Silverbear Membership Solution

UCI – SALES, MARKETING, AND FUNDRAISING: SALES

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Approval

Approver	
Date of latest approval by Management	

Version History

Version	Date	Author	Change Details	Reviewed by
1.0	March 2020	SUSANNAH PATRICK	CREATED	

Video

Video guide available	Video URL	Last updated

Guide Purpose and usage

To accompany the Silverbear Sales, Marketing & Fundraising Modules

To help Silverbear clients use the Sales functions on Silverbear, including creating and developing leads, converting into Opportunities, and using the quotes and orders functions

Please note that configuration will have taken place and may be continuing on your environment, and forms and layout options are likely to change. This guide should be used purely to give you an overview of navigation.

Pre-Requisite Modules	Recommended Modules
Silverbear Fundamentals – Introductory	Memberships Subscriptions and products – Introductory
	Silverbear Fundamentals – Intermediate

Pre-requisite specialist Skills
Advanced finds
*pre-requisite skills are covered in these modules

Recommended follow up Modules

1. Introduction to Leads and Opportunities

1.1. What are Leads?

Leads are early-stage enquiries from individuals or businesses. They may be from contacts or organisations that already exist on your system or they may be from other interested parties who you do not yet want to add to your CRM until you have found out more about them and whether they will have relationship of some kind with your own business. Recording them as a Lead allows you store their information and potentially progress them into a paying client through a qualification process.

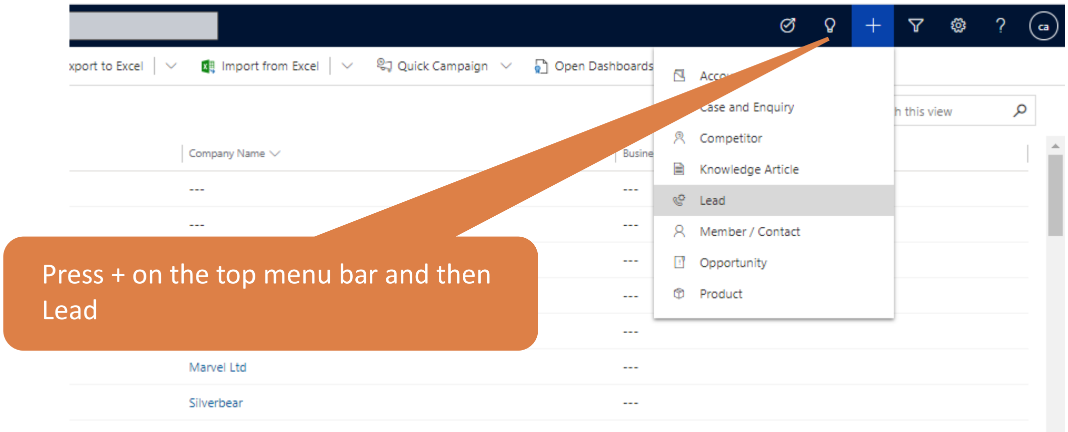
1.2. What are Opportunities?

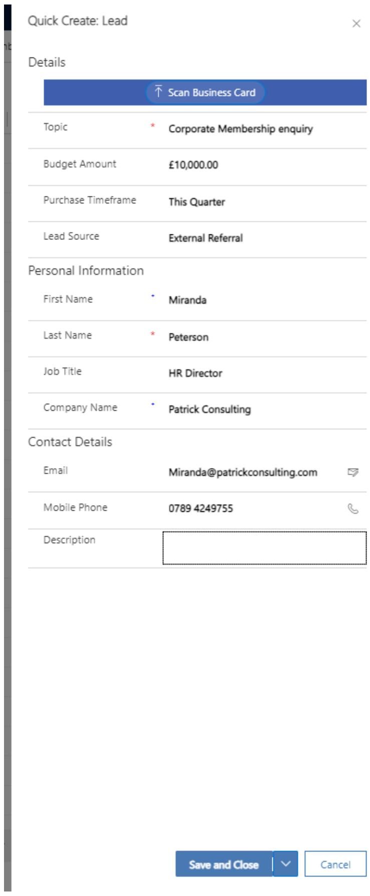
Opportunities are the next stage in the lead management process – a lead will become an opportunity once you have qualified it and decided it should now be an opportunity record. This allows you to differentiate between your new and your qualified leads. There is additional functionality connected to Opportunities, for example you can create a quote from an Opportunity record

2. Creating Leads

2.1. Manually through quick create

- Press the + button on the top menu bar and choose Create Lead



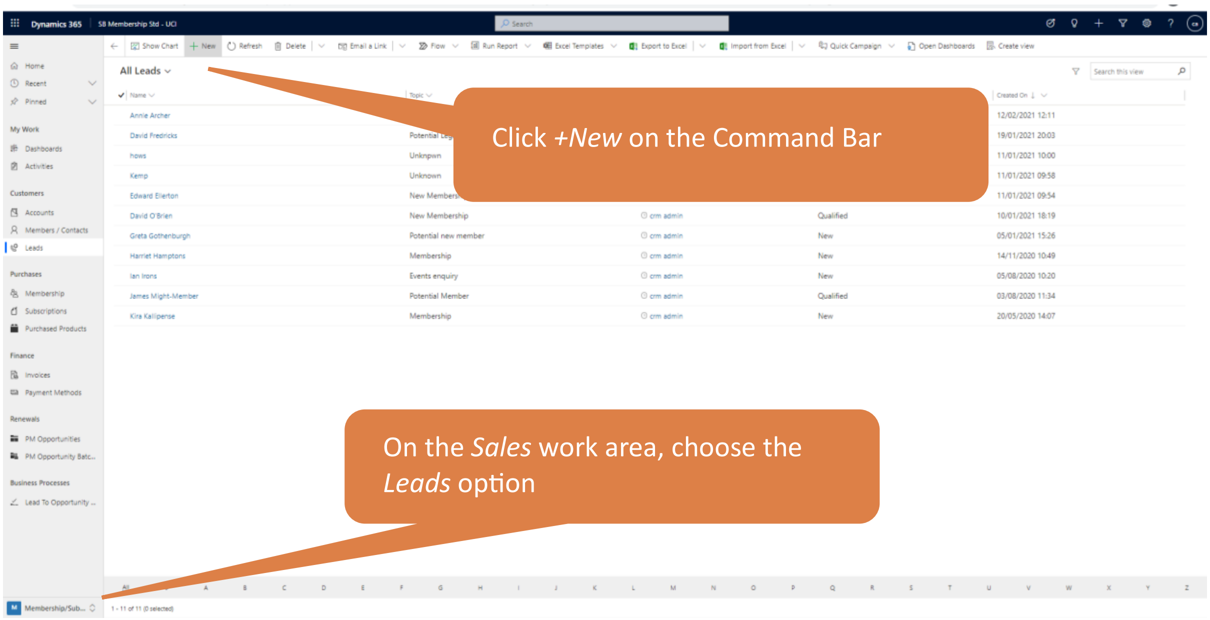


- Complete the quick create record
- Note that this is not the full Lead record card but just the basic details
- Press Save & Close
- You will be able to access the full record card (from Recent or by searching) later to enter more information and progress the lead

