Unanet University

Unanet CRM by Cosential:
Administering the System

PARTICIPANT GUIDE

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ABOUT THIS PARTICIPANT GUIDE

This document serves as a supplement to the training courses offered through Unanet University. Participants should use this workbook to complete exercises in the student Unanet CRM system. Additionally, participants should record notes and actions for reference when working within their own Unanet CRM system.

Symbols used in this guide

Activity

Important Note

Demo

Question

Tour

Unanet Contact Information

- VirtualUU@unanet.com

Send questions here for information about courses, course schedule, unanetuniversity.com, certifications, and enrollments. This is a mailbox that is monitored daily.

Student Training Site

A Unanet training system has been specifically created to support this course. The system is configured around a fictional company named Demo Firm. The activities, and accompanying simulations, reference Demo Firm, its related internal and external personnel, companies, contacts, and business processes.

COURSE INTRODUCTION

In this course, you will review tasks specific to general administration of the system such as creating and modifying firm settings, value lists, records, dashboards, reports, templates, and workflows.

Learning Objectives

After this session for **Unanet CRM by Cosential: Administering the System**, participants will be able to:

- Customize basic firm settings and understand navigation
- Create Personnel Records
- Utilize My Preferences
- Create and Navigate a Company Record
- Create and Navigate a Contact Record
- Create and Navigate a Lead Record
- Create and Administer Opportunity Records
- Configure Contact Manager Administration
- Utilize the User Manager to Set Permissions
- Set Up and Distribute Dashboards
- Run and Analyze Reports
- Create and Maintain the Knowledge Module
- Create and Set Up Workflows
- Configure Firm Setup as the OFA

Roles & Access

During this course, students will be instructed to log-in to Unanet CRM utilizing specific user personas which contain the appropriate roles in order to access and complete the required activities.

Please note, the password is case sensitive; login name is not.

Unanet Role	Name	Unanet login Username	Password
Overall Firm Administrator	Jessica Miller	**Admin**	**welcome**

The license types available are Full, CRM, and Read Only. The available features are listed in the table below. The Overall Firm Administrator (OFA) and Administrator use a Full license type and have preset permissions that are all already enabled.

	Features	[FULL] Full License Type	[CRM] CRM License Type	[READ] Read Only License Type
CRM Functionality Best for: • Door sellers • Project managers • Field reps	Actionable Dashboards	✓	✓	👓
	Companies	✓	✓	👓
	Contacts	✓	✓	👓
	Leads	✓	✓	👓
	Opportunities	✓	✓	👓
	Activities	✓	✓	👓
	Mobile App	✓	✓	---- *
Marketing Functionality Best for: • Marketers • Proposal Coordinators • Dedicated Business Development • Administrator(s)	Outlook Integration	✓	✓	✓
	Reports	✓	✓	👓
	Publisher	✓	👓	👓
	Email Marketing	✓	👓	👓
	Personnel (Resumes)	✓	👓	👓
	Projects, Surveys	✓	👓	👓

👓 = Read Only

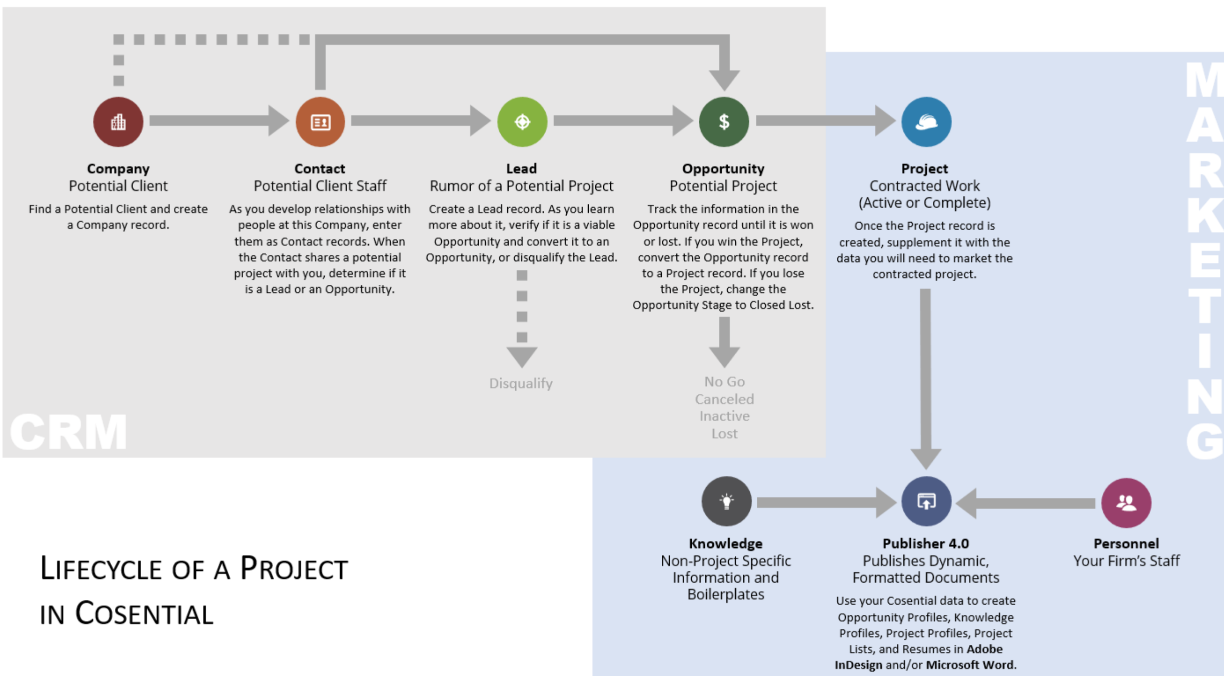
LESSON 1: CUSTOMIZE BASIC FIRM SETTINGS AND UNDERSTAND NAVIGATION

Learning Objectives

- Find field customization and explore functionality
- Find value lists and explore functionality

Introduction

Unanet CRM by Cosential provides a single source of truth for your entire project lifecycle from meeting an individual contact through the completion of a successful project. The modules that support this process are shown in the graphic below.



LIFECYCLE OF A PROJECT IN COSENTIAL

Information flows from Lead to Opportunity to Project as you convert them through the lifecycle. The modules considered core data modules that store and track all of your data are Companies, Contacts, Leads, Opportunities, Personnel, and Projects. Many of the key categorizations are shared across record types.

Administration Menu

Administration menus are available in the top-right corner of the header bar next to the User Profile picture and is indicated by an icon displaying hammer and wrench tools. In this menu, you will find:

- General Administration
- Activities Administration
- Contact Manager Administration
- Personnel Administration
- Projects Administration

General Administration contains a home page displaying Recent Account Activity, information on updates, and numerous tabs. These tabs are organized in two rows with the top row containing items used frequently.

Activities Administration contains the Even Manager Administration window that allows you to add or remove Call Log types and dispositions, add Personnel groups, and enable Phone System Integration.

Contact Manager Administration contains Value Lists where you can administrate fields, use cleanup tools such as Mass Updates, Mass Removal, Merged Updates, and Data Manipulation Tools.

Personnel Administration contains one tool that allows you to merge one personnel record into another.

Projects Administration contains Project Fields, Project Value Lists, Data Manipulation Tools, and the Project Merge Tool.

General Administration Menu

The frequently used items in the toolbar includes User Manager, Firm Setup, Work Flow 2.0, Value Lists, Field Customization, and Custom Fields. All of these are specifically addressed in this course, but for now you will explore two specific topics.

Field Customization Menu

This area allows you to turn on and off and relabel fields, which allows for matching to your company terminology or perhaps repurposing fields. The types of fields that allow customization found in the menu are:

- Projects > Project Fields Display
- Contact Manager > Contact Fields Display
- Contact Manager > Company Fields Display
- Contact Manager > Opportunity Fields Display
- Personnel > Personnel Fields Display

- Knowledge > Knowledge Fields Display
- Products > Product Fields Display

Within each area, you may be able to add a Custom Label, add a Custom Tool Tip, toggle the Tool Tip on or off, or Enable or Disable the field via the Viewable toggle. Tool Tips will display when hovering over the field when toggled on.

The Project Fields Display area also allows you to toggle on and off fields in the Size section regarding if they will Display in Project Summary.

The Contact Fields Display area adds an additional option to toggle on and off Required for fields associated in the Contact record.

The Opportunity Fields Display area does not include the toggle to turn on and off fields. This is located in Contact Manager Administration.

Some fields exist in more than one place, such as Primary Categories and Secondary Categories. They exist in Projects and Opportunities, so you will want to make any modifications the same in both places.

Tour 1.1 - Find Field Customization and explore functionality

This video explains the options available in the Field Customization menu and the purposes they serve.

Activity 1.2 – Enable a Contact field and add a custom label

Activity Steps

1. Open **General Administration** menu
2. Open the **Field Customization** tab in top row of toolbar
3. Open **Contact Fields Display** in the CONTACT MANAGER section
4. Scroll down to the Other Information section
5. Find **Contact Category** and turn the Viewable toggle **On**
6. Click the edit pencil icon
7. Type “**Contact Hobbies”** into the text field for Custom Label
8. Click the **Save** icon

Value Lists Menu

Value lists are the options available from any of the number of dropdown options throughout the different record types and modules. The Value Lists menu contains a Preferences section at the top where you are able to choose between Single-Select and Multi-Select functionality for certain fields. The sections below list the fields for Project, Personnel, Goals, Companies, Documents, Firm Org, Contacts, Opportunities, Leads, and Properties.

Some Value Lists will have pre-configured options while others will be blank and left to your customization. The layout of the interface may appear different from value to value, but the basic functions within a section or to edit, add, or remove a value. To add an option the list you will generally find a button labeled +Add, or a button for "new" value, or a text field to type in New Value accompanied by a Save button.

It should be known that some value lists are shared between record types. Use careful consideration if modifications are made since all records will use the values in the same manner.

Be very careful if choosing to delete a value from any value list. Deleting a value that is associated to any record could create a ghost association where the value still appears although it does not exist in the database.

