

# CRM Procedures

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FOR USE IN UAT TESTING

**World Vision**<sup>®</sup>



# Purpose

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

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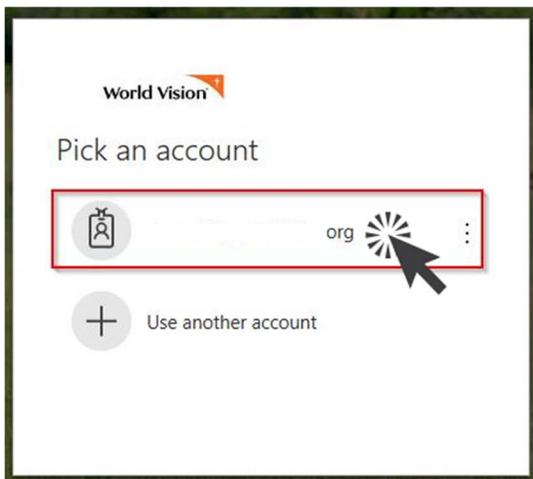
# Log-In



Url: [https://\[redacted\].com](https://[redacted].com)

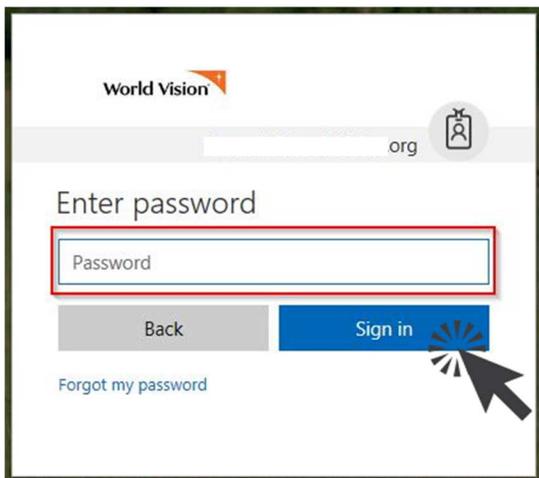
Click on the URL to access the training environment (or CTRL+Click within this document)

**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.

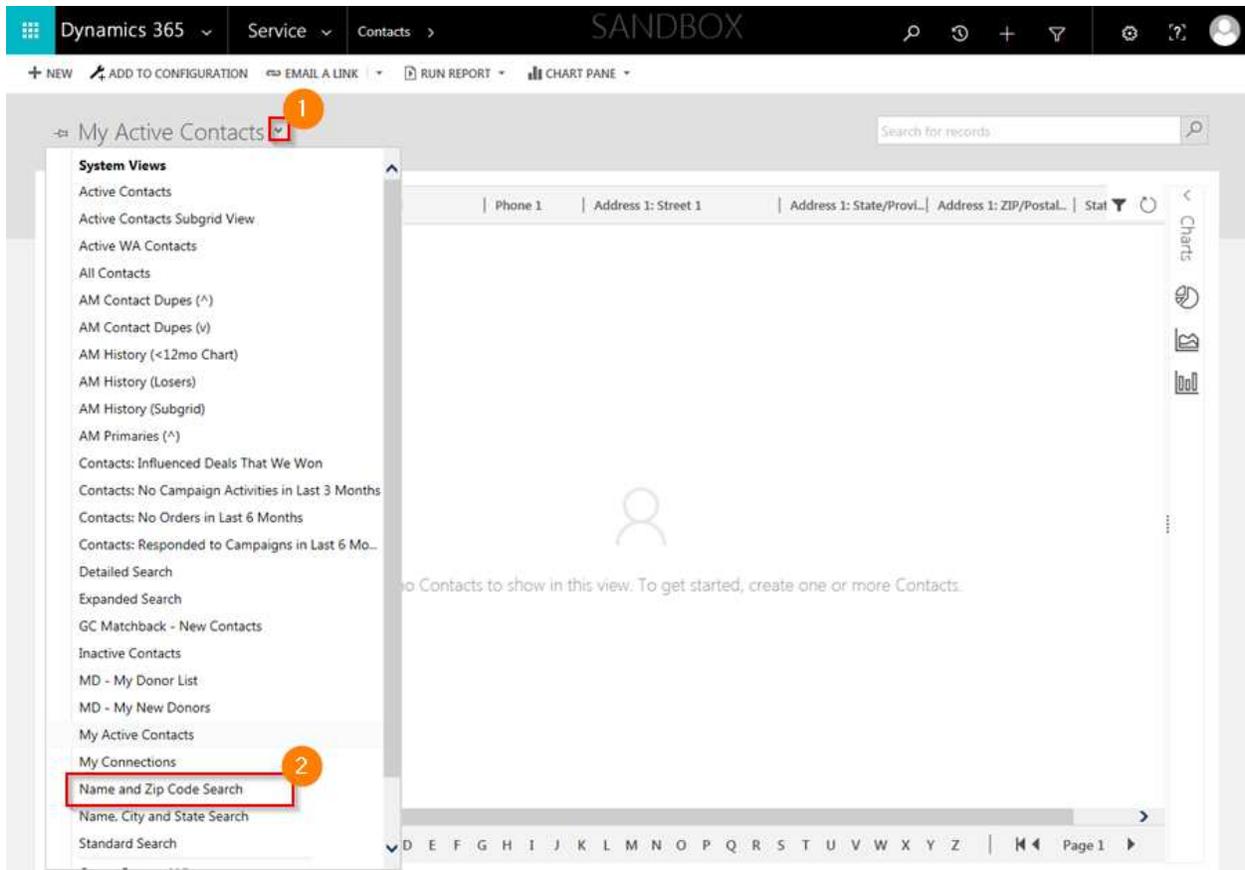
Locate the top menu bar.

