Unanet University

UNANET CRM by Cosential: ADMINISTERING THE SYSTEM

PARTICIPANT GUIDE

Last Revised June 19, 2024

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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

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Send questions here for information about courses, course schedules, unanetuniversity.com, certifications, and enrollments. Unanet monitors this mailbox daily.

Student Training Site

Students can use their Sandbox site to support this course. Students must have login credentials to log in as the Overall Firm Administrator (OFA). The Sandbox system should include Personnel, Companies, Contacts, Opportunities, Projects, and business processes to complete the designed activities sufficiently.

COURSE INTRODUCTION

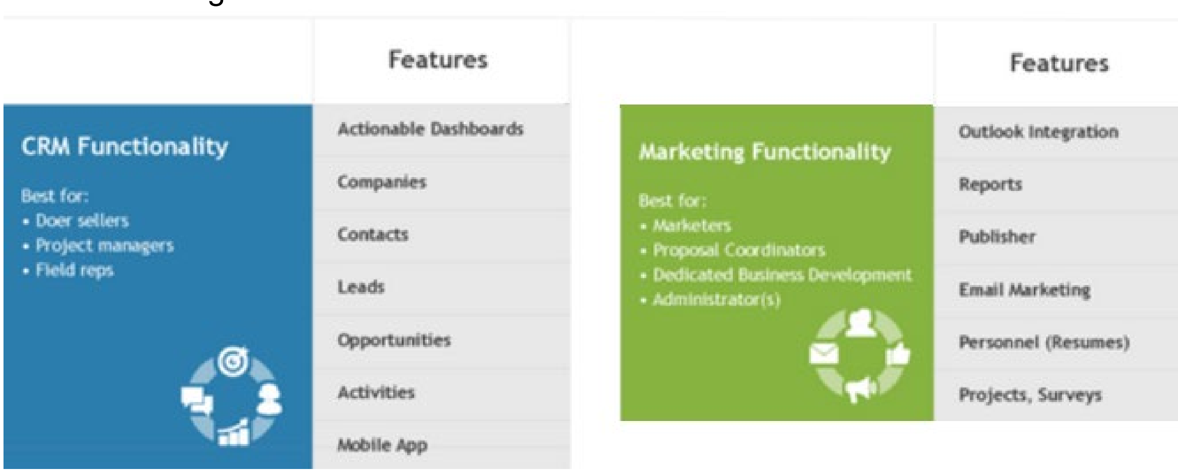
In this course, you will review tasks specific to general administration of the system to configure value lists, field labels, and custom fields for all record types. You will also complete tasks for system cleanup of records, configuring and creating forms, utilizing the user manager, creating dashboards and customizing widgets, running reports, using the knowledge module, creating workflows, and configuring firm setup.

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
- Configure a Personnel Record
- Utilize *My Preferences*
- Configure a Company Record
- Configure a Contact Record
- Configure a Lead Record
- Configure an Opportunity Record
- Create and Publish a Form
- Utilize Contact Manager Administration
- Configure a Project Record
- Configure Projects 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

Unanet CRM by Cosential provides CRM and Marketing Functionality. The graphic below outlines system features that apply to each and the user type for which these features are best. The Overall Firm Administrator can control access through permission settings.



Administrator Roles

Every firm has one Overall Firm Administrator (OFA) assigned by Unanet CRM. Only the OFA can access the Firm Setup tab in Administration, administer the Activities module, and assign Administrator access to other users. To change the OFA, please get in touch with Unanet CRM Support.

The OFA can assign other users as Administrators. Administrators have complete access to all of a firm's active modules (except Administration > Firm Setup) and can view, edit, and delete records, change value list fields, and administer other firm settings.

We recommend limiting the number of Administrators because the system does not log Administrator modifications to your firm's settings.

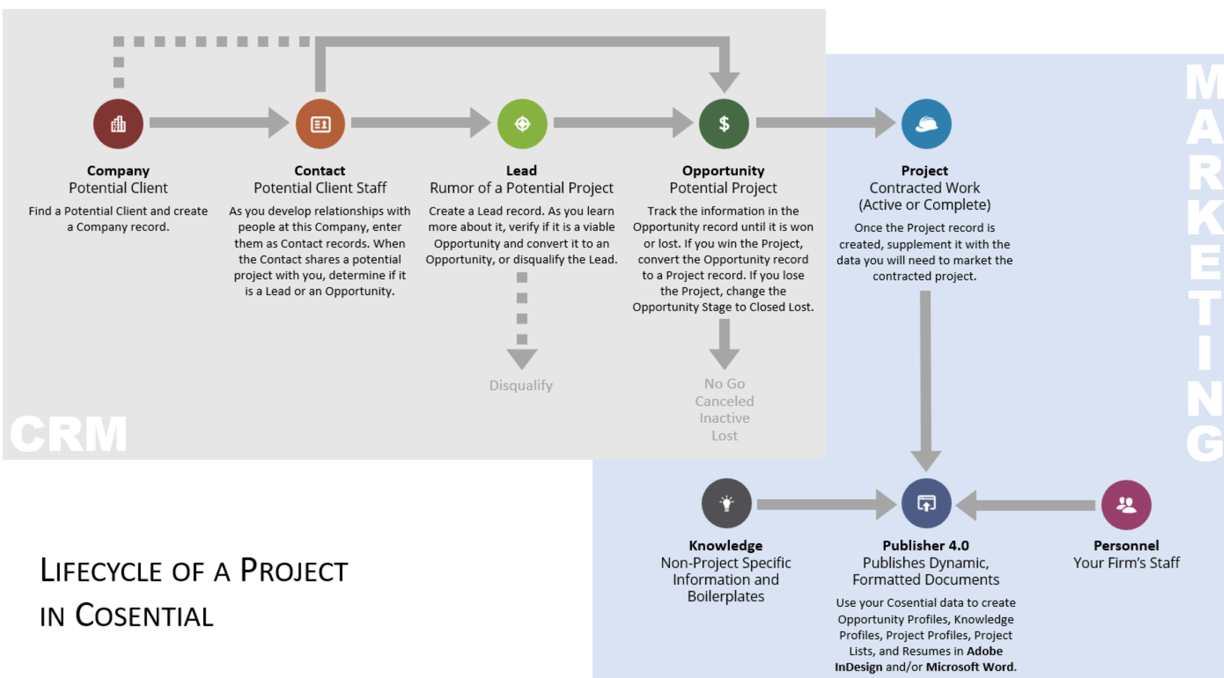
LESSON 1: CUSTOMIZE BASIC FIRM SETTINGS AND UNDERSTAND NAVIGATION

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 to completing a successful project. The graphic below shows the modules that support this process.



LIFECYCLE OF A PROJECT IN COSENTIAL

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

Administration Menu

Find the Administration menu in the header bar's top-right corner next to the User Profile picture, which 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
- App Market

General Administration's homepage displays Recent Account Activity, updated information, and multiple tabs. There are two rows of tabs, with the frequently used items at the top.

Activities Administration contains the Event 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 includes Value Lists, cleanup tools (Mass Updates, Mass Removal, Merged Updates), and Data Manipulation Tools.

Personnel Administration is where you can 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

Hover over General Administration to view contents. We cover the most frequently used items in the General Administration dropdown: User Manager, Firm Setup, Workflow 2.0, Value Lists, Field Customization, and Custom Fields. We address these areas in this course, but let's explore Field customization and Value Lists now.

