



CRM Tips 'n' Tricks from Altico



There are dozens of little tips and tricks for using your Microsoft Dynamics CRM application that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your February 2010 CRM tip:

Use Contracts in Dynamics CRM to Track Support Incidents

The Contract entity in CRM can be used to keep track of support incidents allocated to a client.

It is very easy to allocate a case to a contract. When creating a new case, simply assign a support contract and a contract line. That's it!

When the case is resolved, the number of incidents remaining will be reduced by 1. When there are only 2 incidents remaining, an email will be sent to the support desk along with contact information for that client.

The following screenshots will show you exactly how to do this.

The screenshot displays the Microsoft Dynamics CRM web interface in Internet Explorer. The browser address bar shows the URL: `http://altico-crm:5555/?id={3E01C1FF-17CB-DE11-8927-0015C5ED4545} - Case: CAS-01680-C3VVG9 - Windows Internet Explorer`. The page title is "Case: CAS-01680-C3VVG9" and the main heading is "Information".

The interface is divided into several sections:

- Details:** A sidebar on the left with options for Information, Activities, History, and Workflows.
- General Information:**
 - Overview:** Case Description: "Integration Manager grayed out in GP can't access"; Priority: "Campfire"; Client: "Ektron Inc"; Support Contract: "Ektron Silver Support"; Contract Line: "Silver Support 10".
 - Assignment Information:** Case Contact: "Scot Limric"; Subject: "GP System"; Current State: (empty dropdown); Caller Phone: (empty field); Owner: "Melissa Peloquin"; Case Origin: "E-mail".
- Notes:** A list of notes with titles and creation/edit dates. The first note is titled "newsfeed: New Case Opened" and the second is "Note created on 11/6/2009 4:04 PM by Melissa Peloquin".
- Form Assistant:** A panel on the right with a dropdown menu for "Form Assistant Help" and a "Select a lookup field." input.

At the bottom of the page, the status is "Active" and the browser's security bar shows "Trusted sites | Protected Mode: Off" and a zoom level of "100%".

Contract Setup and Maintenance

Contracts are found under the Service Module in CRM

The screenshot shows the Microsoft Dynamics CRM interface in a Windows Internet Explorer browser. The address bar displays the URL: `http://altico-crm:5555/AlticoAdvisors/loader.aspx`. The page title is "Microsoft Dynamics CRM". The user is identified as Justin Languirand, Altico Advisors. The left navigation pane shows the "Service" module selected, with sub-items like Service Calendar, Cases, Accounts, Contracts, Knowledge Base, Products, Services, Forecast Manager, Workplace, ExactTarget, Sales, Marketing, Settings, and Resource Center. The main content area displays the "Contracts" list. The list has columns for Contract Name, Customer, Contract ID, Contract Template, and Status. The view is set to "My Contracts".

Contract Name	Customer	Contract ID	Contract Template	Status
Ektron Silver Support	Ektron Inc	CNR-01001-DK8NRL	Silver Support 10 Incidences	Active
Kaspersky Support Contract	Kaspersky Lab, Inc.	CNR-01003-HBYQH5	Silver Support 10 Incidences	Active
Univex Support Plan	Univex Corporation	CNR-01002-C7XCPR	Silver Support 10 Incidences	Expired

Here is what a new contract looks like.

The screenshot shows the "Contract: New" form in Microsoft Dynamics CRM. The form is titled "Contract: New" and "Information". It has tabs for "General", "Details", and "Notes". The form is divided into several sections:

- Header:** Contract ID, Contract Name, Customer, Contract Address, Contract Start Date, Contract End Date, Duration In Days.
- Billing Information:** Bill To Customer, Bill To Address, Billing Start Date, Billing End Date, Billing Frequency (set to "Annually"), Cancellation Date.
- Pricing:** Total Price, Total Discount, Net Price, Currency (set to "US Dollar").

At the bottom of the form, it shows "Status: New" and "Allotment Type: Number of Cases". The browser status bar at the bottom indicates "Done" and "Trusted sites | Protected Mode: Off".

This one is filled out.

Contract: Ektron Silver Support
Information

General Details Notes

Header

Contract ID: CNR-01001-DK8NRL
Contract Name: Ektron Silver Support
Customer: Ektron Inc
Contract Address: [Empty]
Contract Start Date: 9/4/2009
Contract End Date: 9/4/2010
Duration In Days: 366

Billing Information

Bill To Customer: Ektron Inc
Bill To Address: [Empty]
Billing Start Date: 9/4/2009
Billing End Date: 9/4/2010
Billing Frequency: Annually
Cancellation Date: [Empty]

Pricing

Total Price: \$ 1,250.00
Total Discount: \$ 0.00
Net Price: \$ 1,250.00
Currency: US Dollar

Status: Active Allotment Type: Number of Cases

A Contract must also have a Contract Line. Click here for Contract Lines

Contract: Ektron Silver Support
Contract Lines

New Contract Line Run Workflow... More Actions

Title	Product	Allotments Remaining	Net
Silver Support 10 Licenses		6	\$1,250.00

1 of 1 selected. Page 1

Status: Active Allotment Type: Number of Cases

This is a blank new contract line.