Tour 1.3 –Find value lists and explore functionality

Activity 1.4 – Open the Primary Categories value list and remove an item

Activity Steps

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Open **Primary Categories** in the PROJECTS section
4. Find **Agricultural** at the top of the list and click **delete**
5. Click **OK** in the pop-up window to confirm

Activity 1.5 – Open the Regions value list and disable an item

Activity Steps

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Open **Project Region** in the PROJECTS section
4. Find **Caribbean** near the top of the list and click the **Viewable** eye icon to toggle off
5. Click the **Save** button at the top of the screen

Check your understanding

The modules considered core data modules that store and track all of your data are

a) Companies
b) Contacts
c) Leads
d) Opportunities
e) Personnel
f) Projects
g) All of the above

Value Lists are located in ________________.

a) General Administration
b) Activities Administration
c) Contact Manager Administration

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 2: CREATE PERSONNEL RECORDS

Learning Objectives

- Create a Personnel record
- Modify Education value list

Introduction

The Personnel module will allow you to manage the information you have for your staff members to assemble knowledge project teams and generate dynamic resume documents. Data records include resumes intros, personal information, education, training, memberships, project experience, etc., and can be associated to all other core data modules as well as Firm Orgs, Activities, Knowledge, and Goals.

On the Personnel overview screen you will have an alphabetical list of all personnel. The first column includes icons to represent whether a record is for a User, Unassigned Personnel, Admin, or Firm Admin.

= Firm Admin, = Admin, = User, = Unassigned Personnel

Upon opening a Personnel record, you will see several tabs with the top row including Personnel Summary, Project Experience, Education, Training/Skills, Registrations, and Awards. These tabs are some of the more often used and help populate resumes for proposals.

The Firm Organization area includes value lists created and maintained by the Administrators and allows you to categorize core data across all modules.

TIP: If your firm has enabled the Make User button, then your Administrators can click on that button and convert this person into a user by adding that person to one of the existing user groups. If the person is already a user, the Make User button will not display.

Demo 2.1 – Create a Personnel record and make User

It is recommended to search for a person’s name before adding a new record to avoid duplication.

Demo Steps

Part 1: Create a Personnel record

1. Open the **Personnel** module from the left menu

2. Click the **+Personnel** button on the top-right of the table
3. Input required fields
    a. First Name - Craig
    b. Last Name – Halliday
    c. Title - CEO
4. Input additional fields in EMPLOYMENT HISTORY section
    a. Year Started in Industry - 1988
5. Input additional fields in OFFICE CONTACT section
    a. Office Email – craig@unanet.com
6. Input additional fields in PERSONNEL FIRM ORG ASSOCIATIONS section
    a. Offices – Washington, DC
7. Click **Save**
8. Open **Education** tab
9. Click **+Education** button at the top-right
10. In the pop-up window, input the following fields:
    a. School – University of Edinburgh
    b. Year – 1988
11. Click **Save**

Part 2: Make the personnel a user

1. Go back to **Personnel Summary** tab
2. Select +**Make User** button on top-right
3. In the pop-up window, select **CRM User Group**
4. Click the **Convert to a User** button

Education Value List in Personnel Record

In the Personnel record, the Education tab is a popular tab when pulling information into resumes for proposals. There are only four fields and one of those being required is the School. The value list for Degree is the only field on the Education tab that pulls from a value list.

Activity 2.2 – Modify Education value list

Activity Steps

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Scroll down to the **PERSONNEL** section
4. Open the **Education Degrees** link
5. Add a new value to the list
    a. Type “JD” into the **New Value** text field
    b. Click **Save**

6. Edit the first value “AA” to read “Associates of Arts”
    c. Click edit pencil icon to left of “AA”
    a. Type “Associate’s of Arts” in the **Edit Value** window
    b. Click **Save**

Check your understanding

True or False
Personnel records store data used for resumes.

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 3: UTILIZE MY PREFERENCES

Learning Objectives

- Change a password
- Set opportunity preferences to associate self to record

Introduction

Upon clicking on your user profile picture, a menu appears and allows you to access your Personnel Record, My Preferences, and also to Logout. Upon choosing My Preferences there will be a PERSONAL and CONTACT MANAGER section.

Password

The PERSONAL section allows you to handle password and login preferences, along with home page preferences.

The Change Password function in My Preferences is straight forward and works as one would expect. Changes are effective immediately and passwords do not expire. Users may also reset their own password by going to the login screen and clicking the “Forgot your password” link. This process also works as one would expect.

Administrators can reset a user’s password for them, and this will be covered in Lesson 9: User Manager.

Demo 3.1 – Reset a password as a user

Demo Steps

1. Open your **User Profile**
2. Open **My Preferences**
3. Select **Change Password**
4. Enter your Old Password: ***welcome***
5. Enter a New Password: ***unanet***
6. Re-Type New Password: ***unanet***
7. Click **Save**

Opportunity Preference

The CONTACT MANAGER section allows to choose a preference on how to view Company records in the Companies module, and to choose a preference as to how to add yourself as a staff team member to an Opportunity record.

The Opportunity Preferences allows uses to automatically associate themselves as a Staff Team member with the desired role every time they create a new Opportunity record. Administrators should help users understand this preference is available to help expedite workflow with creating opportunities, filtering My Opportunities, and utilizing the Opportunity Grid.

Activity 3.2 – Set opportunity preferences to associate self to record

Activity Steps

Part 1: Associate self to Opportunity record

1. Click on your User Profile
2. Open **My Preferences**
3. Open **Opportunity Preferences** under CONTACT MANAGER section
4. Open the dropdown menu for “Add me to opportunities I create as:”
5. Select **Assistant Project Manager**
6. Click **Save**

Part 2: Check the association populates a record

1. Add a new Opportunity by clicking the **Create New** + icon in the upper-right
2. Scroll down to the **Opportunity Associations** section
3. Confirm that Staff Team and Staff Role are pre-populated

Check your understanding

My Preferences includes options to ______________.

a) Create a Dashboard
b) Upload profile picture
c) Associate yourself to a record

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 4: CREATE AND NAVIGATE A COMPANY RECORD

Learning Objectives

- Create a Company record
- Modify the Company Type value list

Introduction

In Unanet CRM the information flow begins with the Company and your firm's relationship with that client, prospect, consultant, etc. This module will allow you to manage the information you have for the companies with whom you are doing business and those with whom you are pursuing business.

The Company summary page shows all associations to other records, providing a complete overview of your firm's relationship with the Company.

The Company record is the foundational data of the CRM. Neither Contacts nor Opportunities can be entered into the system without an associated Company record.

Before creating a new company, it is recommended to do a global search to see if that name already exists. After entering a Company Name any similar names will populate to help avoid duplication. A warning is provided to cancel or continue naming a potential duplicate, and it is advised to cancel.

Activity 4.1 – Create a Company record

Activity Steps

1. Add a new Company by clicking the **Create New +** icon in the upper-right
2. Select **Company**
3. In the Company Name field Type "**ABC**", then click into the next field
4. View the list of similarly named companies
5. Finish typing "**ABC Construction**"
6. Click the green **Continue** button
7. Enter the following information in the ADDRESS section (although not required):
    a. Address 1: **123 Plaza Way**
    b. City: **Phoenix**
    c. Country: **United States**
    d. State: **Arizona**

    e. Website: **www.abc-const.com**
8. Select the following in the COMPANY FIRM ORG ASSOCIATIONS section
    a. Offices: **Phoenix**
    b. Practice Areas: **Corporate**
9. Select in OTHER INFORMATION section
    a. Company Type: **Client**
10. Click **Save**
11. Review the generated Company record

Value Lists in the Company Record

While there are several value lists in the Company section of the Value List menu, Company Type is the most widely used. Company Types are used to categorize the companies you do business with. This value list can be single-select or multi-select. The option for Available on DropDown will allow for the value to be included, or not, in the list. Turning this option to "No" removes the value from being displayed but associated records will maintain the data. This is an approach to use rather than deleting values from value lists.

Removed values will display in a list Removed Company Types where the data exists but is hidden. There is an option to Re-Add. There is also an option Delete the removed value which will confirm if there are any companies associated to the value.

Activity 4.2 – Modify the Company Type value list

Activity Steps

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Scroll down to the **COMPANIES** section
4. Open the **Company Type** link
5. Add a new value to the list by clicking the **+Add** button
6. Enter the following information into the Add Company Type pop-up window
    a. Type **Other Financial** into the Company Type Name text field
    b. Select a Label: **Yellow**
    c. Select a Company Type Group: **Client**
7. Click **Save**

Check your understanding

Which record requires a Company record for association?

a) Contact record
b) Opportunity record
c) Both Contact and Opportunity record

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 5: CREATE AND NAVIGATE A CONTACT RECORD

Learning Objectives

- Create a Contact record
- Relabel Contact Category to Personal Interests
- Modify Contact Type and Mailing List value lists
- Create a custom value list for “Golf Shirt Size”

Introduction

The Contacts module allows you to manage the information you have for the contacts with whom you are doing business with and those with whom you are pursuing business.

There are several ways to add a new contact, such as by clicking the Create New + icon in the upper-right and selecting Contact. However, it is best practice to open the company record for which your contact is a member and search the Contacts table first.

It is also recommended to search for the person as they may be a contact for a different company they may have previously worked for.

A Contact Relationship will automatically be added for the person creating the contact. Other Relationships can be added by editing the Contact record after it is created.

Activity 5.1 – Create a Contact record

Activity Steps

1. Search for **Leo A. Daly** using the search field in the header bar.
2. Open the Company record
3. Select the **Contacts** tab along the top row
4. Verify if the contact already exists
5. Click the **+Contact** button in the upper-right of the Contacts section
6. Enter the following information for the required fields:
    a. First Name: **Matt**
    b. Last Name: **Jones**
7. Enter the following information:
    a. OTHER BUSINESS INFORMATION > Email Address: **mjones@leoadaly.com**

    b. OTHER INFORMATION > Contact Type: **Decision Maker**
8. Click **Save Contact**
9. Review the generated Contact record

Field Customization in the Contact Record

Field customization is a useful practice for several reasons. One reason is to repurpose fields through relabeling. One field in the Contact record that is generally used for this is Contact Category which is turned off by default and not in use. Many firms use this multi-select field to collect information regarding contacts' hobbies or personal interests.