Field Customization

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 can add a Custom Label, a Custom Tool Tip, toggle the Tool Tip on or off, or Enable or Disable the field via the Viewable toggle. Tool Tips display when hovering over the field when toggled on.

The **Project Fields Display** area also allows you to toggle on and off *Size* fields to *display in the Project Summary*.

The **Company/Contact Fields Display** areas allow you to toggle on or off fields and make them **Required**.

The **Opportunity Fields Display** takes you to the Opportunity Configuration area.

Some fields exist in multiple places, such as Primary and Secondary Categories shared by Projects and Opportunities.

Tour 1.1 - Find Field Customization and explore functionality

Tour the options available in the Field Customization menu and learn the purposes they serve.

Activity 1.2 – Edit a Personnel field and add a custom label

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Field Customization** from the secondary dropdown menu
2. In the **PERSONNEL** section, open **Personnel Fields Display**
3. Scroll down to the **Office Contact History** section
4. If not already off, Toggle the Viewable button to "**Off**" for Pager
5. Scroll up to the **Personnel Details** section
6. Click the edit pencil icon for "**Other Info**"
    a. Add Custom Label: "Date of Birth"
7. Click the **Save** icon

Value Lists

Value lists are a set of dropdown options across different record types. You can choose between Single-Select and Multi-Select functionalities in the Preferences section. You can add, remove, or edit a value within a section by finding a button labeled **+Add**, a "new" value button, or a text field that says New Value, accompanied by a Save button.

Some Value Lists come pre-configured, while others can be customized. Remember that some Value Lists are shared across different record types, so modifying them affects all records that use those values.

Deleting a value from a value list already selected in a record creates a ghost association where the value still appears but does not exist in the database.

Tour 1.3 – Locate value lists and explore functionality

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

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Value Lists** from the secondary dropdown menu
2. Scroll down to the PROJECTS section and Open **Primary Categories**
3. Find **Agricultural** at the top of the list and click **delete**
4. Click **OK** in the pop-up window to confirm

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

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Value Lists** from the secondary dropdown menu
2. Open **Project Region** in the PROJECTS section
3. Find **Caribbean** near the top of the list and click the **Viewable** eye icon to toggle it off
4. 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: CONFIGURE A PERSONNEL RECORD

Learning Objectives

- Navigate and configure a Personnel record
- Modify the Education value list

Introduction

The Personnel module manages your marketable staff information efficiently. This module lets you quickly assemble winning project teams and generate dynamic resumes. Personnel records store a wide range of information such as bios/intros, education, skills/training, memberships, current and previous project experience, awards, and references. These records can be associated with the core data modules: Firm Orgs, Activities, Knowledge, and Goals, making it easier for you to manage your organization's marketable staff effectively.

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

Upon opening a Personnel record, you see several tabs in 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. It 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. There is no *Make User* button if the person is already a user.

Education Value List in Personnel Record

Degree is the only field on the Education tab that pulls from a value list. **Note**: School is a **required field**.

Activity 2.1 – Modify the Education value list

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Value Lists** from the secondary dropdown menu
2. Scroll down to the **PERSONNEL** section
3. Open the **Education Degrees** link
4. Add a new value to the list
    a. Type “JD” into the **New Value** text field
    b. Click **Save**
5. Edit the first value “AA” to read “Associate of Arts”
    c. Click the edit pencil icon to the left of “AA”
    a. Type “Associate 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 password
- Set preferences to associate yourself with New Opportunities

Introduction

When you click on your user profile picture, a menu appears with options to access your Personnel Record, Preferences, and log out. Selecting Preferences leads you to a PERSONAL and CONTACT MANAGER section.

Password

In the PERSONAL section, you handle password and login preferences, home page, and auto-login preferences, and set your default Country.

The Change Password function in My Preferences is straightforward and works as expected. Changes are effective immediately, and passwords do not expire. Users may reset their 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, which we cover in Lesson 12.

Demo 3.1 – Reset a password as a user

Demo Steps

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

Opportunity Preferences

In your MY PREFERENCES > CONTACT MANAGER section, you change the default view for listing Company records and how to associate yourself to newly created Opportunity records automatically.

Users set up their associated Opportunity Staff Team Role in the Opportunity Preferences area. They are automatically associated with this role whenever they add a new Opportunity. **Note**: Administrators should help users understand that this preference is available to help expedite workflows that create Opportunities, filter *My Opportunities*, and utilize 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 the CONTACT MANAGER section
4. Check the box for “Automatically associate yourself to Opportunities you create as”
5. Open the dropdown menu
6. Select **Assistant Project Manager**
7. Click **Save**

Part 2: Check that 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: CONFIGURE A COMPANY RECORD

Learning Objectives

- Navigate and configure a Company record
- Modify the Company-type value list
- Modify Company fields to be required

Introduction

In Unanet CRM, the information flow begins with the Company record and your firm's relationship with them. Think Client, Owner, Prospect, or Consultant. This module is where you manage the information you have for the companies you are doing business with and those with whom you are pursuing business.

First, the Company summary page displays associations with other records. It provides 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.

Check for similar company names before creating a new record. The CRM system displays potential duplicates as you type. If you find one, cancel and confirm you are not creating a duplicate record.

Company Record Value Lists

In the Value List menu of the Company section, there are multiple value lists. However, the company type is the most commonly used. Use the **Company Types** value list to classify the companies you interact with. This value list can be either single-select or multi-select.

Use The *Available on Dropdown* option to include or exclude a specific value from the list. By selecting "No," the list does not display the value, but the data associated with it stays in the records. We recommend hiding them from the dropdown vs deleting values from value lists.

Removed values move to the list called "Removed Company Types." You can choose to either re-add the value or delete it completely. If you decide to delete it, the system alerts you to associated companies using that value.

Activity 4.1 – Modify the Company Type value list

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Value Lists** from the secondary dropdown menu
2. Scroll down to the **COMPANIES** section
3. Open the **Company Types** link
4. Add a new value to the list by clicking the **+Add** button
5. 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**
6. Click **Save**

Activity 4.2 – Modify Company fields to be required

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Field Customization**
2. Open **Company Fields Display** in the second section for CONTACT MANAGER
3. Click to expand the **Address** section
4. In the **Required** column, turn on the following fields (click to expand section)
    a. Address 1 e. Phone
    b. City f. Postal Code
    c. Country g. Website
    d. State

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: CONFIGURE A CONTACT RECORD

Learning Objectives

- Navigate and configure 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 people you are doing business with and those with whom you are pursuing business.

Even though there are several ways to add a new Contact, such as quickly clicking the Create New + icon in the upper-right corner and selecting Contact, we recommend you review the Company > Contacts table first to help avoid duplicates.

Please also search the database for the person as they may be a contact for a company they previously worked for.

You are automatically associated with the Contacts you create. You can associate more people to the record after you create it.

Field Customization in the Contact Record

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

Activity 5.1 – Turn on and relabel Contact Category to Personal Interests

Activity Steps

Part 1: Relabel

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Field Customization** from the secondary dropdown menu

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

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

Part 2: Add values

1. Click the **Administration** button
   a. Hover over **General Administration**
   b. Select **Value Lists** from the secondary dropdown menu
2. Scroll down to the CONTACTS section
3. Open the **Contact Category** field
4. Add a value using the **+Add** button in the upper-right of the page
5. Input "**Golf**" into the Contact Category Name box in the pop-up window
6. Add another value using the **+Add** button in the upper-right of the page
7. 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 include suggested additions to better use the value list.