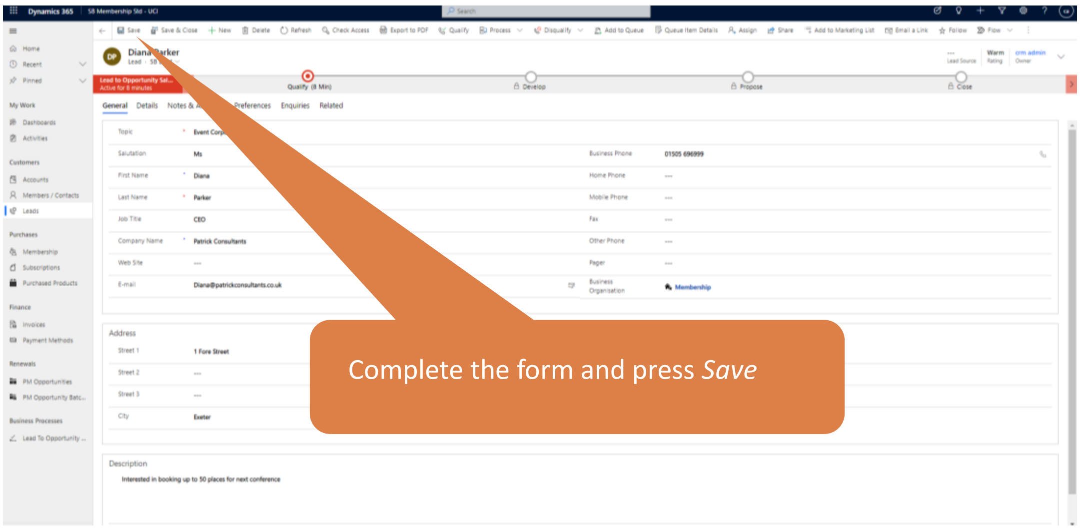
Complete the short form and press *Save and Close*

2.2. Manually through the main Lead record card

- Go to the *Sales* work area (your relevant work area may be labelled different, e.g. Sales & Marketing)
- Click on the *Leads m*enu option
- You will see all current leads (you can change the view, sort, filter etc to manage your list of leads)



- Press + *New* on the Command Bar
- Complete the record – you will notice that there are many more fields than on a quick create form, particularly if you access the different tabs
- Press *Save* on the Command Bar

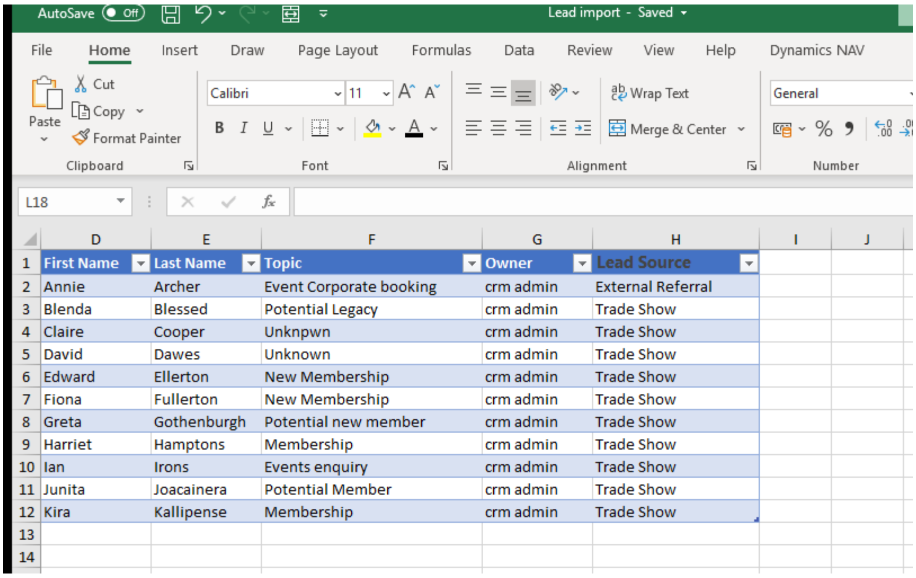


2.3. By Importing a list

- Before you can import a list of leads you need to have a correctly formatted excel sheet with those leads on them.
- The easiest way of doing this is to either look at an existing lead record and see how the fields are labelled, or have a view set up with the columns of information you

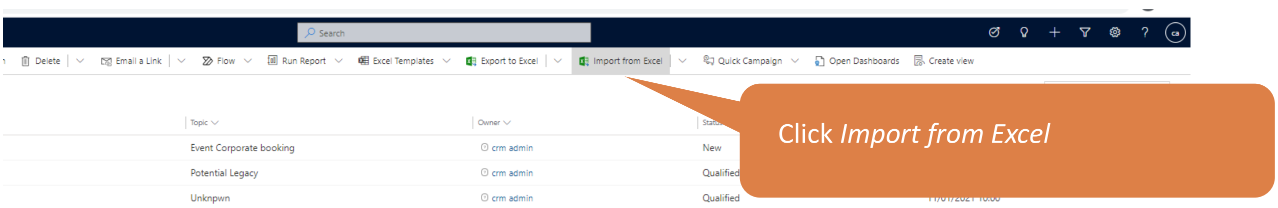
are likely to import e.g. First Name, Second Name, Lead source and then Export that view.

- Please see the Silverbear Fundamentals Intermediate module for more information on creating views. To export a view, click *Export* on the Command bar once you can see the view on the screen.
- After exporting the view and looking at examples you can use this as a template for your import
- You might want to do a test import first into your UAT before importing into Live



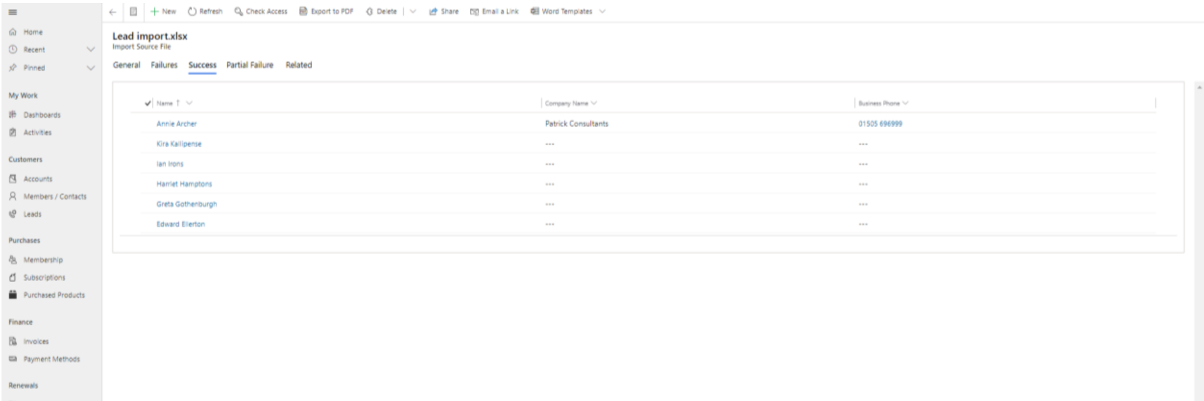
	First Name	Last Name	Topic	Owner	Lead Source
2	Annie	Archer	Event Corporate booking	crm admin	External Referral
3	Blenda	Blessed	Potential Legacy	crm admin	Trade Show
4	Claire	Cooper	Unknpwn	crm admin	Trade Show
5	David	Dawes	Unknown	crm admin	Trade Show
6	Edward	Ellerton	New Membership	crm admin	Trade Show
7	Fiona	Fullerton	New Membership	crm admin	Trade Show
8	Greta	Gothenburgh	Potential new member	crm admin	Trade Show
9	Harriet	Hamptons	Membership	crm admin	Trade Show
10	Ian	Irons	Events enquiry	crm admin	Trade Show
11	Junita	Joacainera	Potential Member	crm admin	Trade Show
12	Kira	Kallipense	Membership	crm admin	Trade Show

- Once you have your list ready, navigate back to the list of leads (go to *Sales* and then choose the menu option *Leads*) and press *Import From Excel* on the Command Bar