Activity 5.2 – Turn on and relabel Contact Category to Personal Interests

Activity Steps

Part 1: Relabel

1. Open **General Administration** menu
2. Open the **Field Customization** tab in top row of toolbar
3. In the CONTACT MANAGER section, open **Contact Fields Display**
4. Scroll down to the Other Information section
5. Toggle the Viewable button to "**On**" for Contact Category
6. Click the pencil icon in that row to edit
7. Input a Custom Label of "**Personal Interests**"
8. Click the save icon

It is important to note that the Value List page does not reflect customized labels for fields. If you will need to modify the value list for your field, you must locate the field by its original label.

Part 2: Add values

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Scroll down to the CONTACS section
4. Open the **Contact Category** field
5. Add a value using the **+Add** button in the upper-right of the page
6. Input "**Golf**" into the Contact Category Name box in the pop-up window
7. Add another value using the **+Add** button in the upper-right of the page
8. Input "**Guitar**" into the Contact Category Name box in the pop-up window

Value Lists in the Contact Record

The Contact record has several value lists. An administrator can modify or add values to meet your company's needs. The below activities will include some suggested additions to make better use of the value list.

For Contact Type some of the default types might include Accounting Contact, Coordination Contact, Decision Maker, Influencer, Manager, or Personal.

For Mailing Lists these values determine which contacts receive what types of mailings.

Activity 5.3 – Modify Contact Type and Mailing List value lists

Activity Steps

Part 1: Modify Contact Type

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Scroll down to the CONTACTS section
4. Open the **Contact Types** field
5. Add a value using the **+Add** button in the upper-right of the page
6. Input "Marketing Contact" into the Contact Type box in the pop-up window
7. Click **Save**

A marketing contact could be useful to indicate if you are doing business together or perhaps submitting a partner proposal.

Part 2: Modify Mailing List

1. Open the **Value Lists** tab in top row of toolbar
2. Scroll down to the CONTACTS section
3. Open the **Mailing Lists** field
4. Add a value using the **new mailing list** button in the upper-right of the page
5. Input "**Holiday Cards 2022**" into the Mailing List Name box
6. In the Available on Dropdown menu selection choose "Yes"
7. Click **add to mailing list**

Mailing List Types is an option that needs a selection only if you have a third-party email marketing integration.

In the Mailing Lists value list, it is often best practice to use the Available on Dropdown menu option to disable the mailing list from future selection.

Custom Fields in the Contact Record

Custom Fields can be added to several areas of the CRM such as Projects, Opportunities, Contacts, and Companies only by an Administrator.

You can add up to 5 custom fields for each type. Custom Field Types include:

- **Date** - Entered as mm/dd/yyyy (or dependent on date localization settings)
- **Text Area** - Large text field, holding over 15,000 characters including spaces
- Currency - Any whole-number dollar value, formatted as dollars and cents (e.g., 1000=$1,000.00)
- **Number** - Numbers of any size, formatted with commas
- **Percentage** - Any whole number from 0 to 100
- **Short Text** - Small text field, holding up to 50 characters including spaces
- **Value List** - A list of single-select customizable values to be selected from a drop-down list.

It is best practice to try to repurpose an existing field, whenever possible, before creating a custom field

Here are a few important procedures to note:

1. You cannot change the field type of a custom field once it has been created.
2. You cannot delete a custom field. You can only remove it and delete all data being held in that field.
3. To re-purpose a removed custom field, simply edit the name of a custom field with the field type that you require (including any associated values if it is a Value List) and click the "Re-Add" button to re-add it to the system.
4. Custom Value Lists are single-select only. If you need an additional multi-select Value List, review your current lists and see if you can re-purpose one that you are not using or switch data around to free up a multi-select list.

Activity 5.4 – Create a custom field for Golf Shirt Size

Activity Steps

Part 1: Create the custom field

1. Open **General Administration** menu
2. Open the **Custom Fields** tab in top row of toolbar
3. Open **Custom Contact Fields**

4. Click the **+ Custom Field** button in the upper-right of the CUSTOM FIELDS page
5. In the pop-up window, select **Value List**
6. Input **"Golf Shirt Size"** into the Field Label box
7. Click **Save**

Part 2: Add values to the Golf Shirt Size value list

1. In the newly created row for Golf Shirt Size, click the **Value List** text in the Field Type column
2. In the pop-up window, input "**Men's Small**" in the New Value box
3. Click **Save**
4. Input **"Men's Medium", "Men's Large",** and click **Save** each time.

Check your understanding

What is the best practice for adding a new Contact?

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 6: CREATE AND NAVIGATE A LEAD RECORD

Learning Objectives

- Create a Lead record
- Modify Lead Stages value list by adding “Assigned/Opened”

Introduction

The Leads module allows you to manage the information you have for the leads you are tracking.

Leads can be entered without associating to any other core data modules, or they can be associated with Company, Contact, Personnel, or Firm Org values. You can create a Lead record by clicking the Create New + icon in the upper-right and selecting Lead.

Only a Lead Name is required. This optional module lets you track rumors or long-range pursuits before enough information to determine a viable opportunity.

NOTE: A potential client company is required to convert a Lead to an Opportunity.

Activity 6.1 – Create a Lead record

Activity Steps

1. Add a new Lead by clicking the **Create New +** icon in the upper-right
2. Select **Lead**
3. In the **Name** field, type “**Grocery Store**”
4. In **Potential Client** field, type “**Leo**” to search for Leo A. Daly
5. Select Leo A. Daly
6. In **Contact First Name** field, type “**Matt**”
7. In **Contact Last Name** field, type “**Johnson**”
8. Click **Save** in the upper-right of the record
9. Review the generated Lead record

Value Lists in the Lead Record

The Lead record has several value lists. Many of the value lists are shared with Opportunities and Projects and are configured under General Administration > Value Lists > PROJECTS.

Some of the key lists specific to Leads are Stages, Record Source, and Lead Scores. The Stages value list has default values of “Closed”, “Convert to opportunity”, and “Unassigned”.

Activity 6.2 – Modify Lead Stages value list by adding “Assigned”

Activity Steps

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Scroll down to the LEADS section
4. Open the **Stages** field
5. Add a value by selecting the **New Value** text field at the top of the page
6. Input “**Assigned**” into the New Value text field
7. Open the **Status** dropdown and select **Open**
8. Click **Save**

Check your understanding

True or False
Leads can be entered without associating to any other core data modules.

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 7: CREATE AND ADMINISTER OPPORTUNITY RECORDS

Learning Objectives

- Create an Opportunity record
- Identify and discuss value lists that are shared between records
- Modify value lists for Stages, Categories, and Contact Role
- Relabel fields for Dollar and Date
- Add or remove fields for Dollar and Date
- Create a custom text field for “Proposal Date/Time Submission”

Introduction

The Opportunity module allows you to manage the information you have for the opportunities you are pursuing and/or tracking.

The best practice for adding new Opportunity records is to start from the Company record where a **+Opportunity** button can be in the appropriate Opportunity section of the record. This method ensures you are associating the Opportunity to the correct client and allows you the chance to see the entire list of existing Opportunity records for that client to ensure you are not creating a duplicate.

To convert a Lead into an Opportunity, open a Lead and click the **Convert to Opportunity** button in the upper-left corner.

Remember, you can always use the Opportunities Quick Search to make sure that you are not creating a duplicate record.

The new Opportunity form allows for easier navigation and use. There is a shortcut panel on the left that will help you jump to different sections of the form, and there is also a Search box to directly find specific fields. The addition of the blue “More required” button helps ensure you don’t miss the required fields. Pressing the blue button will jump you directly to required fields that are incomplete.

Activity 7.1 – Create an Opportunity record

Activity Steps

1. Open up the Company record for **Leo A. Daly**
2. Select **the Associated Opportunities** tab along the top

3. Click the **+Opportunity** button on the right side of the section
4. Enter the following under General Info:
    a. Opportunity Name: **New School Building**
    b. Client Company: **Leo A. Daly**
    c. Contact: **Matt Jones**
    d. Stage**: 01-Prospecting**
5. In the shortcut panel on the left side, select **Categorization**
    a. For **Offices**, click **+Add**, and select **Phoenix** then save
    b. For **Practice Areas**, click **+Add**, and select **Education** then save
    c. For **Primary Categories**, click **+Add**, and select **Higher Ed** then save
    d.
6. In the shortcut panel on the left side, select **Staff Team**
7. Click the **+Add Staff Team Member** button
8. Search for and select **Alfredo Flagg**
9. For **Staff Role,** open the dropdown and select **Assistant Project Manager**
10. Click **Add**
11. Click **Save** on the bottom of the form

Value Lists in the Opportunity Record

The Opportunity record has a variety key value lists including Stages, Submittal Type, Win Probability, Prospect Type, and Contact Role.

The value lists mentioned below are also very important but not unique to just the Opportunity record. These are shared as the key information flows through the project lifecycle.

Firm Org categorizations will allow you to organize your data the same way your firm is organized. The six standard Firm Orgs are Offices, Divisions, Office Divisions, Studios, Practice Areas, Territories. These are present in all of the core data modules.

Primary Categories and Secondary Categories, Contract Type, and Service Type are shared with Leads and Projects.

Client Type, Construction Type, and Delivery Method are shared with Projects.

See Appendix B – Sample Value Lists for recommended values for some of the mentioned value lists

Tour 7.2 – Identify and discuss value lists that are shared between records

Stages Value List

Opportunity Stages represent your incoming work or your pipeline. It is extremely important to get consensus with the management, business development and marketing staff in your firm on what the Stages need to be. This value list is managed form the OPPORTUNITIES section.