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.

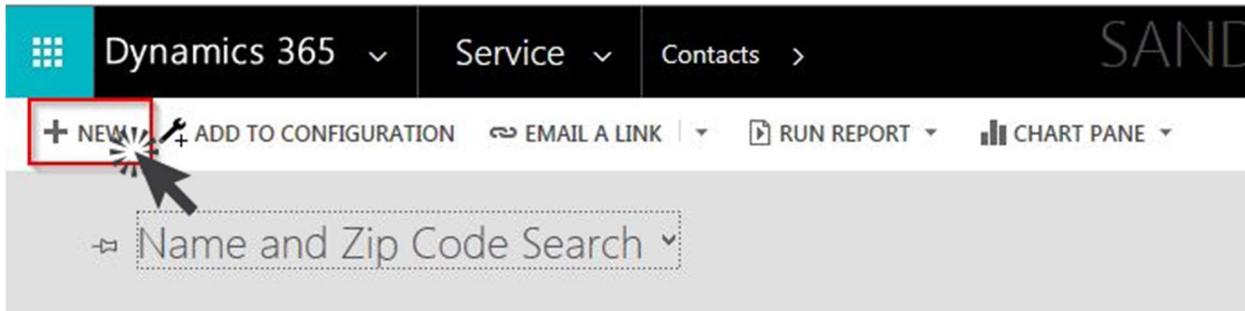
1. **Click** the down arrow next to the label "My Active Contacts"
2. **Select** a new view from the list. For example: "Name and Zip Code Search"



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.

**i** 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”**

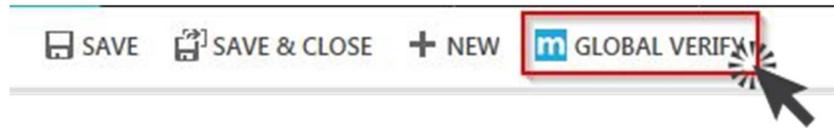
Missing information will be indicated by red “X” next to the field.

## 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

Primary Address	
Mail is Undeliverable	<input type="checkbox"/>
Attention	.....
* Street 1	24th Ave
Street 2	.....
Street 3	.....
* City	Seattle
* State/Province	WA
* ZIP	98115-4604
Country	United States of America
Demote Primary Address	<input type="checkbox"/>
Global Processed Results	AV24 - Verified to Premise 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:

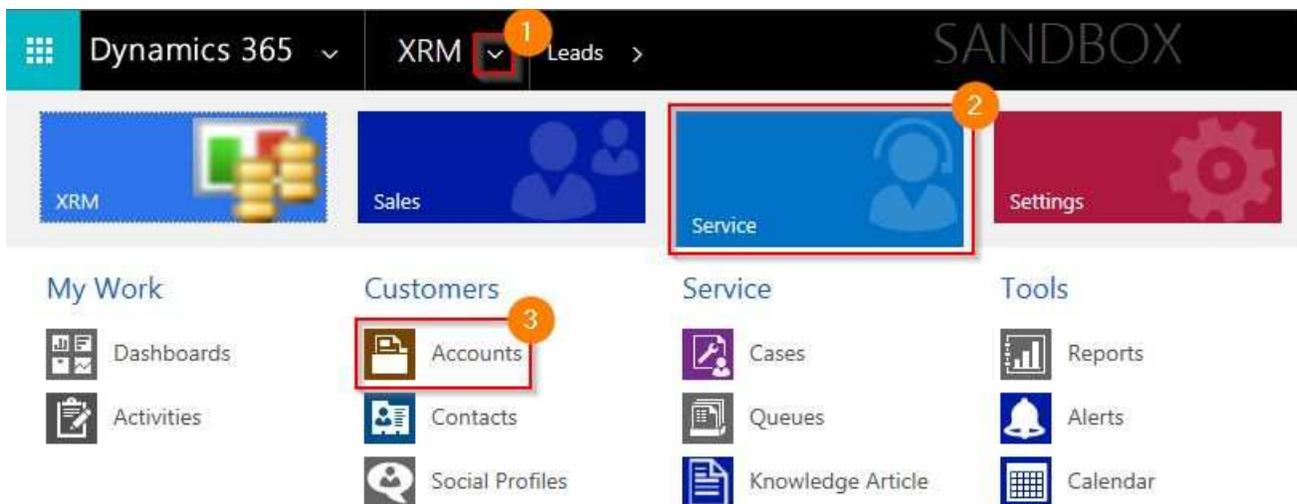
**Click** “SAVE” from the top white menu

# Access Accounts View

 An "Account" is the record for an Organization.

