number was automatically

Form field	Description
	assigned when the batch was created and cannot be modified.
Batch type	The only available batch types are **Sales opportunity**, **Donation opportunity**, and **Activity**. The activity batch type is used to create standalone activities. The opportunity batch types create their own first step activities.
Activity	The activity type of the first step activity for opportunity batch types or, for standalone activity batches, the standalone activity type. The available activity types for batches include **Phone call**, **Email**, **Letter**, and **Other**.
Source list name	The name of the patron list that was used to create the batch.
Batch name	The batch name is entered by a user when creating or editing the batch. The batch name displays in the **Name** field on the Assign Batch Activities form. The batch name also displays in the **Batch name** column of the **Search Results** table when using the Batch Lookup.
Description	The batch description is entered by a user when creating or editing the batch. The batch description displays in the **Description** column of the **Search Results** table when using the Batch Lookup.
Items in source list	The number of patron IDs that were in the source list at the time of batch creation.
Batch items not created	The number of opportunities or activities (batch items) that could not be created at the time of batch creation. A batch item can't be created when the patron ID represents an invalid patron or the patron record does not include the necessary contact information.
Batch items created	The number of opportunities or activities (batch items) that were created at the time of batch creation.
Created by	The first name, last name, and user name of the user who created the batch.
Date created	The date and time that the batch was created.
Last updated by	The first name, last name, and user name of the user who last updated the batch attributes.
Last updated	The date and time that the batch attributes were last updated.
Batch assigned by	The first name, last name, and user name of the user who assigned the batch items to users using the Assign Batch Activities form (batch assignment process). This field is clear if the batch items were assigned manually instead of using the batch assignment process.
Date assigned	The date and time the batch items were assigned to users using the Assign Batch Activities form (batch assignment process). This field is clear if the batch items were assigned manually instead of using the batch assignment process.

Assigning Batch Items to Users

Opportunities and activities that are created in batches are assigned to a single owner. You can change the ownership of these batch items by individually editing them. However, CRM provides a better way by allowing you to distribute ownership of the items across users and teams in bulk with a single operation. The open opportunities and activities in a batch are referred to as a pool of items.

When setting up the bulk assignment of a pool of items, you can choose to simply distribute the items evenly among a group of users. CRM also allows you to distribute the pool of items by assigning them using different percentages or numbers of items for each user.

While you're assigning the pool to users, you can optionally schedule due dates for the items in the pool. CRM allows you to schedule the items evenly across due dates that you select or by using a daily or weekly frequency.

When assigning items to users in CRM, you can use the following methods:

- Standard user assignment. This is the most basic method, where you assign an equal number of items to each user in a selected group of users. By default, CRM will assign the due date set during batch creation to all of the items in the pool. You can also schedule multiple due dates for the pool of items.
- Advanced user assignment. Distribute a pool of items by assigning them to individual users by percentage, by number, or by equally distributing them. CRM will assign the due date set during batch creation to all of the items in the pool. You can also schedule multiple due dates for the pool of items.

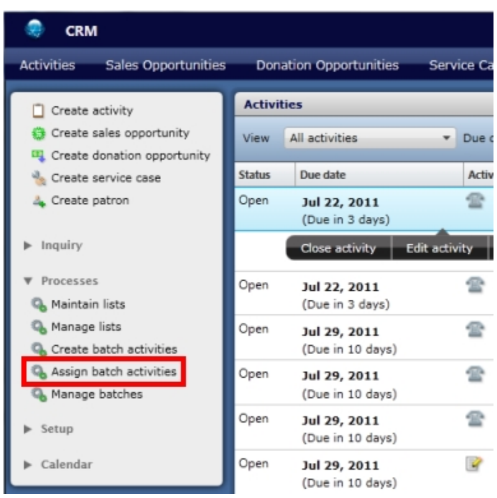
Once you run item (task) assignment for the selected users, by default CRM assigns the pool of items the due date entered during batch creation or the current date, whichever is later. You can also choose to schedule the due dates of the items. If you want to schedule due dates, you have the following options:

- Enter a set of due dates. CRM will assign the due dates evenly across the pool of items.
- Set up daily due date assignments. You can choose the number of items to which due dates must be assigned on each day, or you can choose an end date by which due date assignment must be complete. If you choose an end date, CRM will evenly assign enough due dates to items each day so that due date assignments are complete on that date.
- Set up due date assignments based on weekly intervals. You can choose the days of the week and the weekly interval on which due dates are assigned to items. For example, you can choose to assign due dates to items on Monday and Wednesday every two weeks.

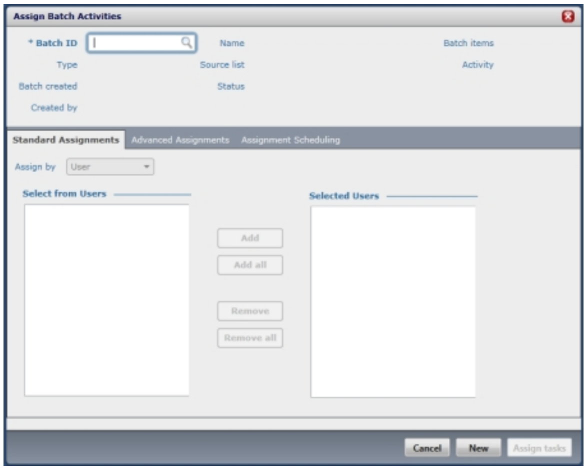
Use one of the following procedures to make batch item assignments

To assign items using standard user assignment

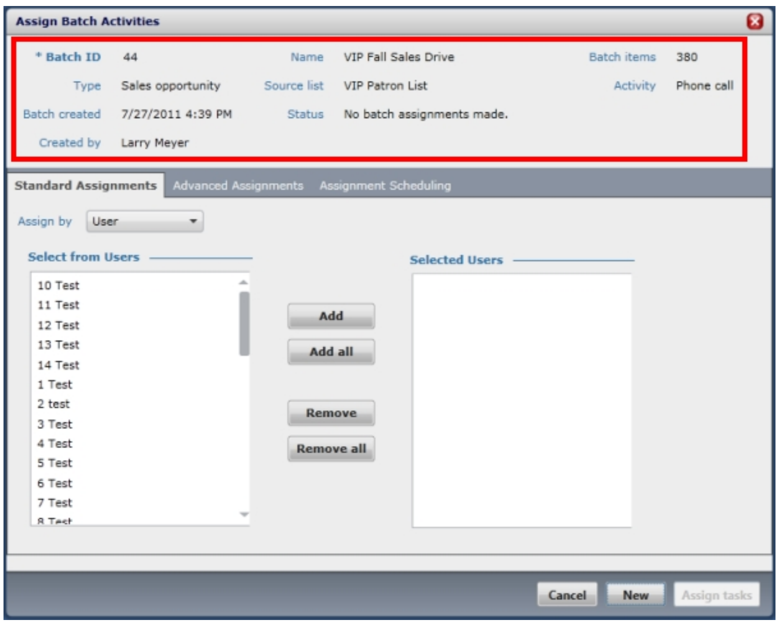
1. In the navigation pane, click **Processes**, and then click **Assign batch activities**.



CRM displays the Assign Batch Activities form.

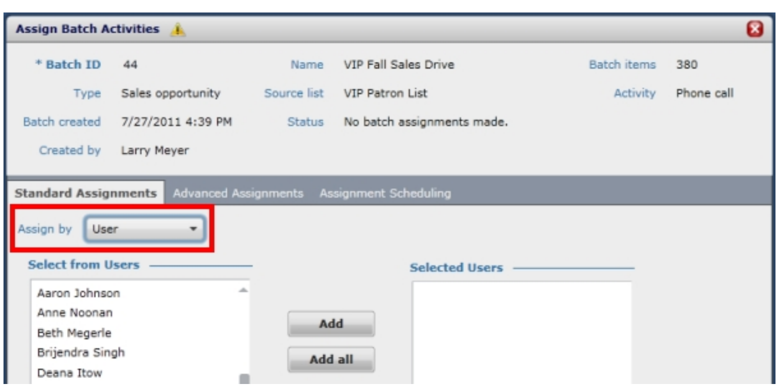


2. In the **Batch ID** field, enter the ID number of the batch that contains the pool of items you want to assign to users. If you do not know the number, click to use the Batch Lookup to locate the batch. Once you select a batch, CRM displays the batch information.

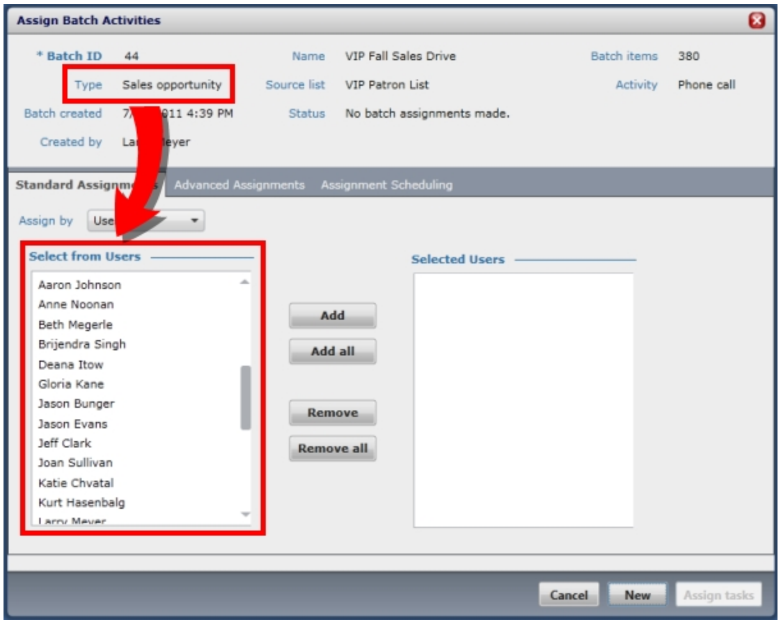


3. Select the users to which you want to assign tasks by doing one or both of the following:

 - To add individual users, change the **Assign by** drop-down list selection to **User**, and then move users from the **Select from Users** list to the **Selected Users** list.



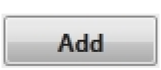
The users included in the **Select from Users** box are determined by batch type.



If the value in the **Type** field is **Sales opportunity**, only users with access to ticketing data are included. If the value in the **Type** field is **Donation opportunity**, only users with access to donation data are included. If the value in the **Type** field is **Activity**, all CRM users are included.

- To add users in teams, change the **Assign by** drop-down list selection to **Team**, and then move teams from the **Select from Teams** list to the **Selected Users** list. If you add a team to the **Selected Users** list, the users on the team are added to the list as individuals, although the items assigned to each user will be associated with the team.

  See a table describing how to move users and teams between lists.

