CRM Procedures

FOR USE IN UAT TESTING

Purpose

This document's purpose is to provide members of UAT teams for the CRM application instructions of core procedures.

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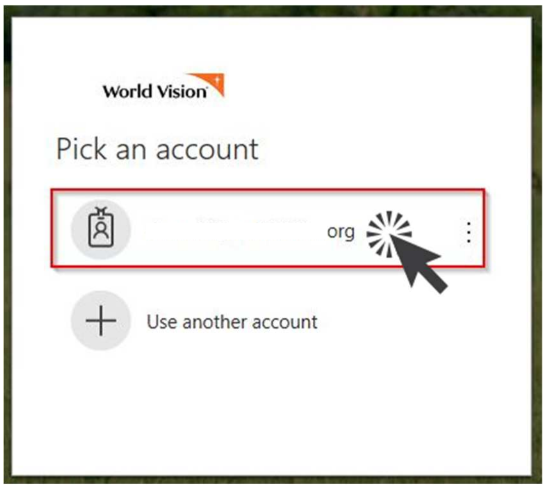
Log-In

Url: https:// .com

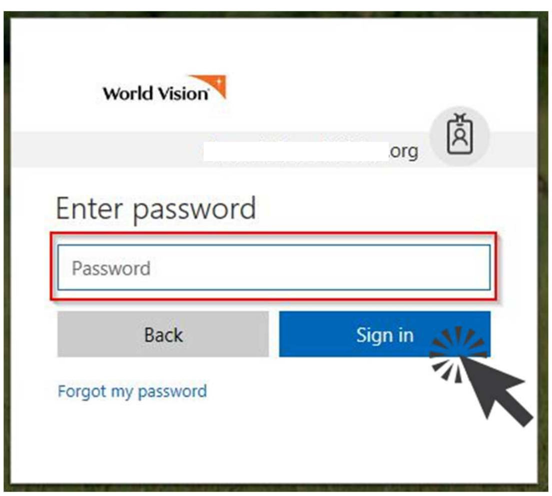
Click on the URL to access the training environment (or CTRL+Click within this document)

Step 1: ***Select*** your account or ***enter*** your World Vision email address.



Step 2: ***Enter*** your network password.

Step 3: ***Click*** the “Sign in” button.



Access Contacts View

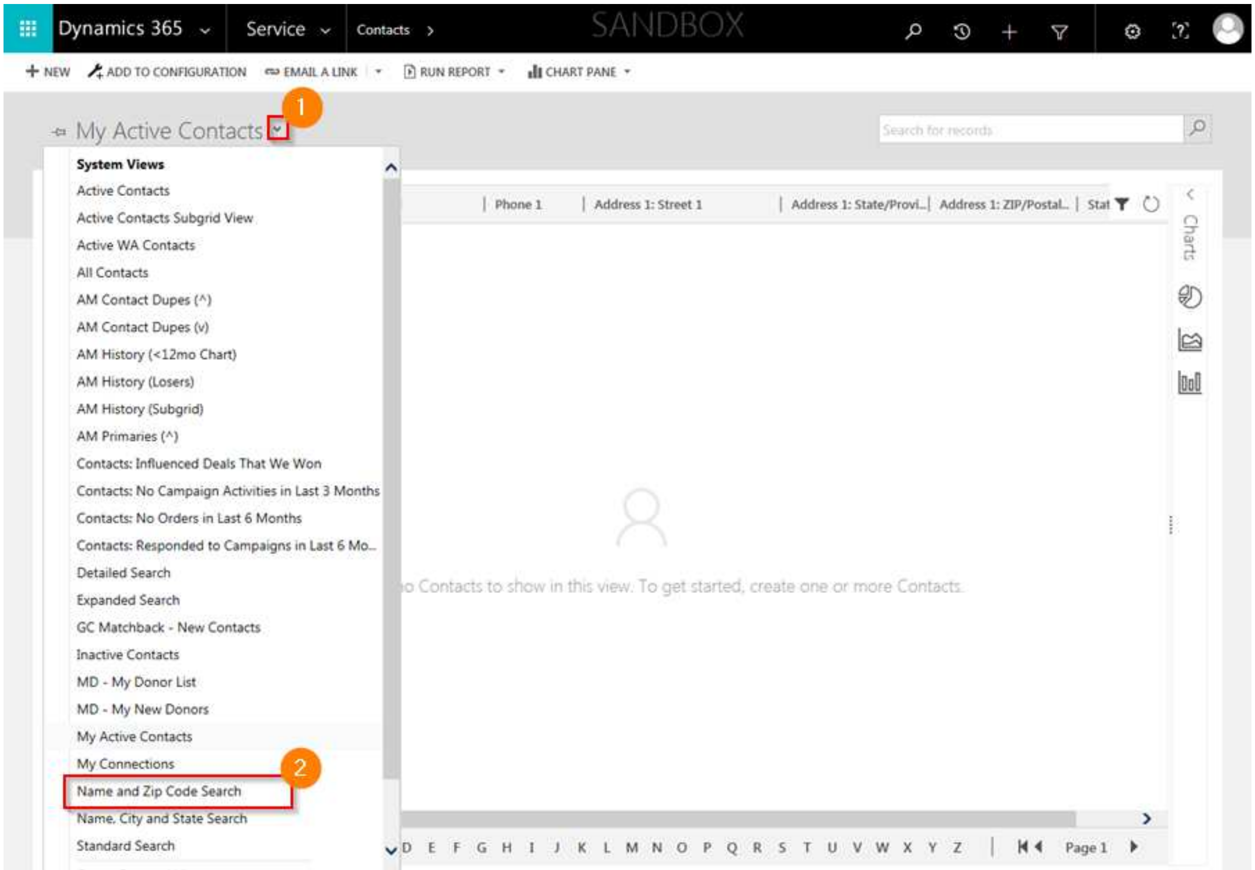
A “Contact” is the record for a donor.

Locate the top menu bar.

1. ***Click*** on the down arrow of the second item, currently labeled “XRM”
2. ***Select*** “Service”
3. ***Select*** “Contacts”

The “My Active Contact” view will either be blank or have limited Contacts. Change your view to include a more practical display of Contacts.