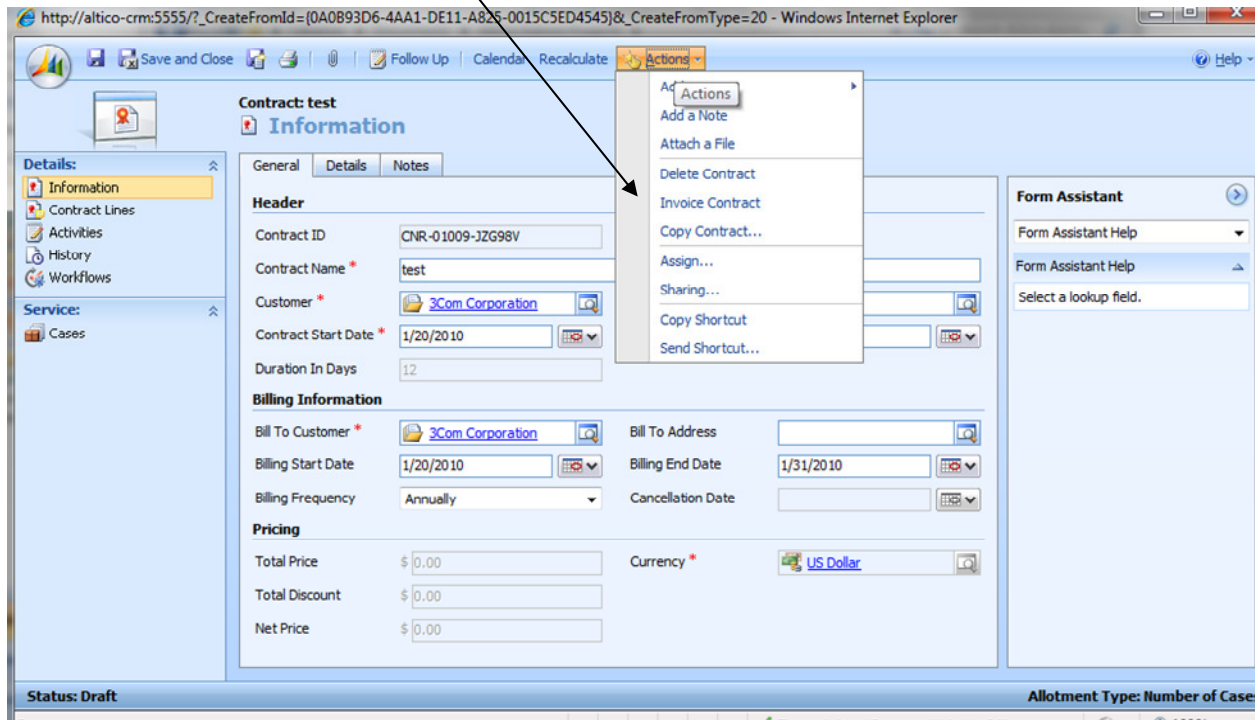
The screenshot shows a web browser window displaying the 'Contract Line: New' form in Altico CRM. The form is titled 'Information' and has three tabs: 'General', 'Administration', and 'Notes'. The 'General' tab is active. The form contains several input fields for general information, all of which are empty. The 'Allotment Details' section has three empty input fields. The 'Pricing' section has four empty input fields. The status at the bottom is 'New'. The browser address bar shows the URL: http://altico-crm:5555/?contractid={A7C18342-4BA1-DE11-A825-0015C5ED4545}&_CreateFromType=1010& - Windows Internet Explorer.

Field	Value
Title *	
Product	
Quantity	
Start Date *	9/4/2009
End Date *	9/4/2010
Total Cases/Minutes *	
Allotments Used	
Allotments Remaining	
Total Price *	\$
Discount in (%) or	\$
Net	\$

This contract line is filled out properly. Once you have created a contract and a contract line, it must be invoiced before you can start using cases against it. Use the Actions Menu to invoice a contract.

The screenshot shows the same 'Contract Line: New' form, but now it is filled out. The title is 'Silver Support 10 Licenses'. The 'Allotment Details' section shows 'Total Cases/Minutes' as 10, 'Allotments Used' as 4, and 'Allotments Remaining' as 6. The 'Pricing' section shows 'Total Price' as \$1,250.00, 'Rate' as \$125.00, and 'Net' as \$1,250.00. The status at the bottom is 'Existing'. The browser address bar shows the URL: http://altico-crm:5555/?id={6A052995-4BA1-DE11-A825-0015C5ED4545}&_CreateFromType=1010&_CreateF - Windows Internet Explorer.

Field	Value
Title *	Silver Support 10 Licenses
Product	
Quantity	
Start Date *	9/4/2009
End Date *	9/4/2010
Total Cases/Minutes *	10
Allotments Used	4
Allotments Remaining	6
Total Price *	\$ 1,250.00
Discount in (%) or	\$
Net	\$ 1,250.00



I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

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