Contact Role Value List

Contact Role applies to Leads and Projects. This is a key value for tracking relationships and for identifying key contacts throughout the lifecycle of a project. This value list is managed form the OPPORTUNITIES section.

Primary Categories Value List

Primary Categories is the main method to organize your information. This is a key value throughout the lifecycle of a project as well. This value list is managed form the PROJECTS section.

Activity 7.3 – Modify value lists for Stages, Contact Roles, and Primary Categories

Activity Steps

Part 1: Add a field to Stages value list

1. Open **Contact Manager Administration** menu
2. In the OPPORTUNITIES section, open the **Stages** field
3. Add a value using the **+Add** button in the upper-right of the page
4. Input "**07.1-Submitted Roster**" into the Stage Name box in the pop-up window
5. Open the dropdown menu for **Stage Type** and select **Pending**
6. Input **"60"** into the **Probability** text field
7. Click **Save**

Part 2: Add a field to Associated Contact Roles value list

1. Click the Contact Manager Administration link at the top
2. In the OPPORTUNITIES section, open the **Associated Contact Roles** field
3. Add a value by selecting the **New Value** text field at the top of the page
4. Input "**Bid Contact**" into the New Value text field
5. Click **Save**

Part 3: Add a field to Primary Categories value list

1. Open **General Administration** menu
2. Open the **Value Lists** tab in top row of toolbar
3. Scroll down to the PROJECTS section

4. Open the **Primary Categories** field
5. Click the **New Category** button in the upper-right above the table
6. In the **Category Name** text field input “**Airport Terminal”**
7. For the **Available on Dropdown** menu select **Yes**
8. Click the **add category** button

NOTE: The value lists for Stages and Associated Contact Roles can also be found in Contact Manager Administration.

Field Customization in the Opportunity Record

Activity 7.4 – Relabel Dollar and Date fields

Activity Steps

1. Open **General Administration** menu
2. Open the **Field Customization** tab in top row of toolbar
3. In the CONTACT MANAGER section, open the **Opportunity Field Display** link
4. Scroll down in the Opportunity Metrics section and find **Factored Fee**
5. Click the **edit pencil icon** to the right of the row
6. In the **Custom Label** box**,** type “**Weighted Potential Revenue**”
7. Click the **Save icon** to the right of the row
8. Scroll down in the Opportunity Lifecycle section and find **Estimated Selection Date**
9. Click the **edit pencil icon** to the right of the row
10. In the **Custom Label** box**,** type “**Client Decision Date**”
11. In the **Custom Tool Tip** box, type “**When the client will make a decision**”
12. Click the **Save icon** to the right of the row

Administrate Opportunity Fields

This is a menu located within Contact Manager Administration, and it allows you to determine what fields can be available and/or required when creating a record and what fields are available on the Opportunity Grid.

The page displays in a table format with several sections and columns. The rows are grouped in sections pertaining to the basic required fields (e.g., Client Company, Opportunity Name, Opportunity Status), opportunity lifecycle date-related fields, project milestone date-related fields, opportunity metrics fields, project address fields, associations, and other grid-specific settings related to Firm Orgs and Staff Roles.

The table columns function for several purposes, described below:

- **Require Field:** Require a value in this field to save a new Opportunity. (Company/Client, Opportunity Name, Status and Stage are required for all records in the system).
- **Grid-Enable:** Make the field available on the Opportunity Grid.
- **Grid-Edit:** Allow the field to be edited on the Opportunity Grid.
- **Enable Field:** Make the field available in the Opportunity module.
- **Custom Opportunity Forms:** When either require field or conditionally require (by stage) are enabled on this page, it will override those settings the Opportunity Form.

Activity 7.5 – Add or Remove Dollar and Date Fields

Activity Steps

1. Open **Contact Manager Administration** menu
2. In the OPPORTUNITIES section, open the **Administrate Opportunity Fields** link
3. Scroll down to the **OPPORTUNITY LIFECYCLE** section, and find **Quals Due Date**
4. Uncheck any selected checkboxes
5. Scroll down to the **OPPORTUNITY METRICS** section, and find **Estimated Cost**
6. Uncheck any selected checkboxes
7. Click the button in the seventh column for Associates Forms
8. In the pop-up window, toggle the button on the left to **Off**
9. Click **Save**
10. Scroll back up to the top of the page
11. Click the blue **Save** button

Custom Fields in the Opportunity Record

Custom Fields can be added to several areas of the CRM such as Projects, Opportunities, Contacts, and Companies only by an Administrator.

You can add up to 5 custom fields for each type. Custom Field Types include:

- **Date** - Entered as mm/dd/yyyy (or dependent on date localization settings)
- **Text Area** - Large text field, holding over 15,000 characters including spaces
- Currency - Any whole-number dollar value, formatted as dollars and cents (e.g., 1000=$1,000.00)
- **Number** - Numbers of any size, formatted with commas
- **Percentage** - Any whole number from 0 to 100

- **Short Text** - Small text field, holding up to 50 characters including spaces
- **Value List** - A list of single-select customizable values to be selected from a drop-down list.

It is best practice to try to repurpose an existing field, whenever possible, before creating a custom field

Here are a few important procedures to note:

1. You cannot change the field type of a custom field once it has been created.
2. You cannot delete a custom field. You can only remove it and delete all data being held in that field.
3. Custom Value Lists are single-select only. If you need an additional multi-select Value List, review your current lists and see if you can re-purpose one that you are not using or switch data around to free up a multi-select list.

Activity 7.6 – Create a custom text field for Proposal Date/Time Submission

Activity Steps

1. Open **General Administration** menu
2. Open the **Custom Fields** tab in top row of toolbar
3. In the CONTACT MANAGER section, open the **Opportunities** link
4. Go to the **Opportunity Lifecycle Fields** section
5. Click **+ Custom Field** on the right-side of the table
6. In the pop-up window, select **Short Text** from **Field Type** dropdown menu
7. In the **Field Label** box, type "**Proposal Due Date and Time**"
8. Click **Save**
9. From the Opportunity Lifecycle Fields section, click **Order Custom Field** on the right-side of the table
10. Click the **up arrow** to move Proposal Due Date and Time to the top

The Custom Fields page includes a section for Removed Custom Fields that contain once deleted custom fields. You have the option to Re-Add them or permanently delete the custom fields with the associated data.

Check your understanding

It is best practice to add an Opportunity record from _______________.

a) the + Create New menu
b) a Contact record
c) a Company record

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 8: CONFIGURE CONTACT MANAGER ADMINISRATION

Learning Objectives

- Administrate Company fields for required fields
- Administrate Opportunity fields for required fields and turning on/off
- Discuss Mass Updates

Introduction

Contact Manager Administration is a menu that allows you to configure Value Lists, administrate company and opportunity fields, and use cleanup tools such as Mass Updates, Mass Removal, Merged Updates, and Data Manipulation Tools.

This menu can be accessed from several places. The quickest access is from the Administration icon in the top-right corner of the header bar, next to the User Profile picture, indicated by an icon displaying hammer and wrench tools. It is also accessible as a blue text link at the top of the Companies, Contacts, Leads, and Opportunities modules.

Administrate Company Fields

The Administrate Company Fields menu is used to customize which fields are included and/or required on Company forms. You will find only the Company Name is required by default. Other fields related to address and company firm org associations are available as well. The menu includes two columns that can be checked on or off, a Required column and a View column.

Activity 8.1 – Administrate Company fields for required fields

Activity Steps

1. Open **Administration** menu
2. Select **Contact Manager Administration**
3. Open **Administrate Company Fields** in the first section for COMPANIES
4. Mark the **Required** checkbox to require the following fields
    a. Address 1
    b. City
    c. Country
    d. State
    e. Phone

f. Postal Code
g. Website

Administrate Opportunity Fields

The Administrate Opportunity Fields menu is used to make opportunity fields required, or not required when creating or editing opportunities. This menu is more complex and lengthier than the Administrate Company Fields menu.

The menu includes several columns for the initial section, and Opportunity Lifecycle, Project Milestones, Opportunity Metrics, Project Address, and Opportunity Associations sections. The menu ends with a few other sections that affect grid settings include Firm Org and Staff Roles.

Here are descriptions of the functionality for the first four columns:

- **Require Field:** Require a value in this field to save a new Opportunity. (Company/Client, Opportunity Name, Status and Stage are required for all records in the system)
- **Grid-Enable:** Make the field available on the Opportunity Grid
- **Grid-Edit:** Allow the field to be edited on the Opportunity Grid
- **Enable Field:** Make the field available in the Opportunity module
- **Enable Field:** Make the field available in the Opportunity module

There is a unique +/- button in the fifth, sixth, and seventh columns. This button is used to add/remove stages or configure forms conditionally based on the stage selection.

There is a checkbox to turn on **Enable Opportunity Grid** that will allow you place selected fields into a grid view on which records can be edited (similar to editing within an Excel spreadsheet), filtered, sorted, and grouped. When enabled, the Grid is the home page of the Opportunities module.

Activity 8.2 – Administrate Opportunity fields for required fields and turning on/off

Activity Steps

1. Open **Administration** menu
2. Select **Contact Manager Administration**
3. Open **Administrate Opportunity Fields** in the third section for OPPORTUNITIES
4. In the OPPORTUNITY LIFECYCLE section, mark the **Require** checkbox for **Quals Due Date**

5. In the OPPORTUNITY LIFECYCLE section, uncheck the following for **Expected RFP Date**
    a. **Grid-Enable**
    b. **Grid-Edit**
    c. **Enable Field**
6. In the OPPORTUNITY LIFECYCLE section, select the **add/remove stages** ◪ **button** for **RFP Received** in the **Conditional Require (by Stage)**
7. Mark the following checkboxes in the pop-up window for **ValueList: Required By Stage**
    a. 03-Received RFP
    b. 05-Submitted RFQ
    c. 06-Submitted RFP
    d. 08-Shortlisted
    e. 11-Closed Won
    f. 12-Closed Lost
8. Click **Submit**
9. Click **Save** in the upper-right of the menu

Mass Updates/Mass Removal/Merged Updates/Data Manipulation Tools

Mass Updates, Mass Removal, and Merged Updates are located in the Contact Manager Administration menu

The Mass Updates and Mass Removal sections includes functions mainly for Contacts, with some Company cleanup. These are intended to provide methods to make changes in bulk to clean up or enhance your data. There is one Mass Update function that deals with Opportunities to Associate/Unassociate Opportunities to Projects.

