Junior Achievement®

BCRM
QUICK GUIDE

Outlook Integration
Installation

Objective: Introduce the Outlook Integration and its functionality to make constituent/prospect management more productive and organized. This serves as a link between your Outlook emails, appointments, and assigned prospects. This integration allows you to add emails to BCRM as interactions or contact reports, update constituent information, and add plan steps and interactions to your Microsoft Outlook calendar.

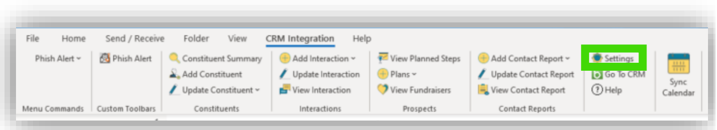
Installation

Download and Install Outlook Add-In

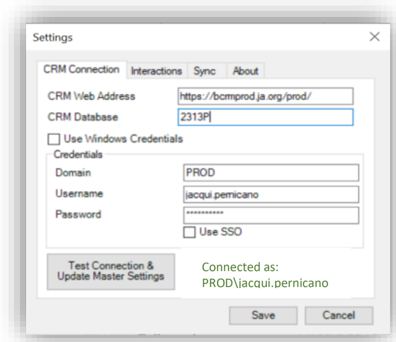
1. Close **Outlook**
2. Click Outlook Integration Download to directly download the software.
3. Click the BCRM Outlook Integration
4. Click download
5. After the file has downloaded, open the file
6. Click next
7. Click finish

Configuration

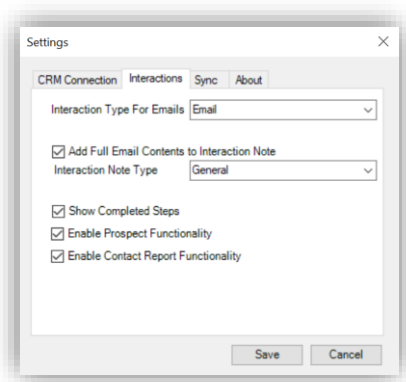
1. Open ***Outlook***
2. Click the ***CRM Integration*** tab



3. Click ***Settings*** from the ribbon
4. Enter the below information:
   a. CRM Web Address: https://bcrmprod.ja.org/prod/
   b. CRM Database: ***2313P***
   c. Uncheck the ***Use Windows Credentials*** checkbox
   d. Enter ***Prod*** in the ***Domain*** field
   e. Enter your credentials (first.last name and Password)
   f. Click the ***Test Connection*** button
   g. Click OK on the connections test popup



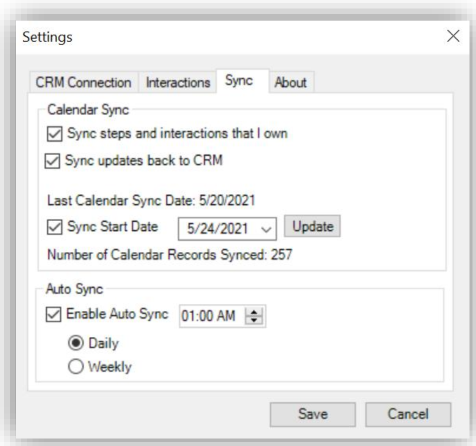
5. Click the ***Interactions*** tab
6. Enter the below information:
   a. Interaction Type for Emails: Email
   b. Checkbox for ***Add Full Email Contents to Interaction Note***
   c. Interaction Note Type: General
   d. Check boxes for ***Show Completed Steps, Enable Prospect Functionality*** and ***Enable Contact Report Functionality***



7. Click the ***Sync*** tab
8. Check boxes for:
   a. ***Sync steps and interactions that I own***
   b. ***Sync updates back to CRM***
   c. ***Sync Start Date***

i. Enter date you want sync to start

9. Optional – ***Enable Auto Sync***
   a. If you select Auto Sync, select a time that is outside of normal business hours



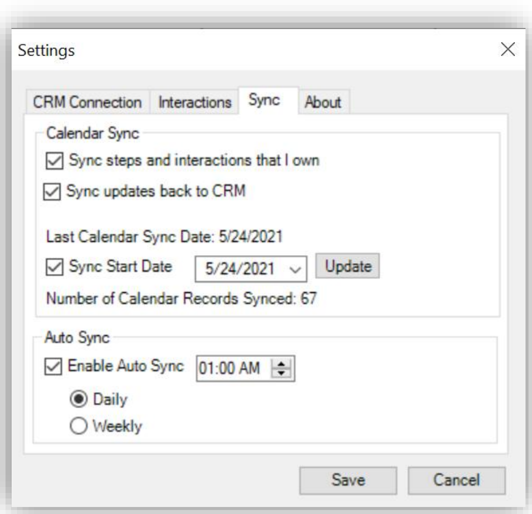
10. Click the ***Save*** button
11. Pending steps and interactions from BCRM are now added to your Outlook calendar

