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**Process Document**

**CRM – Outreach**

Liverpool John Moores University

**Outreach: Adding New Organisations**

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**Adding New Organisations on Dynamics**

**Set-Up**

* All non-school/college organisations who we deal with should be recorded in Dynamics.
* Contact information should also be recorded against the relevant Organisation.

**Procedure**

* ***Microsoft Dynamics CRM > School Liaison > Organisations***
* Click **‘+New’**
* Complete as much detail as possible in the below form



* You can then assign any Appointments/School Interactions which take place directly to this Organisation, using the ‘Activities’ tab **(see below)**



* To ensure that activities is displayed on the Organisation page, use the Organisation name in the ‘Regarding’ field.
* If you want the appointment to display on the School/Organisation page, then when setting up appointments make sure you list the School(s) involved under the ‘Optional’ section, which can hold multiple schools (see below).