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

For Mailing Lists, these values determine who receives what mailings.

Activity 5.2 – Modify Contact Type and Mailing List value lists

Activity Steps

Part 1: Modify Contact Type

1. Click the **Administration** button
   a. Hover over **General Administration**

    b. Select **Value Lists** from the secondary dropdown menu
2. Scroll down to the CONTACTS section
3. Open the **Contact Types** field
4. Add a value using the **+Add** button in the upper-right of the page
5. Input “Marketing Contact” into the Contact Type box in the pop-up window
6. 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 the top row of the 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 2024**” 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 selection 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 selections.

Custom Fields in the Contact Record

Custom Fields can be added to Projects, Opportunities, Contacts, and Companies by an Administrator.

Add up to 5 custom fields of each type for all modules except Opportunities. In Opportunities, you can add up to 200 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 (for example, 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 dropdown list of single-select customizable values

It is best practice 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 customer field **type** once you've created it.
2. You cannot delete a custom field. You can only remove it and delete all data held in that field.
3. To re-purpose a removed custom field, edit the name of a custom field with the field type 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 you are not using or switch data around to free up a multi-select list.

Activity 5.3 – Create a Contact Custom Field for Golf Shirt Size

Activity Steps

Part 1: Create a custom field

1. Open the **General Administration** menu
2. Open the **Custom Fields** tab in the top row of the toolbar
3. Open **Custom Contact Fields**
4. Click the **+ Custom Field** button
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"** and **"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: CONFIGURE A LEAD RECORD

Learning Objectives

- Navigate and configure a Lead record
- Modify the Lead Stages value list by adding “Assigned/Opened”

Introduction

The Leads module is optional, where you manage the information you have for the leads you are tracking.

You can add a Lead without associating it with other core data modules. Or associate 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 to create a Lead record. This optional module lets you track rumors or long-range pursuits before enough information to determine a viable opportunity.

NOTE: To convert a Lead to an Opportunity, you must associate a Client Company records with the Lead record.

Value Lists in the Lead Record

The Lead record has several value lists. Leads, Opportunities, and Projects share value lists. Configure them under General Administration > Value Lists.

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

Activity 6.1 – Modify the Lead Stages value list by adding “Assigned”

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Value Lists** from the secondary dropdown menu
2. Scroll down to the LEADS section
3. Open the **Stages** field
4. Add a value by selecting the **New Value** text field at the top of the page
5. Input “**Assigned**” into the New Value text field
6. Open the **Status** dropdown and select **Open**

7. Click **Save**

Check your understanding

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

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

LESSON 7: CONFIGURE AN OPPORTUNITY RECORD

Learning Objectives

- Navigate and configure an Opportunity record
- Identify and discuss value lists 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”
- Modify Opportunity fields to turn fields on or off or make the fields required

Introduction

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

The best practice for adding a new Opportunity is to start from the Company, where you have a **+Opportunity** button in the Opportunity section. This method ensures you associate the Opportunity with the correct client (company). You can see the entire list of associated opportunities 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, use the Opportunities Quick Search tool and ensure you are not creating a duplicate record.

The *Opportunity* form includes a shortcut panel on the left that helps you jump to different sections of the form, and there is a search box to find specific fields directly. The blue “More required” button helps ensure you don’t miss the required fields. Pressing the blue button jumps you directly to the required fields that are incomplete.

Value Lists in the Opportunity Record

The Opportunity record has various essential value lists: Stages, Submittal Type, Win Probability, Prospect Type, and Contact Role.

The following value lists are also significant but not unique to the Opportunity record. These are shared as the key information flows through the project lifecycle.

- **Firm Org** categorizations allow you to categorize (organize) your data to mirror your firm. The six baked-in Firm Orgs are Offices, Divisions, Office Divisions, Studios, Practice Areas, and Territories. These are present in all of the core data modules.

- **Primary and Secondary Categories,** Project **Contracts**, and Project **Service types** 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.

Activity 7.1 – Modify value lists for Stages, Contact Roles, and Primary Categories

Activity Steps

Part 1: Add a field to the Stages value list

1. Click the **Administration** button
    a. Select **Contact Manager Administration**
    b. Select **Administrate Opportunity Fields** to open Opportunity Configuration
2. In the Lifecycle section, click the Value List link for the **Stage** 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 the Associated Contact Roles value list

1. Click the **Value Lists** link at the top
2. In the OPPORTUNITIES section, open the **Associated Contact Roles** field
3. Add a value by typing in the **New Value** in the 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 the Associated Contact Roles value list

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Value Lists** from the secondary dropdown menu
2. In the PROJECTS section, open the **Primary Categories** field
3. Click the **New Category** button in the upper right
4. Input "**Airport Terminal**" into the text field

5. Select the **Yes** radio button for Available on Dropdown menu
6. Click **add category**

Stages Value List

Opportunity Stages represent your incoming work or your pipeline. It is vital to reach a consensus on your Stages with management, business development, and marketing staff.

Associated Contact Role Value List

Contact Role applies to Leads and Projects and is a key value for tracking relationships and identifying key Contacts throughout the lifecycle of a project. Manage this value here: General Administration > Value Lists > OPPORTUNITIES > Associated Contact Roles.

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 from the PROJECTS section.

Field Customization in the Opportunity Record

Activity 7.2 – Relabel Dollar and Date fields

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Field Customization** from the secondary dropdown menu
2. In the CONTACT MANAGER section, open the **Opportunity Field Display** link
3. Find **Factored Fee** in the **Metrics** section
4. Click the **ellipses** left of Factored Fee
5. Select **Edit Field** from the dropdown menu to open the Edit form
6. In the **Custom Label** box**,** type "**Weighted Potential Revenue**"
7. Click **Save**
8. Click the **expand icon** at the left end of the header bar to collapse all
9. Click the **expand** icon on the left side of **Lifecycle** and find the **Est. Selection Date**
10. Click the **ellipses** left of Est. Selection Date
11. Select **Edit Field** from the dropdown menu to open the Edit form
12. In the **Custom Label** box**,** type "**Client Decision Date**"
13. In the **Custom Tool Tip** box, type "**When the client makes a decision**"
14. Click **Save**

Administrate Opportunity Fields

This section covers the Opportunity Configuration Grid and how to make Opportunity fields required when creating and editing Opportunities.