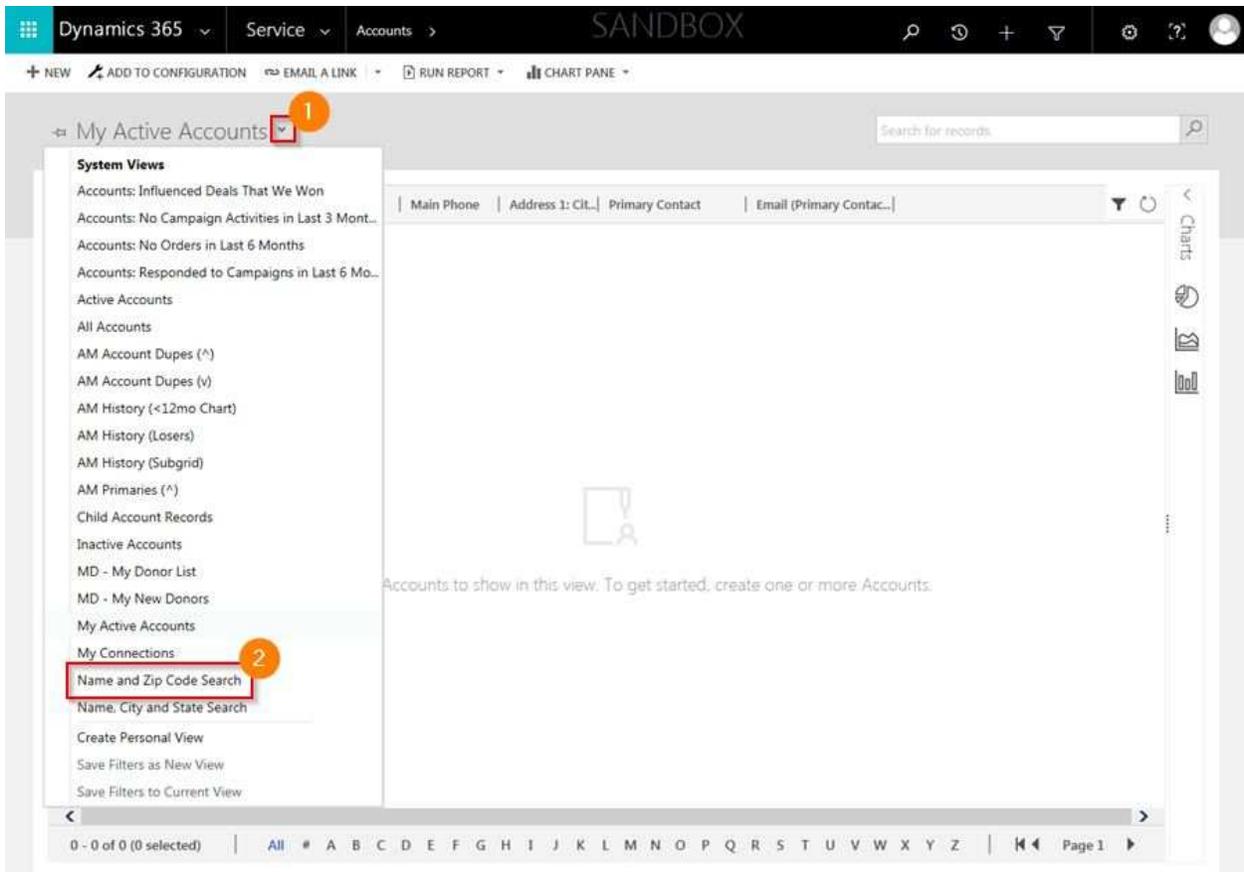
Locate the top menu bar.

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.

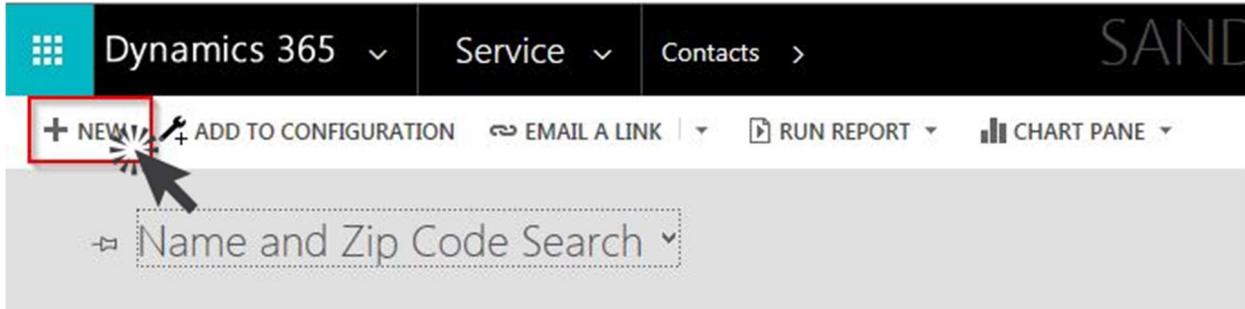
1. **Click** the down arrow next to the label "My Active Accounts"
2. **Select** a new view from the list. For example: "Name and Zip Code Search"



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.

