NCLM’s Dynamics CRM Best Practices

Enter your customer service information under Activities. Code the service type based on your department’s available choices. Close them once all details captured and work has finished.

When a Contact **leaves** an organization:

(a) If you know the new organization and it’s listed in CRM, update the Municipality/Org field to the new organization’s name.
(b) If you do not know the new organization or it’s not listed in CRM, update the Municipality/Org field to **None.**
(c) Keep the contact active in CRM. Do not deactivate the contact.
(d) Deactivate any responsibilities the contact has for the organization being left.
(e) Remove the contact from any static marketing lists. Dynamic lists automatically update.
(f) Deactivate any affiliate memberships for this contact that are under the Municipality’s Name. Notify Finance of the affiliate change. Only Manager’s affiliate follows the contact/member.
(g) Update the Municipality/Org name on the affiliate membership if it follows the Contact.

When a Contact is **added** to an organization:

(a) Search CRM for an Existing Contact with a similar name to avoid making duplicates in CRM and Navision
(b) Update the municipality/org field on the existing contact if the contact has changed jobs. Be sure to update Mailing Address, Phone, and Email Address for the new town.
(c) If no match exists in CRM, create a new Contact including mailing address, phone, & email.
(d) Update the responsibilities for this Contact at this new organization.
(e) Update the affiliate memberships including the Municipality/Org field.

No contacts should **share** an email address. Our new e-blast software and continuing education software will require each contact to have a unique email address. Website logins also require unique email addresses for each contact with a website account.

Finance will run periodic reports on affiliate members & payments for CRM team to compare with CRM affiliate member list. You can check affiliate financials in 2 places: (1) Workplace, My Work, Reports, *Affiliate Name* Membership Payments This Fiscal Year, Run Report; (2) Workplace, Extensions, Affiliates, *Affiliate Name*, Affiliate Transactions. (Insert your *Affiliate Name* as appropriate)

Notify Finance of affiliate member changes and any municipal billing address changes in CRM.

Enter Contact’s full Legal Name if known. Use Nickname field for preferred name if different than First Name.

Phone numbers for Contacts should display (xxx)xxx-xxxx. CRM should put in the symbols if you type in the numbers.

All NC cities, towns, or villages should already exist in CRM. If you cannot find one, please let me know.

Use the existing responsibilities list in CRM. If you need a new one created, please let me know. We use a predefined set list to create marketing lists, views, and reports.

Use the Work History to record non-consecutive terms in office for Elected Officials as well as Managers' work history.

Use the Elected Official area to capture term limits.

Use the Personal Information section to capture any demographic data known about the Contact.

One Navision Integration should appear on a Municipality/Org or on a Contact record in CRM. Creating multiple records can cause the integration to Navision not to pick up the change.