

## Silverbear Membership Solution

UCI – SALES, MARKETING, AND FUNDRAISING: SALES

Our purpose is to liberate the value of relationships within member organisations.



## UCI – SALES, MARKETING, AND FUNDRAISING: SALES

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Video guide available	Video URL	Last updated

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## 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.

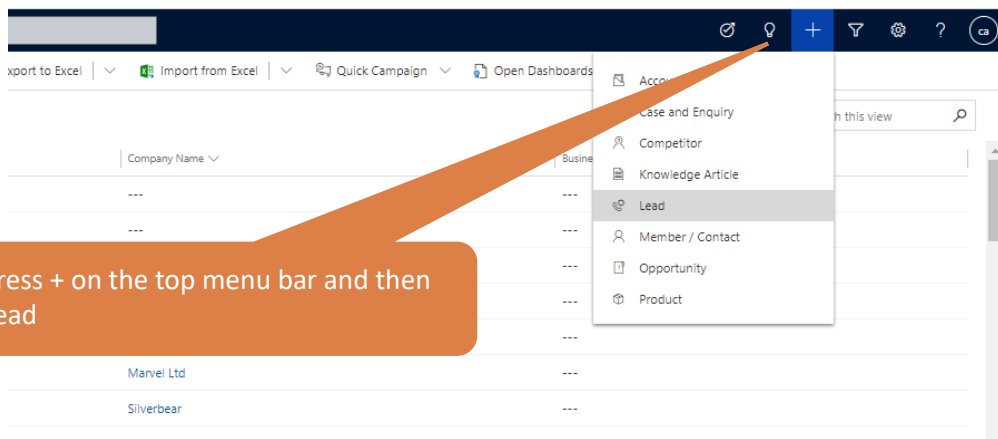
### 1.2. What are Opportunities?

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



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Quick Create: Lead ×

Details

[↑ Scan Business Card](#)

Topic \* Corporate Membership enquiry

Budget Amount £10,000.00

Purchase Timeframe This Quarter

Lead Source External Referral

Personal Information

First Name \* Miranda

Last Name \* Peterson

Job Title HR Director

Company Name \* Patrick Consulting

Contact Details

Email [Miranda@patrickconsulting.com](mailto:Miranda@patrickconsulting.com)

Mobile Phone 0789 4249755

Description

[Save and Close](#) [Cancel](#)

- 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* menu option
- You will see all current leads (you can change the view, sort, filter etc to manage your list of leads)

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The screenshot shows the Dynamics 365 interface for the 'All Leads' view. The left-hand navigation pane is visible, with 'Leads' selected. The main area displays a list of lead records. An orange callout box with a white border points to the '+New' button in the command bar at the top of the list, containing the text 'Click +New on the Command Bar'.

Name	Lead Source	Created On
Annie Archer	Lead	12/02/2021 12:11
David Friedrichs	Potential lead	19/01/2021 20:03
hoses	Unknown	11/01/2021 10:00
Kemp	Unknown	11/01/2021 09:58
Edward Eiertan	New Membership	11/01/2021 09:54
David O'Brien	New Membership	10/01/2021 18:19
Greta Gothenburgh	Potential new member	05/01/2021 15:26
Harriet Hamptons	Membership	14/11/2020 10:49
Ian Innes	Events enquiry	05/08/2020 10:20
James Might-Member	Potential Member	03/08/2020 11:54
Kira Kallipse	Membership	20/05/2020 14:07

On the Sales work area, choose the Leads option

- 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

The screenshot shows the Dynamics 365 'Lead' form for a record named 'Diana Parker'. The form is divided into several tabs: General, Details, Notes & Attachments, Preferences, Enquiries, and Related. The 'General' tab is active, showing fields for Name, Address, and Description. An orange callout box with a white border points to the 'Save' button in the command bar at the top of the form, containing the text 'Complete the form and press Save'.