**i** 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”**

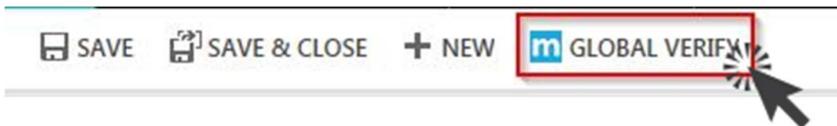
Missing information will be indicated by red “X” next to the field.

## 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.

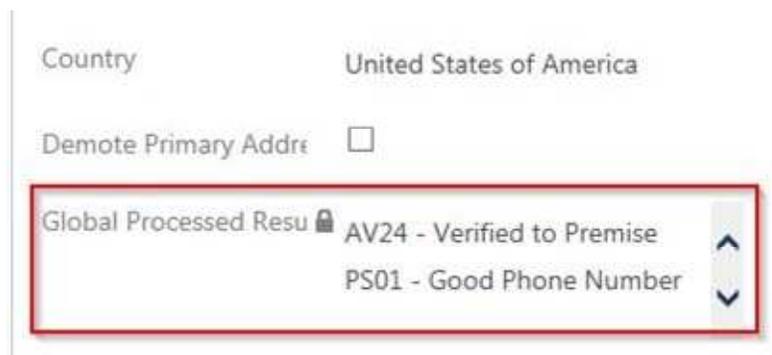
**Step 2:** *Click* “GLOBAL VERIFY” from the main white menu.



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 <i>[will return all matching records]</i>
By Wild Card Name	J* Smith <i>[will return all records with First Name starting with “J” and Last Name matching “Smith”]</i>
By Zip code	98001 <i>[will return all matching records]</i>
By City	Seattle / Federal Way <i>[will return all matching records]</i>
By Email Address	jsmith@altavista.com <i>[will return all matching records]</i>

 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:

Look for:	Contacts	Use Saved View:	[new]
▼	First Name	Equals	John
▼	Last Name	Equals	Smith
▼	Address 1: City	Equals	Seattle

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

Example 2:

Look for:	Contacts	Use Saved View:	[new]
▼	First Name	Equals	John
▼	Last Name	Equals	Smith
▼	Address 1: State/Province	Equals	WA

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.