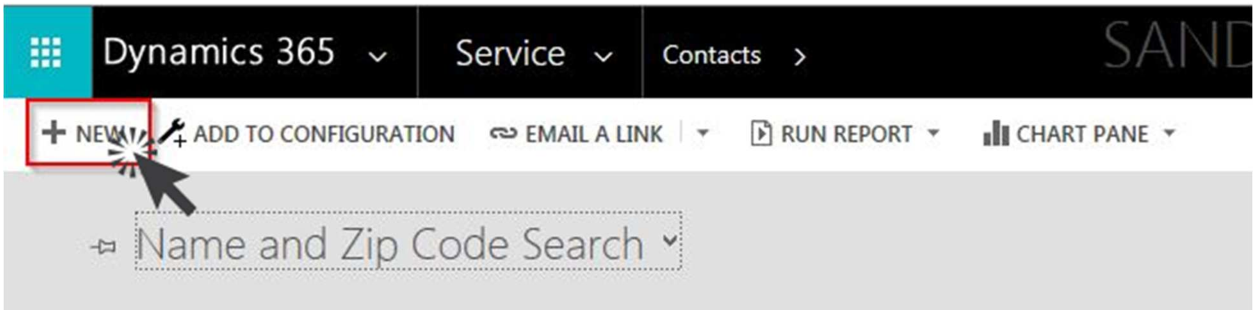
1. ***Click*** the down arrow next to the label “My Active Contacts”
2. ***Select*** a new view from the list. For example: “Name and Zip Code Search”



Your view will now populate with Contacts, sorted in alphabetical order.

Add a New Contact

Step 1: ***Select*** "New" from the white menu at the top.



A blank contact record will be created. Enter the pertinent information in the appropriate sections and information fields.

A new Contact requires the following information to be entered before the Contact can be saved.

Required fields are notated by a red asterisk:

Contact Information

- First Name
- Last Name

Primary Address

- Street 1
- City
- State/Province
- Zip
- **Country must be entered as "US"**

Missing information will be indicated by red "X" next to the field.

Verify the Address, Phone, and Email Using "Global Verify"

"Global Verify" queries the "Melissa Data" database to ensure that the Contact address, phone number, and email address (if entered) is correct.

Step 1: ***Enter*** the Contact's address, phone number, and email (if known) information.

Step 2: ***Click*** "GLOBAL VERIFY" from the main white menu.

The results of Global Verify will be displayed at the bottom of the "Primary Address" section.

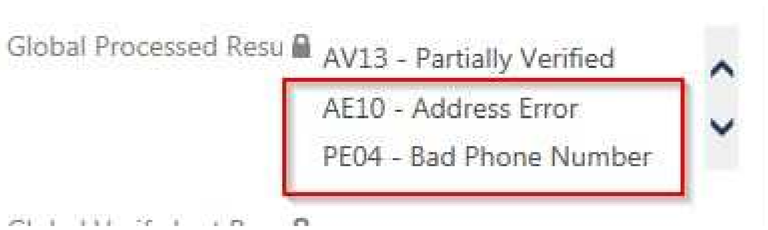
Step 3: ***Confirm*** the information was successfully verified with the following codes:

- AV24 – Verified to Premise or AV25 – Verified to Sub Premise
- ES01 – Good Email
- PS01 – Good Phone Number

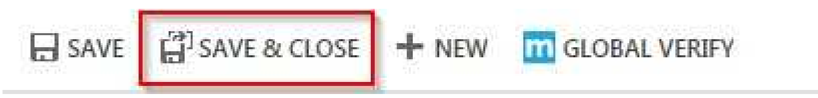
Step 4: ***Correct*** your information if any of the following failed codes are displayed:

- AE10 – Address Error
- ES02 – Bad Email
- PE04 – Bad Phone Number

Click "GLOBAL VERIFY" again.



Step 5: ***Click*** "SAVE & CLOSE" from the top white menu to save your new Contact.



Or to continue working on the same Contact:

Click "SAVE" from the top white menu

Access Accounts View

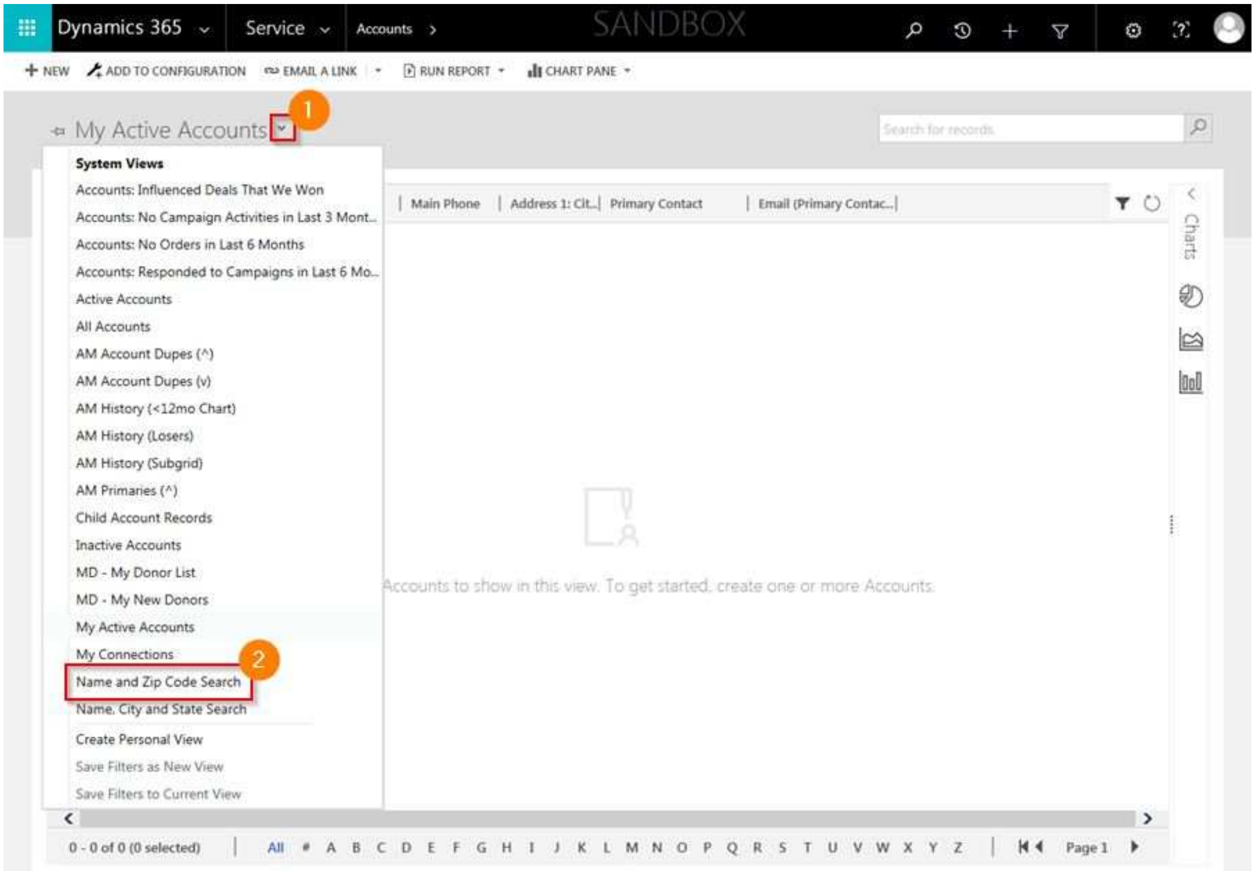
An "Account" is the record for an Organization.