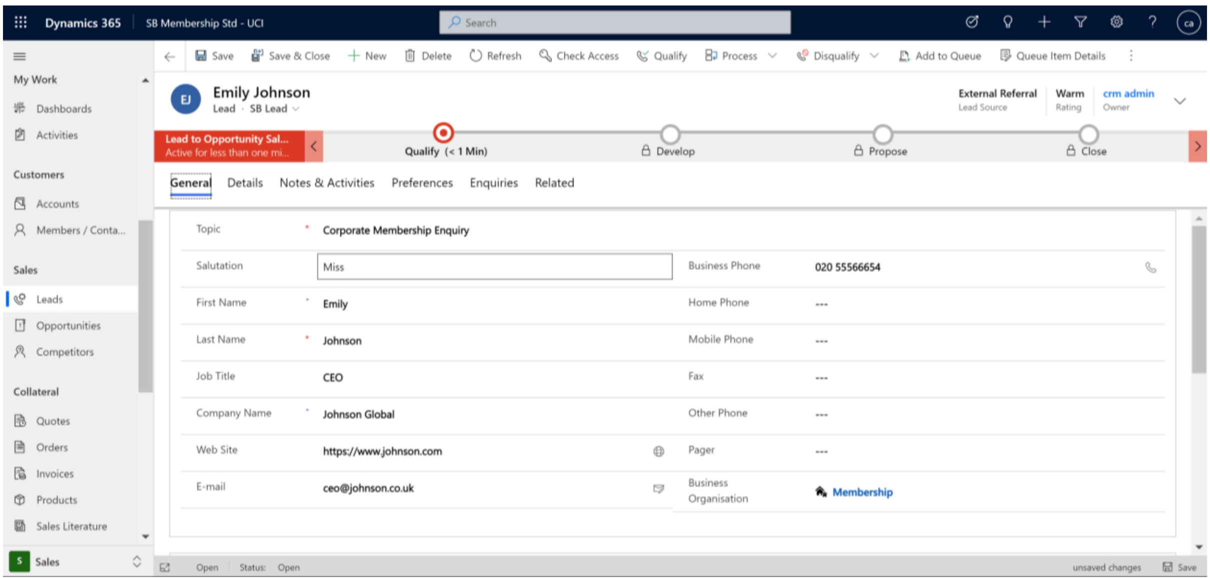
- Choose your file and press *Next*
- On the next page you can choose if you will allow duplicates to be created during this import process.
- You can also *Review Mapping*. This is particularly useful if you are importing a list of leads and you haven't used an export to create your template but instead need to choose which fields on your list represent which fields in CRM.

- Press *Finish Import* once you are confident that the fields will be mapped correctly (the right data will go into the right CRM fields on a Leads record)
- You should then see a message “your Data has been submitted for import”
- The process will take a few minutes, or longer if you are importing a great deal of records. You can follow the progress by choosing the *Track Progress* button. This will take you to the *My Imports* view which will show all imports, current and processed and will show you any errors which have occurred
- From *My Imports* you can click through completed imports to see successes and failures



3. Developing and monitoring leads

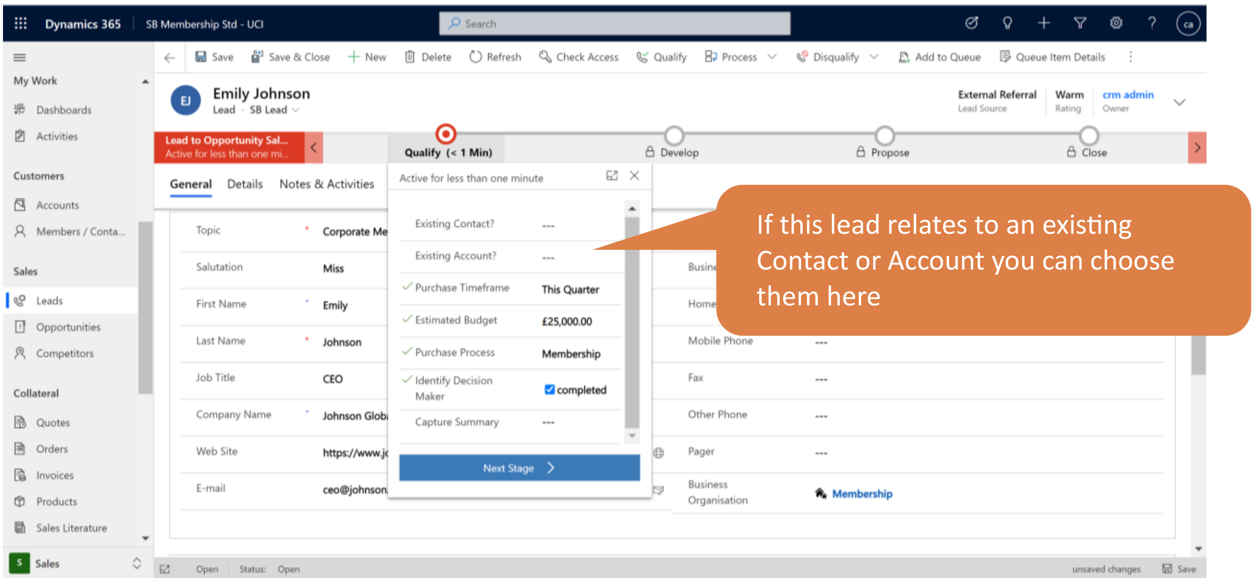
- As part of the sales process you will develop the information you have for a lead and populate more of the fields on the record.
- Some of this can be entered through the Qualification process (see next section), however some fields are built into the record card. Most fields are optional as standard but a detailed lead record is very useful in terms of business insights



- the *Rating* (Hot, Warm, Cold) allows you to identify how likely a prospect is to lead to a sale – this field can be used in views to pull out leads of a certain rating
- You might find it helpful to use the *Assign* process (click *Assign* on the Command Bar) to allocate leads to individual team members
- The *Notes & Activities* screen allow you to add and view interactions between your company and this lead
- The *Preferences* screen should be used to record and check the ways you are entitled to contact this lead – e.g. by Bulk Email
- Choose *Related* and then *Competitors* to store information about any competitors that your lead is considering
- Click *Related* and then *Marketing Lists* to add this record to an Existing Marketing list or create a new Marketing List

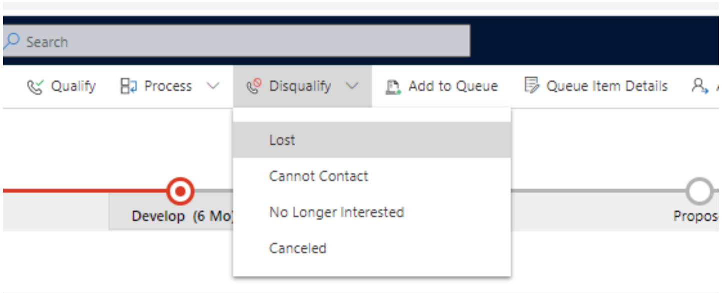
4. The Qualification Process (business flow)

- Along the top of the screen is a business flow which will help you carry out the steps to Qualify this lead (turn it into an opportunity)
- You can click on the different sections to see the details of the stage requirements. Note that not all fields will need to be completed
- The Qualify stage allows you to enter specific procurement information as well as link the lead to an existing Account or Contact