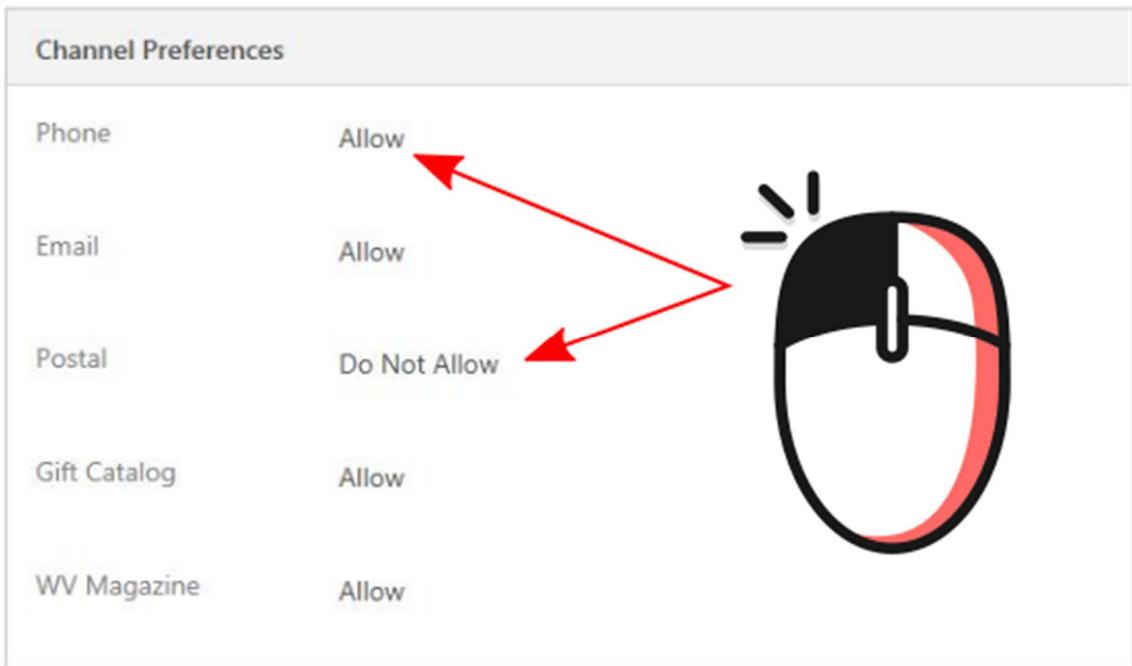


## Add a Channel Preference



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

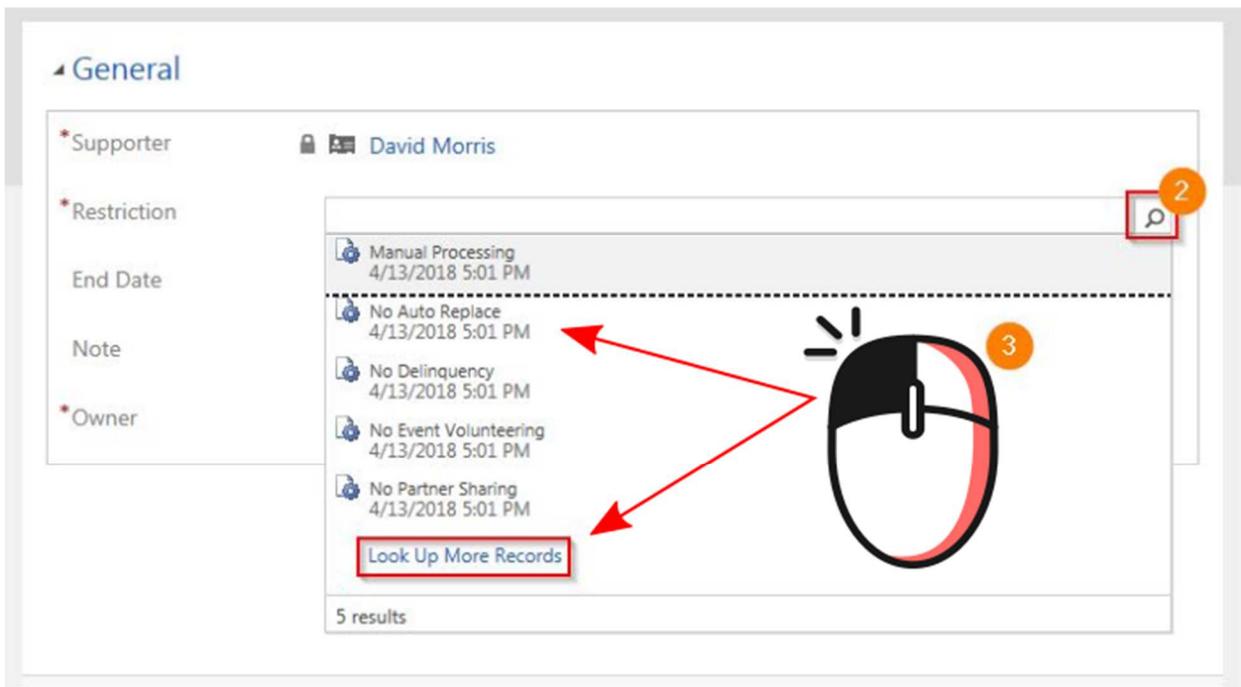
**i** Add a “Restriction” to alert a user of special treatment for the Contact or Account.

**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.



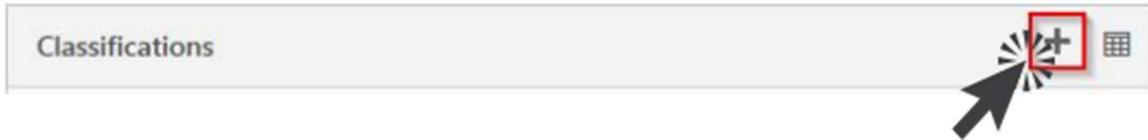
**Step 4:** *Click* “SAVE & CLOSE” from the top white menu to save your changes.



## Add a Classification

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

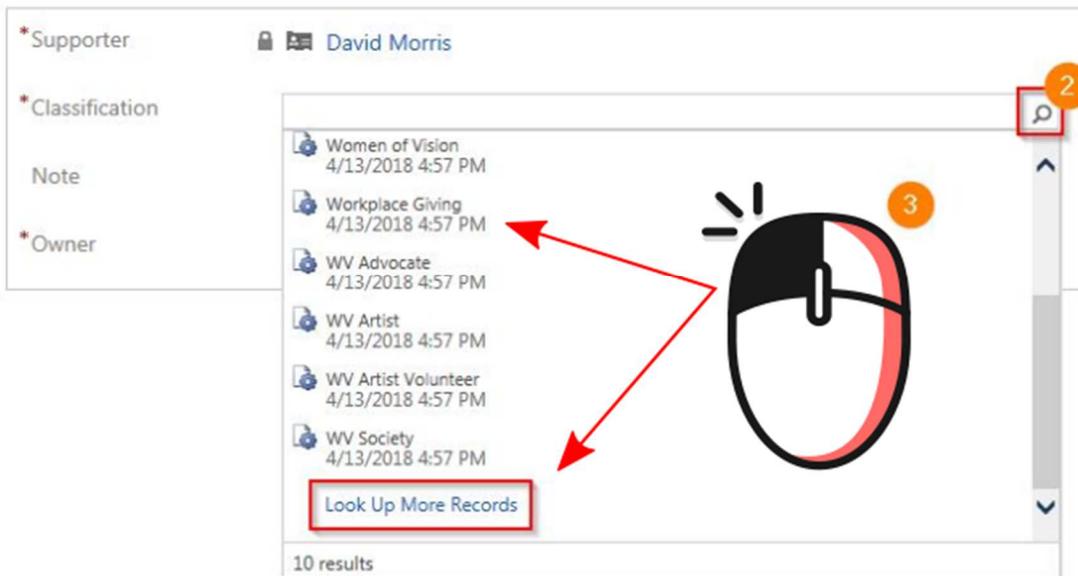
**Step 1:** *Click* the “+” to begin adding a new Classification.