Locate the top menu bar.

1. ***Click*** on the down arrow of the second item, currently labeled "XRM"
2. ***Select*** "Service"
3. ***Select*** "Accounts"

The "My Active Accounts" view will either be blank or have limited records. Change your view to include a more practical display of accounts.

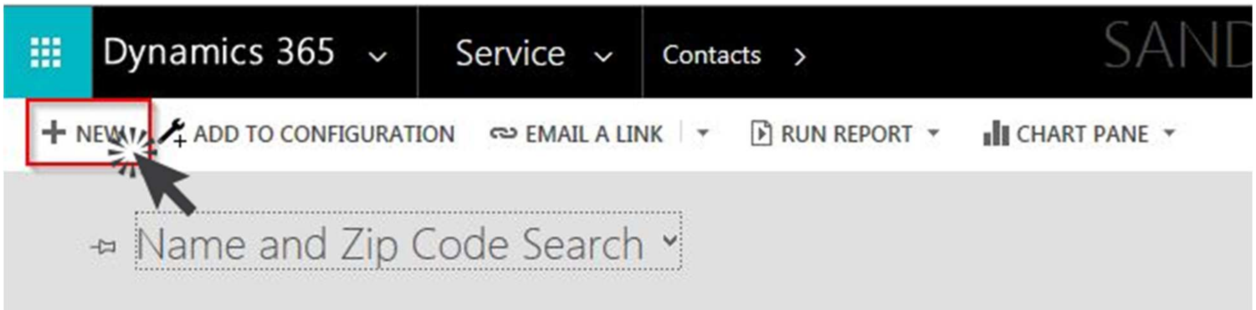
1. ***Click*** the down arrow next to the label "My Active Accounts"
2. ***Select*** a new view from the list. For example: "Name and Zip Code Search"



Your view will now populate with Accounts, sorted in alphabetical order.

Add a New Account

Step 1: ***Select*** "New" from the white menu at the top.



A blank Account record will be created. Enter the pertinent information in the appropriate sections and information fields.

A new Account requires the following information to be entered before the Account can be saved.

Required fields are notated by a red asterisk:

Contact Information

- Account Name

Primary Address

- State/Province
- Zip
- **Country must be entered as "US"**

Missing information will be indicated by red "X" next to the field.

Verify the Address, Phone, and Email Using "Global Verify"

"Global Verify" queries the "Melissa Data" database to ensure that the Account's address, phone number, and email address (if entered) is correct.

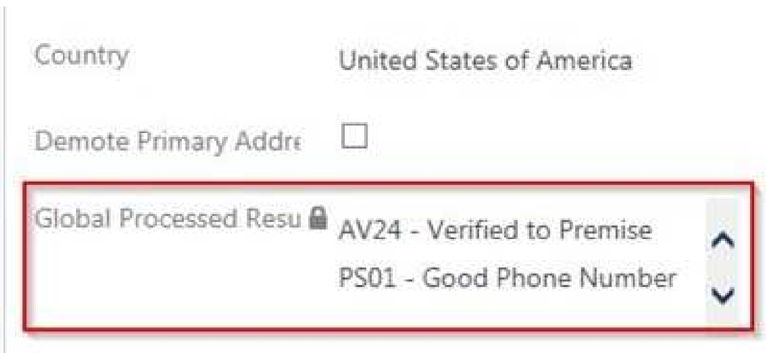
Step 1: ***Enter*** the Account's address, phone number, and email (if known) information.

Step 2: ***Click*** "GLOBAL VERIFY" from the main white menu.

The results of Global Verify will be displayed at the bottom of the "Primary Address" section.

Step 3: ***Confirm*** the information was successfully verified with the following codes:

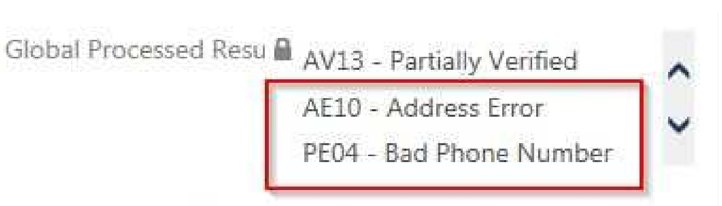
- AV24 – Verified to Premise
- ES01 – Good Email
- PS01 – Good Phone Number



Step 4: ***Correct*** your information if any of the following failed codes are displayed:

- AE10 – Address Error
- ES03 – Status of Email Unknown
- PE01 – Bad Phone Number

Click "GLOBAL VERIFY" again.



Step 5: ***Click*** "SAVE & CLOSE" from the top white menu to save your new Account.

Or to continue working on the same Account:

Click "SAVE" from the top white menu.

Search for a Contact or Account

Enter your search criteria in the "Search Field" located in the gray bar, directly above the records.

Search tips and examples

Select a proper search view from the gray bar directly above the records.

- Name and Zip Code Search
- Name, City and State Search
- Standard Search

SEARCH …	ENTER …
By Name	Joe Smith / Jane Smith *[will return all matching records]*
By Wild Card Name	J* Smith *[will return all records with First Name starting with "J" and Last Name matching "Smith"]*
By Zip code	98001 *[will return all matching records]*
By City	Seattle / Federal Way *[will return all matching records]*
By Email Address	jsmith@altavista.com *[will return all matching records]*

Use an asterisk as a "Wild Card" to return a broader result. **Note:** search will take longer.

Sort search results

The column headers can be used to quickly sort your results by broad criteria.

Click the column you wish to sort.

The small arrow indicates which column the records are currently sorted by.

- An “Up” arrow - ↑ - indicates the records are sorted from A – Z.
- A “Down” arrow - ↓ - indicates the records are sorted from Z – A.