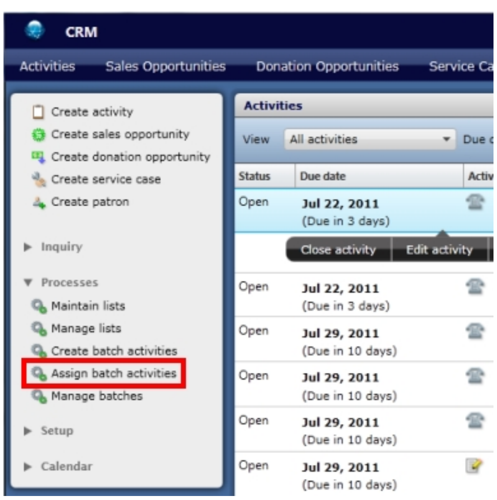
Method	Usage information
Drag users	To move one user, drag the user from one list to the other list. To move more than one user at a time, hold down the `Ctrl` key, select each user, and then drag the selected users to the other list. The selected users will be dragged together. To move a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then drag the selected users to the other list.
Drag teams	To select all the users on a team, change the **Assign by** drop-down list selection to **Team**, and then drag the team from the **Select from Teams** list to the **Selected Users** list. The users on the team are added individually to the **Selected Users** list. You cannot select more than one team at a time. Users who are on more than one team are associated with the first team dragged to the **Selected Users** list. To remove the users on a team from the **Selected Users** list, you must change the **Assign by** drop-down list selection to **User**. You can then move the users to the **Select from Users** list with the methods for dragging users described above.
	To add a user to the **Selected Users** list, select the user in the **Select from Users** list and then click this button. To add more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To add a group of sequential users quickly, select the first user in the sequence, press

Method	Usage information
	the `Shift` key while selecting the last user in the sequence, and then click this button. To add a team of users to the **Selected Users** list, change the **Assign by** drop-down list selection to **Team**, select a team **Select from Teams** list, and then click the **Add** button. The users on the team are added individually to the **Selected Users** list. Users who are on more than one team are associated with the first team added to the **Selected Users** list.
Add all	Click this button to add all the users from the **Select from Users** list to the **Selected Users** list. If most of the available users need to be selected, you can save time by clicking this button and then removing the users that don't belong. To add all the users from all CRM teams to the **Selected Users** list, change the **Assign by** drop-down list selection to **Team**, select any one of the teams from the **Select from Teams** list, and then click the **Add** button. The users on the teams are added individually to the **Selected Users** list.
Remove	To remove a user from the **Selected Users** list, select the user and then click this button. To remove more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To remove a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then click this button. You cannot remove users by team.
Remove all	Click this button to remove all the users from the **Selected Users** list. You cannot remove users by team.

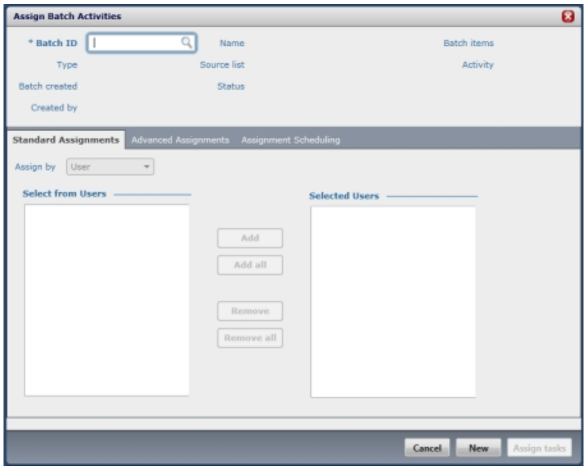
4. Do one of the following:
   - To assign the pool of items to the selected users with the default item due date you set during batch creation, click the **Assign tasks** button. CRM assigns the pool of items evenly among the selected users and sets the item due date.
   - If you want use multiple item due dates while assigning items to users, proceed to one of the due date assignment procedures below.

To assign items using advanced user assignment

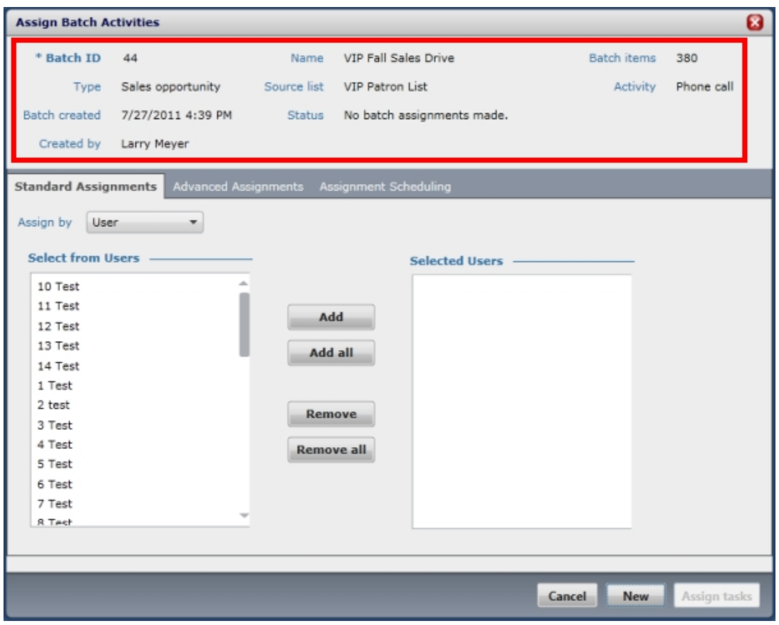
1. In the navigation pane, click **Processes**, and then click **Assign batch activities**.



CRM displays the Assign Batch Activities form.

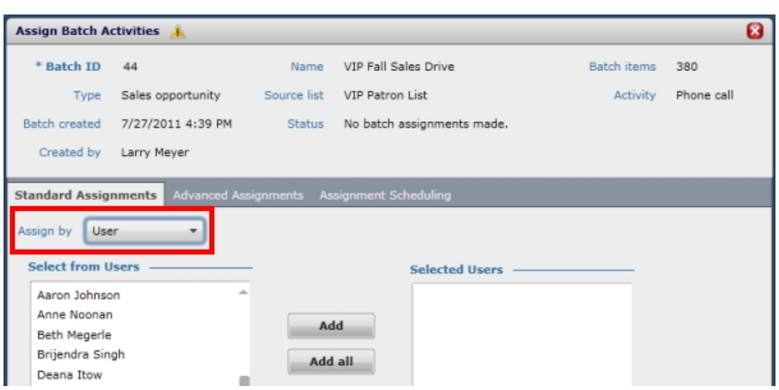


2. In the **Batch ID** field, enter the ID number of the batch that contains the pool of items you want to assign to users. If you do not know the number, click to use the Batch Lookup to locate the batch. Once you select a batch, CRM displays the batch information.

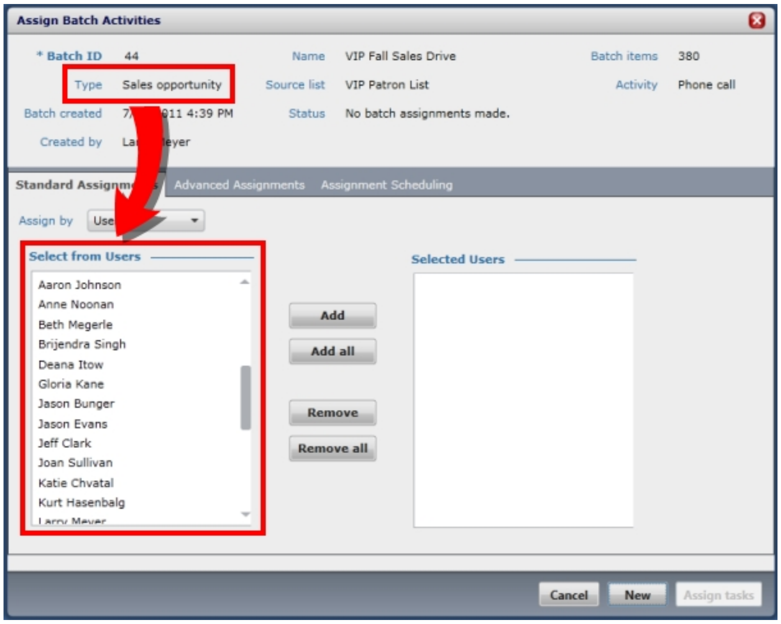


3. Select the users to which you want to assign tasks by doing one or both of the following:

- To add individual users, change the **Assign by** drop-down list selection to **User**, and then move users from the **Select from Users** list to the **Selected Users** list.



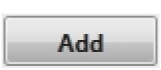
The users included in the **Select from Users** box are determined by batch type.



If the value in the **Type** field is **Sales opportunity**, only users with access to ticketing data are included. If the value in the **Type** field is **Donation opportunity**, only users with access to donation data are included. If the value in the **Type** field is **Activity**, all CRM users are included.

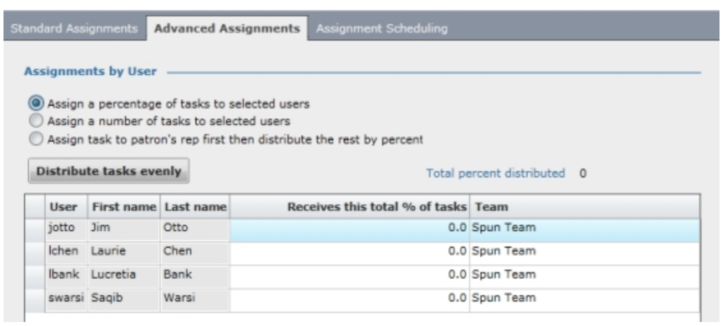
- To add users in teams, change the **Assign by** drop-down list selection to **Team**, and then move teams from the **Select from Teams** list to the **Selected Users** list. If you add a team to the **Selected Users** list, the users on the team are added to the list as individuals, although the items assigned to each user will be associated with the team.

  See a table describing how to move users and teams between lists.