**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.

#### General



**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.

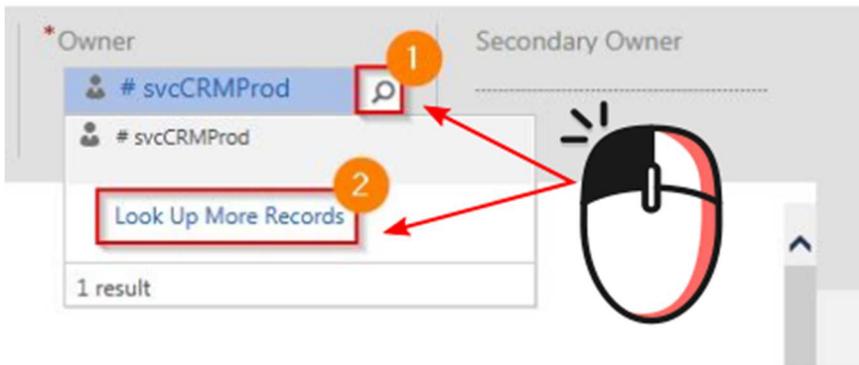
# Add an Owner or Secondary Owner



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

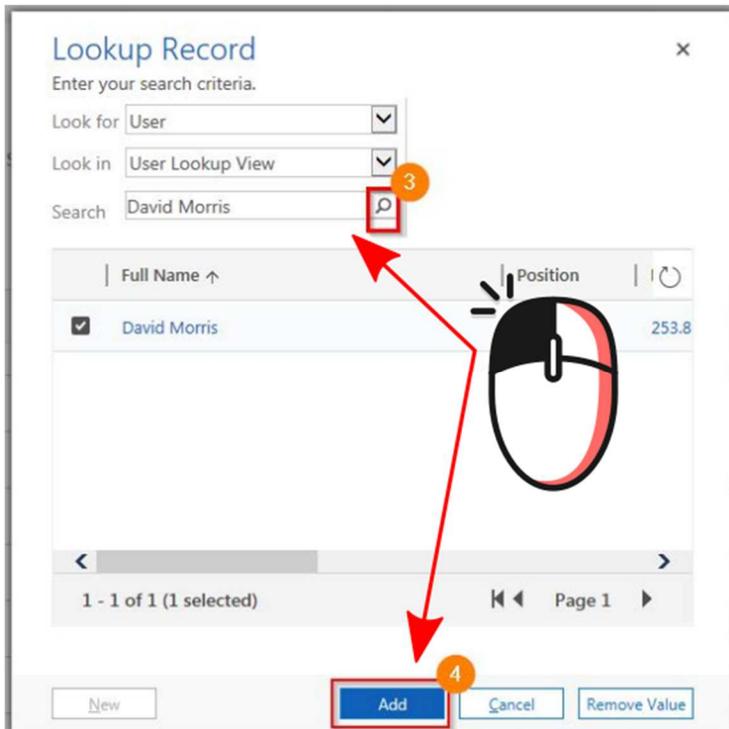
**Step 1:** *Click* the Magnifying Glass icon next to the label “Owner” or “Secondary Owner” in the top gray bar, to open a list of available Owners.

