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New Contacts On Opportunities

- Use quick add
 - Click Plus at top and select contact
 - Add contact record – click save
 - Add new contact to opportunity

The screenshot shows the Microsoft Dynamics CRM interface for a 'New Opportunity'. The browser address bar displays 'https://dynamics.premieresuites.com/main.aspx#989239192'. The navigation bar includes 'Microsoft Dynamics CRM', 'Sales', 'Opportunities', and 'New Opportunity'. The user profile 'Max Stocker dynamics' is visible in the top right. The main form is titled 'Contact' and is divided into three columns: 'Details', 'Contact Information', and 'Address'. Each column contains several fields with dropdown menus and validation icons (plus for required, red X for error). Below the main form is a 'Summary' section with additional fields and a 'Where and When' sub-section.

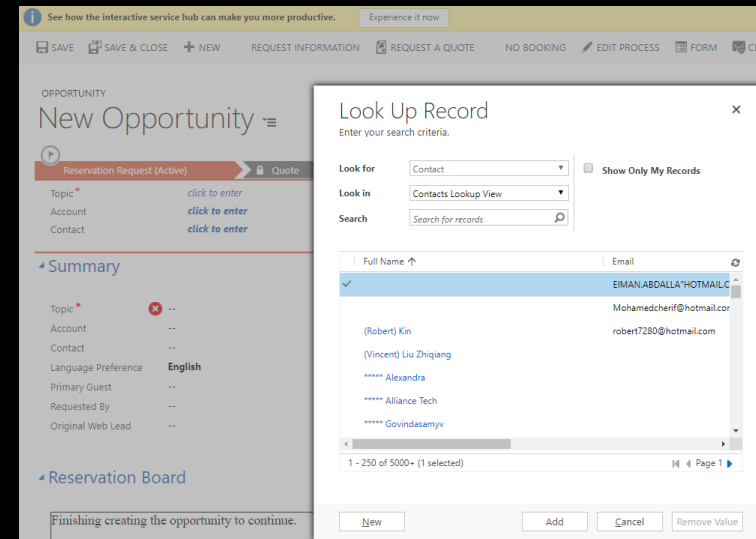
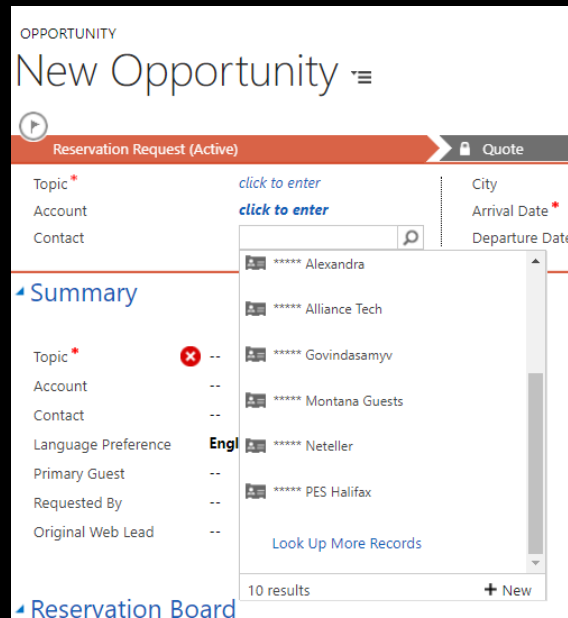
Details	Contact Information	Address
First Name* --	Email --	Street 1 --
Last Name* --	Mobile Phone --	Street 2 --
Job Title --	Business Phone --	City --
Account Name --	Language Preference --	ZIP/Postal Code --

Summary	Where and When
Topic* --	City --
Account --	Arrival Date* --
Contact --	Departure Date* --
Language Preference English	Duration Of Stay --
Primary Guest --	
Requested By --	
Original Web Lead --	



New Contacts On Opportunities - Alternate

- In contact go down to “look up new records” and select that
- Click “New” on new window that opens
- Create and save contact – add to opportunity



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Information from Web Leads

- On Opportunity
 - Original Web Lead – when created from a web lead will link back to the original lead
 - Notes – in Posts, Activities and Notes area at bottom of form
 - User submitted comments will display as notes
- On Contact
 - Uses existing contact where possible (identified by email)
 - Provided phone number will be displayed as Home Number



Further Information on Web Leads

- Multiple web leads may direct to a single opportunity, based on contact, dates inquired etc
- New Contact form inquiry emails
 - These are from people submitting the site contact form – NOT inquiring about a specific property – general contact



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Closing Opportunities

- Close as Lost
 - Updated reasons – Premiere specific

Close Opportunity

Provide the following information about why this opportunity is being closed.

Status Reason *

Actual Revenue *

Close Date *

Competitor

Description

OK Cancel



Tip: Multiple Order Opportunities

- Multiple Quotes (and orders) from a single opportunity
 - Create multiple quotes from an opportunity, change product on quote as required
 - Don't close the related opportunity when creating orders from quotes



Best Practices – Customer for Orders

- Recommended to always have the customer be a contact
- That contact should be associated with an account
- This works better for reporting and accounting



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Automatic Thank You Email

- Email generated on order creation
- Generated in draft state – can be edited before sending
- Source Quote must have a primary guest identified



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Tip: Merging Order Products

- Cleans up : messy invoices and orders with multiple extensions
- Fixes issues with : billing issues caused by tax changes and/or cancelled invoices or other items
- To do:
 - Go to affected order
 - Manage Stay -> Change Rate
 - Select period to change rate for – entire stay is best – effective from and to to match arrival and departure
 - Enter rate exactly as current rate
 - Click Next
 - Will create one new order product for period

