**[](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)**

**Process Document**

**CRM – Outreach**

Liverpool John Moores University

**Outreach: Adding New Organisations**

Version 0.1. November 2018

Author: Debbie Smith Business Support Team

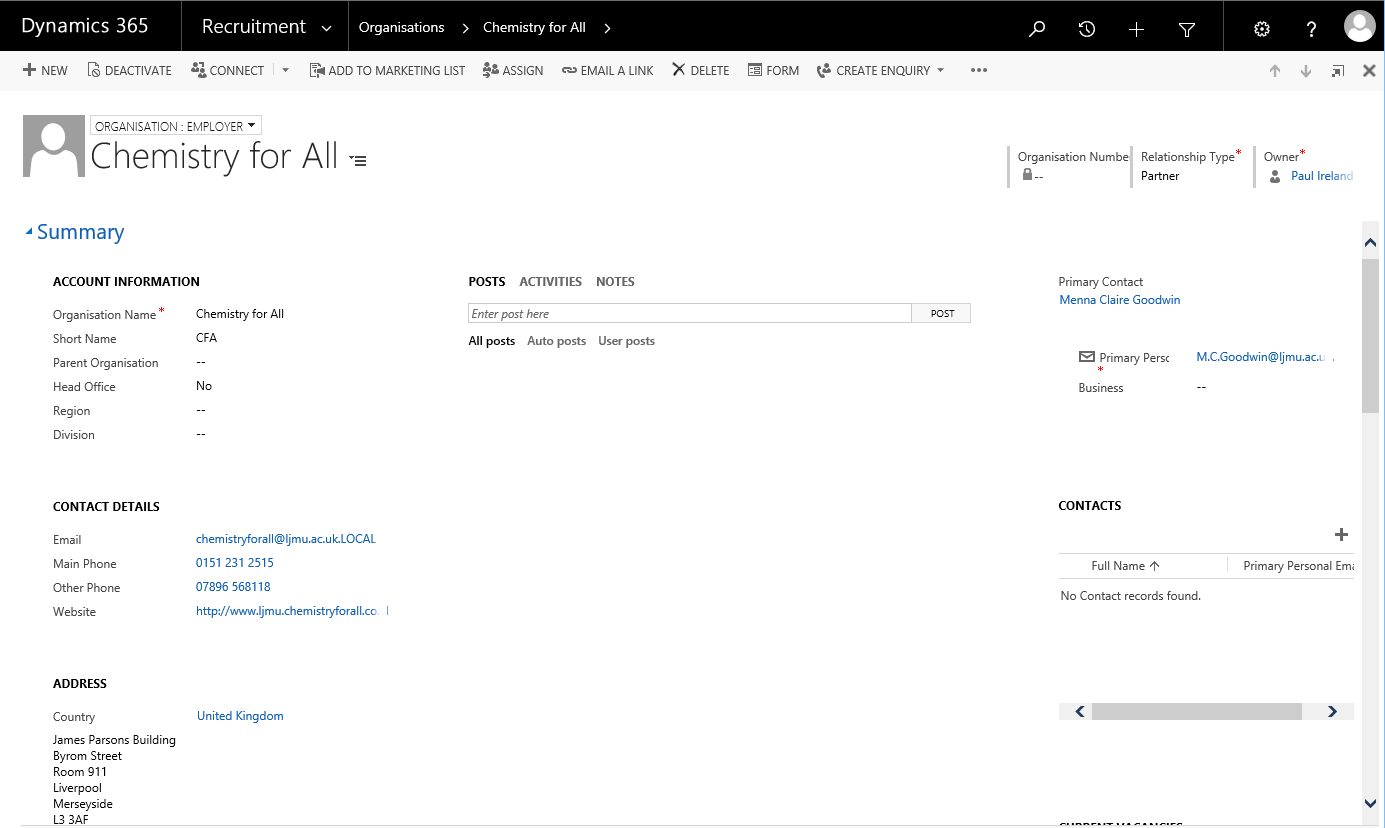
**Adding New Organisations on Dynamics**