**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.

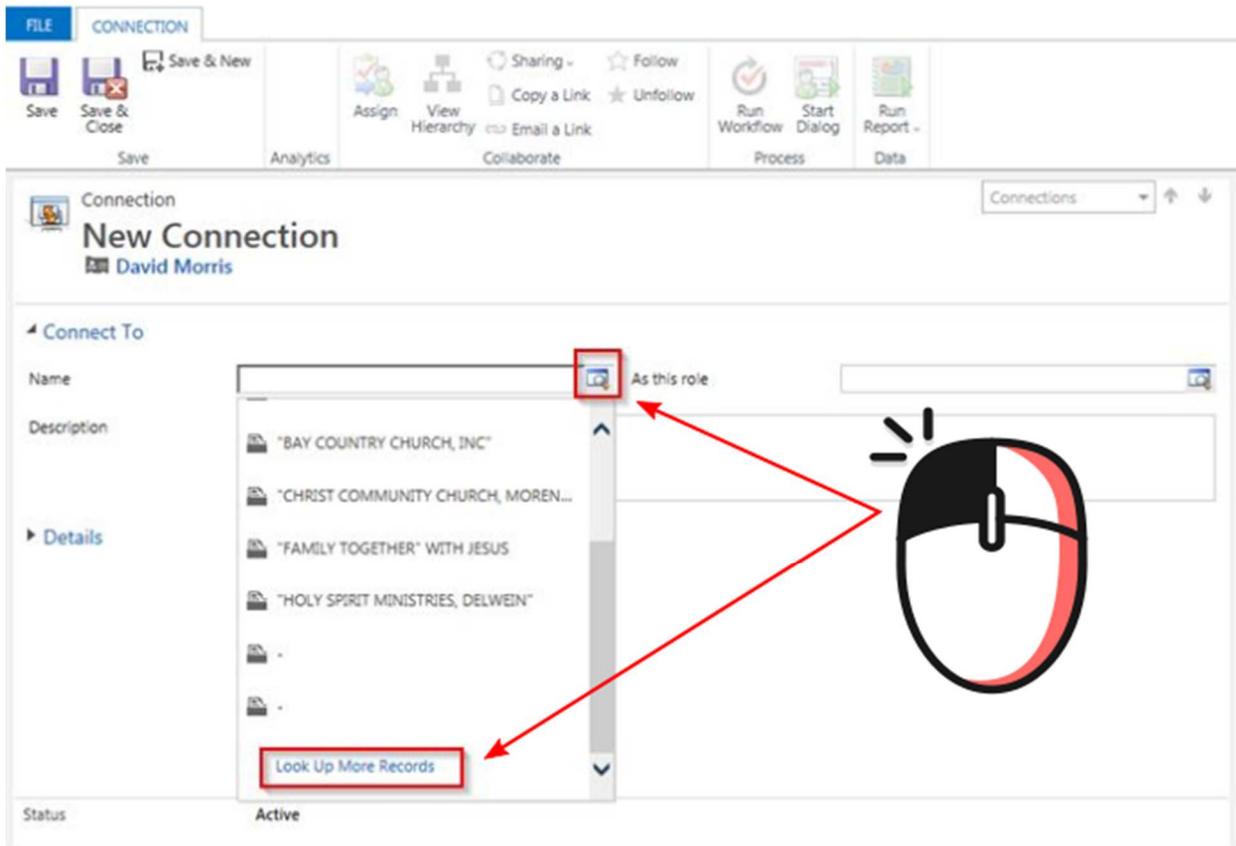
**Step 2:** *Click* “Connect” from the top white menu.



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

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

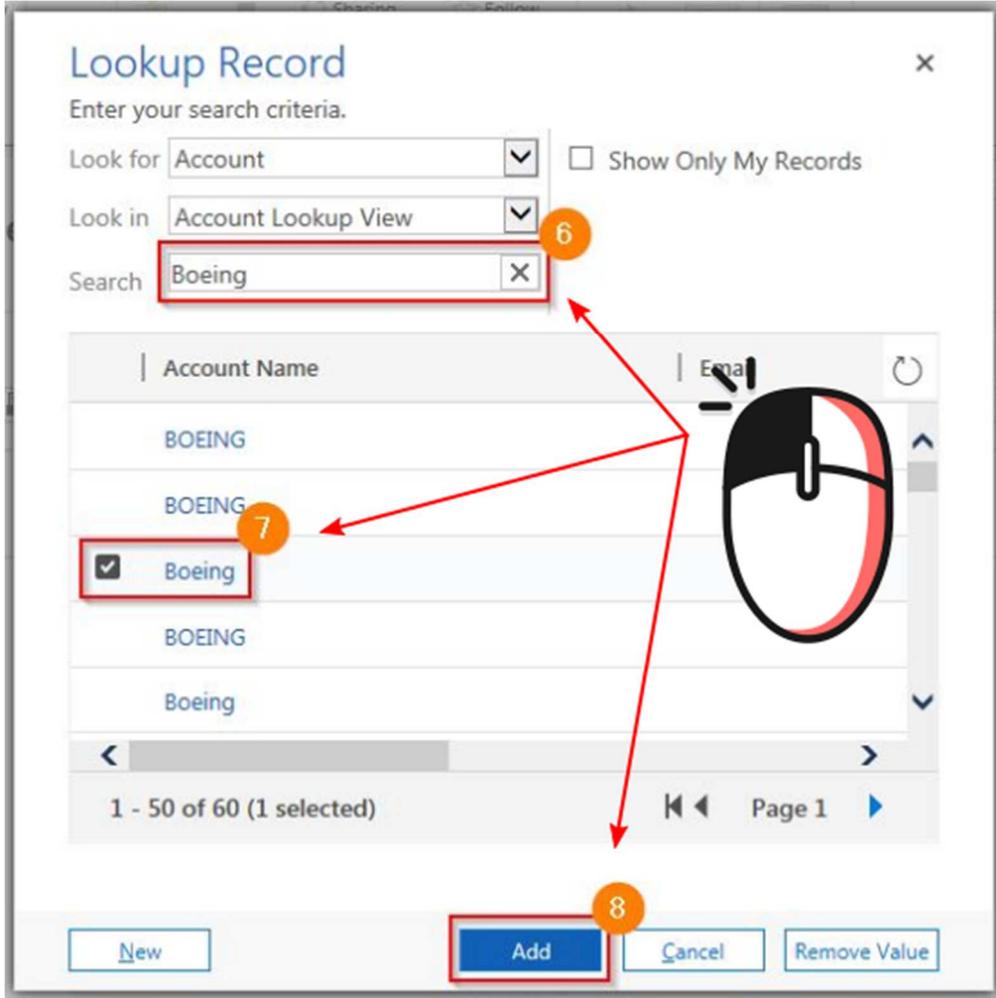
**Step 5:** *Choose* “Look Up More Records” at the bottom of the list.