The following navigation paths all lead to **Opportunity Configuration**:

- Administration > Contact Manager Administration > Administrate Opportunity Fields
- Administration > General Administration > Field Customization > Opportunity Fields Display
- Administration > General Administration > Custom Fields > Opportunities

Opportunity Configuration Area

The Opportunity configuration provides the following information for all standard and custom opportunity fields:

- **Field Name** – The standard default field display name
- **Custom Field Name** – Manually entered text to relabel a standard field name
- **Field Type** – Checkbox, Currency, Date, Hyperlink, Number, Percentage, Rich Text, Short Text, Value List
    - **Custom field label** – For New Custom Fields, an informative label displays to represent the custom field.
    - **Legacy field label** - An informative label will be displayed to represent the custom field for legacy Custom Fields.
- **Enabled** –Toggle on/off to make field visible or hidden on data entry forms
- **Required** - A value in this field is required to save a new Opportunity. (The system requires a Company/Client, Opportunity Name, Status, and Stage for all records).
- **Read Only by Stage** – Lists all Opportunity Stages to conditional set the field as read-only when the Opportunity reaches the desired Stage.
- **Custom Data Entry Forms** – Lists custom Opportunity forms on which an Admin can set the field as conditionally required.
- **Enable on grid** - Makes the field available on the Opportunity Grid.
- **Edit on grid** – Allows you to edit the field on the Opportunity Grid.
- **Tooltip** – Once you have added a tooltip, it is visible here, and when a user hovers over the field

The ellipse to the left of the field name allows you to manage individual fields:

- Standard Fields
    - Clicking the ellipses on a Standard field allows an administrator to edit the field
- New Custom Fields
    - An administrator can perform the following actions when they click the ellipses on a New Custom field type:
        - Edit Field - Copy Backend ID - Hide Tool Tip - Delete - Manage Value List

- Legacy Fields
    - Clicking the ellipses on a New Custom field type allows an administrator to perform the following actions:
        - Edit Field - Copy Backend ID - Hide Tool Tip - Delete - Manage Value List

Activity 7.3 – Add or Remove Dollar and Date Fields

Activity Steps

1. Click the **Administration** button
    a. Select the **Contact Manager Administration** menu
2. In the OPPORTUNITIES section, open the **Administrate Opportunity Fields** link
3. Find **Quals Due Date** in the **LIFECYCLE** section
4. Turn on the **Enable** toggle

Activity 7.4 – Modify Opportunity fields to turn fields on or off or make the fields required

Activity Steps

Part 1

1. Click the **Administration** button
    a. Select **Contact Manager Administration**
2. In the OPPORTUNITIES sections, select **Administrate Opportunity Fields**
3. In the LIFECYCLE section, select the **ellipses** next to **Quals Due Date**
4. Select **Edit Field**
5. Select **Required** from the Required dropdown
6. Select **Save**

Part 2

1. Select the **ellipses** next to the **Expected RFP Date**
2. Select **Edit Field**
3. Check the box next to **Enable on Grid**
4. Check the box next to **Edit on Grid**
5. Select **Save**

Part 3

1. Select the **ellipses** next to **RFP Received**
2. Select **Edit Field**
3. Select **By Stage** from the Required dropdown

4. Select the following stages from the dropdown (note, your stage values may be different)
    a. **02-Received RFP**
    b. **03-Submitted RFQ**
    c. **06-Submitted RFP**
    d. **07-Shortlisted**
    e. **10-Closed Won**
    f. **11-Closed Lost**
5. Select **Save**

Custom Fields in the Opportunity Record

An Administrator can add Custom Fields to several areas of the CRM, such as Projects, Opportunities, Contacts, and Companies.

You can add up to 5 of each custom field type for Projects, Contacts, and Companies, with up to 200 for Opportunities.

Custom Field Types include:

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

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 you are not using or switch data around to free up a multi-select list.

Activity 7.5 – Create a custom text field for Proposal Date/Time Submission

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
        i. Select **Custom Fields** from the secondary dropdown menu
2. In the CONTACT MANAGER section, open the **Opportunities** link
3. Click **Add Custom Field** on the top-right side of the table
4. In the pop-up window, in the **Field Name** box type "**Proposal Due Date and Time**"
5. For the **Section** dropdown menu select **Lifecycle**
6. For the **Field Type** dropdown menu, select **Short Text**
7. Click **Save**

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: UTILIZE CONTACT MANAGER ADMINISTRATION

Learning Objectives

- Discuss Mass Updates, Mass Removal, Merged Updates, and Data Manipulation Tools

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.

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

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

The Mass Updates and Removal sections include 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. One Mass Update function deals with Opportunities to Associate/Unassociate Opportunities to Projects.

Tour 8.1a – Discuss Mass Updates

Tour 8.1b – Discuss Mass Removal

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

Tour 8.1c – 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 allow 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, to the data that can be updated.

Tour 8.1d – Discuss Data Manipulation Tools

LESSON 9: CONFIGURE FORMS

Learning Objectives

- Create a Form
- Publish a Form

Introduction

This lesson covers the administrative functions of the Forms feature. Learn how to create and publish Forms to use on Opportunities within CRM.

Features and Benefits

Forms provide a flexible way to gather additional information about your Opportunities within CRM. This feature allows you to:

- Create custom Forms to support your business processes, such as Go/No Go Forms and Proposal Checklists
- Utilize various question types to gather the type of data that is most important to your processes
- Optionally require and score question responses to ensure you gather the appropriate amount of data
- Create Workflow notifications based on Form status and score

Use Cases

Use Forms for various purposes associated with Opportunities within Unanet CRM, including:

- Go/No Go
- Strategy to Win
- Proposal Checklist
- Debrief
- Conflict of Interest
- Request for Resources

Tour 9.1 – Discuss Forms

Access the Forms Dashboard here: Admin tool icon > General Administration > Forms. Create forms using templates or from scratch.

Creating Forms

Create from Template

When creating a Form from a template, we provide Admins with a great starting point that can save time when developing a Form from scratch. Admins have complete control to change all aspects of the template before saving and publishing, including:

- Modifying the name and description
- Adding additional questions
- Removing/modifying provided questions
- Adding conditional requirements to the Form
- Adding/modifying conditional display logic of individual questions

The following Opportunity Form templates are available:

- Go-No Go Simple
- Go-No Go Advanced
- Debrief
- Checklist
- Gate Review forms

Activity 9.2 – Create a Form from a Template

Activity Steps

1. Click the **Administration** button
2. Hover over General Administration
    a. Select **Forms** from the dropdown menu
3. Click on **Create from Template**
4. Select the **template** from the drop-down list to open the form-build-page
5. Rename your template
6. Add a Section title
7. Hover over the left edge of question 2 for a 4-directional arrow to appear
8. Drag and drop question 2 before question 1
9. Click on question 1 and check the box next to **Required**
10. Select **Save**
11. Notice the new Form in your Drafts section

Create A Form from Scratch

To create a new Form, click "Create from Scratch" at the top of the page. Add questions and a title/description. To duplicate a Form, click the three-dot menu and select "Duplicate."

The following question types are currently supported:

- **Short text** – gathers a short text response
- **Long text** – gathers an extended text response
- **Radio button** – allows the user to select a single option from a set of admin-determined responses
- **Checkbox** – allows the user to select multiple options from a set of admin-determined responses
- **Date/Time** – gathers a date/time response
- **Currency** – gathers a currency response
- **Number** – gathers a numerical response
- **Percentage** – gathers a percentage response
- **Rating** – gathers a rating response in “stars”
- **Likert** – measures opinions, attitudes, or behaviors as a flexible scale response

Tour 9.3 – Discuss Forms Section in Opportunity Record

The Forms section displays previously added forms and allows you to add more forms to the Opportunity.

NOTE: You may add a form to an Opportunity you are currently editing.

Check your understanding

True or False

The Go-No Go Form is the only template provided.

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

LESSON 10: CONFIGURE A PROJECT RECORD

Learning Objectives

- Navigate and configure the Project record
- Associate relationships to a Project

Introduction

The Marketing side of the Unanet CRM System includes the Project and Personnel Core Data Modules and various Output and Support modules. The data tracked in these modules is used to generate resumes, project profiles, and reports to help demonstrate your firm's expertise.

A Project record stores and interrelates project-specific data. Information includes a **project directory** (Owner/Client, Consultant, and Staff Team), **financials** (Fees/Contracts, Costs, and Change Orders), **logistics** (Schedule and Size), **marketing** (Images, Awards, Publications, Descriptions, and References), and other documentation (Documents, Emails, and Archiving).