Tour 8.3a – Discuss Mass Updates

Tour 8.3b – Discuss Mass Removal

Merged Updates provides functions that allow you to clean up and consolidate data through merging records and/or identifying duplicates.

Tour 8.3c – Discuss Merged Updates

Data Manipulation Tools includes three functions to help make data changes/updates for large groups of records. The Company Data Update Tool and Contact Data Update Tool allows you to update Firm Org data for the appropriate records. The Opportunity Data Update Tool adds another layer of functionality including Primary and Secondary Categories also to the data that can be updated.

Tour 8.3d – Discuss Data Manipulation Tools

Check your understanding

Contact Manager Administration is accessible via ______________.

a) Administration menu
b) Contacts module
c) Opportunities module
d) All of the above

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 9: UTILIZE THE USER MANAGER TO SET PERMISSIONS

Learning Objectives

- Create user groups
- Set user permissions for a group
- Populate group with users
- Send login/reset password message

Introduction

Setting up users in the system is a two-step process. We have first covered create Personnel records. Second, we need to assign personnel to user groups. The User Manager makes it easy to see what groups have been created, add new groups, finding user details and permissions, and managing login and password.

Default user groups included in the system are for Personnel: No Access, Overall Firm Administrator, Administrator, No Group, Full User Group, CRM User Group

Activity 9.1 – Create user groups

Activity Steps

1. Open **Administration** menu
2. Select **General Administration**
3. Open the **User Manager** tab in the top row of the toolbar
4. Click the **+ New User Group** button at the top-left of the module
5. Type "**Users: Seller Doer User Group**" into the **Name** field
6. Open the dropdown form **License**, and select **CRM**
7. Click **Create Group**

User Group Permissions

User Permissions are managed in the bottom pane of the User Manager module. The first tab summarizes the permissions that are set. The second tab lists all of the modules in the left pane and the individual keys in the right pane. Permissions must be assigned to a group before users can be added.

When setting up permissions for User Groups, there are three User levels that can be defined within most Modules. They are Full, Self, or Firm Org.

Full – User can read, edit, and delete every record within the assigned module

Self – User can only read, edit, and delete records they created
Firm Org – User can only read, edit, and delete records that match their Firm Org associations within their Personnel record

Each of the three levels is combined with the following to further define itself within the various modules:

Read - can read data on records
Write – can edit or write data to records
Delete – can delete entire data records

For a newly created user groups, all keys are disabled by default and appear read. You can turn on keys by clicking the red lock icon, which will close the lock and turn the icon green.

To turn on many keys at once instead of one by one, you can click Full Write to turn on Full Read. If granting delete permissions, you can turn on Full Delete and it will turn on Full Write and Full Read. This will also turn on corresponding Self-labeled keys and Firm Org-labeled keys if included for that module.

Use Appendix B – Permission Lists as a resource for setting recommended permissions for your user groups.

Activity 9.2 – Set user permission groups

For demonstration purposes, permissions will be turned on just for Contact Manager modules

Activity Steps

1. Open **User Manager** from Administration > General Administration > User Manager
2. In the top-left pane select the **Seller Doer User Group**
3. At the top of the bottom pane select the **Users: Seller Doer User Group Permission** tab
4. In the bottom-left pane select **Contact Manager**
5. Click on the **red lock icon** for **Full Delete**
6. In the bottom-left pane select **Activities**
7. Click on the **red lock icon** for **Full Delete**
8. In the bottom-left pane select **Leads**
9. Click on the **red lock icon** for **Full Delete**
10. In the bottom-left pane select **Opportunities**
11. Click on the **red lock icon** for **Full Delete**

Populating User Groups

In User Manager, the first group, Personnel: No Access, contains all employees at your company that has a Personnel record. You can select users from here or use the Find User search toolbar to locate users.

Your company must have enough licenses purchased to add users to groups that require a license.

Activity 9.3 – Add user(s) to a user group

Activity Steps

1. Open **User Manager** from Administration > General Administration > User Manager
2. Select the **Personnel: No Access** user group in the left pane of the module
3. Scroll down and select the user **Angie Rose**
4. Notice that the bottom pane now shows the User Detail tab
5. Select the **+ Move to group dropdown**
6. Choose **Users: Seller Doer User Group**
7. Confirm by clicking **Move User**

Passwords

In User Manager, Administrators can reset passwords for users. In Demo 3.1, it is also addressed that users can reset their own passwords.

Demo 9.4 – Send login/reset password message

Demo Steps

1. Open **User Manager** from Administration > General Administration > User Manager
2. Find **Ben Smith** via the search box
3. Ensure Ben Smith is selected via the checkbox
4. In the bottom pane, ensure the User Detail matches the selected user
5. Click the **Reset Password** button in the lower pane User Detail
6. Click the **Send Login Information** button
7. Verify subject and message, then make any desired updates
8. Click **Send**

Check your understanding

True or False
Permissions must be set on a user group before adding users.

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 10: SET UP AND DISTRIBUTE DASHBOARDS

Learning Objectives

- Set up a firm-wide dashboard and share as firm default
- Set up a business development dashboard

Introduction

The Dashboard allows you to install widgets that bring information and data to a central portal for you to quickly access and analyze. A customized dashboard can include multiple tabs with each tab having numerous widgets. Each widget is individually customizable as well. Many of the widgets display charts and graphs. A large number of the widgets display data related to Opportunities as well.

Your Dashboard is managed from the Home page. There is a Dashboard dropdown menu to select from different Saved Dashboards, and there is a Dashboard Settings button where you can do the following:

- **Dashboard Items** – add/remove widgets that are found listed according to module
- **Dashboard Options** – select a theme color, customize layout options
- **Saved Dashboards** – Set a dashboard as firm default, share/unshare a dashboard, and delete
- **Exported Widgets** (OFA/Admin only) – lists widgets that have been exported to embed in other websites
- **Administration** (OFA/Admin only) – enable/disable widgets available to users for their dashboards

Activity 10.1 – Setup a firmwide dashboard and share as firm default

This activity will guide you in adding recommended widgets, but not customize them as these are very flexible to meet each firm's needs

Activity Steps

1. Go to the **Home** page
2. Open the **Dashboard dropdown menu** at the top left of the dashboard
3. Select **General Dashboard**
4. Open the **Dashboard dropdown menu** and select **Save Dashboard As**
5. In the pop-up window, type "**Firmwide Dashboard**"
6. Click **OK**
7. Open **Dashboard Settings** at top right of the dashboard
8. In the **Tab Title** type "**Metrics**"

9. In the **Layout** dropdown select **3 Column**
10. Click the **+** sign next to the following widgets to add (if not already selected)
    a. Contact Manager
        i. **Opportunity Financial Data**
        ii. **Opportunity Pipeline**
        iii. **Opportunity Summary**
        iv. **Top Deals**
    b. Goals
        i. **Sales Vs. Goals**
        ii. **Sales Vs. Goal Over Time**
    c. None
        i. **Shortcuts**
11. Select **Saved Dashboards** in the pop-up window
12. Select the **radio button** in the **Firm Default** column for the newly created Firmwide Dashboard

It is very useful to include the Shortcuts widget set to a toolbar. This can be accomplished by checking the box at the top of the Shortcut widget settings window for **Add shortcuts to toolbar (only one per dashboard tab allowed)**

Activity 10.2 – Set up a business development dashboard and make it public

This activity will guide you in adding recommended widgets, but not customize them as these are very flexible to meet each firm's needs

Activity Steps

1. Go to the **Home** page
2. Open the **Dashboard dropdown menu** at the top left of the dashboard
3. Select the **Executive Dashboard**
4. Select **Save Dashboard As**
5. In the pop-up window, type "**BD Dashboard**"
6. Click **OK**
7. Open **Dashboard Settings** at top right of the dashboard
8. In the **Tab Title** type "**My Metrics**"
9. Click the **+** sign next to the following widgets to add (if not already added)
    a. Activities
        i. **Call Log**
        ii. **Goal Progress w/history**
    b. Contact Manager
        i. **Hit Rate**
        ii. **Opportunity Analysis**

iii. **Opportunity Financial Data**
iv. **Opportunity Pipeline**
v. **Opportunity Summary**
vi. **Sales Goal Gauge**
vii. **Top Deals**
viii. **Win Rate**

c. Goals

i. **Sales Vs. Goals**
ii. **Sales Vs. Goal Over Time**

10. Select **Saved Dashboards**
11. In the row for BD Dashboard, click the **lock icon** so that it shows unlocked to make a public dashboard

Check your understanding

Where can Dashboards be customized?

a) My Preferences
b) Dashboard Settings
c) General Administration

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 11: RUN AND ANALYZE REPORTS

Learning Objectives

- Navigate the Reports module
- Build and run a standard opportunity report by groups
- Build and run a standard opportunity hit rate report
- Maintain reports in the Report Manager

Introduction

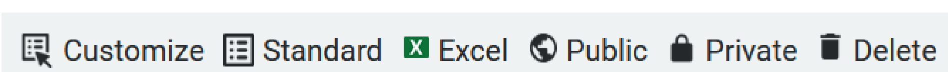
The Reports module components share names with the core data modules and features—Project, Opportunity, Survey, Lead, Contact, Company, Activity, and Personnel. The other available component reports are as follows:

- **Grouped Reports** – Links several individually created reports together so they can be generated into one document, creating one report from many
- **Stats** – Lists what reports have been recently run, and how many times
- **Human Resources** – Lists prospective candidates by name, title, job, and date
- **System Activity** – Lists the system messages created in project publications by activity, modification type, and date

The tabs on the main page allow you to move between four different report types:

- **My Last Viewed Reports** – Most recently run by your user account
- **My Private Reports** – Created by your user account and set as private
- **My Reports** – Created by your user account and set as public
- **All Reports** – All Standard Reports, plus all public reports created by all of the user accounts within your firm. Firm Administrators can see all reports

The table includes a legend that may include the icons shown here:



The first three icons occur to the left of the Title column. The **Customize** and **Excel** icons provide functionality to edit the report options and export to excel, respectively. The **Standard** icon is just a label (this could also represent a Structured report). The Status column will indicate if a report has been marked **Public** or **Private**. Lastly, there is a Delete column on the far-right of the table which will display a **Delete** trash can icon if available.