Field	Value
Salutation	Ms
First Name	Diana
Last Name	Parker
Job Title	CEO
Company Name	Perick Consultants
Web Site	
Email	Diana@perickconsultants.co.uk
Business Organization	Membership
Street 1	1 Foss Street
Street 2	
Street 3	
City	Exeter

### 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

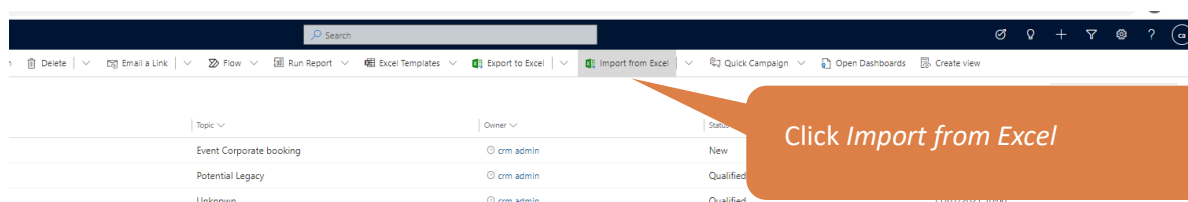
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are likely to import e.g. First Name, Second Name, Lead source and then Export that view.

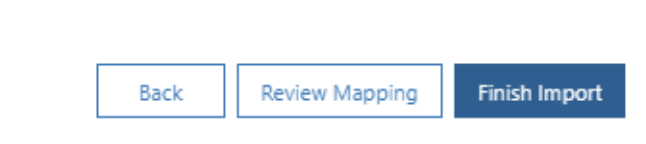
- Please see the Silverbear Fundamentals Intermediate module for more information on creating views. To export a view, click *Export* on the Command bar once you can see the view on the screen.
- After exporting the view and looking at examples you can use this as a template for your import
- You might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

	D	E	F	G	H	I	J
1	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	Unknwn	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		
13							
14							

- 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



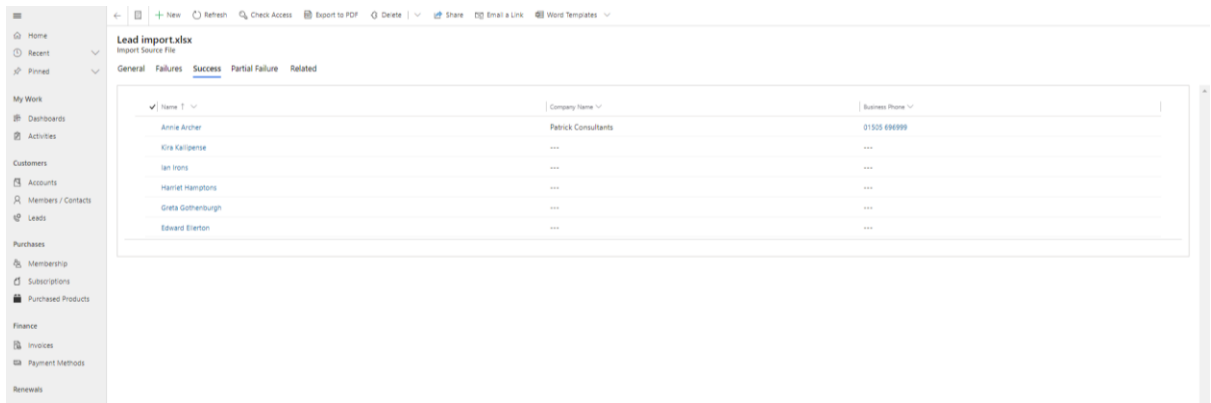
- Choose your file and press *Next*
- On the next page you can choose if you will allow duplicates to be created during this import process.
- You can also *Review Mapping*. This is particularly useful if you are importing a list of leads and you haven't used an export to create your template but instead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