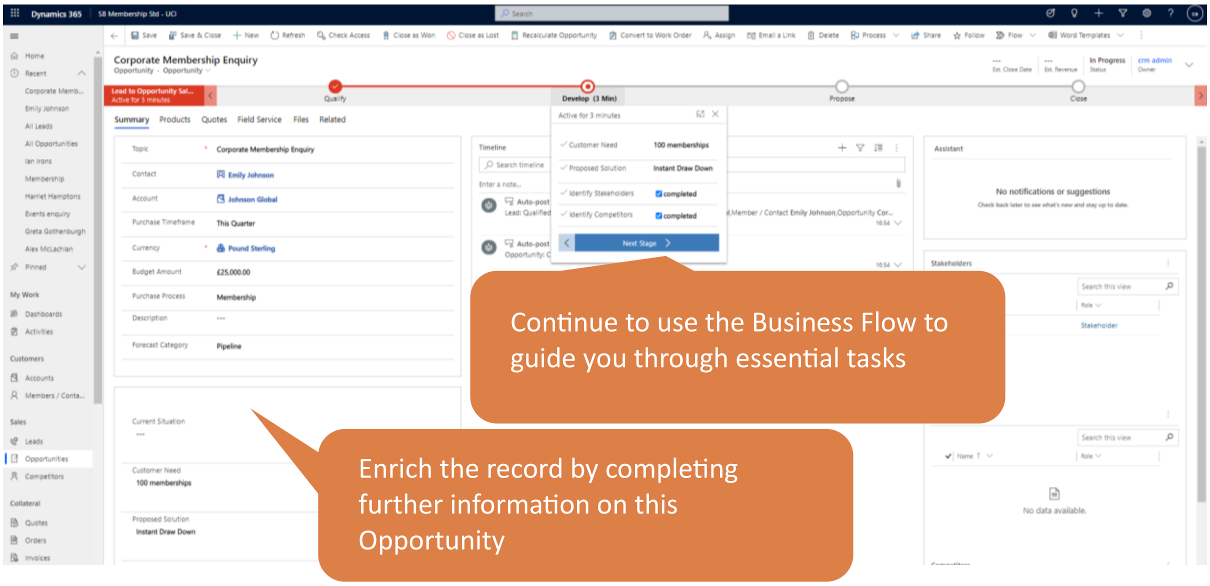
- To move on to the next stage you will need to Qualify this lead – this will then change the Lead into an Opportunity – press *Qualify* on the Command bar. When this process is complete a new record will be created with all of the information from the lead and the lead will close

- To close the lead without qualifying choose the *Disqualify* option on the command bar and then the most relevant reason



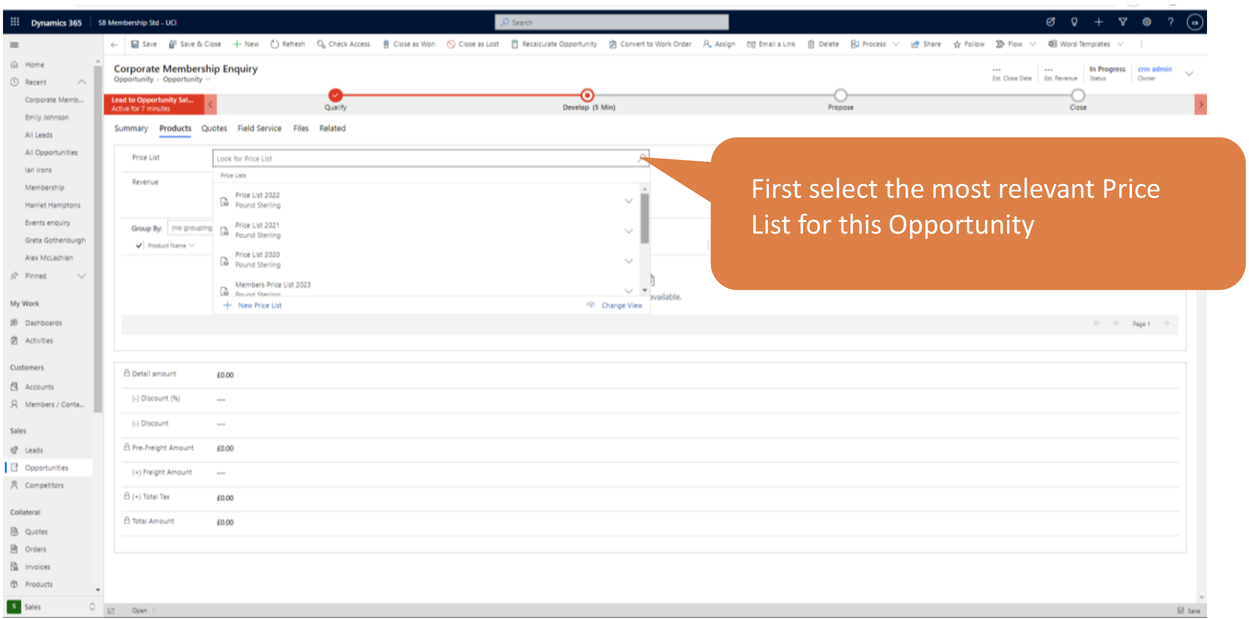
5. Accessing and updating Opportunities

- When you first create an opportunity from a lead the new opportunity will appear on a screen.
- A new Contact and or Account/Organisation will have been created alongside the Opportunity record. If you already selected the Contact and/or Account on the lead record then the Opportunity will be linked to those instead
- To access a list of opportunities go to the Sales work area and choose the *Opportunities* menu option
- The information from the lead record will have been transferred to the opportunity, however now you can start to develop this further by adding further details such as Stakeholders and other information to enrich this record
- You will also be able to start building a quote – see the following sections
- The timeline has been transferred from the lead and you can continue to update this by adding new interactions
- Using the business flow at the top of the screen allows you to show how this opportunity is progressing



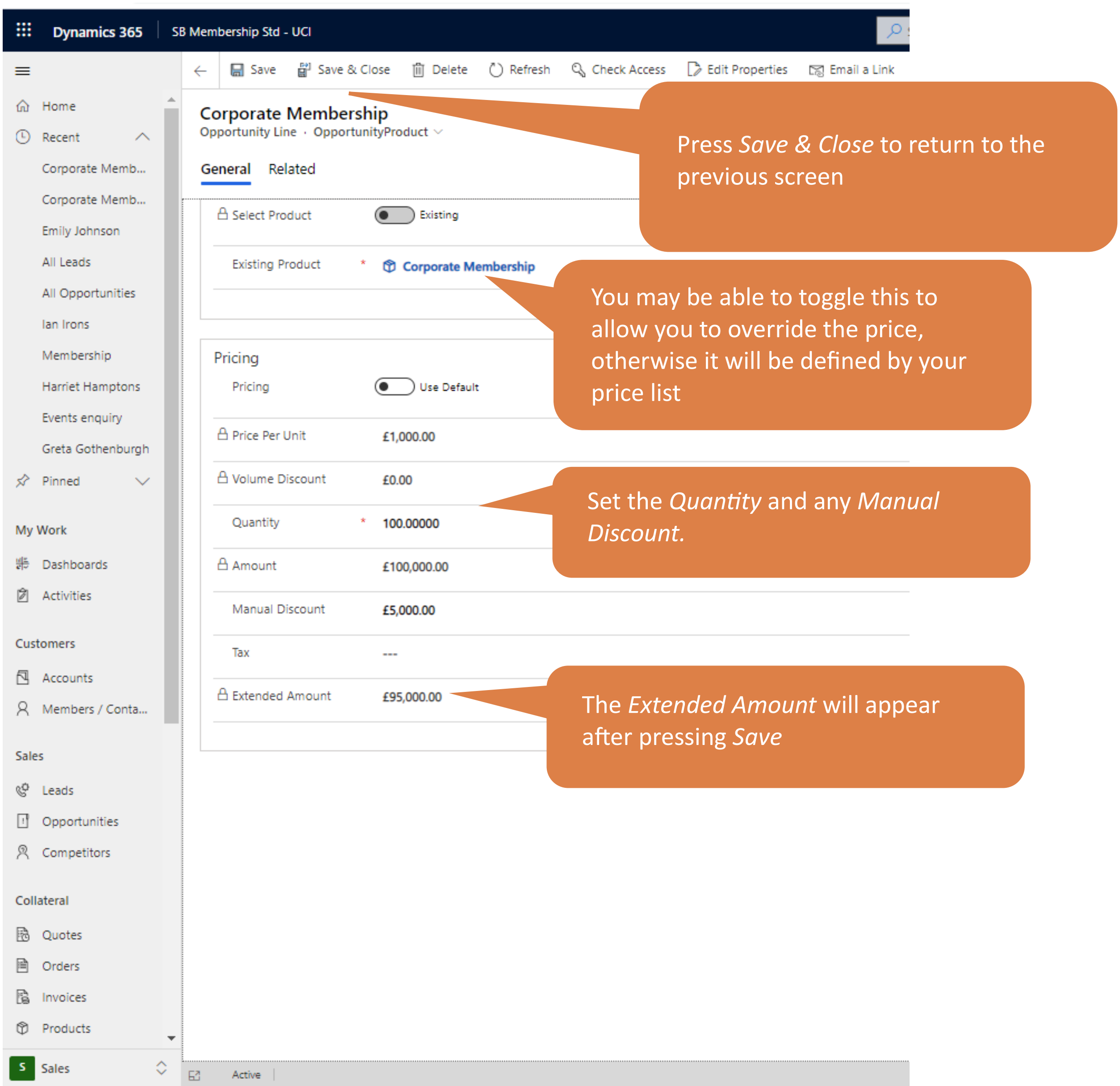
6. Building a quote/proposal – stage 1: adding Products