Key project relationships include associations with companies and contacts (such as owners, clients, consultants, and references), staff teams (your personnel), and the relationship to the original opportunity.

Tour 10.1 – Identify and discuss Project record fields and tabs

Before creating a new Project record, please ensure you are not creating a duplicate. Specific fields are required when adding a new project via the main menu or from the Project Grid. Once those fields are populated and you click Create Project, you see the Project Summary page. Click edit to add or make changes to the summary page.

Other information is stored in Project records and broken into several tabs, which you can view by clicking. Each tab has buttons for editing and associating data. When you are done editing within any tab, click the "Save" button.

The **Images tab has its own Project Image Manager tool**. You can find thumbnail previews, metadata, and download capabilities for uploaded Project images here.

Activity 10.2 – Create a Project record

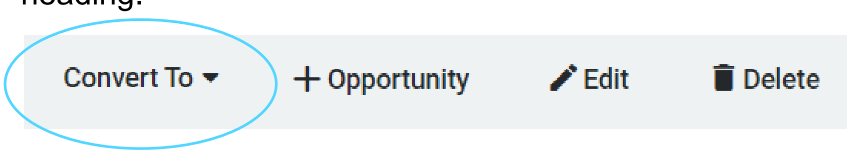
Activity Steps

1. Click the **Create New +** icon in the upper-right and select **Project**
2. Add a **Project Name** (*required*)
3. Scroll down and Select the **Create Project** button to open the new record
4. In the new record, Scroll down to **Project Categories/Types**
    a. Select the icon left of **Primary Categories** and make a selection
        i. Click **Submit**
    b. Select **Services Type(s)**
    c. Select **Construction Type**
    d. Select **Delivery Method**
    e. Select **Project Client Type**
5. Identify Firm Organization information
    a. Select the icon left of **Offices** and make a selection
        i. Click **Submit**
6. Associate a Client/Owner (*Companies can be associated with Projects as Client, Owner, Owner's Rep, or Consultant Companies*)
    a. Select the **Owner/Client** tab
    b. Select **+Company** to open the Add Owner/Client panel
    c. Search for and select a Company
    d. Select **Company Type Role**
    e. Mark if this is a confidential Owner/Client
    f. Add any comments
    g. Select the **Save** button
7. Associate a Contact (*Contacts can be associated with Projects as Client Contact, Owner Contact, Owner's Rep, or Consultant Contacts, as well as Project References*)
    a. Select **+Contact** to open Add Owner/Client Contact
    b. Search by **OwnerClient Company** from Company previously associated
        i. Select **Save**
        ii. Check any Contact
        iii. Select **Save**
8. Select Contact Role (*value list created by OFA*)
    a. Click the **Edit** pencil icon for the Owner/Client Contact just created
    b. In the pop-up window, Select an **OwnerClient Contact Role** from the dropdown list
    c. Select **Save**
    d. Check Box **Create Reference Record** (S*electing this option creates a Reference record on the Project Reference tab. To remove this Project Reference, you'll need to go to the Reference tab and delete the record.*)
    e. Add Testimonial Text to Associated Contact

NOTE: Both records display links to one another if the Project was created by converting an Opportunity into it.

9. Select **References** Tab
    a. Select the **View icon** next to the newly added reference
    b. In the pop-up window, select **+ Add** next to **Testimonials**
    c. Add **Testimonial Text**
    d. Select **Save**
10. Associate Personnel (You associate your P*ersonnel with your Projects as "Staff Team members*")
    a. Select the **Staff Team** tab
    b. Select the **+Add Staff** link to open the Add Staff window
    c. Search for and select **Staff Member**
    d. Select **Staff Role** (this is another Admin-created *value list*)
    e. Add **Staff Team Hours**
    f. Add **Percent Involved**
    g. Add **Start/End Dates**
    h. Add a **Description** of their role/involvement in the project
    i. Select **Save**
11. Add **Cost/Schedule** details (*Depending on your firm's setup, you may see different tabs*)
12. Add **Size**
    a. Place cursor in the text field for **Building Size**
        i. Enter a numeric amount
    b. Place the cursor in the text field for **Size Type**
        i. Select **SF** for square feet from the dropdown
13. Add a **Project Description**
    a. Select the **Descriptions** Tab
    b. Select the **+Add** to the right of the PROJECT DESCRIPTIONS header to open the Add a Description window (*Required fields highlighted in blue*)
    c. Select **Type** – **Proposal Short** from the dropdown menu
    d. Check box **Project Resume Description**
    e. Add **Description** text (*required*)
    f. Select **Save**

You can always create a Project by converting an Opportunity into a Project. Select **Convert To** in the Opportunity record > GENERAL INFORMATION section heading.



Check your understanding

Which tab in the Project record has its own management tool?

True or False
A Project can be created from the Opportunity record.

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

LESSON 11: CONFIGURE PROJECTS ADMINISTRATION

Learning Objectives

- Administrate Project fields
- Discuss Project data and merge tools
- Configure and customize the Project Grid

Introduction

To access Projects Administration, click on the Administration icon **at the header bar's top-right corne**r. It's next to the User Profile picture and displays hammer and wrench tools.

In Projects Administration, you can configure project-related fields, value lists, and the Project Grid. Additionally, you will find the Project Data Manipulation and Merge Tools here.

Configure Project Fields

If you want to customize, include, or exclude fields on Project records, select the Project Fields Display link under Modify Project Field Display. **Y**ou can find columns for custom labels, tooltips, and a Viewable toggle to include or exclude a field**.**

Tour 11.1 – Configure Project fields

Data Manipulation Tools

The Projects Administration menu has two data manipulation tools: Project Data Update Tool and Associate/Unassociate Opportunities to Projects. The purpose of these tools is as follows:

Project Data Update Tool – Use this Data Update Tool to change data for large groups of Projects. For example, let's say you are closing your Baltimore office, and the New York office will now handle Baltimore's Projects. Use the Product Data Update Tool to make this change with minimal effort.

Functions for the following fields: Primary Category, Secondary Category, Offices, Studios, Practice Areas, Divisions

Associate/Unassociate Opportunities to Projects – Use this tool to link and unlink an Opportunity to one or more Projects. **Note**: This tool is also accessible here: General

Administration > Contact Manager Administration > Data Manipulation Tools > Opportunity Data Update Tool.

Demo 11.2 – Associate Opportunities to Project Records

Demo Steps

1. Click the **Administration** button
2. Select **Projects Administration**
3. In the Data Manipulation Tools section, select **Associate / Unnassociate Opportunities to Projects**
4. In the first box, **Link an Opportunity to a Project (1 of 2),** search for and select an Opportunity
5. Click **Select**
6. For the second box, **Link an Opportunity to a Project (2 of 2)**, search for and select a Project
7. Click **Select**
8. Select **OK**

Project Merge Tool

The Project Merge Tool is a feature that enables users to merge data from one project to another. When using this tool, the CRM system adds data to the project record that you want to be the master project. Importantly, it only adds data that is missing from the master project. The declared master project is then retained and updated with the associations of the duplicate project. However, it's important to note that you must manually delete the project that you merged into your master project.

Refer to Appendix B – Project Merge Fields and Associations for updated fields and associations based on existing merge functionality.