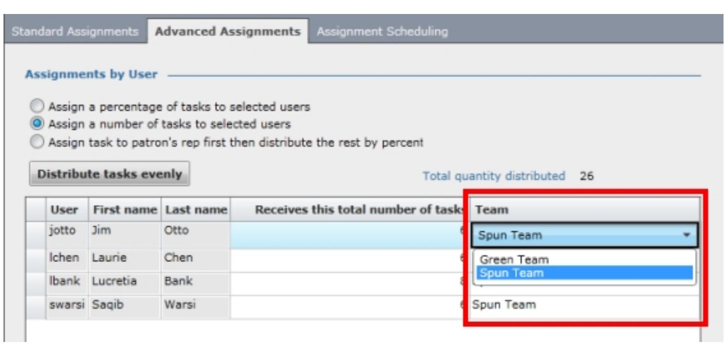
Method	Usage information
Drag users	To move one user, drag the user from one list to the other list. To move more than one user at a time, hold down the `Ctrl` key, select each user, and then drag the selected users to the other list. The selected users will be dragged together. To move a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then drag the selected users to the other list.
Drag teams	To select all the users on a team, change the **Assign by** drop-down list selection to **Team**, and then drag the team from the **Select from Teams** list to the **Selected Users** list. The users on the team are added individually to the **Selected Users** list. You cannot select more than one team at a time. Users who are on more than one team are associated with the first team dragged to the **Selected Users** list. To remove the users on a team from the **Selected Users** list, you must change the **Assign by** drop-down list selection to **User**. You can then move the users to the **Select from Users** list with the methods for dragging users described above.
	To add a user to the **Selected Users** list, select the user in the **Select from Users** list and then click this button. To add more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To add a group of sequential users quickly, select the first user in the sequence, press

Method	Usage information
	the `Shift` key while selecting the last user in the sequence, and then click this button. To add a team of users to the **Selected Users** list, change the **Assign by** drop-down list selection to **Team**, select a team **Select from Teams** list, and then click the **Add** button. The users on the team are added individually to the **Selected Users** list. Users who are on more than one team are associated with the first team added to the **Selected Users** list.
Add all	Click this button to add all the users from the **Select from Users** list to the **Selected Users** list. If most of the available users need to be selected, you can save time by clicking this button and then removing the users that don't belong. To add all the users from all CRM teams to the **Selected Users** list, change the **Assign by** drop-down list selection to **Team**, select any one of the teams from the **Select from Teams** list, and then click the **Add** button. The users on the teams are added individually to the **Selected Users** list.
Remove	To remove a user from the **Selected Users** list, select the user and then click this button. To remove more than one user at a time, hold down the `Ctrl` key, select each user, and then click this button. To remove a group of sequential users quickly, select the first user in the sequence, press the `Shift` key while selecting the last user in the sequence, and then click this button. You cannot remove users by team.
Remove all	Click this button to remove all the users from the **Selected Users** list. You cannot remove users by team.

4. Click the Advanced Assignments tab. CRM displays the tab.

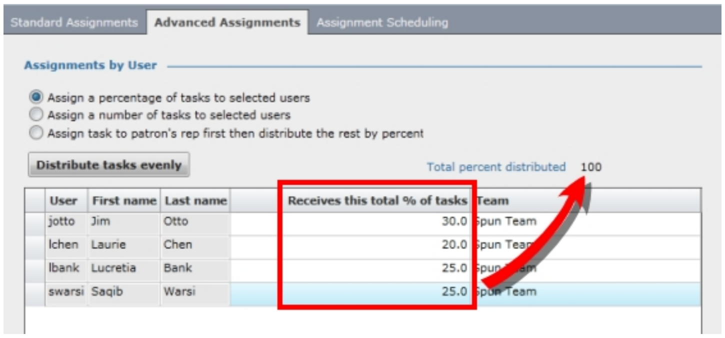


5. If you want to change the teams that users are assigned to when working on the batch items, change the team in the **Team** column.



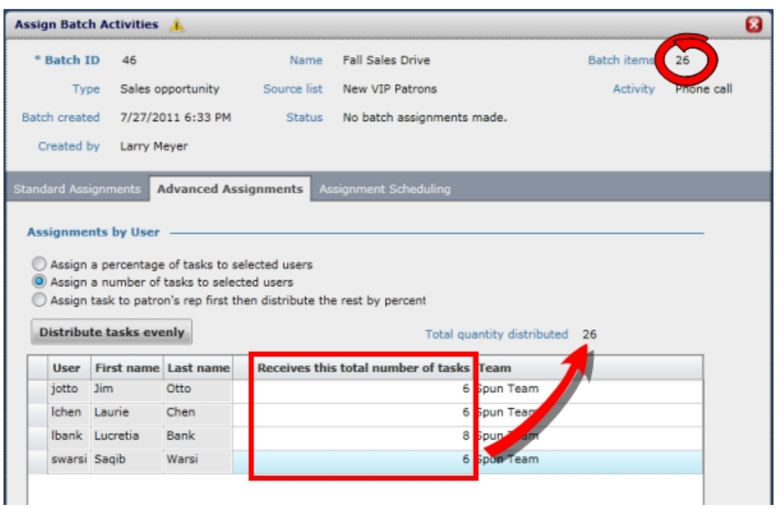
6. Assign batch items to the users using one the following options:

- To assign the items to the selected users by entering a percentage for each, select the **Assign a percentage of tasks to selected users** option. Then, enter a percentage for each user in the **Receives this total % of tasks** column of the user table.

  CRM displays the percentage you have assigned next to **Total percent distributed**. You cannot assign items until the number is 100. You can also have CRM set the percentage equally for the users by clicking the **Distribute tasks evenly** button.

- To assign the items to the selected users by entering the number of items for each user, select the **Assign a number of tasks to selected users** option. Then, enter a number for each user in the **Receives this total number of tasks** column of the user table.

  CRM displays the number of items you have assigned next to **Total quantity distributed**. You cannot assign items until the number matches the number of **Batch items**. You can also have CRM distribute the number of items equally for the users by clicking the **Distribute tasks evenly** button. If the number of items is not divisible by the number of the selected users, CRM assigns the remainder to the last user in the table. For example, if there are 3 selected users and 10 items, the first and second users in the table are assigned 3 items, and the third (last) user is assigned 4 items.

- If you assign dedicated representatives to patrons, select the **Assign task to patron's rep first then distribute the rest by percent** option. This option first distributes items for patrons with dedicated representatives to those representatives. Once that is done, CRM distributes the remaining items automatically by percentage.

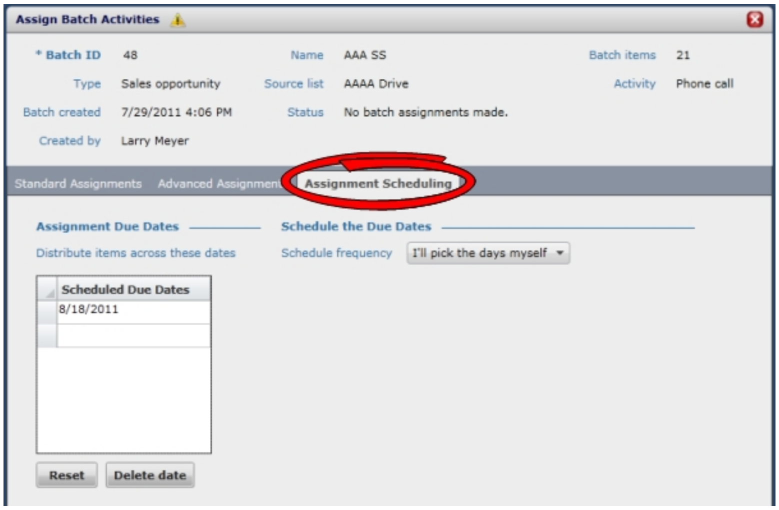
7. Do one of the following:

   - To assign the pool of items to users with the default item due date you set during batch creation, click the **Assign tasks** button. CRM assigns the pool of items to the users and sets the item due date.

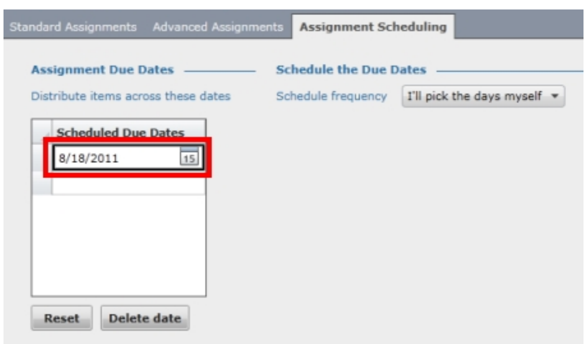
- If you want use multiple item due dates while assigning items to users, proceed to one of the due date assignment procedures below.

To assign due dates for a pool of items on a set of dates

1. Select the users who will be assigned items using the standard or advanced assignment procedure above.
2. Click the Assignment Scheduling tab.The pool of items will be assigned due dates based on the settings on this tab.



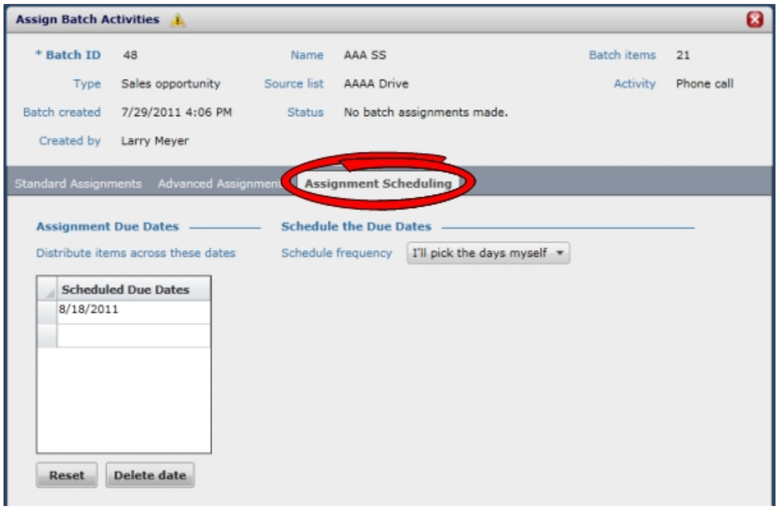
3. In the **Schedule frequency** drop-down list, select **I'll pick the days myself**. CRM displays an editable version of the **Scheduled Due Dates** table.



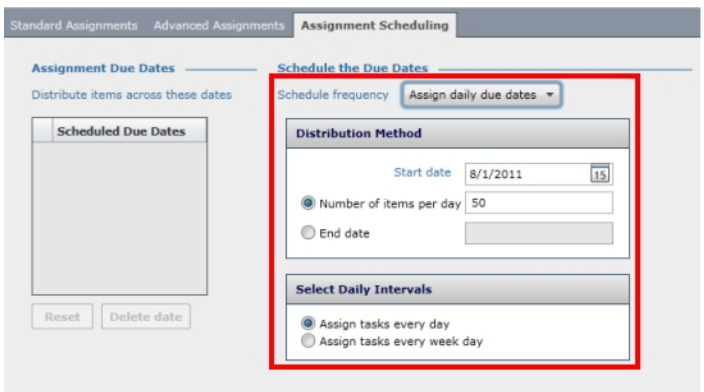
4. In the **Scheduled Due Dates** table, click in the top row, and then enter the date or click to select one from the popup calendar.
5. Click to create another row, add another date, and then repeat for each date on which you want items due. To delete a date, click in its row and then click the **Delete date** button. Click the **Reset** button to clear all the dates you've entered.
6. Click the **Assign tasks** button. CRM assigns the pool of items to the selected users and assigns due dates evenly across the items based on the due dates you entered.

To assign daily due dates for a pool of items

1. Select the users who will be assigned items using the standard or advanced assignment procedure above.
2. Click the Assignment Scheduling tab.The pool of items will be assigned due dates based on the settings on this tab.