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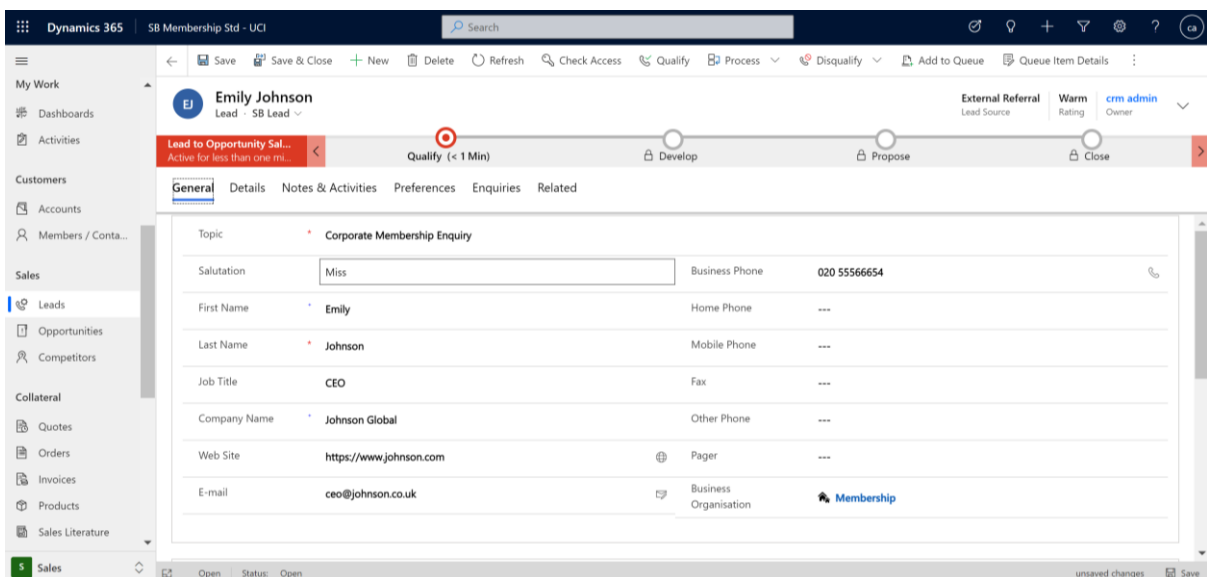
- Press *Finish Import* once you are confident that the fields will be mapped correctly (the right data will go into the right CRM fields on a Leads record)
- You should then see a message “your Data has been submitted for import”
- The process will take a few minutes, or longer if you are importing 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



Name	Company Name	Business Phone
Amie Archer	Patrick Consultants	01525 696999
Kira Kallipense	---	---
Ian Irons	---	---
Harriet Hamptons	---	---
Sheta Gottemburgh	---	---
Edward Eerton	---	---

### 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



**Emily Johnson**  
Lead - SB Lead

External Referral Lead Source | Warm Rating | crm admin Owner

Lead to Opportunity Sal... Active for less than one mi... | Quality (< 1 Min) | Develop | Propose | Close

**General** | Details | Notes & Activities | Preferences | Enquiries | Related

Topic: Corporate Membership Enquiry

Salutation	Miss	Business Phone	020 55566654
First Name	Emily	Home Phone	---
Last Name	Johnson	Mobile Phone	---
Job Title	CEO	Fax	---
Company Name	Johnson Global	Other Phone	---
Web Site	https://www.johnson.com	Pager	---
E-mail	ceo@johnson.co.uk	Business Organisation	Membership

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- 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

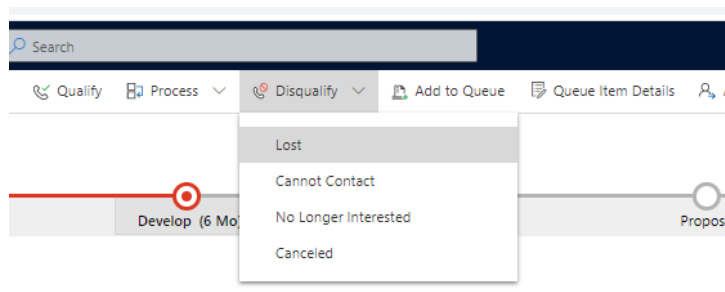
The screenshot shows the Dynamics 365 CRM interface for a lead named Emily Johnson. The lead is currently in the 'Qualify' stage, which is highlighted in the top command bar. The 'Qualify' form is open, showing various fields for procurement information. A callout box highlights the 'Existing Contact?' and 'Existing Account?' fields, indicating that users can select existing records if applicable. The 'Next Stage' button is visible at the bottom of the form.