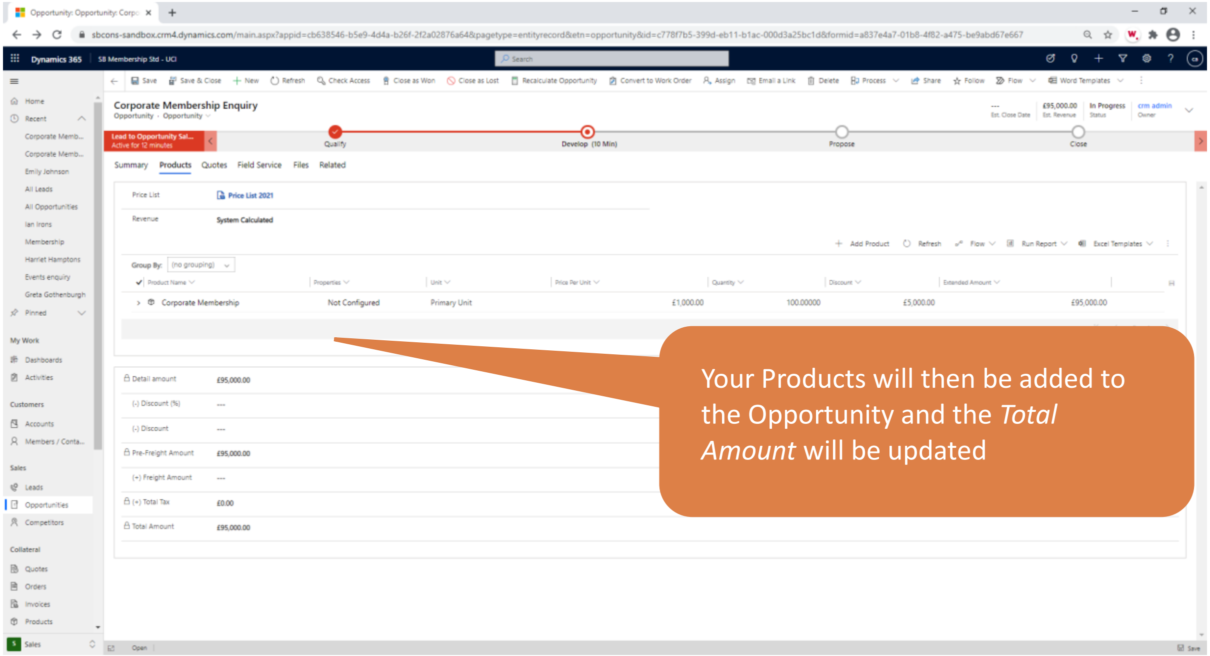
- Silverbear allows you to build a quote using the existing products and pricing on your CRM. This is optional, if you do not wish to create a quote then you can still record the opportunity as lost or won – please see later sections
- To begin this process, click on the Products tab and click the magnifying glass at the end of the *Price List* field. You may have different price lists for different periods, currencies, and different types of clients. Choose the correct option for this opportunity
- Press *Save*



- To add products and build up a quote, press *+ Add Product*
- Go to the *Existing Product* field and type in part or all of the product you would like to add to a quote

- You may the option to switch the pricing from Use Default to Override price (which allow you to enter a specific price for this opportunity)
- Add the *Quantity* and any *Manual Discount*
- Press *Save & Close*
- Repeat the process for any further products
- The *Total* will update on the product tab