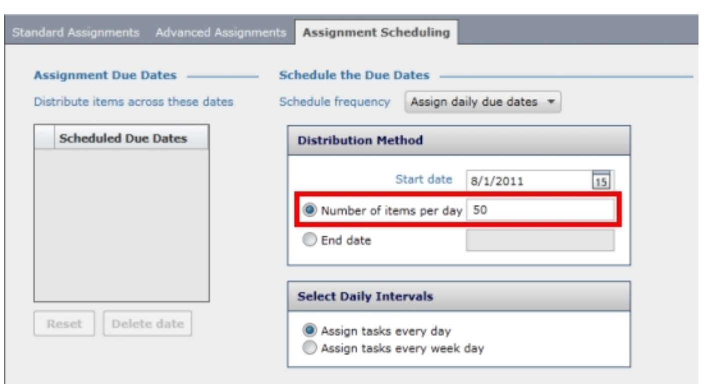


3. In the **Schedule frequency** drop-down list, select **Assign daily due dates**. CRM displays the **Distribution Method** and **Select Daily Intervals** sections.

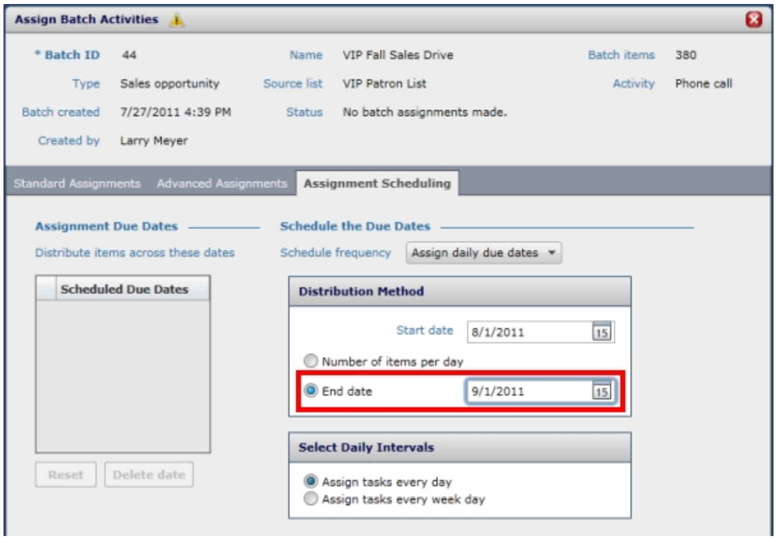


4. In the **Start date** field of the **Distribution Method** section, enter the date or click to select one from the popup calendar. Use the first due date that you want CRM to assign to the pool of items. You configure the number of items in the pool to which CRM assigns the start due date in the following steps.
5. Do one of the following:

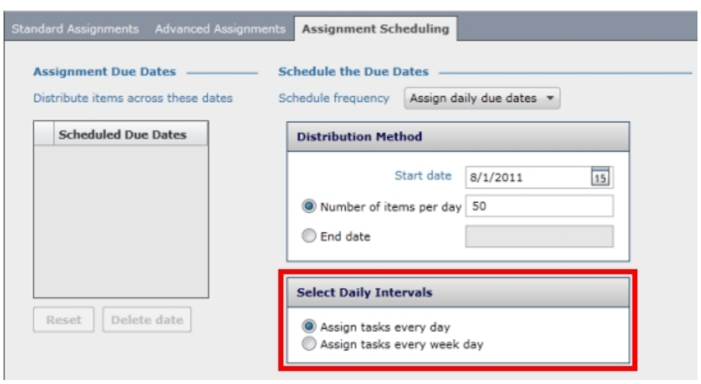
   - To assign due dates to a predetermined number of items every day until all the items are assigned, select **Number of items per day**, and then enter the number in the adjacent field. In the example image below, CRM will assign a due date to 50 items per day on every work day until all the items in the batch are assigned, starting on August 1, 2011. The last due date assigned is affected by whether you choose to include weekends as work days in the next step.



- To set the last due date on which you want CRM to assign items, select **End date**, and then enter the date or click to select one from the popup calendar. In the example image below, CRM will assign daily due dates to the number of the 380 batch items necessary to make the last due date be 9/1/2011, beginning with the 8/1/11 due date. The number of assignments per day is also affected by whether you choose to include weekends as work days in the next step.



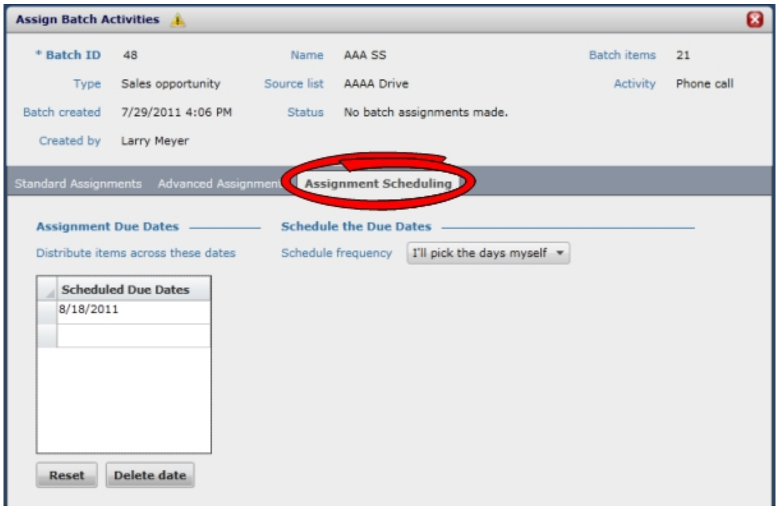
6. In the Select Daily Intervals section, do one of the following:
   - To assign due dates to items every day of the week, including Saturdays and Sundays, select the **Assign tasks every day** option.
   - To assign due dates to items on each work day, excluding Saturdays and Sundays, select the **Assign tasks every week day** option.



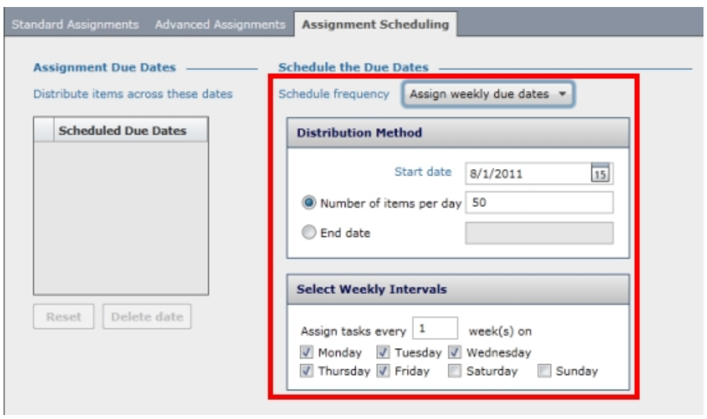
7. Click the **Assign tasks** button. CRM assigns the pool of items to the selected users and assigns due dates to the items based on the settings above.

To assign due dates for a pool of items based on weekly intervals

1. Select the users who will be assigned items using the standard or advanced assignment procedure above.
2. Click the Assignment Scheduling tab.The pool of items will be assigned due dates based on the settings on this tab.

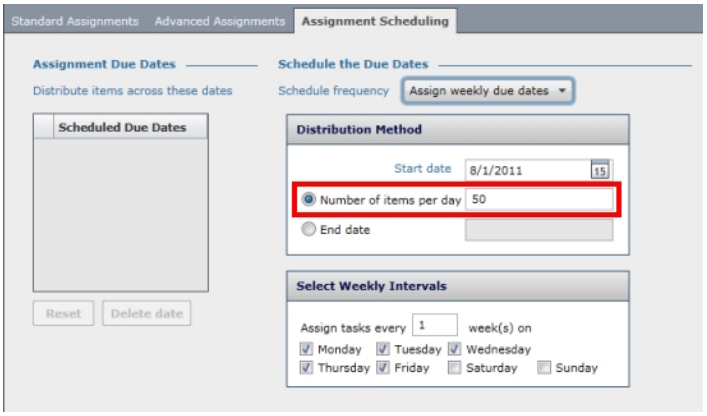


3. In the **Schedule frequency** drop-down list, select **Assign weekly due dates**. CRM displays the **Distribution Method** and **Select Weekly Intervals** sections.

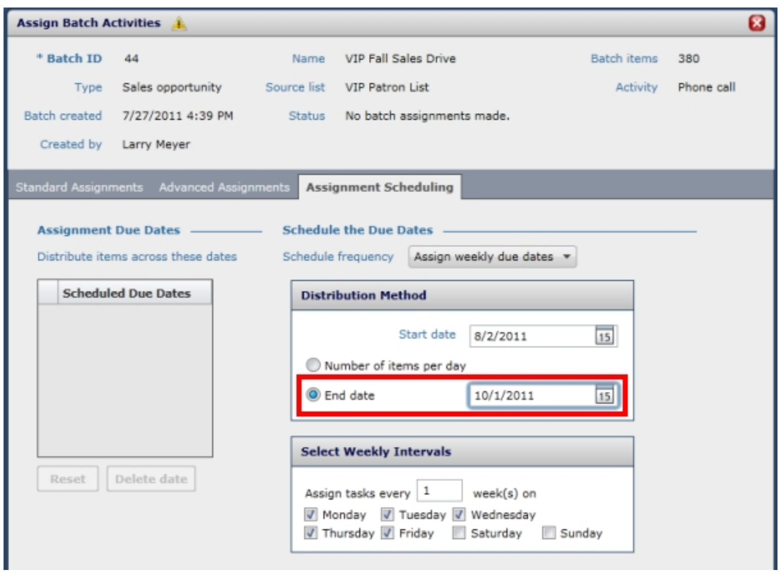


4. In the **Start date** field of the **Distribution Method** section, enter the date or click to select one from the popup calendar. This is the first due date that CRM will assign to the pool of items. You configure the number of items in the pool to which CRM assigns the start due date in the following steps.
5. Do one of the following:

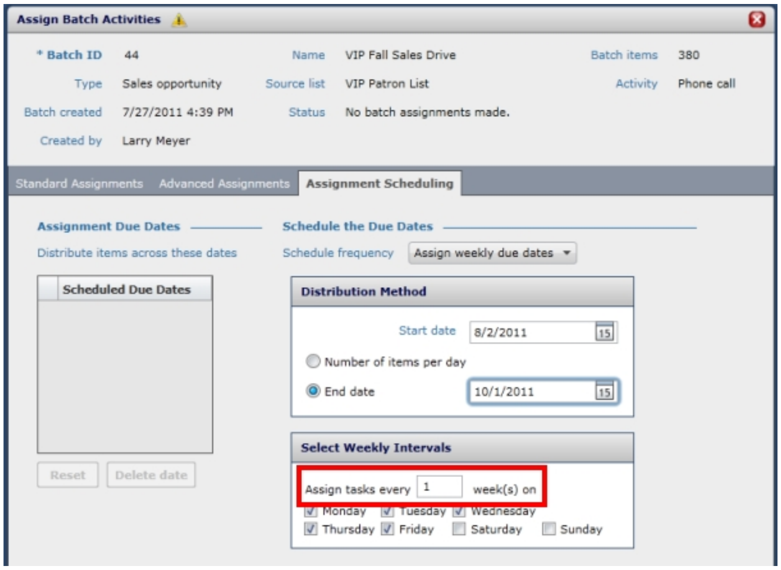
   - To assign a predetermined number of items to the group of selected users on each weekly interval day until all the items are assigned, select **Number of items per day**, and then enter the number in the adjacent field. In the example image below, CRM will assign a due date to 50 items per weekly interval day until all the items in the batch are assigned, starting on August 1, 2011. The number of assignments per weekly interval day is also affected by how many interval days you select in the next step.