- 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

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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

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Continue to use the Business Flow to guide you through essential tasks

Enrich the record by completing further information on this Opportunity

### 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*

First select the most relevant Price List for this Opportunity

- 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

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- 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

The screenshot displays the Dynamics 365 interface for a 'Corporate Membership' opportunity line. The interface includes a navigation pane on the left, a top toolbar with actions like 'Save', 'Save & Close', 'Delete', 'Refresh', 'Check Access', 'Edit Properties', and 'Email a Link', and a main content area with 'General' and 'Related' tabs. The 'General' tab shows the following details:

Field	Value
Select Product	Existing
Existing Product	* Corporate Membership
Pricing	Use Default
Price Per Unit	£1,000.00
Volume Discount	£0.00
Quantity	* 100.00000
Amount	£100,000.00
Manual Discount	£5,000.00
Tax	---
Extended Amount	£95,000.00

Four callout boxes provide additional information:

- Press *Save & Close* to return to the previous screen
- You may be able to toggle this to allow you to override the price, otherwise it will be defined by your price list
- Set the *Quantity* and any *Manual Discount*.
- The *Extended Amount* will appear after pressing *Save*

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Corporate Membership Enquiry

Lead to Opportunity Sat... Active for 12 minutes

Summary Products Quotes Field Service Files Related

Price List Price List 2021

Product Name	Propose	Unit	Price Per Unit	Quantity	Discount	Standard Amount
Corporate Membership	Not Configured	Primary Unit	£1,000.00	100,000.00	£5,000.00	£95,000.00

Detail amount: £95,000.00

(-) Discount (%): ---

(-) Discount: ---

(-) Pre-Freight Amount: £95,000.00

(+) Freight Amount: ---

(+) Total Tax: £0.00

Total Amount: £95,000.00

Your Products will then be added to the Opportunity and the *Total Amount* will be updated

### 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

Corporate Membership Enquiry

Lead to Opportunity Sat... Active for 14 minutes

Summary Products Quotes Field Service Files Related

Quote ID	Name	Status	Total Amount	Effective From	Effective To	Created On
No data available.						

Press Quotes

Press +New Quote

- 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

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The screenshot shows the Dynamics 365 interface for a Corporate Membership Enquiry. The interface is divided into several sections: Summary, Details, and Related. The Summary section includes fields for Quote ID (Q10-01003-HB18L4), Revision ID (0), Owner (om admin), Name (Corporate Membership Enquiry), Currency (Pound Sterling), Price List (Price List 2021), Effective From (14/04/2021), and Effective To (31/05/2021). The Details section includes Shipping Information (Shipping Method, Payment Terms: Net 30, Freight Terms) and Addresses (Bill To Street 1, 2, 3, City, State/Province). The Related section includes a table of Products with columns for Product Name, Properties, Unit, Price Per Unit, Quantity, Discount, and Extended Amount. The table shows one product: Corporate Me... with a quantity of 100,000,000 and an extended amount of £95,000.00. Below the table, there are summary fields for Detail Amount (£95,000.00), Discount (0%), Pre-Freight Amount (£95,000.00), Freight Amount, Total Tax (£0.00), and Total Amount (£95,000.00). The Command Bar at the top includes buttons for Save, Save & Close, New, Delete, Refresh, Check Access, Export to PDF, Lock Up Address, Activate Quote, Get Products, Process, Assign, Share, Email & Link, File, Word Templates, and Run Report. Three callout boxes provide instructions: 'Press Activate Quote once you have completed it' points to the Activate Quote button; 'You can add further products at this stage, or edit existing ones' points to the 'Add Prod.' button; and 'Further discount options are available' points to the 'Discount' column in the Products table.

Press Activate Quote once you have completed it

You can add further products at this stage, or edit existing ones

Further discount options are available

- 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

The screenshot shows the Dynamics 365 interface for a Corporate Membership Enquiry, now in the 'Active' stage. The interface is similar to the previous screenshot, but the Command Bar at the top now includes buttons for New, Delete, Refresh, Check Access, Export to PDF, Create Order, Revise, Close Quote, Assign, Share, Email & Link, File, Word Templates, and Run Report. The Summary section shows the Quote ID (Q10-01003-HB18L4) and Revision ID (1). The Details section shows the same shipping and address information. The Related section shows the same product table. A callout box points to the 'Revise' button, stating 'Press Revise to create a second version of this quote which you will be able to revise'. Another callout box points to the 'Export to PDF' button, stating 'Export to PDF allows you to email or print the Quote'. The status bar at the bottom right shows the Total Amount (£91,000.00), Effective From (14/04/2021), Effective To (31/05/2021), and In Progress status.