Demo 11.3 – Utilize Project Merge Tool

Demo Steps

1. Click the **Administration** button
2. Select **Projects Administration**
3. Scroll down to the **Project Merge Tool** section
4. Select **Merge One Project to Another Project**
5. In the first box, **Project -**, select a Project record you want to merge into another. **ALERT**: CRM does not automatically delete the record after you merge it. You must delete the record manually.

6. In the second box, **Merged Project -**, select the project you want to be the “master” Project (into which CRM merges the first project)
7. Click **Save**

NOTE: After you have merged the Project records, **you must delete** the duplicate Project record(s) manually. And name the master back to the original name.
1. Enter the Project name in the search bar
2. Select the pencil icon Edit button
3. Select Delete

Project Grid

The Overall Firm Administrator (OFA) can make the Project Grid the default landing page for the Projects module vs. just seeing a list of projects. The Project Grid allows you to add specific fields to the grid view, which can be edited, filtered, sorted, and grouped like Excel spreadsheets. Turn on the Project Grid view here: General Administration > Firm Setup.

Use Case: Project Managers
- View your projects, identify missing data, and make updates so the Marketing and BD teams can find relevant experience and respond to RFPs.
- Search for specific projects and update details as the project progresses to ensure Marketing has the most up-to-date information for responding to RFPs.

Use Case: Marketers
- Search for relevant experience to help with go/no go decisions.
- Verify project data's completeness to confidently use your firm’s project experience when responding to RFPs.

Use Case: Business Developers/Seller-Doers
- Search for relevant experience to ensure the work you want to pursue aligns with your firm’s experience.
- Prepare for meetings with prospects by reviewing similar past projects for them, other clients, or in the same geographic area.

Activity 11.4 – Configure Project Grid

Activity Steps

Part 1: Enable Project Grid and Manage Columns
1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Firm Setup**

2. Use CTRL+F and search “Project Grid”
3. Ensure **Yes** is selected
    a. If it is not, select Yes and click **Save**
4. Next, Select **Projects** from the left-side navigation menu
5. Click the **gear** icon in the top-right grid header
6. In the Manage Columns window
    a. Turn on/off columns in the Project Grid in the left column
    b. Reorder columns by dragging and dropping to change the column order
7. Select **Save**
8. Hover over a column header and drag to a new position

NOTE: Depending on settings, you and your users can click and edit fields directly within the grid

Part 2: Enable and allow editing to Staff Roles
1. Click the **Administration** button
    a. Select **Projects Administration**
2. Open **Project Grid Options** from the Modify Project Field Display section at the top of the page
3. Check the boxes for **Grid-Enable** and **Grid-Edit** next to the Staff Role(s) you want permissioned
4. Select **Save**

Check your understanding

True or False
The Administrate Project Fields menu is used to customize fields and include or exclude fields on Project forms.

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

LESSON 12: 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

The process of setting up users in the system consists of two steps. Firstly, we need to create personnel records. Secondly, we must assign personnel to user groups. The User Manager tool simplifies the process of adding new groups, finding user details and permissions, managing login and password, as well as keeping track of the groups that have already been created.

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

Activity 12.1 – Create user groups

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **User Manager** from the secondary dropdown menu
2. Click the **+ New User Group** button at the top-left of the module
3. Type "**Users: Seller Doer User Group**" into the **Name** field
4. Click **Create Group**

User Group Permissions

Manage User Permissions in the bottom pane of the User Manager module. The first tab summarizes the set permissions. The second tab lists all modules in the left and the individual keys in the right pane.

When setting up permissions for User Groups, three User levels 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 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 turned off 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, which will turn on Full Write and Full Read. This will also turn on corresponding Self-labeled and Firm Org-labeled keys if included in that module.

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

Activity 12.2 – Set user permission groups

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

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**

Select **User Manager** from the secondary dropdown menu

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 12.3 – Add user(s) to a user group

Activity Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **User Manager** from the secondary dropdown menu
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 12.4 – Send login/reset password message

Demo Steps

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **User Manager** from the secondary dropdown menu
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 13: SET UP AND DISTRIBUTE DASHBOARDS

Learning Objectives

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

Introduction

A Dashboard is a central location where you can install widgets to access and analyze information and data. You can have multiple dashboards containing multiple tabs and widgets. Tailor widgets to meet your specific needs. Most of our widgets display charts and graphs, and most are Opportunity-related.

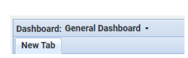
Manage dashboards on the **Home** page. There is a **Dashboard dropdown** menu to select from different Saved Dashboards, and there is a **Dashboard Settings** button where you can do the following:

- **Dashboard Items** – add/remove widgets. Listed by module
- **Dashboard Options** – select a theme color, customize the layout
- **Saved Dashboards** – set a dashboard as the firm default, share/unshare a dashboard, and delete
- **Exported Widgets** (OFA/Admin only) – lists widgets exported to embed in other websites
- **Administration** (OFA/Admin only) – make widgets available to users to include in their dashboards

Activity 13.1 – Setup a firmwide dashboard and share it as firm default

This activity guides 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:** snapshot selector dropdown menu 

at the top left of the dashboard
3. Select **General Dashboard** (*name in your firm may be different*)
4. Open the **Dashboard:** snapshot selector dropdown menu and select **Save Dashboard As**
5. In the pop-up window, type "**Firmwide Dashboard**"
6. Click **OK**

7. Open **Dashboard Settings** at the 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 helpful 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 13.2 – Set Up A Business Development Dashboard And Make It Public

This activity guides 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 the 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. **Events**
        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

Working with Widgets

The Dashboard is where you install widgets that bring information and data to a central portal for you to access and analyze quickly.

Demo 13.3 – Disable a widget and export a widget

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

Activity Steps

Part 1: Disable a widget

1. From the **Home** page, open **Dashboard Settings** Dashboard Settings at the top right of the dashboard
2. Select **Administration**
3. Find the **Revenue vs Goal** widget
4. Click the blue **Enabled** label next to the widget name
5. Select the **x** in the top-right corner of the Dashboard Settings window to close the window

Part 2: Export a widget

1. In the banner of the **Opportunity Summary** widget, find and click the **export icon** (the fourth icon displays as a floppy disk).
2. Copy the URL created in the pop-up window
3. Paste the URL in a desired place to embed
4. To view a list of your firm's embedded widgets, go to **Dashboard Settings > Exported Widgets**.

Once an exported widget is embedded, the widget stays updated with data from the Unanet CRM account.

Demo 13.4 – Customize the Opportunity Financial Data widget

This activity guides you in customizing the Opportunity Financial Data widget so that you can see the various ways you can use it, as it is the most flexible widget.

