Unanet University

UNANET CRM by Cosential:

Managing Contacts (SDL)

PARTICIPANT GUIDE

Last Revised September 30, 2022

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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 system while attending the course. Additionally, participants should record notes and actions for reference when working within their own Unanet 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.

Support Portal

The Unanet Support Portal is now located at support.unanet.com. If you are unsure of how to access the portal, you can acquire a login using the steps below:

To obtain a login to the Unanet support portal or to create a new ticket, send an email to support@unanet.com with "Support Portal ID request" in the Subject line.

The following conditions must be met to be granted a support account:

- The "from" address must match the domain of your company.
- It must NOT be a generic email account (e.g., it cannot be from gmail.com, aol.com, or msn.com).

The company must have an active support agreement with Unanet.

COURSE INTRODUCTION

Your relationships are the key to winning work. Unanet CRM by Cosential makes it easy to maintain a single source of truth for all companies and contacts used for business development purposes. This course will cover how business developers can easily grow their contacts in their natural daily flow – both on-the-go with Unanet CRM Mobile and at-the-desk using Unanet CRM for Outlook or Unanet CRM on the web.

In this course, you will learn which of the different access points of mobile, outlook, and web application will quickly and easily accomplish high volume tasks for creating and growing your contact base.

Learning Objectives

After this session for **Managing Contacts**, participants will be able to:

- Find contact information
- Update contact information
- Find contacts
- Associate to a contact
- Add a contact or company

Roles & Access

Unanet CRM by Cosential is a role-based system which provides security and access based on the roles assigned to the user by the System Administrator.

During this course, students will be instructed to log-in to Unanet CRM by Cosential 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.

Job Title	Unanet Role	Name	Unanet login Username	Password
Business Development Representative	**CRM User**	Joe Manning	**jmanning**	**welcome**

LESSON 1: FIND CONTACT INFORMATION

Find contact information

- Find a contact’s phone number to text or call them
- Find a contact’s email address to email them
- Find a contact’s address to meet with them
- Find more contact details through social media
- Find contact info for an existing contact in the CRM
- Find contact info of an email sender via the email

Introduction

Contact information such as phone number, email address, and business address can be found via all three access points: mobile, outlook, and web application. The recommended access depends on the situation whether you may want to call a contact from your phone when on the go, or perhaps email a contact from your desk.

The following activities highlight uses cases that a business developer will commonly encounter.

Find a contact’s phone number to text or call them

Activity 1.1 – How do I find a Contact’s phone number to text or call them?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap Contacts on the bottom menu
2. Tap the magnifying glass icon in the top menu
3. Begin typing the contact name in the search bar to return results
4. Find contact and tap to open the record
5. Tap the phone number to call
6. Tap the call button

NOTE: As another option, click on “Contacts” in the left menu to open the Contact grid

Outlook Activity Steps – Alternative Method

OUTLOOK

1. View Unanet CRM side panel menu from within an email
2. Click Search bar
3. Select Contacts
4. Type Contact name in the search bar

5. Click on the Contact name to view details
6. View Direct, Cell, and Company Phone

Web Activity Steps – Alternative Method

WEB

1. Place cursor in Search bar
2. Check box next to Contacts to filter results
3. Select a contact to view the record
4. View contact summary information

Find a contact's email address to email them

Activity 1.2 – How do I find an email address of a contact to send them an email?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Open an email message to access the Unanet CRM for Outlook add-in
2. Click on the Unanet CRM for Outlook add-in icon in top ribbon to open Unanet CRM side panel
3. Click Search
4. Click Contacts
5. Type in search bar to return results
6. Click on contact name to view email details

Mobile Activity Steps – Alternative Method

MOBILE

1. Tap Contacts on the bottom menu
2. Tap the magnifying glass icon in the top menu
3. Search for contact
4. Tap Contact to open the record
5. Tap the envelope icon to initiate an email, or tap the email address to initiate an email

Web Activity Steps – Alternative Method

WEB

1. Place cursor in Search bar
2. Check box next to Contacts to filter results
3. Select a contact to view the record
4. View contact summary information