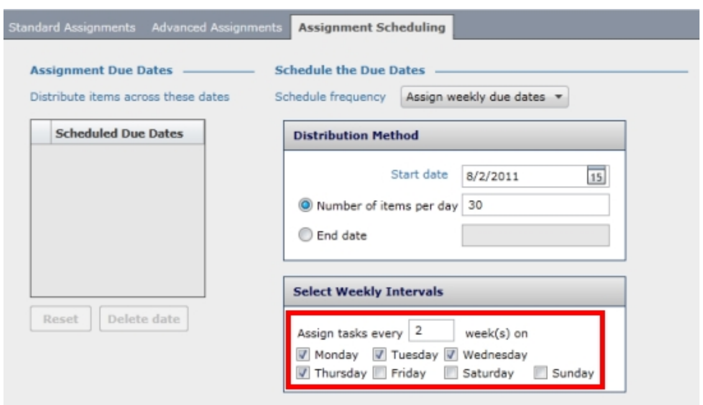
- To set the last due date on which you want CRM to assign items, select **End date**, and then enter the date or click to select one from the popup calendar. In the example image below, CRM will assign due dates to the 380 batch items necessary to make the last due date be 10/1/2011, beginning with the 8/2/11 starting due date. The number of assignments per weekly interval day is also determined the by the number of interval days you select in the next step.



6. In the **Assign tasks every `n` week(s) on** field of the **Select Weekly Intervals** section, enter the number weeks between due date assignments for each interval day. You can enter `1` for weekly assignments, `2` for bi-weekly assignments, etc.



7. In the **Select Weekly Intervals** section, select each day of the week on which you want items assigned due dates. In the example image below, due dates are assigned to items on Monday, Tuesday, Wednesday, and Thursday every two weeks.

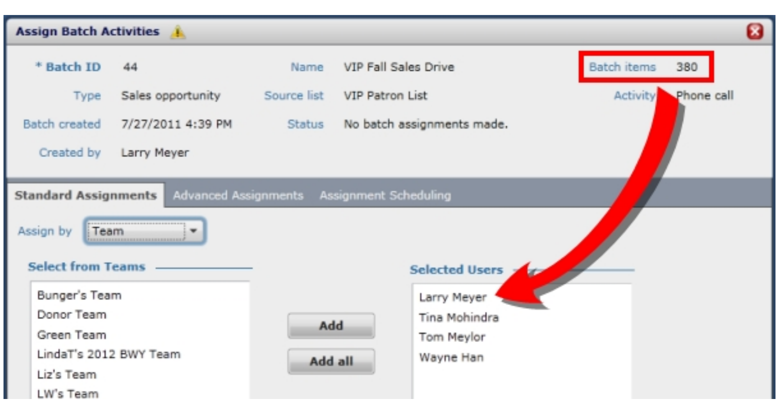


8. Click the **Assign tasks** button. CRM assigns the pool of items to the selected users and assigns due dates to the items based on the settings above.

The following are some examples of batch assignment configurations

See an example of a standard item assignment setup with no due date scheduling

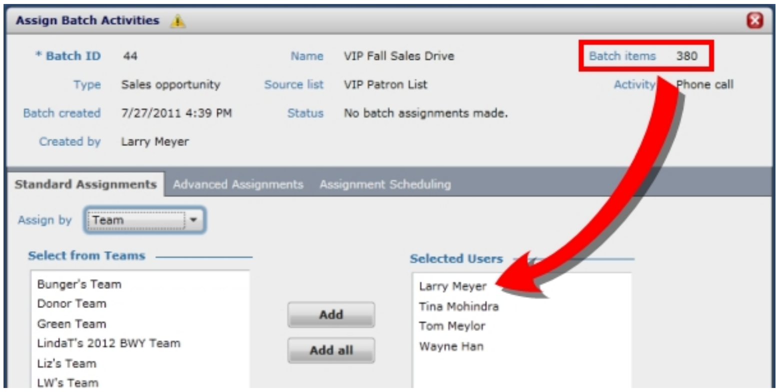
In the example image below, the 380 sales opportunities in the batch will be assigned equally to the 4 selected users. In other words, each user is assigned 95 of the items.



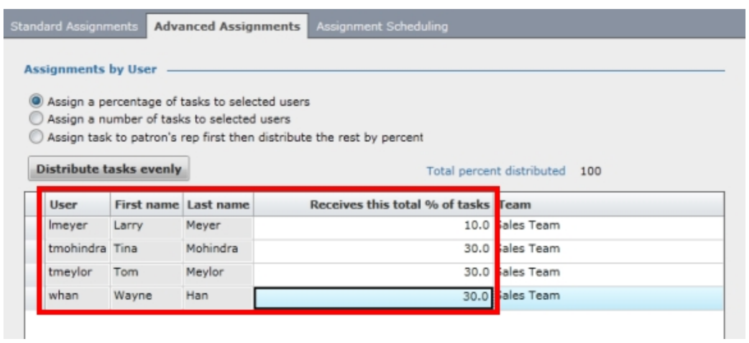
Since no due date scheduling has been configured, the due date will default to the due date entered during the creation of batch 44 or the current date, whichever is later. No other setup is required before assigning the items (clicking the **Assign tasks** button).

See an example of an advanced item assignment setup with no due date scheduling

In the example image below, the 380 sales opportunities in the batch will be assigned to the 4 selected users.



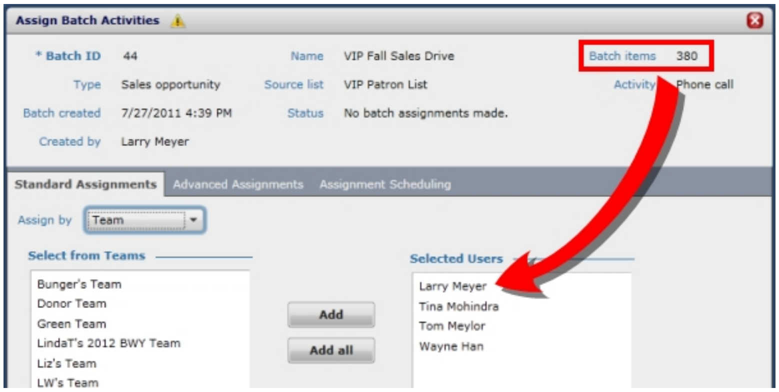
The distribution of the items is determined on the Advanced Assignments tab. In the example image below, the assignments will be done as a percentage of the total number of tasks, since the **Assign a percentage of tasks to selected users** option is selected. In the assignment table user lmeyer is assigned 10% or 38 of the 380 items, while the other 3 users are each assigned 30% or 114 of the 380 items.



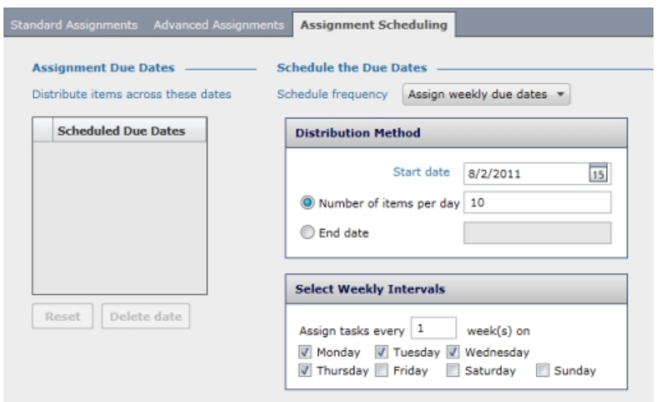
Since no due date scheduling has been configured, the due date will default to the due date entered during the creation of batch 44 or the current date, whichever is later. No other setup is required before assigning the items (clicking the **Assign tasks** button).

See an example of standard item assignment with item due date scheduling

In the example image below, the 380 sales opportunities in the batch will be assigned to the 4 selected users.



The item due date schedule is set up on the Assignment Scheduling tab. In the example image below, item due date assignments will begin on the **Start date** of 8/2/2011. The **Number of items per day** is 10, which means that, for each user, 10 items will be assigned per day selected in the **Select Weekly Intervals** section. The due date assignment days selected are Monday, Tuesday, Wednesday, and Thursday, and the **Assign tasks every n week(s) on** is 1, so 10 items are assigned due dates on each of those days once every week.

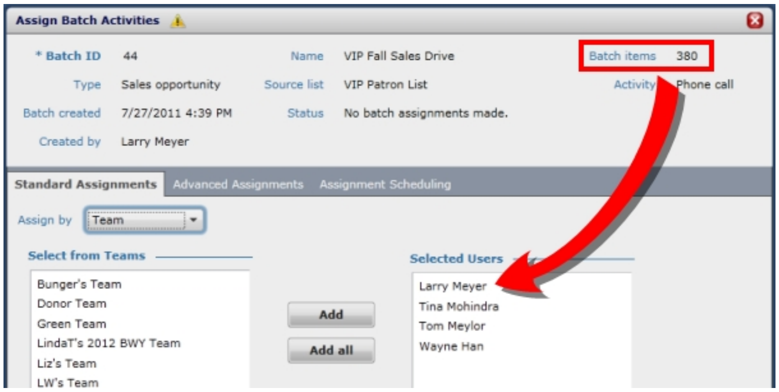


Item due date assignment begins on the **Start date** of 8/2/2011, which is a Tuesday, and continues for each user's items until all of the items have due dates. This configuration generates the following item due date assignment schedule for the selected users:

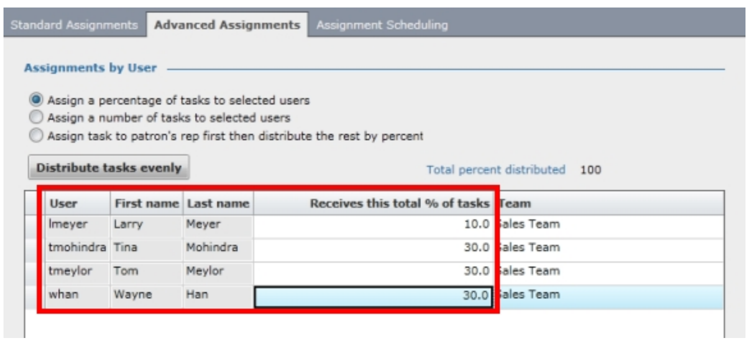
Day of the week	Date	lmeyer	tmohindra	tmeylor	whan
Tuesday	8/2/11	10	10	10	10
Wednesday	8/3/11	10	10	10	10
Thursday	8/4/11	10	10	10	10
Monday	8/8/11	10	10	10	10
Tuesday	8/9/11	10	10	10	10
Wednesday	8/10/11	10	10	10	10
Thursday	8/11/11	10	10	10	10
Monday	8/15/11	10	10	10	10
Tuesday	8/16/11	10	10	10	10
Wednesday	8/17/11	5	5	5	5
	Total	95	95	95	95

See an example of an advanced item assignment setup with item due date scheduling

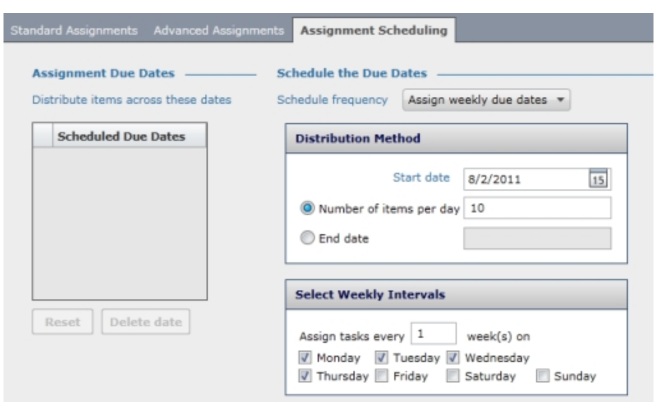
In the example image below, the 380 sales opportunities in the batch will be assigned to the 4 selected users.



The distribution of the items is determined on the Advanced Assignments tab. In the example image below, the assignments will be done as a percentage of the total number of tasks, since the **Assign a percentage of tasks to selected users** option is selected. In the assignment table user lmeyer is assigned 10% or 38 of the 380 items, while the other 3 users are each assigned 30% or 114 of the 380 items.



The item due date schedule is set up on the Assignment Scheduling tab. In the example image below, item due date assignments will begin on the **Start date** of 8/2/2011. The **Number of items per day** is 10, which means that, for each user, 10 items will be assigned per day selected in the **Select Weekly Intervals** section. The due date assignment days selected are Monday, Tuesday, Wednesday, and Thursday, and the **Assign tasks every n week(s) on** is 1, so 10 items are assigned due dates on each of those days once every week.



Item due date assignment begins on the **Start date** of 8/2/2011, which is a Tuesday, and continues for each user's items until all of the items have due dates. This configuration generates the following item due date assignment schedule for the selected users:

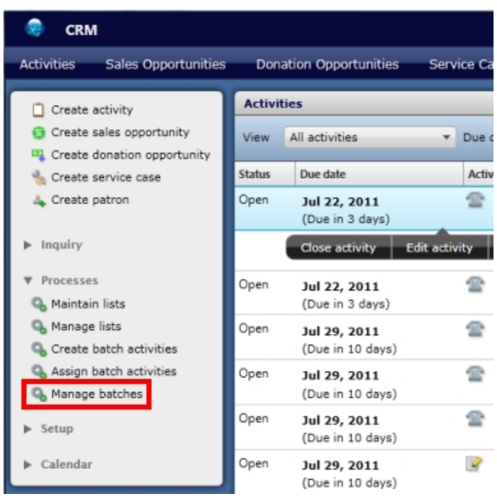
Day of the week	Date	lmeyer	tmohindra	tmeylor	whan
Tuesday	8/2/11	10	10	10	10
Wednesday	8/3/11	10	10	10	10
Thursday	8/4/11	10	10	10	10
Monday	8/8/11	8	10	10	10
Tuesday	8/9/11	0	10	10	10
Wednesday	8/10/11	0	10	10	10
Thursday	8/11/11	0	10	10	10
Monday	8/15/11	0	10	10	10
Tuesday	8/16/11	0	10	10	10
Wednesday	8/17/11	0	10	10	10
Thursday	8/18/11	0	10	10	10
Monday	8/22/11	0	4	4	4
	Total	38	114	114	114

Editing Batch Attributes

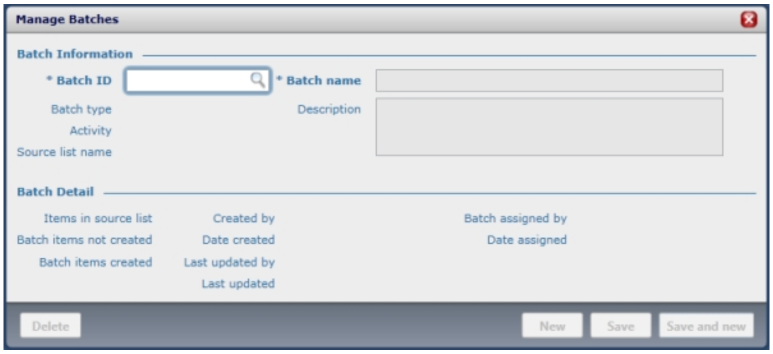
Once you've created a batch of CRM opportunities or activities, you can edit the attributes, including batch name and description, at any time. These attributes help you identify batches when they are used in CRM. You cannot use this process to edit the attributes of the opportunities and activities (batch items) created by the batch. To change batch item properties, you need to edit the items individually on the Edit Sales Opportunity, Edit Donation Opportunity, and Edit Activity forms.

To edit batch attributes

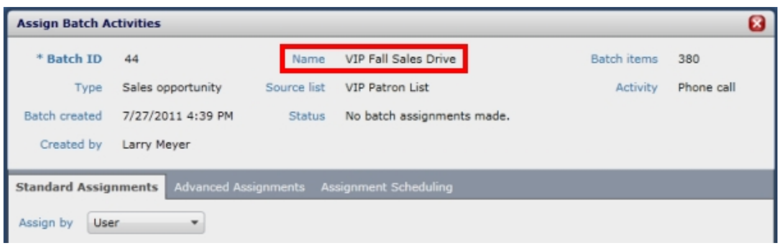
1. In the navigation pane, click **Processes**, and then click **Manage batches**.



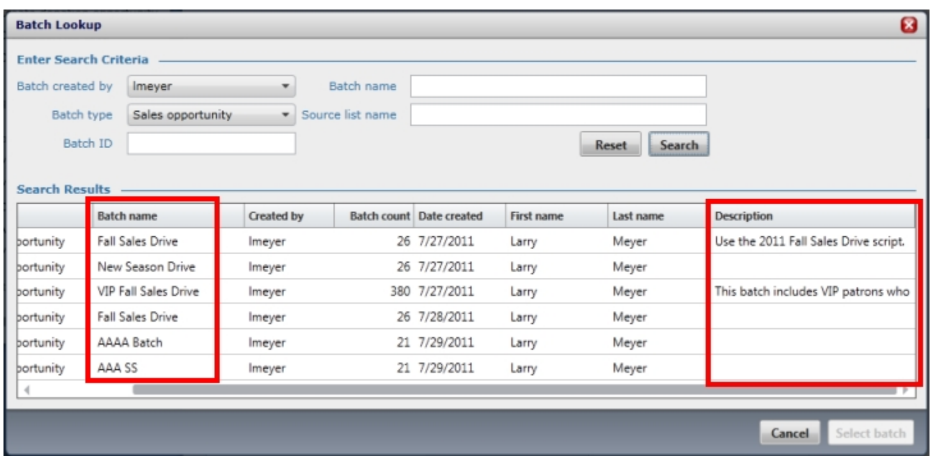
CRM displays the Manage Batches form.



2. In the **Batch ID** field, enter the ID number of the batch whose attributes you want to change. If you do not know the number, click to use the Batch Lookup to locate the batch.
3. Edit the text in the **Batch name** and **Description** fields as required. The name of the batch displays in the **Name** field on the Assign Batch Activities form.



The batch name and the batch description display in the **Batch name** and **Description** columns of the **Search Results** table when using the Batch Lookup.



4. Do one of the following:
   - To save your changes and close the form, click the **Save** button. CRM saves the changes and displays the Activities hub.
   - To save your changes and edit another batch's attributes, click the **Save and new** button. CRM saves the changes and clears the Manage Batches form.
   - To clear the form without making any changes to the batch attributes, click the **New** button. CRM clears the Manage Batches form.

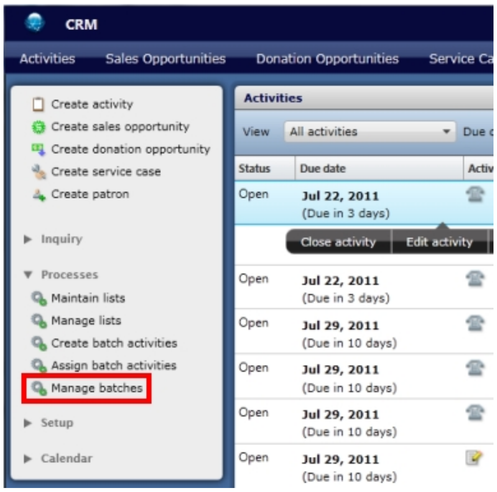
Deleting Batches

If you have created a batch of unneeded opportunities or activities, you can delete them from CRM at any time. Deleting the batch automatically deletes all the opportunities and activities created by that batch, including those that have already been assigned.

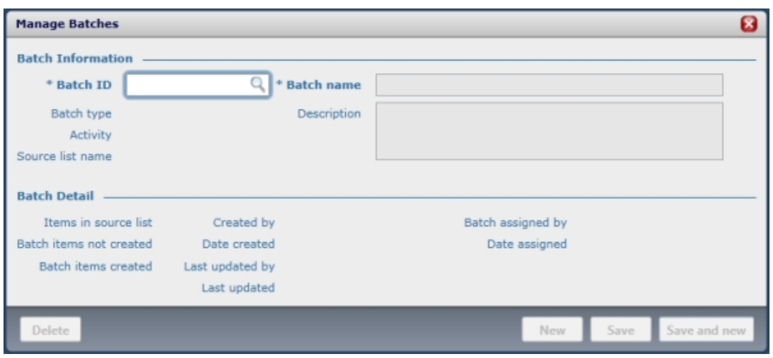
If you are deleting a batch of opportunities, CRM also deletes all activities created from the opportunities (first step, next step, follow up step etc.), including both open or closed items. Once deleted, the batch and all the opportunities and activities created from it are removed from the database and are not recoverable.