**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.

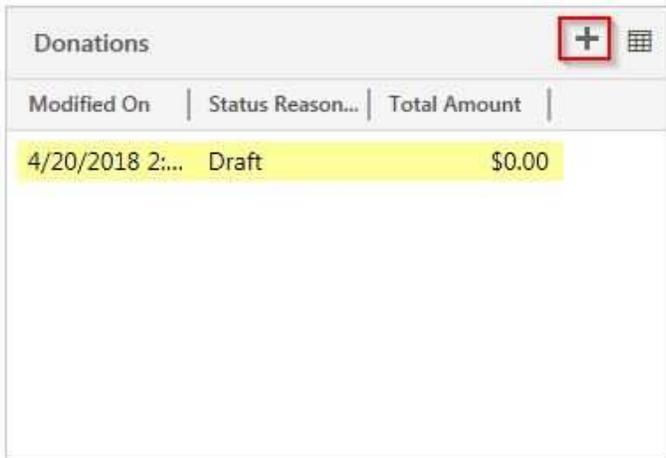
Connections <span style="float: right;">☰</span>		
Connected To ↑	Role (To)	Description
 Boeing	Employer of	In charge of Employee special giving

# 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.

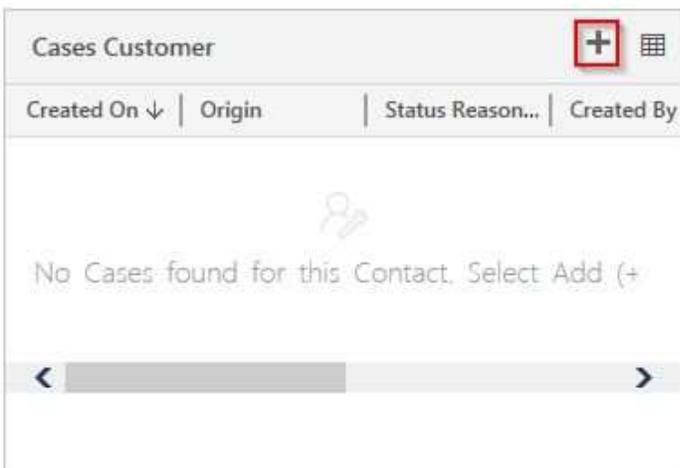


Donations		
Modified On	Status Reason...	Total Amount
4/20/2018 2:...	Draft	\$0.00

## 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.



Cases Customer			
Created On ↓	Origin	Status Reason...	Created By
No Cases found for this Contact. Select Add (+)			

## 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.

ACTIVITIES NOTES

Enter a note

ASF\_OTHER  
ADD CHG PER PO 051508  
Created by: BEANDERS  
Created On: May 16 2008 12:40PM  
Source Modified By: BEANDERS  
Source Modified On: May 16 2008 12:40PM  
# svcCRMProd - 09/30/2016 3:47:27 PM

## 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.

Campaigns Contact has Received +

Name	Start Date ↓	Status
No Price Lists found for this Contact. Select Add (+).		

Lead Source [lock icon]

## 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.

Supporter VOD		+	☰
Name ↑		Created On	
Field Related - Child Info - NA - NA		4/19/2018	
Order/Account/Fulfillment - Commitment Sa...		4/19/2018	
Prayers/General/Service - Prayers - NA - NA		4/24/2018	
Prayers/General/Service - Too Much Contact ...		4/24/2018	

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”

The screenshot shows the Dynamics 365 navigation bar with the following items: Dynamics 365, Service, and Contacts > A J FROST. Below the navigation bar is a 'Common' section with a grid of icons and labels. The 'Voice of the Donor I...' icon is highlighted with a red box and a '2' callout. A '1' callout points to the dropdown arrow next to 'A J FROST'.

Common		
Orders	Donation Methods	PowerOneView
Activities	Agent Actions	Voice of the Donor I...
Connections	Supporter Classificat...	
Audit History	Supporter Restrictions	

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

UAT Procedures Document

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