Find a contact's address to meet with them

Activity 1.3 – How do I find directions to meet with a contact or company?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap Contacts or Company record to view the address
2. Tap the magnifying glass icon
3. Search for Contacts or Company record
4. Find contact and tap to open
5. Tap address to open Google maps
6. Tap Directions to launch

Web Activity Steps – Alternative Method

WEB

1. Place the cursor in the search bar
2. Check the box next to Contacts or Company to filter results
3. Begin typing in the search bar to return results
4. Click on the Contact or Company to view record details
5. Click on Directions in the Business Address panel to launch Google maps

Find more contact details through social media

Activity 1.4 – How can I find out more details about a Contact through social media?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the magnifying glass at top-right of screen
2. Search for contact
3. Select Contact
4. Edit the Contact
5. Enter the Contact email address (this is what CRM uses to search social media sites)
6. Tap on the magic wand icon to 'Enrich' the Contact record to pull in any updated information

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Enter the Company website and Unanet CRM will automatically populate the Company record with details found in social media

sites (based on website address)
2. Enter a Contact email address
3. Click Save and Unanet CRM will automatically populate the Contact record with details found in social media sites (based on email @ address)

NOTE: If enriched in mobile or Outlook, record is enriched in the web app

Find contact info for an existing contact in the CRM

Activity 1.5 – When I meet someone new to me but known in CRM, how can I find out more about them?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap Contacts
2. Tap magnifying glass icon
3. Search/Filter for Contact
4. Tap Contact name
5. Tap Associations to view:
    a. Associated Activities
    b. Associated Opportunities, Projects, Relationships
6. Tap and view Notes

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Click Search bar
2. Select Contacts
3. Search for Contact
4. Open the Contact record

NOTE: When you receive an email introducing a CRM contact (a Contact who is already in CRM) to you, if you click on the email you will see the names of the associated CRM Contact's in the Unanet CRM for Outlook side panel.

Web Activity Steps – Alternative Method

WEB

1. Place the cursor in the search bar
2. Check the box next to Contacts to filter results
3. Search for a contact
4. Select Contact
5. View the Contact Summary and more

Find contact info of an email sender via the email

Activity 1.6 – How do I see information about a contact I got an email from?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. In Outlook, open the email
2. Click on the Unanet CRM add-in icon in the top ribbon
3. The Unanet CRM side panel will display all emails
4. Click the Contact name with the green envelope icon to view that Contacts information

LESSON 2: UPDATE CONTACT INFORMATION

Learning Objectives

Update contact information

- Update contact info with new details
- Update contact info automatically from email signature details
- Document business interactions

Introduction

Contact information such as phone number, email address, and business address can be found and updated via all three access points. The mobile app and Outlook plug-in allow for enrichment of records as well. Outlook has a specific, powerful tool to help identify new information contained in an email signature.

The following activities highlight uses cases that a business developer will commonly encounter.

Update contact info with new details

Activity 2.1 – When I find info on a key contact, how can I quickly store it, so I don't forget?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the magnifying glass icon
2. Tap Contacts tab
3. Search for contact
4. Tap the Contact
5. Tap Edit in the upper-right hand corner
6. Open appropriate section (Notes)
7. Add or update information
8. Tap Done
9. Tap Save

Web Activity Steps – Alternative Method

WEB

1. Place the cursor in the search bar
2. Check the box for Contacts filter
3. Type in the search box
4. Click on Edit below Contact Summary to the right

5. Update new information
6. Click Update Contact

Update contact info automatically from email signature details

Activity 2.2 – A contact has a new cell number in their email signature. How can CRM ensure I don't miss these kinds of updates?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. In the Unanet CRM side panel, click the yellow bell icon (when available) to check for updates
2. Review updates, then click Update

NOTE: The Overall Firm Administrator (OFA) must enable Signature Parser under the Unanet CRM Outlook tile in the App Market. This allows the bell icon to alert users that there is updated or additional information available in the signature.