The Time column indicates how long it takes to run the report, which can offer you insight as to how much information a given report will generate. The longer a report takes to run, the more results it returns.

Tour 11.1 – Navigate the Reports module

This video shows the different sections of the Reports module and what functionality exists.

Build and Run Reports

Creating a report in the Reports module follows a basic sequence of selecting available fields associated to the chosen record type (where there can be many) and selecting criteria and/or numerous filters. A second criteria screen is usually available that may contain options to order the selected fields, select the sort order, and group by any of the selected fields.

Saving a report doesn't save the results of the report, rather it saves the criteria created to run that report.

Activity 11.2 – Build and run a standard Opportunity report by groups

This activity will build a basic Opportunity report utilizing just a few fields but utilizing the Group By Fields feature

Activity Steps

1. Open the **Reports** module from the left-side menu
2. Select the **Opportunity** tab along the top row
3. Click the **Create Custom Report** button at the top-right
4. Select the following fields
    a. **Opportunity Name**
    b. **Stage**
5. In the **Limit by Date** section, select
    a. **Date Created**
    b. **Relative Date**
        i. Only in **Previous 365 Days**
6. Click **Save and Continue**
7. In the **Group By Fields** box, select **Primary Grouping: Stage**
8. Click **Save and Continue**

Activity 11.3 – Build and run a standard Opportunity Hit Rate report

This activity will build an Opportunity report specific to hit rates

Activity Steps

1. Open the **Reports** module from the left-side menu
2. Select the **Opportunity** tab along the top row

3. Click the **Create Custom Hit Rate Report** button at the top-right
4. Select all of the available fields
    a. **Total: Wins, Losses, Pending**
    b. **Declared Wins**
    c. **Declared Losses**
    d. **Pending**
    e. **Hit Rate for Declared Status Pursuits**
5. In the **Group By** section, select **Offices**
6. In the **Close Date Filter** section, select
    a. Between **1/1/2020**
    b. And **12/31/2020**
7. Click **Generate Report**

You can create a more custom Hit Rate report by building a standard Opportunity report, but then choose the **Show Hit Rate Calculations** option in the second criteria screen in the Group By Fields section.

Maintaining the Report Manager

The Report Manager tab in the Reports module allows an Administrator to review quickly and easily, group, sort, export, and delete reports. You can filter and search form this tab, which you cannot from Reports Home.

Tour 11.4 – Maintain reports in the Report Manager

Check your understanding

True or False
My Reports contains reports created by your user account and set as public and private.

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 12: CREATE AND MAINTAIN THE KNOWLEDGE MODULE

Learning Objectives

- Set up file structure
- Upload and create content (knowledge bits)

Introduction

The Knowledge Module is used to store useful, non-project-specific information such as standard narratives and proposal responses, firm documentation and statistics, safety information, community involvement, financials, and even internal Unanet CRM training documentation. It serves very useful providing a single source of truth for answers to common questions, standard narratives, and the parts and pieces you might need to populate a proposal.

The Knowledge Module home page shows the Category Structure that displays links to available knowledge categories you create. These categories are similar to folders in Windows Explorer. Each category shows the number of Knowledge records (or bits) entered in parenthesis after the category name.

Once you create a Knowledge record, you can assign additional categories, upload images, and documents, or link project and opportunity records. Be sure to use the Category Structure tab to create knowledge bits, and use the Edit Categories tab to add, delate, rename, or order categories and subcategories.

Activity 12.1 – Set up file structure

Activity Steps

Part 1: Create a category

1. Open the **Knowledge** module form the left-side menu
2. Select the **Edit Categories** tab in the top-right of the screen
3. Click the **+Category** button
4. In the pop-up window, for **Category Name** type “**Miscellaneous**”
5. Click **Save**

Part 2: Create sub categories

1. If not already open, select the **Edit Categories** tab
2. Open the **Miscellaneous** folder
3. In the Sub Categories box, click the **+Category** button

4. In the pop-up window, for **Category Name** type "**Equipment/Software**"
5. Click **Save**
6. Click the **+Category** button in the Sub Categories box
7. In the pop-up window, for **Category Name** type "**Support Services**"
8. Click **Save**

Part 3: Reorder sub categories
1. If not already open, select the **Edit Categories** tab
2. Open the **Proposal > Approach** folder
3. In the Sub Categories box, click **Order Categories**
4. Select **QA/QC**
5. Click the **up arrow**
6. Click **Save**

Part 4: Delete a sub category
1. If not already open, select the **Edit Categories** tab
2. Select **Proposal > TOC**
3. In the **Current Category** box, click the **Delete** trash can icon
4. Click **OK**

See Appendix B – Knowledge Module Category Structures for two recommended structures (one of which was demonstrated in the previous activity)

Activity 12.2 – Upload and create content (knowledge bits)

Activity Steps

Part 1: Create a new knowledge record
1. Open the **Category Structure** tab
2. Select **Proposal > Graphics**
3. In the Marketing section, click the **+Knowledge** button
4. Enter the following information
    a. Title: **Company Logo**
    b. Description: **This is the standard company logo**
5. Click **Save**

Part 2: Add details

6. On the next screen, VIEW MARKETING KNOWLEDGE, perform the following:
    a. In the **Categories** box, click **+Category**
        i. Select **Marketing Collateral**
        ii. Check the box for **Marketing Collateral** at top of the list

b. In the **Images** box, click **+Category**
    i. Select **Choose File** for **Full Size Image**
        1. Choose any .jpg file
        2. Click **Save**
c. In the **Companies** box, click **+Company**
    i. Search for **Leo A. Daly**
    ii. Click **Save**

Part 3: Assign Unassigned Knowledge

1. Open the **Unassigned Knowledge** tab
2. Open Test Project Knowledge Bit
    a. In the **Categories** box, click **+Category**
        i. Select **Proposal**
        ii. Select **Design Approach**
3. Click **Save**

Check your understanding

True or False
The Edit Categories tab is where you create Knowledge bits.

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 13: CREATE AND SET UP WORKFLOWS

Learning Objectives

- Create a reminder workflow for when an Activity is coming due
- Create a notification workflow for when an Opportunity is created/changed
- Create a set action workflow to change the Opportunity Stage when the Proposal Due Date has passed

Introduction

Work Flow 2.0 is located in the Administration module and allows for a number of automated operations to be set up within the system. In short, a Workflow consists of an Action being initiated when an Event occurs to a Resource (record or entry type). For instance, many accounts set up a Workflow that sends an Email notification (Action) when an Opportunity (Resource) is created (Event).

The following are available as Workflow Events:

- **Convert** (when a Lead or Opportunity is converted to an Opportunity or Project, respectively)
- **Create** (when a record or entry is created)
- **Date Trigger** (when the current date matches a relative amount of time determined by a Workflow, such as "Proposal Due Date is 30 Days from now")
- **Send to External System**
- **Update** (when a record or entry is edited/modified)
- **Delete** (when an entry is deleted)

Note, available Events vary depending on the Resource selected in a given Workflow.

The following are available as Workflow Actions:

- **Email** (sends an email to designated recipients)
- **Notification** (sends a push notification to designated recipients)
- **Set** ("sets" a designated field to a specified value. Number/dollar fields can be set equal to custom calculations)
- **Webhook** (sends an API call to an assigned destination)

Here are three practical examples to walk through to understand how to create a Workflow.

Demo 13.1 – Create a reminder Workflow for when an Activity is coming due

Demo Steps

Part 1: Create the Workflow

1. Open **Administration** menu
2. Select **General Administration**
3. Open the **Work Flow 2.0** tab in the top row of the toolbar
4. Click the **+ New Workflow** button on the top-left of the module
5. Type "**Proposal Due Date 1 Week Notification**" in the Name field
6. For the **Resource** dropdown, select **Opportunity**
7. For the **Event** dropdown, select **Date Trigger**

Part 2: Build the Workflow

1. For the bottom pane, select the **Workflow Actions** tab
2. Click the **+Add Action** button
3. Select **Email**
4. Fill out **To: Entire Staff Team**
5. Fill out **Subject: Proposal due date is 1 week away**
6. In the message box, fill in the following:
    a. **Opportunity Name**
        i. Click **Insert Variable** and find and select **Name**
    b. Type **Opportunity Number**
        i. Click **Insert Variable** and find and select **Opportunity Number**
    c. Type **Link**
        i. Click **Insert Variable** and find and select **Link**
    d. Type **Proposal Due Date**
        i. Click **Insert Variable** and find and select **Proposal Due Date**
7. Select the **Event: Date Trigger** tab
8. For the **Trigger when** dropdown, select:
    a. **Proposal Due Date**
    b. is **7 days from now**
9. Select the **Workflow Summary** tab to review the workflow
10. Click **Save**

Part 3: Make the Workflow active

1. Click the blue **Draft** label next to newly created Workflow
2. Select **Activate** from the pop-up menu

Activity 13.2 – Create a notification Workflow for when an Opportunity is created/changed

Activity Steps

Part 1: Create the Workflow

1. Open **Administration** menu
2. Select **General Administration**
3. Open the **Work Flow 2.0** tab in the top row of the toolbar
4. Click the **+ New Workflow** button on the top-left of the module
5. Type "**Opportunity Modified Notification**" in the Name field
6. For the **Resource** dropdown, select **Opportunity**
7. For the **Event** dropdown, select **Update**