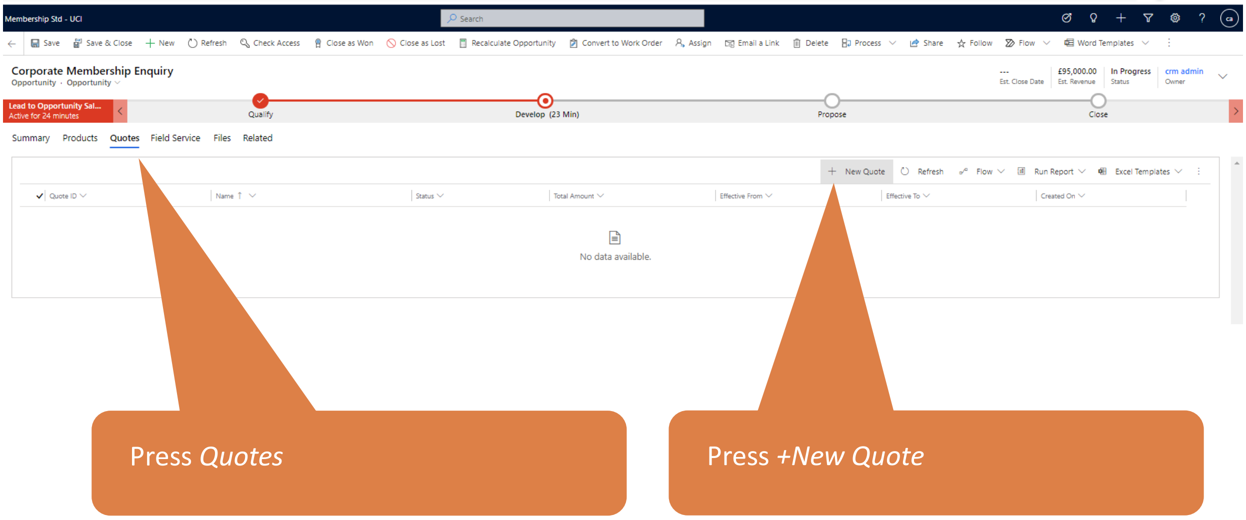




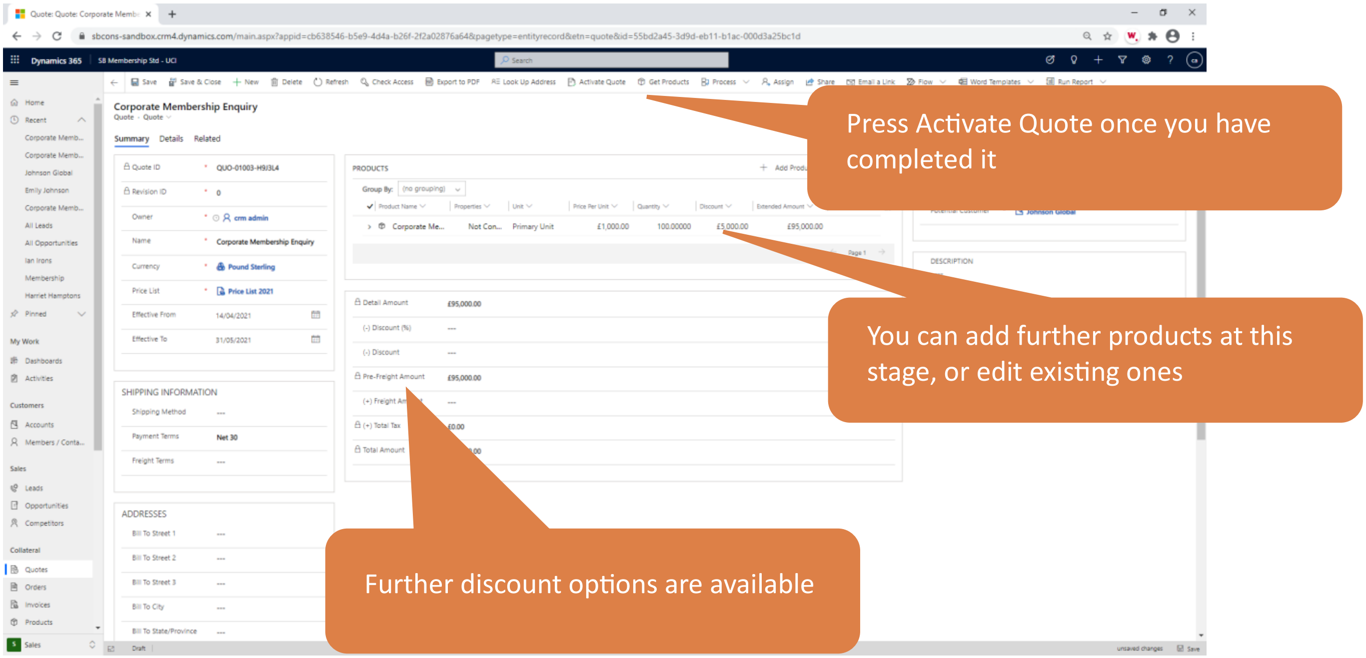
7. Building a quote/proposal – stage 2: Creating the Quote

You may want to use this record to create a written quote which can be emailed.

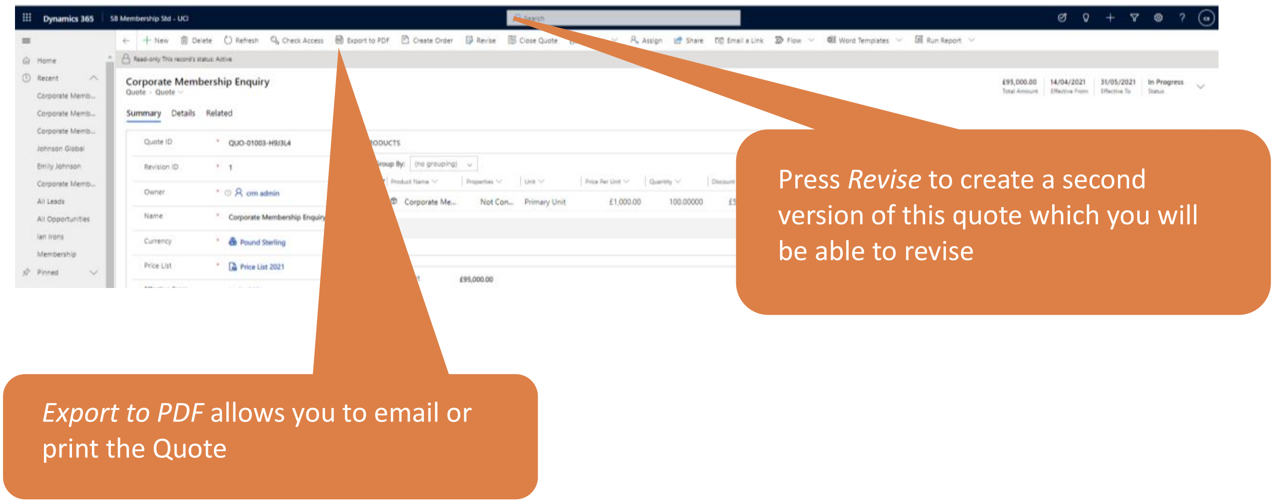
- Press the Quotes tab
- Press +New Quote on the Tool Bar



- Complete the Quote by adding any further products, or editing existing ones
- Adjust pricing and/or discounts as required
- Complete billing and payment term information
- Press *Save* once completed



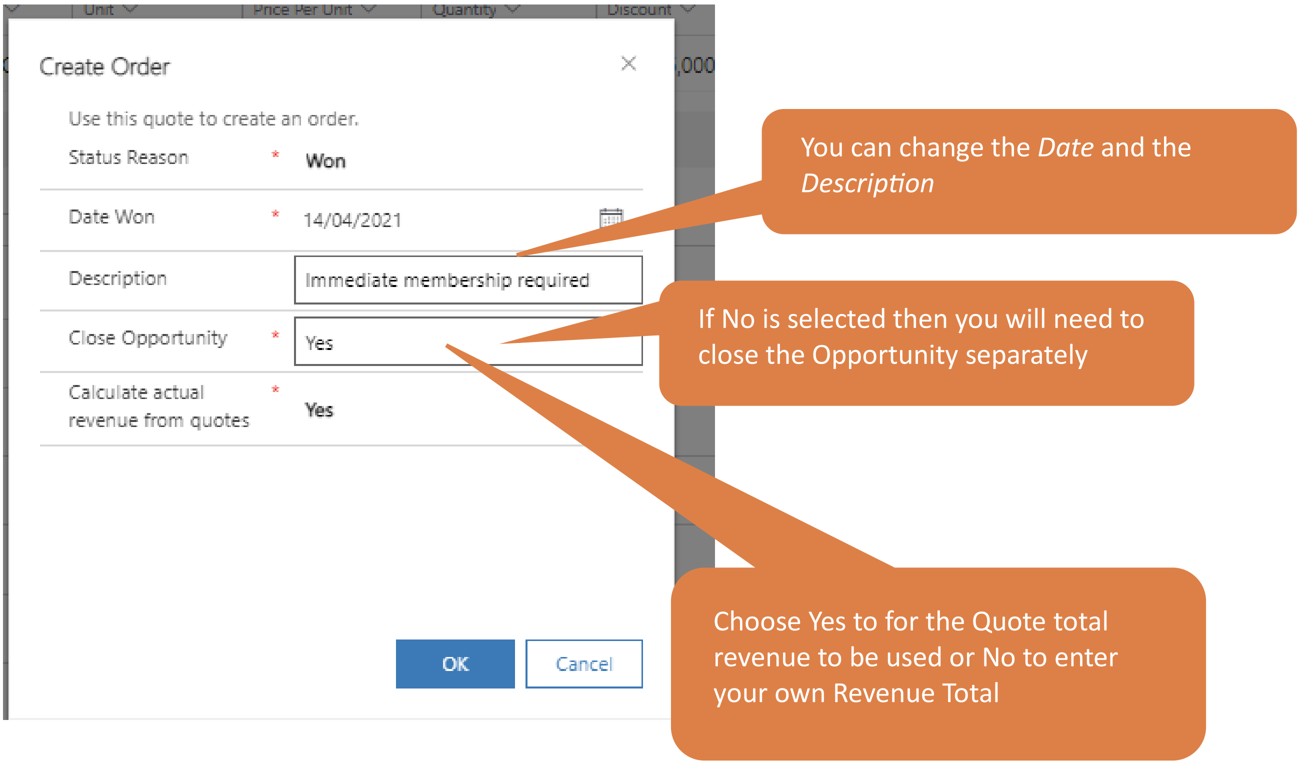
- When you are happy with the Quote, press Activate Quote on the Command Bar to move it from Draft to Active stage. This will effectively lock the quote
- If you need to change the Quote after activating it, you will be able to press Revise. This will create a copy of your original quote which you can work with
- Press Export to PDF for email and print options to send this quote to your prospective client



8. Converting a Quote to an Order

In this scenario your Quote has resulted in an order and you want to record this through the CRM. If you want to close the Quote instead then see the section below.