Press Revise to create a second version of this quote which you will be able to revise

Export to PDF allows you to email or print the Quote

## 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.

The screenshot shows a 'Create Order' dialog box with the following fields and values:

- Status Reason: \* Won
- Date Won: \* 14/04/2021
- Description: Immediate membership required
- Close Opportunity: \* Yes
- Calculate actual revenue from quotes: \* Yes

Buttons: OK, Cancel

You can change the *Date* and the *Description*

If *No* is selected then you will need to close the Opportunity separately

Choose *Yes* to for the Quote total revenue to be used or *No* to enter your own Revenue Total



## 9. Accessing Orders

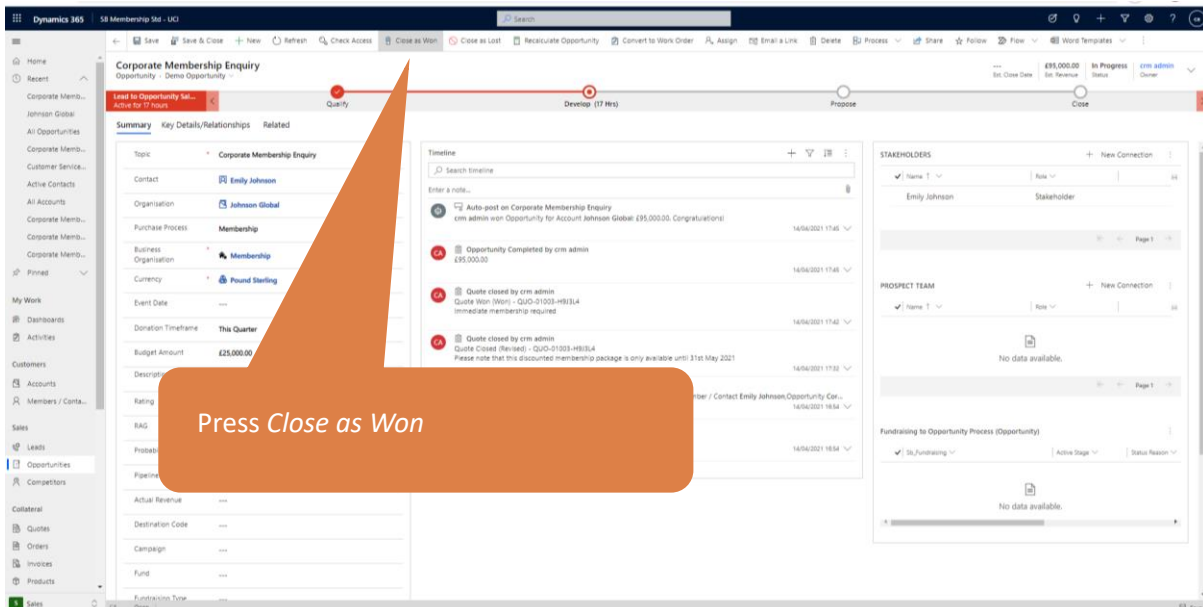
- Orders can be accessed from the Sales Work Area – then choosing Orders.
- They can also be accessed by clicking Related and then Orders when viewing the Quote record connected with this Order. You may also find them linked to the Contact and/or Account depending on your setup
- A Pdf version of an 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

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The screenshot shows a 'Close Opportunity' dialog box with the following fields:

- Status Reason: **Won**
- Actual Revenue: **£95,000.00**
- Close Date: **15/04/2021**
- Competitor: ---
- Description: **Must be fulfilled ASAP**

Two callout boxes provide additional information:

- An orange callout box points to the 'Actual Revenue' and 'Close Date' fields, stating: "Actual Revenue and Close Date can be edited".
- Another orange callout box points to the 'Description' field, stating: "A Description might be useful. This can appear on a view".

Buttons for 'OK' and 'Cancel' are visible at the bottom of the dialog.

### 10.2. Closing as lost

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

The screenshot shows a 'Close Opportunity' dialog box with the following fields:

- Status Reason: **Out-Sold**
- Actual Revenue: **£0.00**
- Close Date: **15/04/2021**
- Competitor: **Acme Ltd**
- Description: **Competitor offered 50% discount**

Buttons for 'OK' and 'Cancel' are visible at the bottom of the dialog.