Advanced Find for Contacts or Accounts

Use the “Advanced Find” to match records with a variety of custom criteria not available in the basic search.

Step 1: *Click* the “Advanced Find” icon in the main menu at the top.

- ***Choose*** “Contacts” or “Accounts” in the **“Look For”** menu.
- ***Choose*** “[new]” in the **“Use Saved View”** menu.

Step 2: *Select* the criteria for the search.

Example 1:

Search will return all records of “John Smith” in “Seattle.”

Example 2:

Search will return all records of “John Smith” in Washington State.

Select a Contact or Account

To view a record from your search results:

- ***Double Click*** the record to select and open or
- ***Right Click***
    - ***Select*** “Open” or “Open in a New Window”

Connections & Preferences

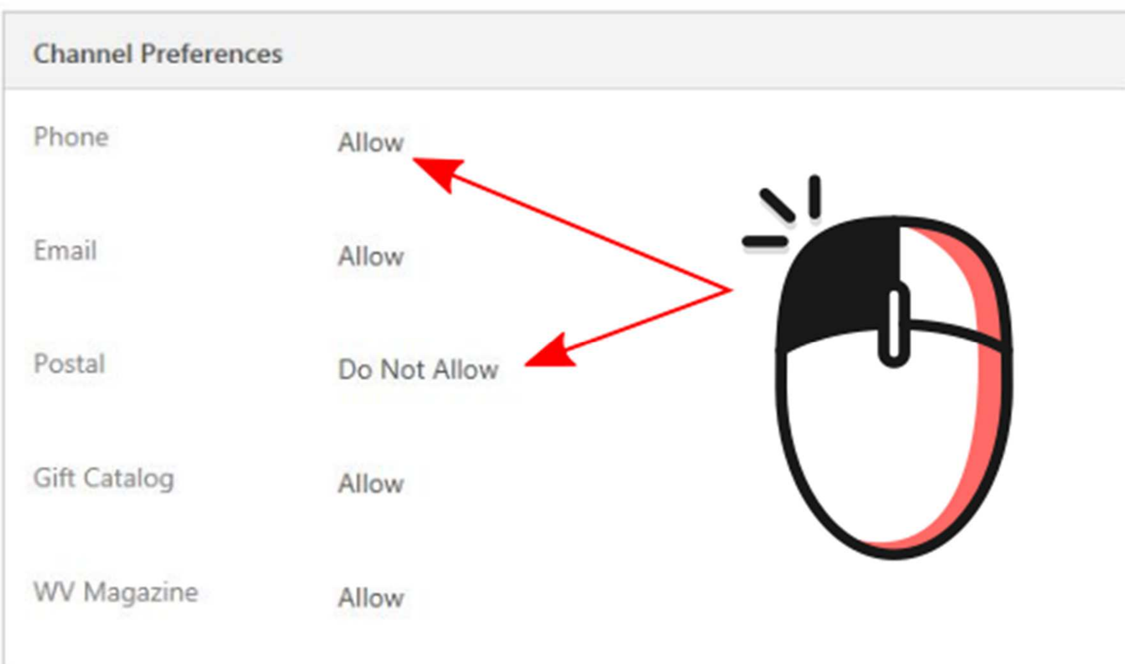
The section for adding information in "Connections & Preferences" is located below the main Contact or Account summary view.

- ***Click*** the arrow located to the right of the label to expand the form.

Add a Channel Preference

> A "Channel Preference" either allows or blocks various forms of communication to the Contact or Account.

- ***Click*** on each line of the channel to toggle between "Allow" & "Do Not Allow"



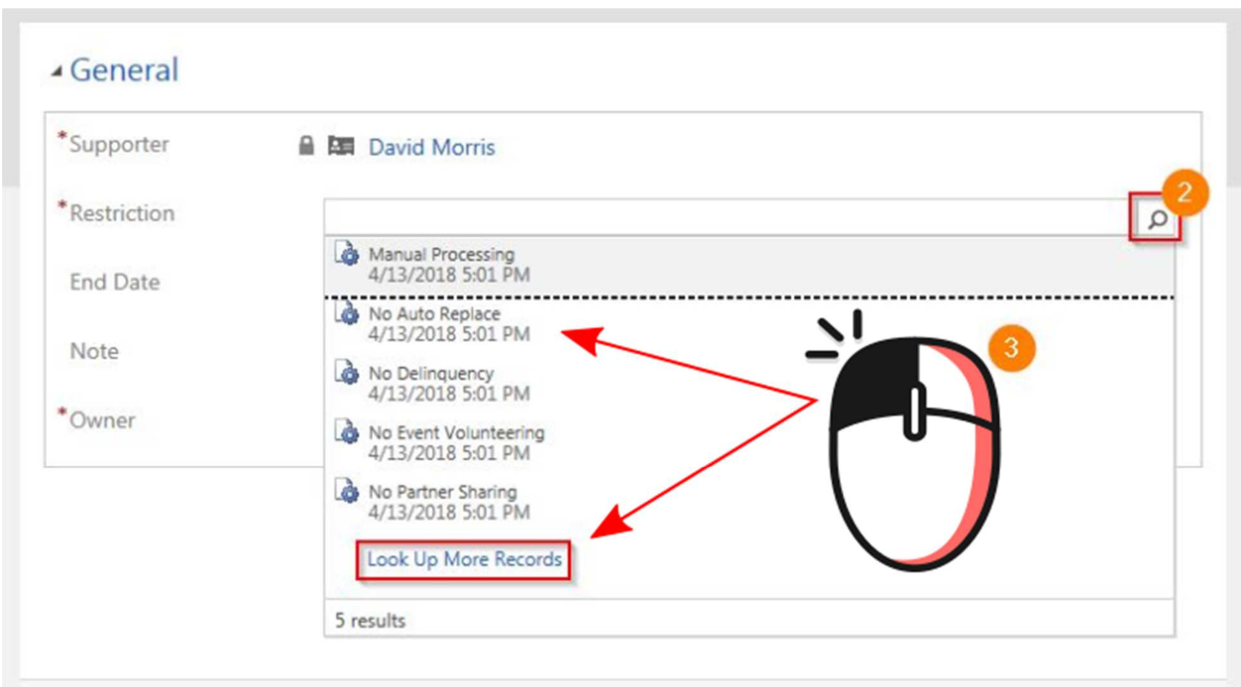
Add a Restriction

Add a “Restriction” to alert a user of special treatment for the Contact or Account.