- Press the *Create Order* option on the Command Bar.
- A Pop up will appear with some options on how you would like to progress
- Choosing Yes to *Close the Opportunity* will give you the chance to choose how you want the Revenue to be created
- If you want to attach further quotes and orders and continue working with the Opportunity record then choose No
- Press Save once done, an Order record will be created and the Opportunity will be changed to Read Only with a *Status* Won if you have chosen to close it.



9. Accessing Orders

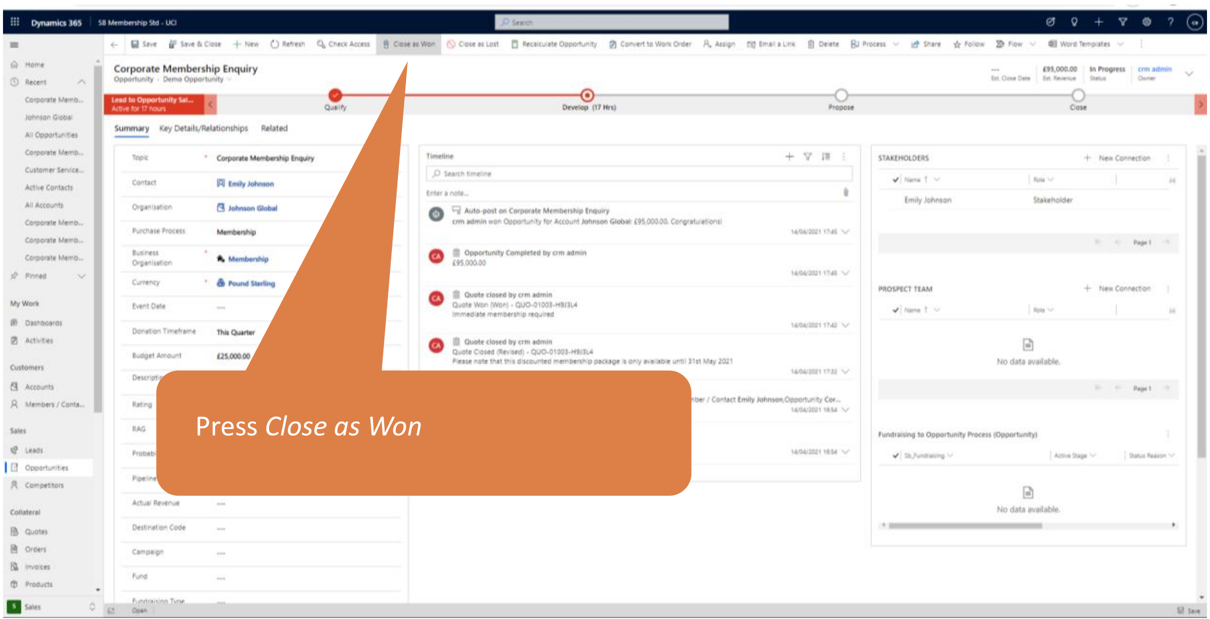
- Orders can be accessed from the Sales Work Area – then choosing Orders.
- They can also be accessed by clicking Related and then Orders when viewing the Quote record connected with this Order. You may also find them linked to the Contact and/or Account depending on your setup
- A Pdf version of an Order can be created and then emailed or posted to a client. Click the drop-down arrow next to Word Templates on the Command Bar when viewing an order to choose any template which have been created for your environment
- Please note that there is no link between an Order and the Silverbear Cart functionality. In order for the correct records to be created in Silverbear, an order, once processed would need to be re-created through the CART

10. Closing an opportunity in different ways

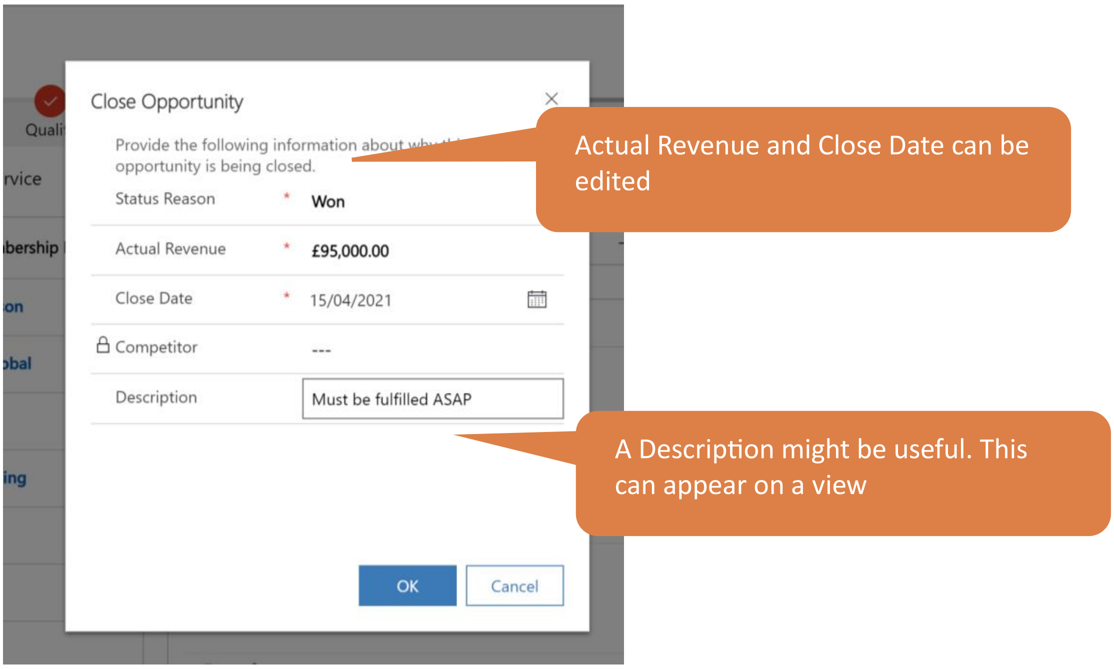
If you have not chosen the route of creating an order and closing the Opportunity that way, you can close the Opportunity directly and show whether it was won or lost.