Activity Steps

Part 1: Customize as a Headline report displaying total open pursuits by an office

1. From the Home page, open the **Firmwide Dashboard** from the Dashboard selection dropdown menu
2. Open the **Settings** for the Opportunity Financial Data widget by clicking on the **gear icon** (fourth icon from the left)
3. Select the **Chart Type** dropdown, and select **Headline**
4. Change the **Title** to “**[type in the name of office] Open Pursuits Total**”
5. Adjust **Fee Type**
    a. Sum
    b. Firm Estimated Fee
6. Open the **Stage Types** tab
    a. Check only **Open** and **Pending**
7. Scroll tabs over and open the **Offices** tab
    a. Check the **box** next to the Office for which you are creating this Opportunity Financial Data widget only
8. Click **Save**
9. Re-open **Settings** and change **Height** to **75**
10. Click **Save**

Part 2: Customize as an “All Open Pursuits by Office” List Results widget

1. Clone the widget from Part 1 by clicking the clone icon (second to last icon before the “x”)
2. Open the **Settings** for the cloned widget
3. Change the Title to “**All Open Pursuits by Office**”
4. Change **Chart Type** to **List Results**
5. Change **Height** to **300**
6. Select the **Offices** tab
    a. **Uncheck** the office currently selected
7. Click **Save**

Part 3: Customize as a Multi-Series List

1. Clone the widget from Part 2
2. Open **Settings** for the cloned widget
3. Change the Title to “**All Open Pursuits by Office and Stage**”
4. Change **Chart Type** to **Multi-series List Results**
5. Select the following
    a. Group 1: **Offices**
    b. Group 2: **Stages**
6. Open **the Offices** tab to ensure all unchecked
7. Open **Stage Types**
    a. Check **Open**
    b. Check **Pending**
8. Open the **Stages** tab
    a. Check submitted stages, for example, Qualifications Submitted, Shortlisted, Submitted RFP, Interviewed
9. Click **Save**

Part 4: Customize for a Chart

1. Clone the widget from Part 3
2. Open **Settings** for the cloned widget
3. Change **Chart Type** to **Multi-series Column 2D**
4. Click **Save**

Activity 13.5 – Customize the Sales vs Goal widget

This activity guides you in customizing the Sales vs. Goal widget to show the percentage of the goal for a specific office.

Activity Steps

1. From the Home page, open the **Firmwide Dashboard** from the Dashboard selection dropdown menu
2. Open the **Settings** for the **Sales vs Goal** widget
3. Change the **Title** to “**Orlando % of Goal”** (Select an office you have listed in our sandbox)
4. Change **Chart Type** to **% of Goal**
5. Set the following:
    a. Year Count: **1**
    b. Series 1: **Offices**
    c. Goal Type: **Sales Goal**
6. Open the **Actual Settings** tab and select the following
    a. Fee Source: **Firm Estimated Fee**
    b. Date Source: **Close Date**
7. Open the **Stages** tab and check **Closed Won**

8. Scroll over in the tabs and select the **Offices** tab, then select **a city**
9. Click **Save**

Activity 13.6 – Customize the Top Deals widget

This activity guides you in customizing the Top Deals widget to show the 10 Open Pursuits Firmwide.

Activity Steps

1. From the Home page, open the **Firmwide Dashboard** from the Dashboard selection dropdown menu
2. Open the **Settings gear icon** for the **Top Deals** widget
3. Ensure the following are selected:
    a. Fee Type: **Firm Estimated Fee**
    b. Item Label: **Opportunity Name**
    c. Check the option for **"Include the total of your top opportunities in the title"**
4. Open the **Stage Types** tab and select
    a. Open
    b. Pending
5. Click **Save**

You can easily configure the **Top Deals** widget as a **Top Wins YTD** or **Top Losses YTD** report by adjusting the *Filters* > *Close Date* and updating *Stage Types*. You can also configure the Top Deals widget to include only certain offices or roles.

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 14: 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
- Personnel

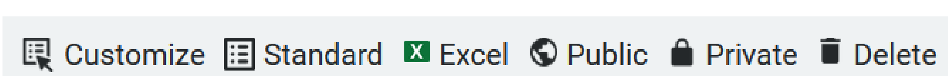
The other available component reports are as follows:

- **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
- **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

Note: When viewing a report grid, refer to the legend located at the bottom of each list of reports. The legend includes the below icons:



- **Customize -** Edit the report
- **Standard -** Structured report
- **Excel –** Export to excel

Notable Column Headers

- **Status** - indicates if a report has been marked **Public** or **Private**.
- **Delete** – Select the trashcan icon to delete the report
- **Time** column indicates how long it takes to run the report. The longer a report takes to run, the more results it returns.

Tour 14.1 – Navigate the Reports module

Tour the Reports module and discover functionality.

Build and Run Reports

Creating a report in the Reports module follows a primary sequence of steps:

1. Select available fields (fields vary by report type).
2. Select criteria and filters.
3. Select additional options, including the order of the selected fields.
4. Select the sort order.
5. Select *Group-By Field* settings.

Saving a report doesn't save the report's results; it saves the selected criteria created to run that report.

Activity 14.2 – Build and run a standard Opportunity report by groups

This activity will build a basic Opportunity report utilizing just a few fields and 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 the **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 14.3 – Build and run a standard Opportunity Hit Rate report

In this activity, you 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

An Administrator can search for, filter, view, customize, group, sort, export, and delete reports on the Report Manager tab.
Note: You can filter and search on the Reports Manager tab, which you cannot from Reports Home.

Tour 14.4 – 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 15: 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 15.1 – Set up file structure

Activity Steps

Part 1: Create a category

1. Open the **Knowledge** module from 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 subcategories

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 subcategories

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 subcategory

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 we built in the previous activity)

Activity 15.2 – Upload and create content (knowledge bits)

Activity Steps

Part 1: Create a new knowledge record (knowledge bit)

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 the top of the list
    b. In the **Images** box, click **+Category**
        i. Select **Choose File** for **Full Size Image**
            1. Choose any .jpg or png file (do not include special characters in file name)
            2. Click **Save**
    c. In the **Companies** box, click **+Company**
        i. Search for and select a **Company**
        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 16: 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 you to automate operations within the system.

A Workflow consists of an initiated **Action** when an **Event** affects a **Resource** (record or entry type). For example, 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 user or integrated system converts a Lead or Opportunity to an Opportunity or Project, respectively)
- **Create** (when a user or integrated system creates a record or entry)
- **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 a user or integrated system deletes an entry)

Note: Available **Events** vary depending on the selected **Resource**.

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

Demo Steps

Part 1: Create the Workflow

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Workflow 2.0** from secondary dropdown menu
2. Click the **+ New Workflow** button on the top-left of the module
3. Type "**Proposal Due Date 1 Week Notification**" in the Name field
4. For the **Resource** dropdown, select **Opportunity**
5. 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 16.2 – Create a notification Workflow for when an Opportunity is created/changed

Activity Steps

Part 1: Create the Workflow

1. Click the **Administration** button
   a. Hover over **General Administration**
   b. Select **Workflow 2.0** from secondary dropdown menu
2. Click the **+ New Workflow** button on the top-left of the module
3. Type "**Opportunity Modified Notification**" in the Name field
4. For the **Resource** dropdown, select **Opportunity**
5. 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 16.3 – 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. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Workflow 2.0** from secondary dropdown menu
2. Click the **+ New Workflow** button on the top-left of the module
3. Type "**Opportunity Stage Date Trigger**" in the Name field
4. For the **Resource** dropdown, select **Opportunity**
5. 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

Activity 16.4 – Use a notification Workflow to create a project setup form that gets sent to accounting

Activity Steps

Part 1: Create the Workflow

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Workflow 2.0** from secondary dropdown menu
2. Click the **+ New Workflow** button on the top-left of the module
3. Type "**Opportunity Closed Won – Notify Accounting**" in the Name field
4. For the **Resource** dropdown, select **Opportunity**
5. 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: **Other → accounting@xyz.com**
5. Fill out Subject: **Opp Closed Won**
    a. Click into message are and find the variable for Opportunity Number and paste in Subject **%opportunity.oppnumber%**
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 **Closed Date**
        i. Click **Insert Variable** and find and select **Client Name**
    e. Type **Link**
        i. Click **Insert Variable** and find and select **Link**
7. Select the **Event: Update Filters** tab
8. Select **Resource: Opportunity Filters (after update)** tab
    a. Click **+Add Filter** and fill in the following
        i. Stage equals Closed Won
        ii. Stage has changed
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 16.5 – Create a notification Workflow to send email with set action link to change an Opportunity stage