Step 1: ***Click*** the “+” to begin adding a new Restriction.

Step 2: ***Click*** the Magnifying Glass icon to open available Restrictions.

Step 3: ***Select*** the Restriction from the list or choose “Look Up More Records” for more choices.

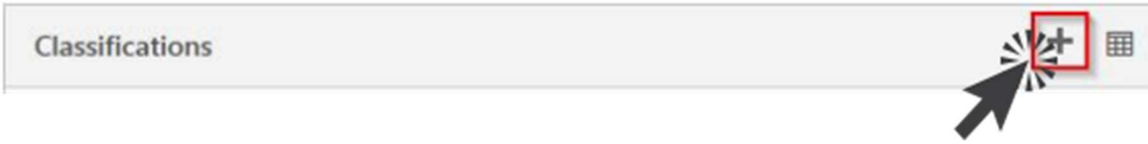


Step 4: ***Click*** “SAVE & CLOSE” from the top white menu to save your changes.

Add a Classification

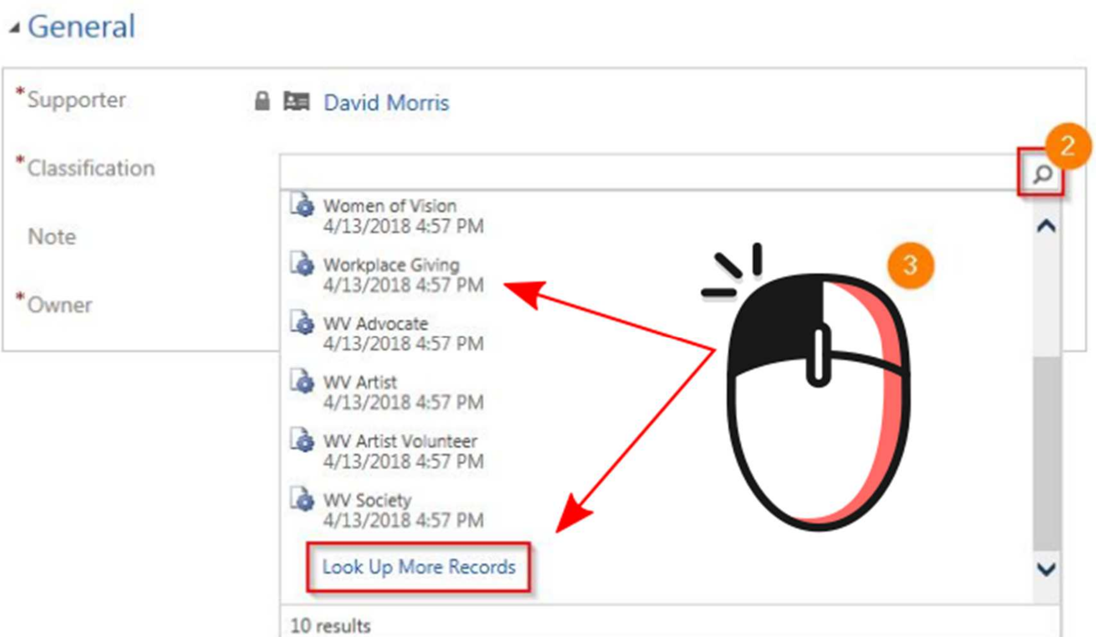
A “Classification” adds special giving criteria to the Contact or Account.

Step 1: ***Click*** the "+" to begin adding a new Classification.

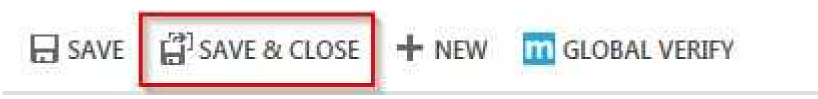


Step 2: ***Click*** the Magnifying Glass icon to open available Classifications.

Step 3: ***Select*** the Classification from the list or choose "Look Up More Records" for more choices.



Step 4: ***Click*** "SAVE & CLOSE" from the top white menu to save your changes.



Save changes made to Contact or Account

Click "SAVE & CLOSE" from the white menu to save all your changes made to the Contact or Account.

Or to continue working on the same Contact or Account:

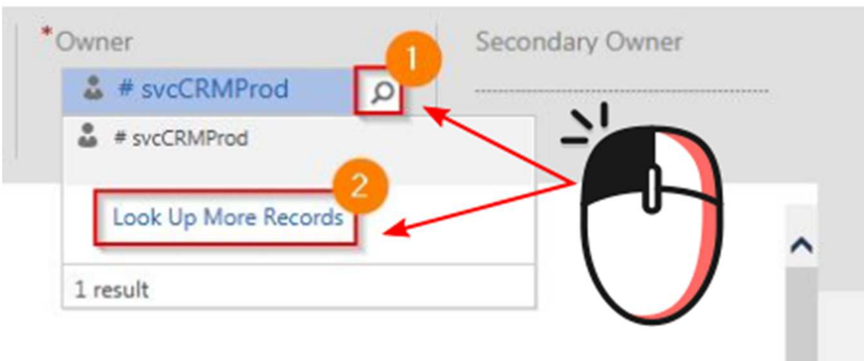
Click "SAVE" from the top white menu.

Add an Owner or Secondary Owner

Follow the same steps for either an "Owner" or "Secondary Owner." These steps are for a new Contact or Account.

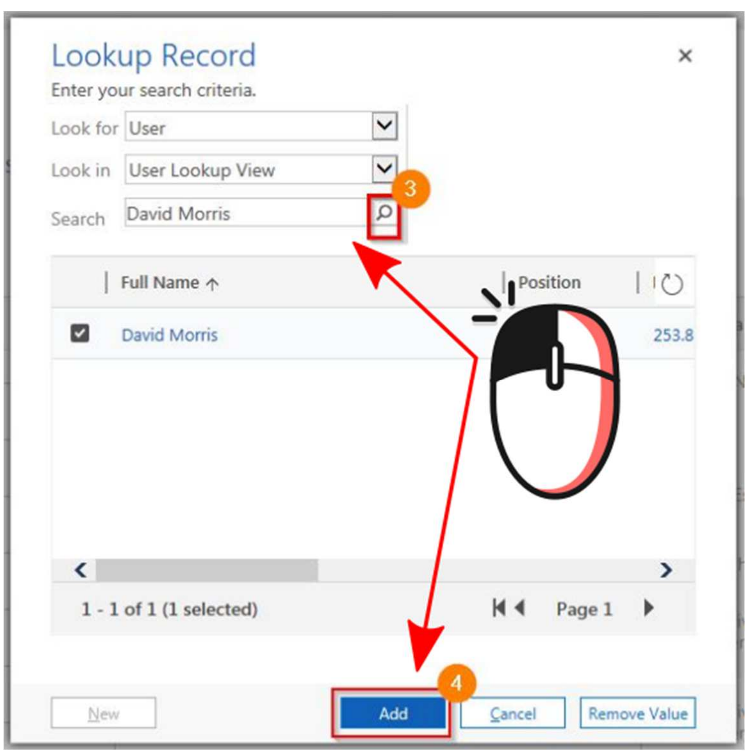
Step 1: ***Click*** the Magnifying Glass icon next to the label "Owner" or "Secondary Owner" in the top gray bar, to open a list of available Owners.