Document business interactions

Activity 2.3 – How do I document business interactions so that my colleagues and I know what is happening with customers, partners, and consultants?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Select the Create New + icon in the blue header bar
2. Select Event (previously Call Log)
3. Add required details
4. Select Save and Close (or Save and New to save Event and create a new Event or Save and Follow Up)

Mobile Activity Steps – Alternative Method

MOBILE

1. Tap Contacts in bottom menu
2. Tap Contacts tab
3. Select Contact record
4. Select desired record
5. Tap Activities
6. Tap the plus + icon to create an event

7. Enter required details
8. Tap Save

Web Activity Steps – Alternative Method

WEB

1. View Contact record
2. Select Activities
3. Select + Event to document interaction
4. Enter details
5. Click Save and Close

NOTE: As another option, click on “Contacts” in the left menu to open the Contact grid

LESSON 3: FIND CONTACTS

Learning Objectives

Find Contacts

- Find contacts with established relationships to self
- Find contacts with relationships to colleagues
- Find contacts in a specific region

Introduction

Discovering or finding contacts to establish or continue relationships is vitally important. Beyond obtaining their basic information or updating new details, finding opportunities to engage with contacts can be quickly achieved primarily with the mobile app.

The following activities highlight uses cases that a business developer will commonly encounter.

Find contacts with established relationships to self

Activity 3.1 – How do I see a list of contacts with which I have a relationship?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the Contacts icon in bottom menu
2. Tap the Contacts tab
3. Open the Filter
4. Tap My Contacts

Web Activity Steps – Alternative Method

WEB

1. Navigate to the Contacts module
2. Click on Filter button
3. Select My Contacts from the drop-down menu

Find contacts with relationships to colleagues

Activity 3.2 – I'm trying to get an in at a new company in town. How can I see if any of my colleagues have a relationship with anyone at that firm?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap the magnifying glass icon in the top menu
2. Tap the Companies tab
3. Search for the company
4. Open Company record
5. Tap Associations tab
6. Scroll down to look at Relationship panel

OUTLOOK

Outlook Activity Steps – Alternative Method

1. Click on Company in Unanet CRM side panel
2. Open Contacts section
3. Select a Contact
4. Find and open Personnel to view CRM associations

Web Activity Steps – Alternative Method

WEB

1. Open Company record
2. Click the Contacts tab
3. View any associated contacts
4. Click Associated References tab to jump down in the record
5. View Associated Personnel

Find contacts in a specific region

Activity 3.3 – I'm going to a specific region and want to call my key contacts. How can I easily identify and reach out to them while on the go?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap Contacts in bottom menu
2. Open All Contacts filter
3. Select Custom Filter
4. Tun on Key Contacts toggle
5. Tap on State/Province

6. Select state
7. Apply filter

Web Activity Steps – Alternative Method

WEB

1. Place cursor in Search bar
2. Click Advanced Search for Contacts at bottom of menu
3. Open Key Contact dropdown
4. Enter Country and State
5. Click Search

LESSON 4: ASSOCIATE TO A CONTACT

Learning Objectives

Associate to a contact

- Associate a contact to an existing lead or opportunity when on the go
- Associate a contact to an existing lead or opportunity when at my desk
- Associate self to contacts created when on the go

Introduction

After finding contact information or updating the information, it is very beneficial to connect all of the pieces that exist in the CRM. Associations can easily be made in the mobile app when on the go, or on the web application when working at a desk.

Associate a contact to an existing lead or opportunity when on the go

Activity 4.1 – How can I associate a contact to an existing Opportunity or Lead when on the go?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap on the existing Opportunity or Lead record
2. Scroll over on tabs and tap Associations
3. Scroll down to Contacts section
4. Tap Associate Contacts
5. Search for and select contact
6. Select Role
7. Tap Save

Associate a contact to an existing lead or opportunity when at my desk

Activity 4.2 – How can I associate a contact to an existing Opportunity or Lead when at my desk?