Part 2: Build the Workflow

1. For the bottom pane, select the **Workflow Actions** tab
2. Click the **+Add Action** button
3. Select **Email**
4. Fill out **To: Staff Team: Project Manager**
5. Fill out **Subject: Opportunity Modified Notification**
6. In the message box, fill in the following:
    a. **Opportunity Name**
        i. Click **Insert Variable** and find and select **Name**
    b. Type **Opportunity Number**
        i. Click **Insert Variable** and find and select **Opportunity Number**
    c. Type **Client Name**
        i. Click **Insert Variable** and find and select **Client Name**
    d. Type **Link**
        i. Click **Insert Variable** and find and select **Link**
7. Select the **Event: Update Filters** tab
8. Select the **Resource: Opportunity Filters (after update)** tab
9. Click **+ Add Filter**
10. Fill in the following:
    a. **Proposal Submitted**
    b. **has changed**
11. Select the **Workflow Summary** tab to review the workflow
12. Click **Save**

Part 3: Make the Workflow active

1. Click the blue **Draft** label next to newly created Workflow
2. Select **Activate** from the pop-up menu

Activity 13.3 – Create a set action Workflow to change the Opportunity Stage when the Proposal Due Date has passed

Activity Steps

Part 1: Create the Workflow

1. Open **Administration** menu
2. Select **General Administration**
3. Open the **Work Flow 2.0** tab in the top row of the toolbar
4. Click the **+ New Workflow** button on the top-left of the module
5. Type "**Opportunity Stage Date Trigger**" in the Name field
6. For the **Resource** dropdown, select **Opportunity**
7. For the **Event** dropdown, select **Date Trigger**

Part 2: Build the Workflow

1. For the bottom pane, select the **Workflow Actions** tab
2. Click the **+Add Action** button
3. Select **Set**
4. Click **+Add Value**
5. Fill in the following
    a. **Stage**
    b. **Equal to**
    c. **06-Submitted RFP**
6. Select the **Event: Date Trigger** tab
7. Fill in the following:
    a. Trigger when **Proposal Due Date**
    b. is **1 day ago**
8. Select the **Workflow Summary** tab to review the workflow
9. Click **Save**

Part 3: Make the Workflow active

1. Click the blue **Draft** label next to newly created Workflow
2. Select **Activate** from the pop-up menu

Check your understanding

Identify the Resource, Event, and Action for the example Workflow:

Notify OFA when a new Company is created

Refer to Appendix A for answers to the Check Your Understanding questions

LESSON 14: CONFIGURE FIRM SETUP AS THE OFA

Learning Objectives

- Navigate the Firm Setup tab for enabling and relabeling features
- Modify Firm Org value lists

Introduction

The Firm Setup menu provides plentiful options to setup and configure the database, accessible by only the Overall Firm Administrator (OFA). Much of this configuration is determined and set during implementation. However, there is a chance that some options may need attention every once in a while.

Firm Setup

Firm Setup, under General Administration, is where you can complete the easy task of uploading a company logo and adding the company name to appear atop the left-side menu. It is also where you enable Opportunity Forms, allow Convert Lead to Opportunity, enable ability to Make User form a Personnel record, among many other things.

Two very important sections near the top of the page are FIRM ORG and RELABEL FIRM ORG NAMES. In the FIRM ORG section, a table displays the core data modules as the rows and the Firm Orgs as columns to select or deselect, and also indicate a single-select option. This is extremely important to organize your information the same way your firm is organized.

FIRM ORG

	Offices	Divisions	Office Division	Studios	Practice Areas	Territories
Projects	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)
Opportunities	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)
Contacts	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)
Companies	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)
Personnel	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)
Leads	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)	☑ (☐ single-select)	☑ (☐ single-select)	☐ (☐ single-select)

Save

In the RELABEL FIRM ORG NAMES sections you can relabel Offices, Divisions, Office Divisions, Studios, Practice Areas, and Territories as needed to fit the needs of your firm.

Tour 14.1 – Navigate the Firm Setup tab for enabling and relabeling features

Firm Org Menu

The Firm Org menu, accessible on the left-side menu, is where you add, delete, and edit Firm Orgs. This is opposed to enabling and relabeling, which is done in General Administration > Firm Setup.

The Firm Orgs describe your firm's internal organizational structure. Creating this hierarchy allows you to assign your Personnel, Companies, Contacts, Leads, Opportunities, and Projects to both physical locations and/or work-specific areas of your firm.

The Firm Org module is divided into seven areas:

1. **Firm** – stores your firm's primary contact and corporate information. To edit this information, click the "Edit" button, enter all desired data, then click the "Save" button.
2. **Offices** - stores the contact and corporate information for each of your firm's physical locations.
3. **Divisions** - stores the contact information for your firm's defined work-specific areas.
4. **Studios** - allows you to designate further breakdowns of your internal structure, as necessary.
5. **Practice Areas** - allows you to designate further breakdowns of your internal structure, as necessary.
6. **Office Division** - stores information regarding the relationship between your Offices and Divisions.
7. **Territories** – stores sales territory breakdowns based on zip codes

Activity 14.2 – Modify Firm Org value lists

This activity will have you add and remove values to the Firm Org value list Offices

Activity Steps

Part 1: Add an Office

1. Open the **Firm Org** module from the left-side menu
2. Open the **Offices** tab from the top row
3. Click the **+Offices** button in the top-right
4. Type the following in the indicated fields:

    a. Offices Name: **Boston**
    b. Acronym: **BOS**
5. In the **BUSINNESS ADDRESS** section, select
    a. **Country: United States**
    b. **State: Massachusetts**
6. Click **Save** at the top-right

Part 2: Remove an Office

1. Open the **Offices** tab from the top row
2. Find the row for **Phoenix**
3. Click the **trash can** icon in the **Delete** column
4. Select **OK** from the pop-up window
5. Click the text **Denver** to open the Denver Office
6. Click the Edit button in the top-right
7. Go to the bottom of the GENERAL INFORMATION section
8. Select **No** for **Available on the drop-down menu?**
9. Click **Save** in the top-right

Check your understanding

The Firm Setup tab allows you to ___________.

a) Create new Firm Org values
b) Create new Firm Orgs
c) Relabel Firm Orgs

Refer to Appendix A for answers to the Check Your Understanding questions

APPENDIX A: Check Your Understanding Answer Key

Lesson 1: Customize Basic Firm Settings and Understand Navigation

The modules considered core data modules that store and track all of your data are

h) Companies
i) Contacts
j) Leads
k) Opportunities
l) Personnel
m) Projects
n) All of the above

Value Lists are located in

a) General Administration
b) Activities Administration
c) Contact Manager Administration

Lesson 2: Create Personnel Records

True or False
Personnel records store data used for resumes.

Lesson 3: Utilize My Preferences

Preferences includes options to

a) Create a Dashboard
b) Upload profile picture
c) Associate yourself to a record

Lesson 4: Create and Navigate a Company Record

Which record requires a Company record for association?

a) Contact record
b) Opportunity record
c) Both Contact and Opportunity record

Lesson 5: Create and Navigate a Contact Record

What is the best practice for adding a new Contact?

It is best practice to open the company record for which your contact is a member and search the Contacts table first.

Lesson 6: Create and Navigate a Lead Record

True or False
Leads can be entered without associating to any other core data modules

Lesson 7: Create and Administer Opportunity Records

It is best practice to add an Opportunity record from
a) the + Create New menu
b) a Contact record
c) a Company record

Lesson 8: Configure Contact Manager Administration

Contact Manager Administration is accessible via
a) Administration menu
b) Contacts module
c) Opportunities module
d) All of the above

Lesson 9: Utilize the User Manager to Set Permissions

True or False
Permissions must be set on a user group before adding users

Lesson 10: Set Up and Distribute Dashboards

Where can Dashboards be customized?

a) My Preferences
b) Dashboard Settings
c) General Administration

Lesson 11: Run and Analyze Reports

True or False

My Reports contains reports created by your user account and set as public ~~and private~~

Lesson 12: Create and Maintain the Knowledge Module

True or False

The ~~Edit Categories~~ Category Structure tab is where you create Knowledge bits

Lesson 13: Create and Set Up Workflows

Notify OFA when a new Company is created

- **Resource**: Company
- **Event**: Create
- **Action**: Email

Lesson 14: Configure Firm Setup as the OFA

The Firm Setup tab allows you to

a) Create new Firm Org values
b) Create new Firm Orgs
c) Relabel Firm Orgs

APPENDIX B: SUPPLEMENTAL INFORMATION

Sample Value Lists

	Construction	Architecture Engineering
Practice Area	Commercial Criminal Justice Education Government Healthcare High Tech Hospitality Industrial Leisure Manufacturing Religious/Cultural	Commercial Criminal Justice Education Government Healthcare High Tech Hospitality Industrial Leisure Manufacturing Religious/Cultural
Primary Categories	Airport Charter School Church Clinic Condominiums/Apartments Convention Center Correctional Facility Courthouse Dormitory/Barracks Hangar Higher Education Hospital Hotel/Motel K-12	Airport Charter School Church Clinic Condominiums/Apartments Convention Center Correctional Facility Courthouse Dormitory/Barracks Hangar Higher Education Hospital Hotel/Motel K-12
Secondary Categories	Auditorium Baggage Claim Biotech Bridge Building Information Modeling (BIM) Classrooms Clean Room Core and Shell Only Data Center/Web Hotel Emergency Room	Auditorium Baggage Claim Biotech Bridge Building Information Modeling (BIM) Classrooms Clean Room Core and Shell Only Data Center/Web Hotel Emergency Room