Step 2: ***Click*** "Look Up More Records" to search for an Owner.

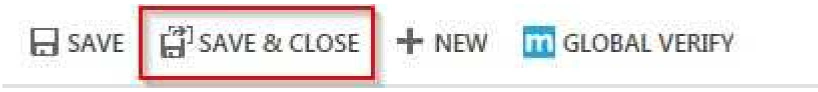


Step 3: ***Enter*** the Owner's name in the "Search" field and click the Magnifying Glass icon.

Step 4: ***Click*** the "Add" button to add the name to the Contact or Account.



Step 5: ***Click*** "SAVE & CLOSE" from the top white menu to save your changes.



Or to continue working on the same Contact or Account:

Click "SAVE" from the top white menu.

Add Connections

Use Connections to add Employer Information or to associate Contacts and Accounts with each other.

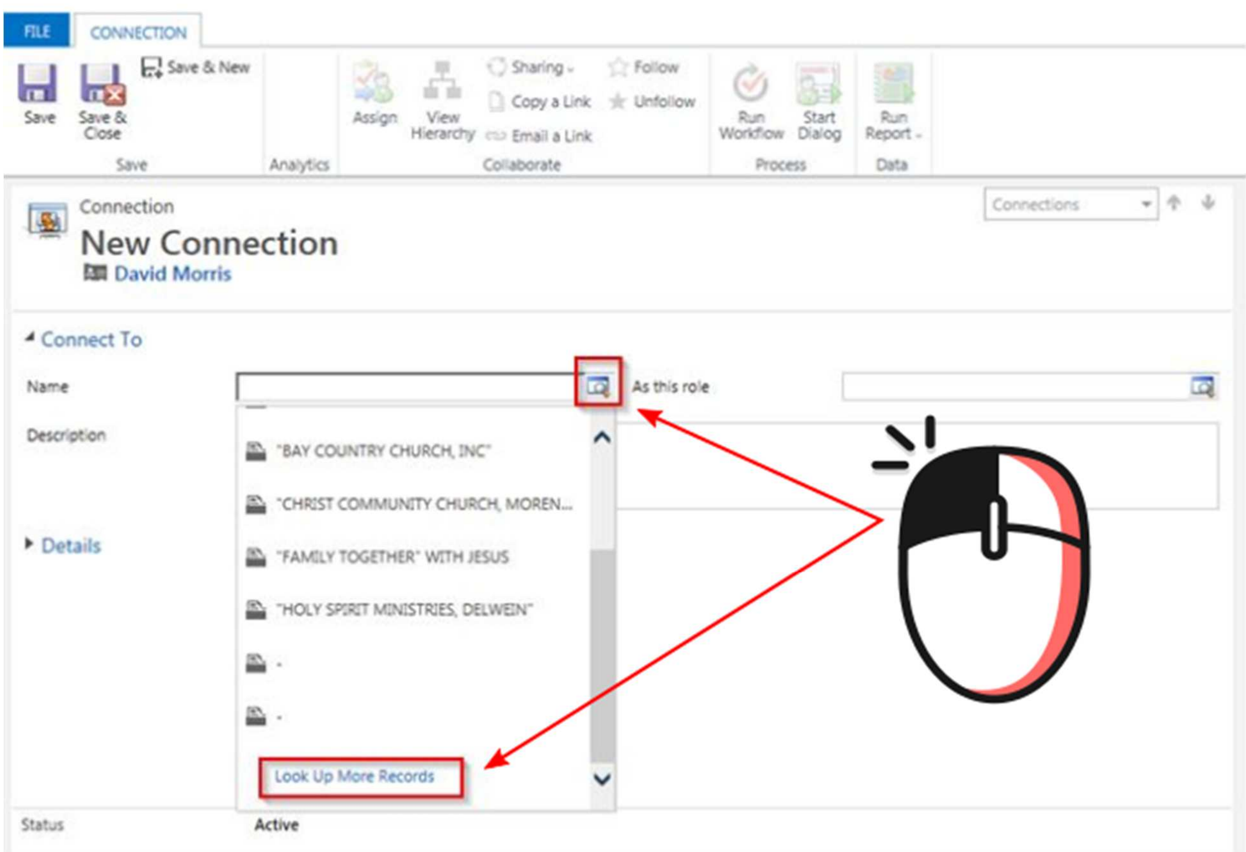
Step 1: ***Select*** the record you wish to add a connection to.

Step 2: ***Click*** “Connect” from the top white menu.

Step 3: ***Select*** the “To Another” item.