## 11. Accessing and Monitoring Leads and Opportunities

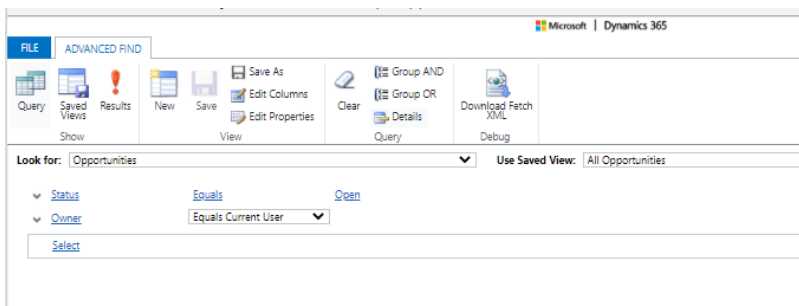
In order to monitor, develop and progress these records we recommend the use of views, charts, and dashboards. Please see the Silverbear Fundamentals Intermediate guide for more information on these processes. Some useful suggestions on views are shown below:

### 11.1. All Open Opportunities



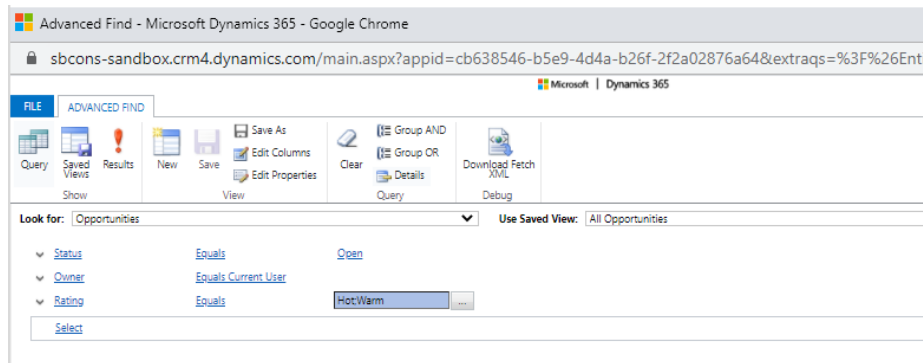
### 11.2. All Open opportunities belonging to the current user

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



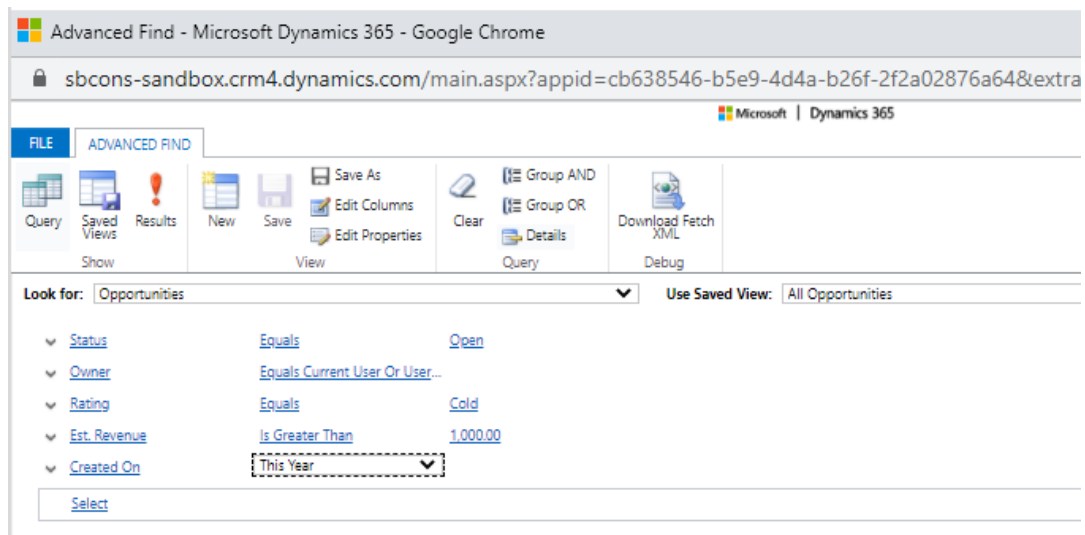
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### 11.3. All opportunities (belong to the current user) with a Rating of Hot or Warm



### 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