	Food Service Laboratory Library Occupied During Construction	Food Service Laboratory Library Occupied During Construction
Contact Type	Accounting Decision Maker Gatekeeper Influencer Manager Marketing/BD Project Site	Accounting Decision Maker Gatekeeper Influencer Manager Marketing/BD Project Site
Staff Team Roles	Estimator Lead Business Developer Project Engineer Project Executive Project Manager Superintendent Lead Estimator	Design Lead Lead Business Developer Principal-in-Charge Project Engineer Project Manager
Opportunity Stage	01-Prospecting 02-Received RFQ 03-Qualifications Submitted 04-Shortlisted to Proposal 05-Received RFP 06-Proposal/Bid Submitted 07-Shortlisted to Interview 08-Interviewed 09-Verbal Award 10-Closed Won 11-Closed Lost 12-Inactive/Did Not Pursue 13-On Hold	01-Prospecting 02-Received RFQ 03-Qualifications Submitted 04-Shortlisted to Proposal 05-Received RFP 06-Proposal Submitted 07-Shortlisted to Interview 08-Interviewed 09-Verbal Award 10-Closed Won 11-Closed Lost 12-Inactive/Did Not Pursue 13-On Hold

Permission Lists

FULL LICENSE TYPE PERMISSIONS

Administration	Move User Groups
	Change Group Permissions
	Change User Permissions
	Login as User
	Login as Extranet User
	Quick Search Admin
Workflow	Full Read
	Full Write
	Full Delete
	Full Admin
App Market	Browse
	Config
	Install
	Purchase
	Admin
Contact Manager	Full Read
	Full Write
	Full Delete
	Full Admin
	Self Read
	Self Write
	Self Delete
	Firm Org Read
	Firm Org Write
	Firm Org Delete
	Company Full Read
Activities	Full Read
	Full Write
	Full Delete
	Full Admin
	Opportunity Self Read
	Opportunity Self Write
	Opportunity Self Delete
Activities	Opportunity Firm Org Read
	Opportunity Firm Org Write
	Opportunity Firm Org Delete
	Contact Self Read

	Contact Self Write
	Contact Self Delete
	Contact Firm Org Read
	Contact Firm Org Write
	Contact Firm Org Delete
	Personnel Self Read
	Personnel Self Write
	Personnel Self Delete
	Personnel Firm Org Read
	Personnel Firm Org Write
	Personnel Firm Org Delete
	Project Self Read
	Project Self Write
	Project Self Delete
	Project Firm Org Read
	Project Firm Org Write
	Project Firm Org Delete
	Company Self Read
	Company Self Write
	Company Self Delete
	Company Firm Org Read
	Company Firm Org Write
	Company Firm Org Delete
	Lead Self Read
	Lead Self Write
	Lead Self Delete
	Lead Firm Org Read
	Lead Firm Org Write
	Lead Firm Org Delete
	Activities Self Write
	Activities Self Read
	Activities Self Delete
Leads	Full Read
	Full Write
	Full Delete
	Full Admin
	Self Read
Leads	Self Write
	Self Delete
	Firm Org Read
	Firm Org Write

	Firm Org Delete
Opportunities	Full Read Full Write Full Delete Full Admin Self Read Self Write Self Delete Firm Org Read Firm Org Write Firm Org Delete Push To Partner Vendor Read From Partner Vendor Generate Proposal Number Full Write Limited Full Write Stage Full Write Project Probability Self Write Limited Self Write Stage Self Write Project Probability Firm Org Write Limited Firm Org Write Stage Firm Org Write Project Probability
Dashboard	Take Snapshot Edit Snapshot
Email	Full Read Full Write Full Delete Full Admin
Email 3.0	Full Read Full Write Full Delete Full Admin
Email Marketing Email Marketing	Full Read Full Write Full Delete Full Admin
Firm Org	Full Read Full Write Full Delete

	Full Admin
Goals	Full Read
	Create
	Modify
	Delete
Knowledge	Full Read
	Full Write
	Full Delete
	Full Admin
Personnel	Full Read
	Full Write
	Full Delete
	Full Admin
	Self Read
	Self Write
Projects	Full Read
	Full Write
	Full Delete
	Full Admin
	Self Read
	Self Write
	Self Delete
	Firm Org Read
	Firm Org Write
	Firm Org Delete
	View Full Import Log
	View Self Import Log
	View Firm Org Import Log
	Push To Partner Vendor
	Read From Partner Vendor
	Edit Web Descriptions
	Publish To Website
	Marketing Project
	Publishable Project
Publisher 4.0	Full Read
	Full Write
	Full Delete
Publisher 4.0	Full Admin
	Publishable Project Filter
Reports	Full Read
	Full Write

	Full Delete
	Full Admin
	Project Type Filter

CRM LICENSE TYPE PERMISSIONS

Administration	
Workflow	Full Read
	Full Write
	Full Delete
App Market	Browse
	Config
	Install
	Purchase
Contact Manager	Full Read
	Full Write
	Full Delete
	Self Read
	Self Write
	Self Delete
	Firm Org Read
	Firm Org Write
	Firm Org Delete
	Company Full Read
Activities	Full Read
	Full Write
	Full Delete
	Opportunity Self Read
	Opportunity Self Write
	Opportunity Self Delete
	Opportunity Firm Org Read
	Opportunity Firm Org Write
	Opportunity Firm Org Delete
	Contact Self Read
	Contact Self Write
	Contact Self Delete
	Contact Firm Org Read
Activities	Contact Firm Org Write
	Contact Firm Org Delete
	Personnel Self Read
	Personnel Self Write

	Personnel Self Delete
	Personnel Firm Org Read
	Personnel Firm Org Write
	Personnel Firm Org Delete
	Project Self Read
	Project Self Write
	Project Self Delete
	Project Firm Org Read
	Project Firm Org Write
	Project Firm Org Delete
	Company Self Read
	Company Self Write
	Company Self Delete
	Company Firm Org Read
	Company Firm Org Write
	Company Firm Org Delete
	Lead Self Read
	Lead Self Write
	Lead Self Delete
	Lead Firm Org Read
	Lead Firm Org Write
	Lead Firm Org Delete
	Activities Self Write
	Activities Self Read
	Activities Self Delete
Leads	Full Read
	Full Write
	Full Delete
	Self Read
	Self Write
	Self Delete
	Firm Org Read
	Firm Org Write
	Firm Org Delete
Opportunities	Full Read
	Full Write
	Full Delete
Opportunities	Self Read
	Self Write
	Self Delete
	Firm Org Read

	Firm Org Write
	Firm Org Delete
	Push To Partner Vendor
	Read From Partner Vendor
	Generate Proposal Number
	Full Write Limited
	Full Write Stage
	Full Write Project Probability
	Self Write Limited
	Self Write Stage
	Self Write Project Probability
	Firm Org Write Limited
	Firm Org Write Stage
	Firm Org Write Project Probability
Dashboard	Take Snapshot
	Edit Snapshot
Email	Full Read
Email 3.0	Full Read
Email Marketing	Full Read
Firm Org	Full Read
Goals	Full Read
	Create
	Modify
	Delete
Knowledge	Full Read
	Full Write
	Full Delete
	Full Admin
Personnel	Full Read
	Self Read
Projects	Full Read
	Full Write
	Self Read
	Self Write
Projects	Firm Org Read
	View Full Import Log
	View Self Import Log
Projects	View Firm Org Import Log
	Read From Partner Vendor
Publisher 4.0	
Reports	Full Read

	Full Write
	Full Delete
	Project Type Filter

READ ONLY LICENSE TYPE PERMISSIONS

Administration	
Workflow	Full Read
App Market	
Contact Manager	Full Read
	Self Read
	Firm Org Read
	Company Full Read
Activities	Full Read
	Opportunity Self Read
	Opportunity Firm Org Read
	Contact Self Read
	Contact Firm Org Read
	Personnel Self Read
	Personnel Firm Org Read
	Project Self Read
	Project Firm Org Read
	Company Self Read
	Company Firm Org Read
	Lead Self Read
	Lead Firm Org Read
	Activities Self Read
Leads	Full Read
	Self Read
	Firm Org Read
Opportunities	Full Read
	Self Read
	Firm Org Read
	Read From Partner Vendor
Dashboard	
Email	Full Read
Email 3.0	Full Read
Email Marketing	Full Read
Firm Org	Full Read
Goals	Full Read
Knowledge	Full Read

Personnel	Full Read Self Read
Projects	Full Read Self Read Firm Org Read View Full Import Log View Self Import Log View Firm Org Import Log Read From Partner Vendor
Publisher 4.0	
Reports	Full Read

Knowledge Module Category Structures

- Firm Introduction (2)
- Business Information (0)
  - Accounting Policies (0)
  - Business Licenses (0)
  - HR Policies (0)
  - Liability Coverage (1)
- Marketing Collateral (3)
  - Company Background (3)
  - General Insurance (0)
  - Templates (2)
- Proposal (1)
  - Cover Page (3)
  - Divider Pages (5)
  - TOC (1)
  - Firm Introduction (3)
  - Appendix (1)
  - Graphics (1)
  - Approach (0)
    - Ability to Meet Schedule/Budget (1)
    - Ability to Work with All (0)
    - Design Approach (0)
    - Environmental Policy (0)
    - On-Call / Work Orders (0)
    - Project Management (0)
    - QA/QC (0)
- Miscellaneous (0)
  - Equipment / Software (0)
  - Support Services (0)

- Agreements (2)
- Budgets & Cost Control (0)
  - Budget Control Graphs & Charts (3)
  - Value Engineering \ Value Management (3)
  - Budget Development (0)
  - Cost Control (0)
  - Budget & Cost Control Examples (1)
- Client Survey (5)
- Construction Innovations (3)
- Construction Methodologies (1)
  - Alternative Delivery Systems (0)
  - Construction Industry Institute Best Practictic
  - Cleanroom Protocol (0)
  - Design-Build Process (0)
  - Fast-Track Plan (1)
  - Fixed Mechanization (1)
  - Infection Control (1)
  - Lean Construction (1)
- Diversity (1)
  - In-House Diversity (10)
  - Community Development - Minority Outreach
  - Standard Subcontracting Plans (1)
- Insurance (2)
- Legal (2)
- Management Systems (13)
- Market Sectors (8)
- Media (1)
  - PR Plan (0)
  - Media Outreach (0)

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The LMS will generate a completion which will be available to the participant under their Transcript section of the LMS.

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