Step 4: ***Select*** the “Search” icon for the Name

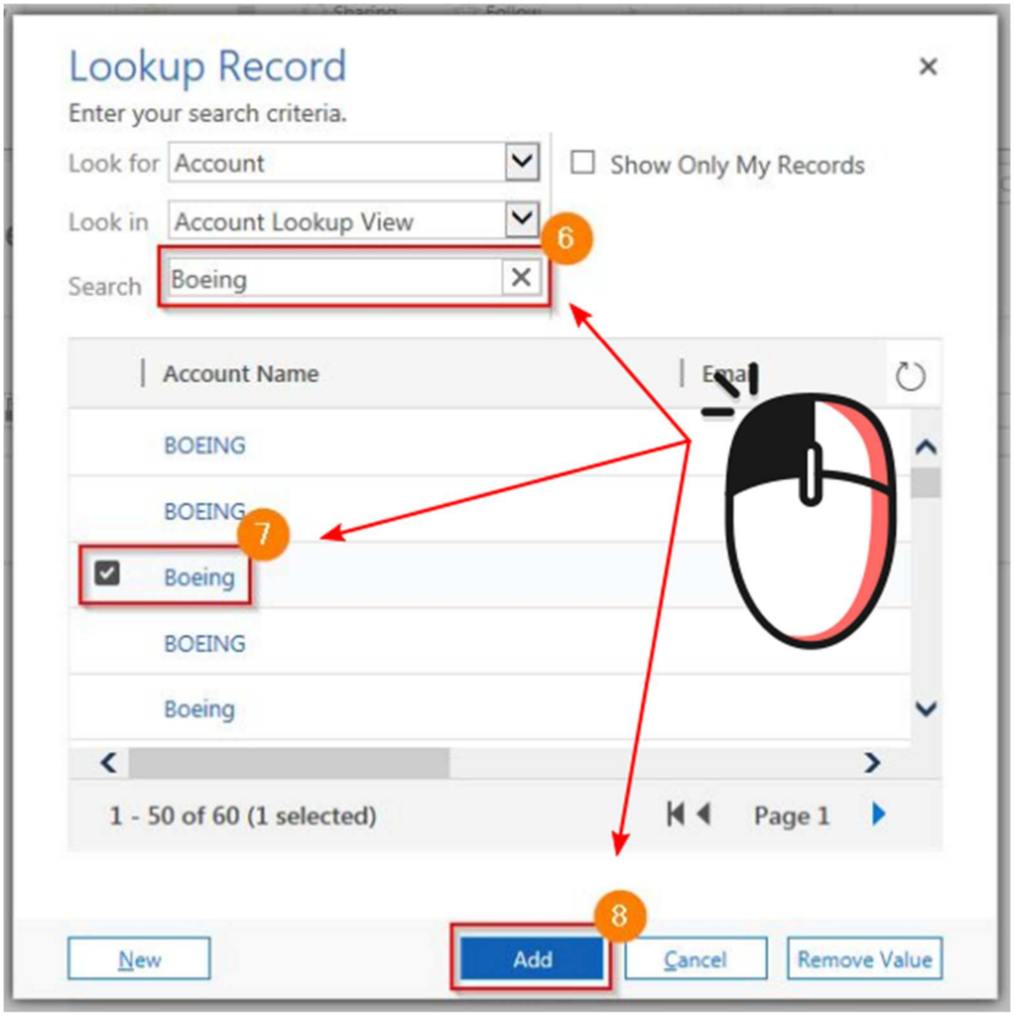
Step 5: ***Choose*** “Look Up More Records” at the bottom of the list.



Step 6: ***Locate*** the name (ie: A Company, another Contact or Account) by using the Search field.

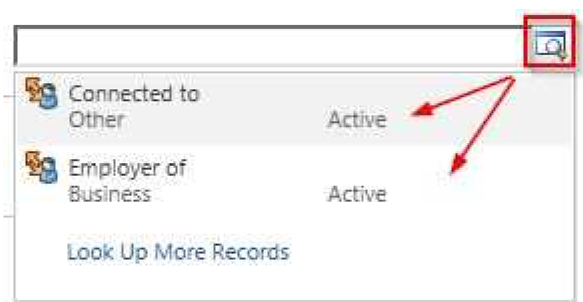
Step 7: ***Select*** the name from the search results.

Step 8: ***Click*** the "Add" button to add the connection to the Contact.



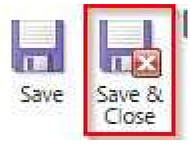
Step 9: ***Click*** the Search icon to choose a value for "As this role."

Step 10: ***Select*** either "Connected to Other" or "Employer of Business."

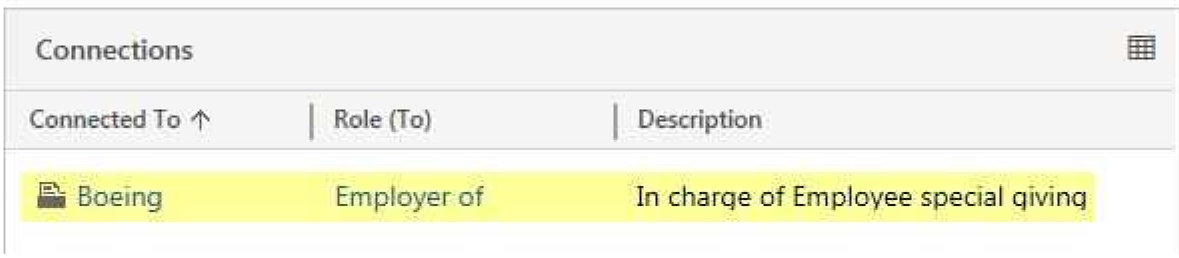


Step 11: ***Enter*** descriptive text in the “Description” box.

Step 12: ***Click*** the “Save & Close” button at the top menu.



The new connection will now be available in the “Connections” view in the “Connections & Preferences” section.

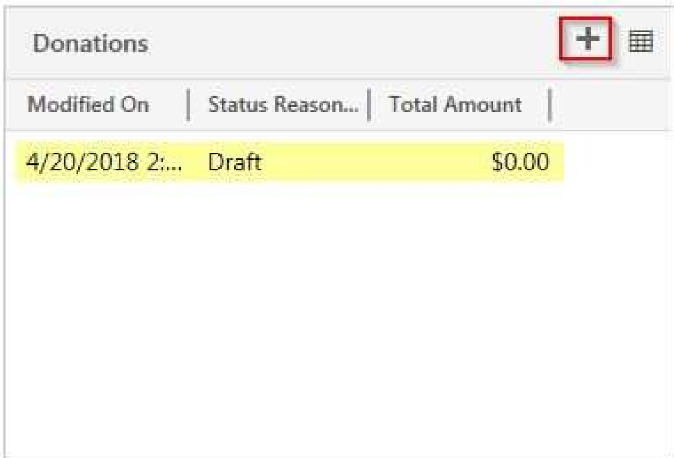


Appendix

Giving History

A Contact's giving history is located in the "Summary" section under the form labeled as "Donations." Any previous transactions will be listed.