To delete a batch

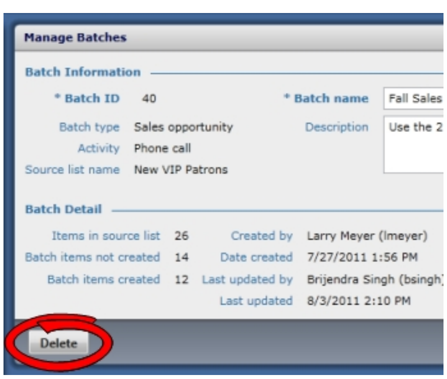
1. In the navigation pane, click **Processes**, and then click **Manage batches**.



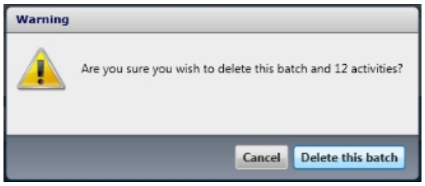
CRM displays the Manage Batches form.



2. In the **Batch ID** field, enter the ID number of the batch that you want to delete. If you do not know the number, click to use the Batch Lookup to locate the batch.
3. Click the **Delete** button.



CRM will display a confirmation dialog box.



4. Click the **Delete this batch** button. CRM deletes the batch and its associated items.

Glossary

A

Action
A change to an opportunity, activity, or service case effected by a CRM user, for example editing, closing, or deleting.

Activity
A CRM operator task. Activities capture and track all communications between the CRM user and the patrons. Activities can exist as standalone entities or be associated with an opportunity or a service case.

Activity Due Date
The approximate date that an activity will be completed. This date is set during activity creation and may be changed at any time until the activity is closed.

Activity History
For standalone activities, the details of a single activity over time. For opportunities and service cases, the details of a set of associated activities over time. The history of each activity displays the status, due date, results, and comments for the activity. It also includes when and by whom the activity was added, updated, or closed.

Activity List
The set of activities that is displayed on the Activities hub. The activity list can be filtered by due date, status, owner, and by its relationship to other CRM items.

Activity Priority
The importance of an activity relative to other activities. An activity's priority can be Low, Normal, Medium, or High. Priority assignments do not affect status of activities in CRM, but they can be included in data views. The same priority values are used for opportunities and service cases.

Activity Status
The status of an activity is either open or closed. CRM users close activities when they have finished with action required by the activity.

Activity Type
The type of communication between a user and a patron. Possible types include Phone Call, Email, Fax, Letter, Meeting, and Other.

Actual Donation Amount
The amount of money donated by a patron as a result of pursuing a donation opportunity. The user enters this amount when closing an opportunity as won.

Actual Revenue Amount
The amount of money generated from a patron as a result of pursuing a sales opportunity. The user enters this amount when closing an opportunity as won. See also Expected Revenue.

Administrator
A CRM user with access to more CRM functionality than a basic user or supervisor. An administrator is the only user type who can create and modify users in the CRM system.

Advanced Assignment
An optional step when setting up the bulk assignment of CRM items. Sets up how to allocate the tasks from the pool of tasks to be distributed. You can assign a percentage of tasks to selected users, a number of tasks to selected users, or task based on each patron’s dedictated representative. To divide batch items evenly among users, you can skip this step and just use standard assignment.

All Day Event
A meeting which is scheduled to take all of the business hours in a day. This is an MS Outlook meeting function.

Assign Batch in Bulk
The process of assigning a previously created batch of opportunities or standalone activities to CRM users.

Assign Bulk Process
The process of creating and then assigning a batch of opportunities or standalone activities to CRM users.

Assignment
Making a user the owner of an activity, opportunity, or service case. Assignments can be made manually or using batch processing.

Assignment Due Dates
A set of due dates over which batch items are evenly distributed. This is set along with user assignments as part of batch assignment.

Assignment Interval
The daily or weekly increments used to schedule item due dates during bulk processing.

Assignment Scheduling
A schedule of item due dates configured during bulk processing.

Associated File
See File Attachment.

Attachment
See File Attachment.

B

Batch
A group of opportunities or activities that can be assigned users and due dates during bulk processing.

Batch Assignment
The assignment a batch of opportunities or activities to users during bulk processing. You can also assign due dates to the batch items during this process.

Batch ID
The numeric ID or key of a batch. This number is automatically assigned during batch creation and is not modifiable by users.

Batch Items
The open opportunities and activities that make up batches. During batch assignment, batch items are distributed among a group of CRM users.

Batch Lookup
A dialog box used to search for a batch by batch creator, name, type, or number. This dialog box can be displayed from the Batch ID field if you don't know the number.

Batch Management
A set of CRM features that allow you to view and edit batch attributes, as well as to delete batches of opportunities or activities that were created by mistake.

Batch Source List
The list of patrons to which the activities or opportunities in a batch are assigned. The list of patrons is generated by your ticketing or development system and then imported into CRM.

Batch Status
The status of a batch in the bulk assignment process. The batch status can be that no assignments have been made or that assignments have previously been made.

Batch Template

The settings on the Assign Batch Activities form that are used to assign a batch of opportunities or activities to users, along with due date assignment. This template cannot be saved for reuse.

Batch Type

The type of CRM items created by a batch. The item types are sales opportunity, donation opportunity, and standalone activity.

Bulk Creation

The process of creating opportunities or standalone activities for each patron on a list. When opportunities are created in bulk, an activity is created for each opportunity.

Bulk Processing

Creating and assigning a group of sales opportunities, donation opportunities, or standalone activities in bulk. To accomplish this process, a patron list is imported and used to create a batch of opportunities and activities. The batch is then bulk assigned to a group of CRM users. Due dates for batch items may also be set. Only supervisors and administrators can perform bulk processing.

Business Account

A WBST account that represents a segment of a tRes data account. A business account allows an organization to designate a set of inventory available to sell by external parties, such as outlets and out-sourced sales teams. Each CRM installation is configured to work with one business account.

C

Campaign

An organized fund raising effort composed of drives. A campaign is normally annual and may be part of a multi-year program.

Category

See List Category or Service Case Category.

Closed

A status that users assign to opportunities, activities, and service cases when they have been completed.

Contact Information

The patron contact information required for an activity type. For example, a phone call activity requires a phone number.

Contact Person

The patron who should be contacted regarding an opportunity, activity, or service case.

Create Bulk Process

A process that uses patron lists to create batches of donation opportunities, sales opportunities, or standalone activities in bulk.

Create/Modify Opportunities

A level of permissions that allows users full access (create/edit/delete) to ticketing or donation opportunities and all their related activities.

CRM

Customer Relationship Management. Generically speaking, processes implemented by a company to handle contact with its customers. Paciolan CRM is used to carry out and track processes that are specific to ticket sales and fund development.

CRM Data

The data recorded by Paciolan CRM during use. This includes data from standard CRM activities involved in sales and fund development, service case management, and individual status reporting. Some CRM data can be viewed and manipulated using Data Views.

CRM Item

The representation of an opportunity, activity, service case, or note in CRM.

CRM User

CRM users include basic users, supervisors, and administrators. Basic users are salespeople, fund raisers, or customer service representatives. Basic users have limited access to CRM functionality and no other users reporting to them. Supervisors have basic users reporting to them. Administrators have access to all CRM functionality.

D

Data Account

An inventory of patrons, events, items, etc. In most situations, an organization using tRes, such as a university, has one tRes data account.

Data Filters

Data fields that are configured to generate data view inquiries. CRM users create filters to limit the data included in a data view.

Data Inquiry

The type of CRM items to which the data view is applied. Inquiry types include Sales Opportunity, Donation Opportunity, Service Case, and Activity.

Data View

A function that allows users quick access to CRM data. Users can create new views, run existing views, and share views. From the data view, data can displayed on screen or exported to Excel for offline manipulation.

Dedicated Representative

The representative that normally communicates with a specific patron. You can choose to assign opportunities or activities created for patrons to their dedicated representatives.

Development

The process of establishing relationships with donors.

Development Campaign

See Campaign.

Development Data

See Donation Data.

Development Program

See Program.

Direct Reports

CRM users that report to a CRM supervisor.

Donation Data

CRM data generated by the fund development activities tracked in CRM.

Donation Milestone

A function in CRM that allows fundraising organizations to categorize donation opportunities for reporting. This categorization is based on fundraising processes and the progress that fundraisers make on their donation opportunities. Donation milestones are used for reporting.

Donation Opportunity

An item in CRM that tracks activities, communication, and information (target amount, campaign/drive, usage, etc.) related to a potential donation or pledge. Each donation opportunity is assigned to a user.

Donation Representative

A CRM user who solicits donations from patrons based on donation opportunities and their associated activities. Also called a solicitor.

Donation Type

In CRM, outright donation, pledge, or gift in kind.

Donor

A patron whose information is stored in a record in Paciolan CRM and the back office patron database. A donor can be an individual or an organization.

Donor List

A list of donors that has been exported from your patron database to bulk assign items in CRM.

Drive

In tFund, a drive is an organized fund raising effort. Each donation and pledge solicted by a representative using CRM is associated with a drive. Drives are usually part of a campaign.

Drive Lookup

A CRM function that allows users to search for open drives when working with a donation opportunity.

Due Date Schedule

The schedule by which representatives should complete CRM items assigned to them during bulk processing.

E

Email

In CRM, an email message in a user's MS Outlook Inbox that is also in the CRM Inbox because of Outlook integration.

Email Conversion

The conversion of an email message in the CRM Inbox into a new CRM sales opportunity, donation opportunity, service case, or email activity.

Error List

A list of undesirable events that occurred during the creation of a batch. Errors include invalid patrons, duplicate patrons in the list, patrons without contact information, etc.

Estimated Close Date

The approximate amount of time it will take a user to complete an opportunity. These dates are entered during opportunity creation. You can use these dates to filter the opportunity list on the Sales Opportunities and Donation Opportunities hubs.

E-ticketing

A tab of the Patron Detail form that is used to view and modify a patron’s eVenue and magnetic stripe ID information.

Expected Donation

See Goal Amount.

Expected Revenue

The amount of money that is expected to be generated from a sales opportunity. See also Actual Revenue Amount.

External ID

A record locator key that is used to identify a patron in an external (non-Paciolan) system.

F

File Attachment

A document attached to an opportunity, activity, or service call. Supported file types include .doc, .pdf, .jpg, .bmp.

Follow-Up Activity

An activity created when closing an existing activity.

G

Goal Amount
The amount of money that is expected to be donated or pledged from working a donation opportunity.

I

Inactive User
A user whose access to CRM has been disabled using the CRM Manage Users form.

Inbound Email
An email message received at a user's Outlook account. All Outlook messages in a CRM user's Outlook account that have been received in the last 30 days are synchronized with the user's CRM inbox.

Inbox
Either the CRM or Outlook Inbox. The CRM Ibox is a collection of the current user's Outlook email messages and meeting invitations from the last 30 days. The inbox is updated from the Outlook inbox automatically. The users' opportunities and service cases can also be displayed at the bottom of the Inbox. This allows users to link email messages with CRM tasks.

Incoming Activity
An activity that is created in response to communication from a patron.

Inquiry
A view of activity, opportunity, or service case data as set up on the CRM Manage Data Views form.