**Set-Up**

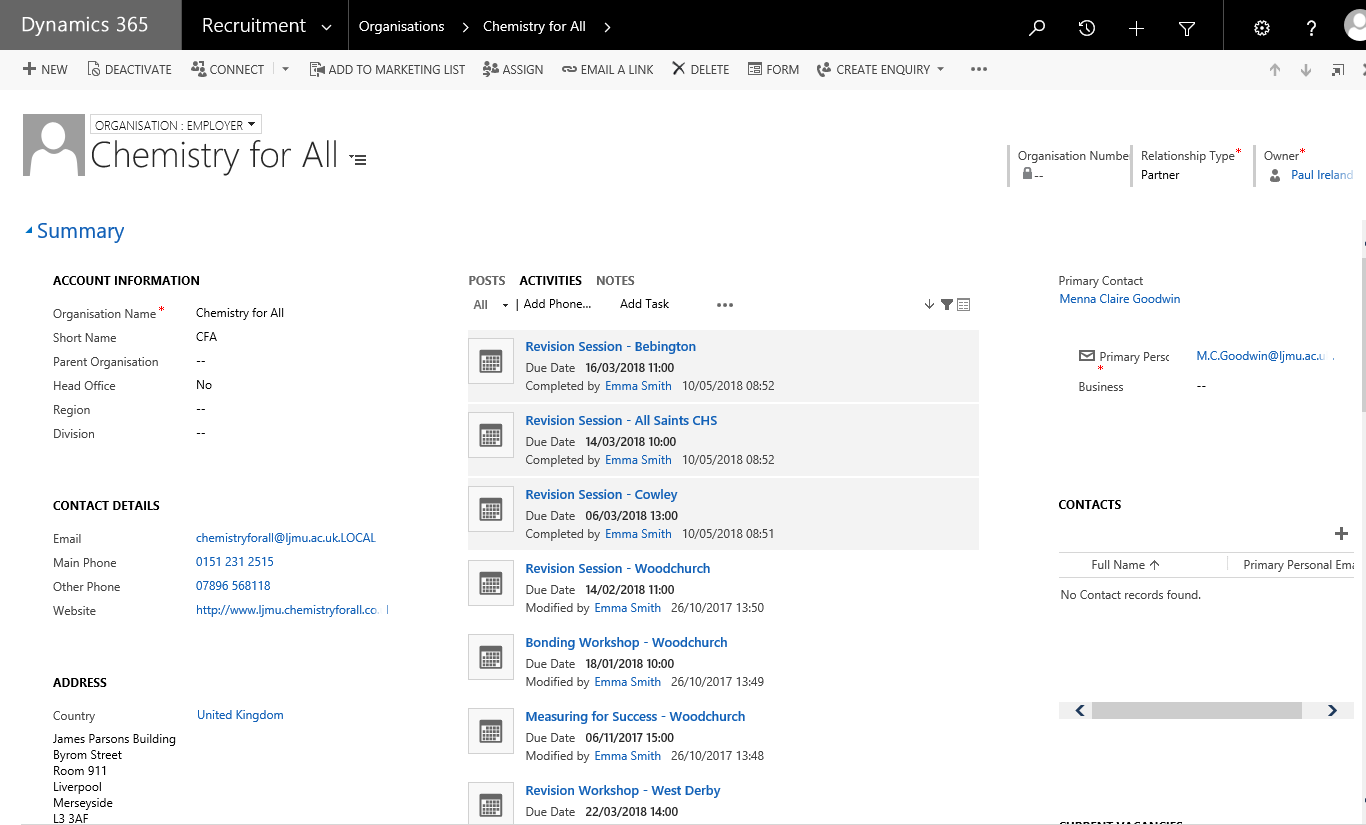
* All non-school/college organisations who we deal with should be recorded in Dynamics.
* Contact information should also be recorded against the relevant Organisation.

**Procedure**

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



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



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