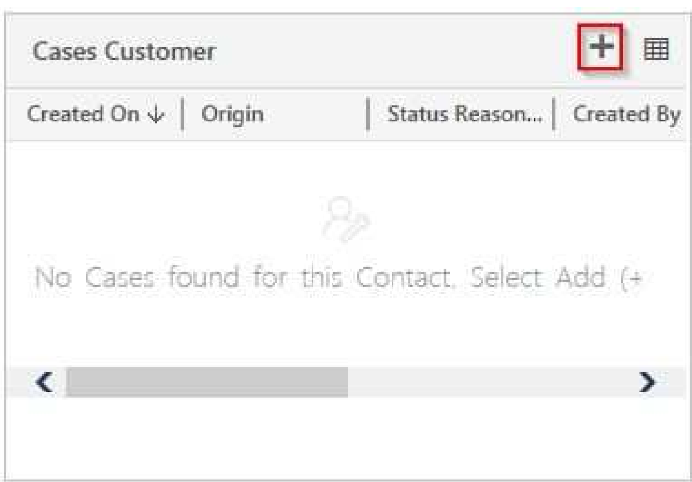
- ***Click*** the "+" to add a new giving item.
- ***Double Click*** on a line item to view it.



View Cases

A Contact's giving history is located in the "Summary" section under the form labeled as "Cases Customer." Any cases recorded will be listed.

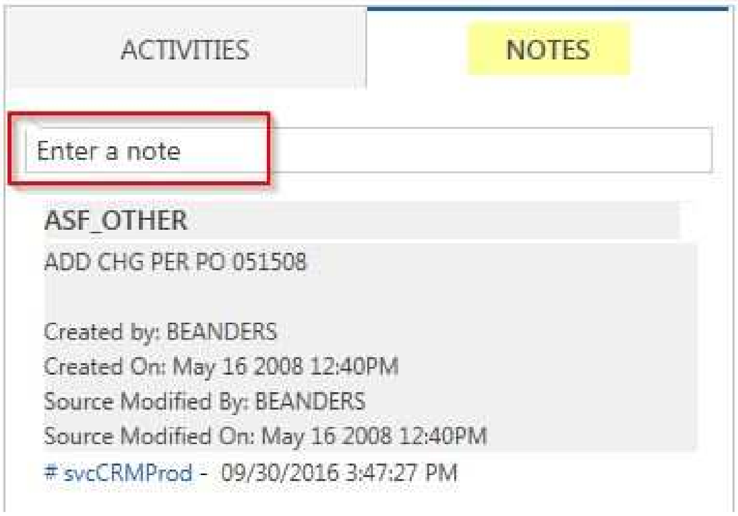
- ***Click*** the "+" to add a new case item.



View Notes

Contact notes are located in the “Summary” section under the form labeled as “Notes.” Any previously recorded notes will be listed.

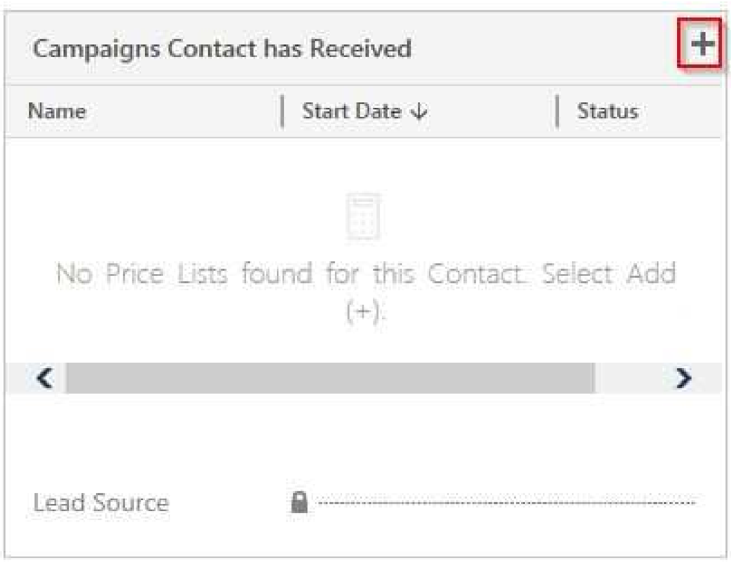
- ***Enter*** text in the “Enter a note” field add a new note.



Interaction History

A Contact’s campaign history is located in the “Campaigns and Donation Methods” section under the form labeled as “Campaigns Contact has Received.” Any previous interactions will be listed.

- ***Click*** the “+” to add a new interaction.



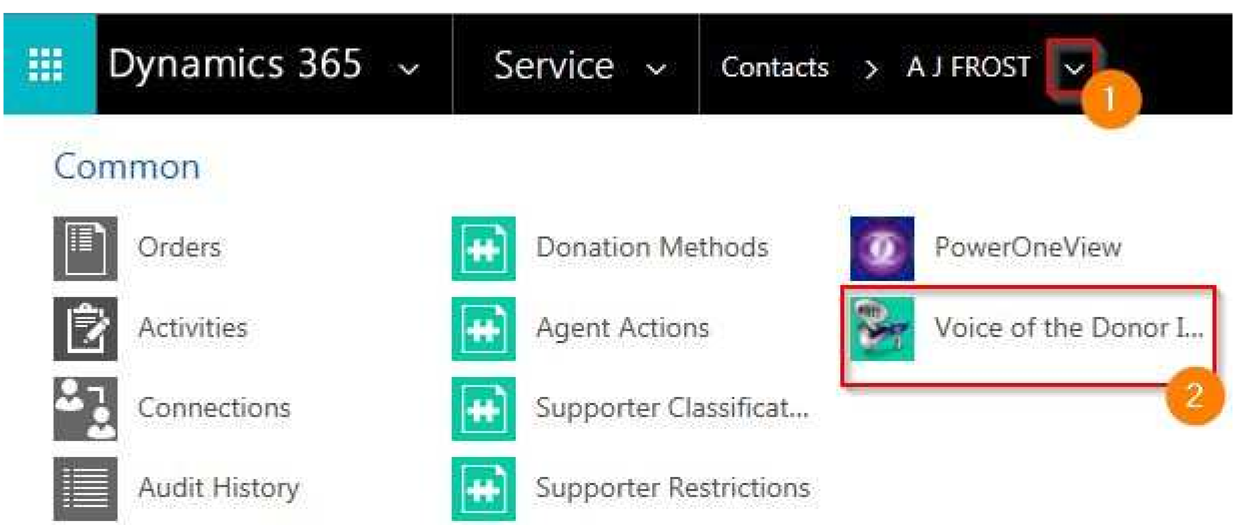
View “Voice of the Donor” Entries

A Contact’s “Voice of the Donor” entries are located in the “Summary” section under the form labeled as “Supporter VOD.” Any recent entries will be listed.

To view the full list of entries:

Step 1: ***Click*** the down arrow located next to the Contact’s name in the top, main menu.

Step 2: ***Click*** “Voice of the Donor”



- ***Click*** the “Name” of any VOD entry to view the full record.