10.1. Closing as Won

- Press *Close as Won* on the Command Bar

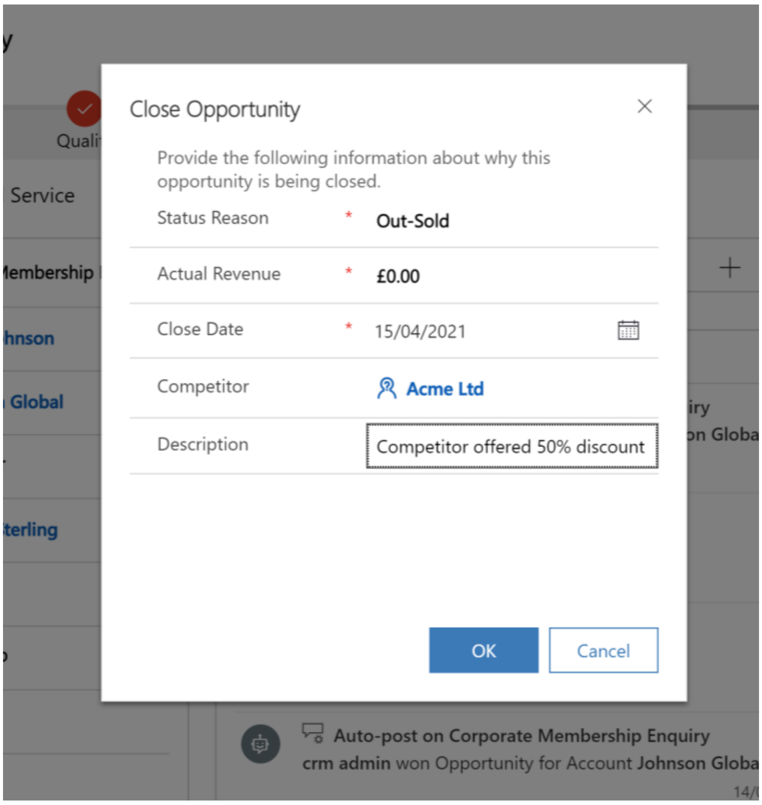


- A Pop-up will appear



10.2. Closing as lost

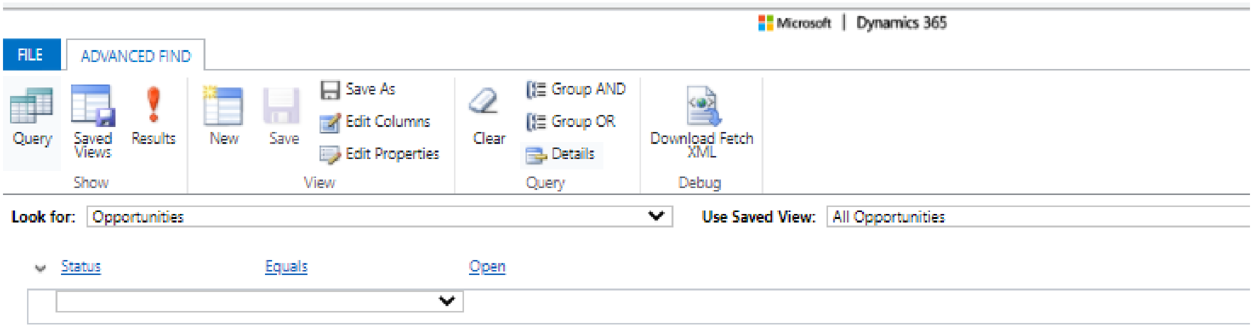
- Press *Close as Lost* on the Command Bar
- Complete the form to build up data on lost Opportunities



11. Accessing and Monitoring Leads and Opportunities

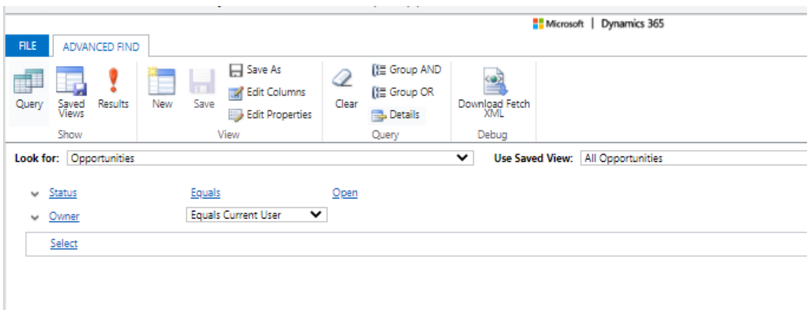
In order to monitor, develop and progress these records we recommend the use of views, charts, and dashboards. Please see the Silverbear Fundamentals Intermediate guide for more information on these processes. Some useful suggestions on views are shown below:

11.1. All Open Opportunities

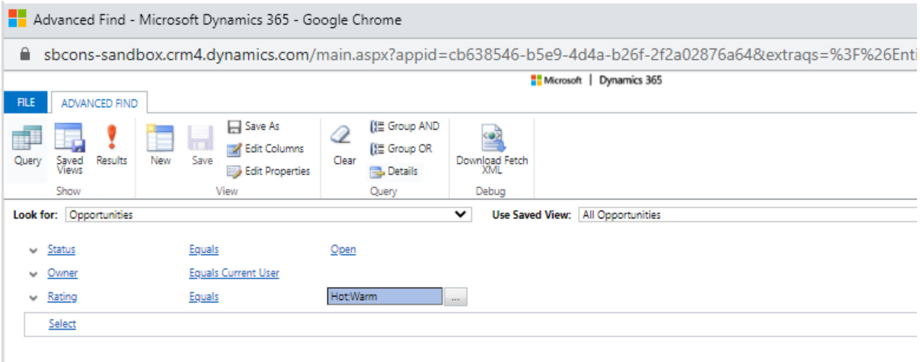


11.2. All Open opportunities belonging to the current user

This will show opportunities which are owned by the current Dynamics user. This ownership can be established if that person creates the opportunity record, but also if it is assigned to them. An opportunity or lead can be assigned to a user through pressing the Assign button on the Command Bar

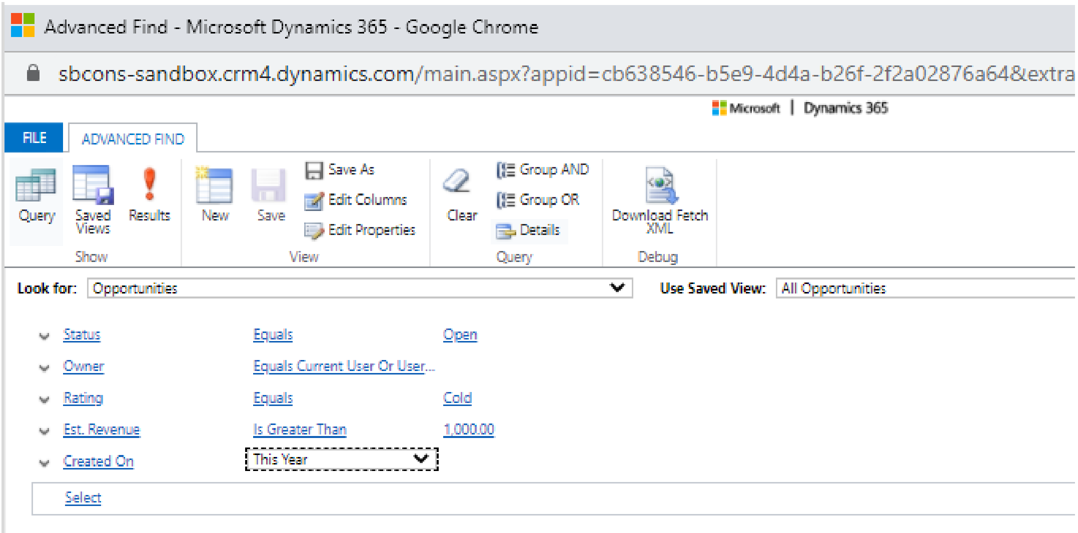


11.3. All opportunities (belong to the current user) with a Rating of Hot or Warm



11.4. All Opportunities (belonging to the current user or a member of the current user's team) with a rating of Cold, over £1k in value that were created this year

This is the type of view you may use to try to reactivate old prospects



11.5. All Opportunities belonging to the current user won this month