Activity Steps

Part 1: Create the Workflow

1. Click the **Administration** button
    a. Hover over **General Administration**
    b. Select **Workflow 2.0** from secondary dropdown menu
2. Click the **+ New Workflow** button on the top-left of the module
3. Type "**Opportunity Proposal Past Due – Set Stage**" in the Name field
4. For the **Resource** dropdown, select **Opportunity**
5. 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 in the following
    a. To: **Other → director@xyz.com**
    b. CC: **Firm Marketing Reviewers**
    c. Subject: **Opportunity Proposal Due date has Passed – Please Update Stage Link**"
        i. Click into message are and find the variable for Opportunity Number and paste in Subject **%opportunity.oppnumber%**
5. 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. Click **Insert Variable** and open **General** > **Set Action Link**
        i. Fill in the following:
            1. Label: Set Stage = "Did Not Pursue"
        ii. Field: Stage
        iii. Value: Inactive/Did Not Pursue
    d. Click Ok
6. Select the **Resource: Opportunity Filters** tab

7. Click **+Add Filter** and fill in the following:
    a. **Proposal Submitted equals No**
8. Select the **Event: Date Trigger** tab
9. Fill in the following:
    a. Trigger when **Proposal Due Date**
    b. is **1 day ago**
10. Select the **Workflow Summary** tab to review the workflow
11. 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 17: 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" area offers many options for configuring the database. These options are only accessible to the Overall Firm Administrator (OFA). The OFA can turn tabs and functions on or off across different modules within this menu. Most of these configurations are determined and set up during implementation. However, some options may require occasional attention.

Firm Setup

In General Administration > Firm Setup, you can upload a company logo and add the company name to the left-side menu. It's also where you can enable **Opportunity Forms**, **Convert Lead to Opportunity**, and enable the ability to **Make a User** from a Personnel record.

Two essential sections near the top of the page are FIRM ORG and RELABEL FIRM ORG NAMES. A table in the FIRM ORG section displays the core data modules as rows and the Firm Orgs as columns to select or deselect. It also indicates a single-select option. It is imperative 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 section, you can relabel **Offices**, **Divisions**, **Office Divisions**, **Studios**, **Practice Areas**, and **Territories**.

Tour 17.1 – Navigate the Firm Setup tab for enabling and relabeling features

Firm Org

Access the Firm Org menu from the left-side navigation. Here, you add, delete, and edit the Firm Orgs to mirror your company structure. Note: You turn the Firm Org values on or off for modules and relabel them 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 your firm's physical locations and work-specific areas.

The Firm Org module includes 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 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.
5. **Practice Areas** - allows you to designate further breakdowns of your internal structure.
6. **Office Division** - stores information regarding the relationship between your Offices and Divisions.
7. **Territories** – stores sales territory breakdowns based on zip codes.

Activity 17.2 – Modify Firm Org value lists

In this activity, you add and remove values to and from 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 in the indicated fields:
    a. Offices Name: **Boston**
    b. Acronym: **BOS**

5. In the **BUSINESS 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 include options to

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

Lesson 4: Configure 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: Configure 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: Configure a Lead Record

True or False
You can enter Leads without associating with any other core data modules

Lesson 7: Configure an Opportunity Record

It is best practice to add an Opportunity record from

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

Lesson 9: Configure Forms

True or False
The Go-No Go Simple and Go-No Go Advanced Form is the only template provided among several others.

Lesson 10: Configure a Project Record

Which tab in the Project record has its own management tool?
Project Image Manager

True or False
A Project can be created from the Opportunity record.

Lesson 11: Configure Projects Administration

True or False
The ~~Administrate~~ Project Fields Display Labels page is used to customize fields and include or exclude fields on Project forms.

Lesson 12: Utilize the User Manager to Set Permissions

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

Lesson 13: Set Up and Distribute Dashboards

Where can Dashboards be customized?

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

Lesson 14: Run and Analyze Reports

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

Lesson 15: Create and Maintain the Knowledge Module

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

Lesson 16: Create and Set Up Workflows

Notify OFA when a new Company is created

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

Lesson 17: 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	Full Read
	Full Write
	Full Delete
Email Marketing	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

Project Merge Fields and Associations

General Information

- Project Name
- Project Status
- Master Project
- Converted Opportunity
- Account ID
- Uses External Data
- Project Address Fields
- Billing Address Fields
- Preferred
- Prominent
- Completion Date
- Federal Work
- Project Role
- Brief Description
- Comments
- Proposal Number
- Percent Complete
- Is Publishable Project
- Project Rank
- Cost Confidential
- NAICS
- Notes
- Custom Fields
- Multi-Select Information:
- Firm Org Offices
- Firm Org Divisions
- Firm Org Studios
- Firm Org Practice Areas
- Firm Org Territories
- Primary Categories
- Secondary Categories
- Service Types
- Construction Types
- Delivery Method
- Contract Type
- Client Type
- SF330s & SF254
- Publishable Reasons

Project Tabs

- Owner/Client Information
- Staff Team
- Consultant Information
- Fees/Costs
- Costs
- Change Orders
- Project Performance
- Construction Schedule
- A/E Schedule
- Size
- Descriptions
- Documents
- Images
- Components
- Awards
- Publications
- References
- Testimonials
- Sub-Contractor
- Self-Work
- Unions
- Properties

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)

APPENDIX C: CREATING DIFFERENT RECORD TYPES

Create a Personnel record and make a User

Search for a person's name before adding a new record to avoid duplication.

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 the EMPLOYMENT HISTORY section
    a. Year Started in Industry - 1988
5. Input additional fields in the 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 the **+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 **the Personnel Summary** tab
2. Select the +**Make User** button on top-right
3. In the pop-up window, select **CRM User Group**
4. Click the **Convert to a User** button

Create a Company record

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 on the following 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 the OTHER INFORMATION section
    a. Company Type: **Client**
10. Click **Save**
11. Review the generated Company record

Create a Contact record

1. Search for **ABC Construction** 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@abcconstruction.com**
    b. OTHER INFORMATION > Contact Type: **Decision Maker**
8. Click **Save Contact**
9. Review the generated Contact record

Create a Lead record

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 the **Potential Client** field, type “**ABC**” to search for ABC Construction
5. Select **ABC Construction**
6. In the **Contact First Name** field, type “**Matt**”
7. In the **Contact Last Name** field, type “**Johnson**”
8. Click **Save** in the upper-right of the record
9. Review the generated Lead record

Create an Opportunity record

1. Open up the Company record for **ABC Construction**
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: **ABC Construction**
    c. Stage**: 01-Prospecting**
5. In the shortcut panel on the left side, select **Categorization**
    a. For **Offices**, click **+Add** and make a selection
    b. For **Practice Areas**, click **+Add** and select **Education**
    c. For **Primary Categories**, click **+Add** and make a selection
    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 **Matt Jones**
9. For **Staff Role,** open the dropdown and select **Assistant Project Manager**
10. Click **Add**
11. Click **Save** at the bottom of the form

COMPLETION CERTIFICATE AND EVALUATION

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