Web Activity Steps – Recommended Method

WEB

1. Click Opportunities on left side to open Opportunity grid
2. Click on the arrow on the left of the Opportunity
3. Select Opportunity Details to open the record
4. Click the Contacts tab
5. Click + Associate Contact
6. Search for and select Contact
7. Select Association
8. Select Role
9. Check Primary Contact box
10. Click Save

NOTE: For a Lead, check “Set as Lead Client” to associate this contact as Lead Client

Outlook Activity Steps – Alternative Method

OUTLOOK

1. Click Search in side panel
2. Select Contact from dropdown
3. Type contact name
4. Select the Contact
5. Click the add button to create an Event
6. Enter required details
7. In Associations panel, search for Opportunity
8. Select Opportunity you would like to associate this contact with
9. Click Save and Close

NOTE: In step 7, click the $ icon to expand the dropdown list for more options

Associate self to contacts created when on the go

Activity 4.3 – How can I ensure that I am associated with contacts I create on the go?

Mobile Activity Steps – Recommended Method

MOBILE

1. Tap on thumbnail image in top-left corner of screen
2. Tap Preferences
3. Tap on Contacts
4. Tap *Assign me to contacts I create as*
5. Select the Relationship Type to automatically assign you for Contacts you create
    a. Alternative Owner
    b. General Relationship
    c. **Recommended** Owner

LESSON 5: ADD A CONTACT OR COMPANY

Learning Objectives

Add a contact or company

- Add a contact via an email
- Add a contact when on the go
- Add a contact when at my desk
- Add a company when on the go
- Add a company when at my desk

Introduction

The ability to find and update existing contacts will make a huge difference. Growing a contact base by adding new companies and contacts to the system is also vitally important. This is easily achieved on the mobile app when on the go, and also through the Outlook plug-in when working at a desk.

Add a contact via an email

Activity 5.1 – I just got an email from a new prospect. How can I easily add them to CRM?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Click the + icon next to the prospect's name to open the Create Contact form
2. Enter required details
3. Click Save

NOTE: *Create Contacts with a Single Click* is a feature that allows you to create Contacts with minimal effort. This is used when the email sender is not already a contact in the system. This is enabled as default.

Add a contact when on the go

Activity 5.2 – How do I add a Contact when on the go?

Mobile Activity Steps – Recommended Method

MOBILE

1. Log in to Unanet CRM for Mobile app

2. Tap the + icon in the top right corner of your screen
3. Tap Contact
4. Enter required details
5. Tap Save

Add a contact when at my desk

Activity 5.3 – How do I add a contact when at my desk?

This activity will show how to add a contact from scratch, while Activity 5.1 showed how to add a contact from existing information included in an email.

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Click + New in blue bar on the top of the side panel
2. Select Contact
3. Enter details in the Create Contact form
    a. Email address
    b. First and Last Name
    c. Company Name
4. Click Save

Web Activity Steps – Alternative Method

WEB

1. Click on + icon in header
2. Select Contact
3. Add required details to the Create Contact form
    a. Company Name
    b. First and Last Name
4. Click Save Contact

Add a company when on the go

Activity 5.4 – How do I add a company when on the go?

Mobile Activity Steps – Recommended Method

MOBILE

1. Log in to Unanet CRM for Mobile app
2. Tap the + icon in the top right corner of your screen
3. Tap Company
4. Enter required details
5. Tap Save

Add a company when at my desk

Activity 5.5 – How do I add a company when at my desk?

Outlook Activity Steps – Recommended Method

OUTLOOK

1. Click + New button
2. Select Company
3. Enter details
    a. Website
    b. Company Name
    c. Company Address
    d. City, State, Postal Code
4. Click Save

Web Activity Steps – Alternative Method

WEB

1. Click on + icon in header
2. Select Company
3. Add required details to the Create Company form
4. Click Save Contact

COMPLETION CERTIFICATE AND EVALUATION

The Learning Management System (LMS) will generate a completion certificate (including **CPE credits**, where applicable) which will be available to the participant under their Transcript section of the LMS.

We appreciate your feedback on our courses and encourage you to complete the course evaluation.