Item
See CRM Item. Also used when refering to events set up in the back office.

L

List Category
Used to categorize the patron lists that are used for the bulk creation of opportunities or activities. List categories are used to organize and report on these lists.

List Export
Used to export patron lists to a comma delimited CSV files.

List ID
The numeric key to a patron list. This key is automatically assigned by the system on initial list save and is not modifiable by users.

List Import
The process of importing patron lists into CRM After being imported, lists are used to create batches of CRM items for bulk processing.

List Lookup
A CRM dialog box that allows you to search for lists by entering the list creator, category, ID, or name. You can also choose to only find new lists (lists that have not been used to create a batch yet).

List Maintenance
Using the Maintain Lists form to import, update attributes, delete, or export patron lists. This does not include maintaining the information of the patrons in a list.

List Management
The process of creating new lists by copying other lists, using the intersection of two lists, merging two lists into a single new list, subtracting the contents of one list from another, splitting one list into two lists, etc.

Log In / Log On
See Sign In / Sign Out.

Loss

Donation and sales opportunities are considered lost if no revenue or donation is realized.

Lost Reason Codes

Used to categorize the reasons why sales representatives and solicitors lose their sales and donation opportunities. You can configure lost reason codes on the Manage Lost Reasons form in CRM.

M

Maintain User

The process of maintaining CRM user profiles. User profiles are created in WBST, and the CRM priviledges are defined in CRM.

Manager

A person within a sales or fundraising organization who generates and analyzes operational, pipeline, and service case reports. In CRM, a manager is assigned the Supervisor role.

Meeting

MS Outlook meeting invitations are automatically synchronized and displayed in the CRM inbox. From the CRM Inbox you can open the meeting invitation in Outlook.

Membership Data

Back office ticketing membership information is displayed on the Patron Summary and Patron Detail forms in CRM.

Milestone

See Donation Milestone or Sales Milestone.

N

Next Step Activity

When creating an opportunity or a service case, you can simultaneously create the next activity required to win or resolve the item.

Note

A CRM note is free form text used to capture information about individual patrons. CRM users can view, create, and edit notes from the Patron Summary form. They can also attach documents and set expiration dates for notes.

O

Operator

See CRM User.

Operator Queue

A pool of available opportunities and activities for a team of CRM users.

Opportunity

A potential sale or donation. An opportunity is created to track all activities, communication, and information related to a potential sale to or donation from a patron. Opportunities are assigned to CRM users individually or in bulk by a CRM supervisor or administrator.

Opportunity List

A CRM user's set of open opportunities. The Sales Opportunities and Donation Opportunities hubs each have their own opportunity list.

Opportunity Priority

The importance of an opportunity relative to other opportunities. An opportunity's priority is set to Low, Normal, Medium, or High. The same priority settings are used by service cases and activities.

Outcome
The status of an opportunity when closed by a CRM user. An opportunity's outcome is either won or lost.

Outgoing Activity
An activity that is initiated by a CRM user to when communicating with a patron.

Outlook
A Microsoft email generation and management program. Outlook is integrated into CRM to facilitate communication between CRM users and their customers or donors.

Outlook Integration
The integration of CRM users' MS Outlook and CRM inboxes.

Owner
The user who is assigned an opportunity, activity, or service case.

Owner Lookup
A CRM form that allows users to search for an owner for an opportunity, activity, or service case. The owner lookup will only search active CRM users.

P

Parent Category
A service case category that has subcategories.

Password
The alphanumeric character string required, along with the user name, for users to sign in to CRM.

Patron
A customer or donor whose information is stored in a record in Paciolan CRM and the back office patron database. A patron can be an individual or an organization.

Patron Account
See Patron Record.

Patron Data
The patron information stored in the back office and used in CRM.

Patron Detail Form
A form on the Patron hub that allows users to edit a patron's name, phone, address, biographical, institutional, ticketing, and development information in one place.

Patron Edit
A function used on the Patron Summary form to edit patron information on the Patron Detail form.

Patron Entry
The creation of a patron in CRM. The information entered includes whether the patron is an individual or organization, as well as the patron name, phone numbers, email address, shipping address, and donor type, if applicable.

Patron ID
An identification number that is unique for each patron. This number is generated in the back office and cannot be changed by CRM users.

Patron List
A list used during bulk processing to create an opportunity or standalone activity for each patron in the list.

Patron Lookup
A method of searching for patrons by name, ID number, keyword, phone number, email address, or organization.

Patron Management Control
WBST functionality for setting the patron data access rights of users. You can define one or more patron management policies per data account. Patron management controls are set up in tRes.

Patron Policy
Used to define patron permissions for WBST and CRM users. A patron policy may be shared and assigned to one or more WBST or patron management controls. Conversely, each WBST and patron management control must be linked to only one patron policy. Patron policies are set up in tRes.

Patron Record
All the information stored in the back office for an individual patron.

Patron Rep
The CRM user to which a patron has been assigned. Also called primary salesperson or primary solicitor.

Patron Search
Locating an individual patron record using the CRM Patron Lookup function.

Patron Source
The channel through which a patron was first entered into the system (for example, donations, internet sales, or walk up sales).

Patron Summary
A comprehensive view of a patron used by CRM users when working with activities, sales opportunities, donation opportunities, and service cases.

Patron Type
A patron must be either the individual or organization type.

Patron View
See Patron Summary.

Permissions
Controls that limit user access to the various CRM functions. User permissions are set by CRM administrators.

Personnel Hierarchy
See User Hierarchy.

Pipeline
The path through which sales or donation information flows.

Pledge
The dollar amount that a patron promises to donate.

Pool
The group of open opportunities or standalone activities in a batch.

Priority
The importance of one CRM entity relative to another. An entity's priority is set to Low, Normal, Medium, or High. The same priority settings are used by all CRM entity types, including sales opportunities, donation opportunities, activities, and service cases.

Privileges
See Permissions.

Probability to Close
The percent probability that an opportunity will be successfully closed. Values in CRM menus are customizable, but the default values are: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%

Profile View
See Patron Summary.

Program
In tFund, a program is an organized fund raising effort composed of campaigns. A program normally runs for multiple years.

Prospect
See Opportunity.

R

Read-Only View
A CRM view that limits users to read-only access to sales/donation opportunities, activities, and service cases.

Reason Code
The code for the reason an opportunity was not won. Reason codes are customizable in the CRM setup. Default values include Unable to Contact, No Longer Interested, and Cancelled.

Related Activity
An activity that is related to a sales opportunity, donation opportunity, or service case.

Release to Mailing List
Patron information that can be used in a mailing list.

Renewable
Tickets purchased for the previous year that the patron has the right to repurchase for the current year.

Resolution
A text description of the action taken to resolve a service case. This text is entered as part of closing a service case.

Restricted Data
Any opportunities, service cases, or stand-alone activities that cannot be seen by all users. The ability to view restricted data is set by users with permission to mark data as restricted.

Revenue Projection
See Expected Revenue.

S

Sales Milestone
A function in CRM that allows sales organizations to categorize sales opportunities. This categorization is based on sales processes and the progress that sales representatives make on their opportunities. Sales milestones are used for reporting.

Sales Opportunity
An opportunity that is created to track all activities, communication, and information (forecast revenue, potential close date, and probability of closing) related to a potential sale. An opportunity is assigned to a sales representative. While creating a new sales opportunity, the sales rep will be able to create the opportunity's first activity at the same time. When closing a sale, the representative may add one or more activity records to the opportunity to track all actions and communications.

Sales Representative
A CRM user that sells tickets using sales opportunities.

Schedule Due Date
The due date assigned to an opportunity or standalone activity during bulk processing.

Schedule Frequency
A method of due date assignment that is available during bulk processing of activities and opportunities. You can allow users to pick dates themselves, assign daily due dates, or assign weekly due dates.

Search
Searches for batches, drives, lists, owners, users, and patrons are done using CRM lookup forms.

Service Case
Created when customers report issues with the service they received. Service cases are used to track all related activities, communication, and information needed to resolve the issue. When the issue is resolved, the service case is closed.

Service Case Category
A type of issue for which a service case can be created. Categories are used to group similar service cases for reporting purposes. Users assign categories to incoming service cases. Categories may be further organized using parent categories and subcategories.

Service Case Priority
The importance of a service case relative to other service cases. The priority can be set to Low, Normal, Medium, or High. The same priority settings are used by opportunities and activities.

Service Case Record
Contains all the information that has been collected about an individual service case.

Sign In / Sign Out
The process users must complete to access CRM. CRM applies user permissions as part of this process.

Solicitor
See Donation Representative.

Source Campaign
CRM uses source campaigns to group sales opportunities for reporting. Source campaigns are created and editied using the Manage Source Campaigns form.

Source List
The list used to assign patrons to opportunities or standalone activities during batch creation.

Standalone Activity
An activity that is not associated with an opportunity or a service case.

Standard Assignments
A method of distributing ownership of a batch of opportunities or standalone activities evenly among a group of users during batch assignment.

Subcategory
See Category.

Supervisor
A CRM user with one or more direct reports. Supervisors can have both operators and other supervisors reporting to them. Supervisors can assign or reassign opportunities and service cases individually or in bulk to any of their reports.

System Administrator
A CRM user who is responsible for the setup and maintenance of CRM software and hardware, including the network, Outlook server, and Paciolan back office.

T

Target
A group of donors or patrons that are used to create donation opportunities. Targets are setup and generated in tFund.

Task
A generic term for opportunities and activities during bulk processing. Tasks are also called CRM items.

Task Allocation
See Task Distribution.

Task Assignment
Assignment of opportunities or standalone activities to users during bulk processing.

Task Distribution
In bulk processing, allocating the entire open quantity of opportunities or standalone activities in the batch to selected users or teams.

Task Distribution Method
The type of configuration used to distribute opportunities or standalone activities during batch assignment. CRM items can be distributed evenly, by percentages, or by number to CRM users.

Task Pool
The opportunities or activities that need to be assigned and scheduled during bulk processing.

Team
A set of CRM users to which tasks can be assigned in bulk. Team assignments allow all users on the team to work from the same pool of tasks.

Ticketing Data
CRM data generated by the ticket sales activities tracked in CRM.

U

Unrestricted Data
Data that is accessible by all CRM users.

User
See CRM User.

User Hierarchy
The user reporting structure defined in CRM. Basic users do not have other users reporting to them. Supervisors have one or more direct reports. Those reports can include both basic users and other supervisors.

User Lookup
A CRM form that allows users to search all CRM users, both active and inactive.

User Name
The name that CRM users use, along with a password, to sign in to the CRM system.

User Profile
The user name and access information of a CRM user. Created within WBST and further defined in CRM to include restrictions within the CRM system.

W

WBST User
A user profile created in WBST for access to the system. CRM user profiles are created in WBST, but further defined in CRM.

Won
If the goal of a donation or sales opportunity is acheived, the resolution of the opportunity is considered won.

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