Features

Sync Information

Calendar Sync

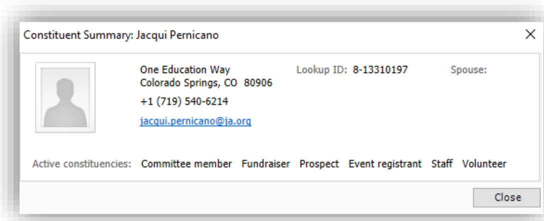
1. In Microsoft Outlook, Click the ***CRM Integration*** tab
2. Click ***Sync***
3. Select the appropriate box you would like to update.
4. Click ***Save***



Constituent Summary

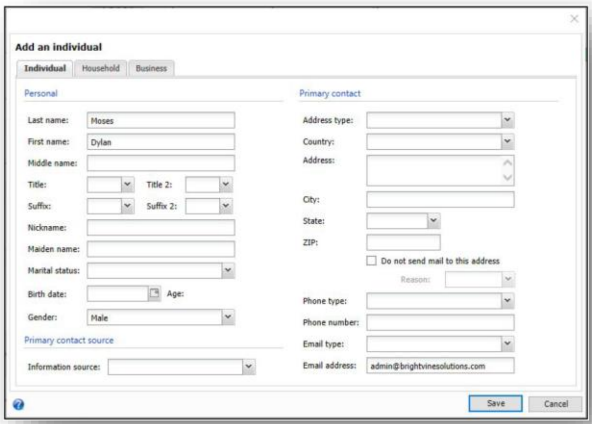
Constituent Summary

1. Highlight a message in Microsoft Outlook
2. Click the ***CRM Integration*** link from the top menu bar
3. Click the ***Constituent Summary*** button from the CRM
4. The first time a constituent is looked up using the integration, the user must preform a constituent search to link to the proper constituent record
   a. Click the ***Search*** button
   b. Click the matching constituent from the results
   c. Click the ***Select*** button
   d. The Constituent Summary view will display
      i. Address
      ii. Phone
      iii. Email
      iv. Lookup ID
      v. Spouse
      vi. Household
      vii. Active constituencies
      viii. Picture if available
   e. Click the ***Close*** button to close the popup window



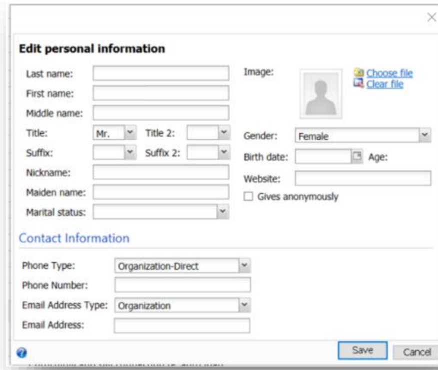
Add Constituent

1. Highlight a message in Microsoft Outlook
2. Click the ***CRM Integration*** link from the top menu bar
3. Highlight a message in Microsoft Outlook mailbox
4. Click the ***Add Constituent*** button
5. If the email matches an existing constituent record, the system will display a message alerting you that the constituent already exists in the system
6. If the email does not exist in BCRM, an ***Add an individual*** popup will display
7. Add information in any of the three tabs (Individual, Household, and Business) and click the ***Save*** button to save the new constituent
8. Click the ***Cancel*** button to close the window without saving the constituent's record



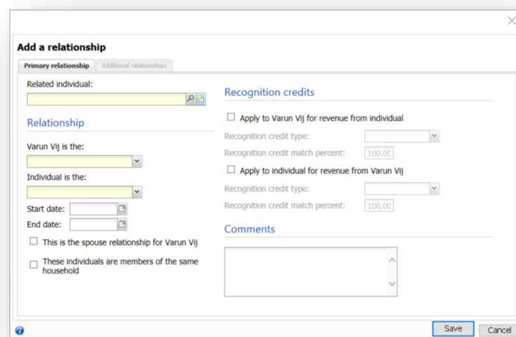
Edit Constituent Information

1. Highlight a message in Microsoft Outlook
2. Click the ***CRM Integration*** link from the top menu bar
3. Highlight a message in Microsoft Outlook mailbox
4. Click the ***Edit Personal Information*** link
5. The first time a constituent is looked up using the integration the user must search for and select the constituent
6. The ***Edit personal information*** popup screen displays



Add Relationship

1. Highlight a message in Microsoft Outlook
   Click the ***CRM Integration***
2. Click ***Update Constituent***
3. Click ***Add Relationship***
4. The first time a constituent is looked up using the integration the user must search for and select the constituent
5. The ***Add a relationship*** popup will display



Interactions

View Interactions

1. Highlight an email in Microsoft Outlook
2. Click the ***CRM Integration*** tab
3. Click ***View Interaction***
4. If no interactions are found, a message will display
5. If the interaction has previously been added, the associated interaction for the email will display as read-only

Add Interactions – From Constituent

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***Add Interaction***
4. Click ***From Sender***

5. The first time a constituent is looked up using the integration the user must search for and select the constituent
a. The *Add an interaction for "constituent name"* popup view will display

Add Interactions – To Other Constituent

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***Add Interaction***
4. Click ***To Other Constituent***
5. The ***Constituent Search*** popup window will display
6. Enter search criteria
7. Click the ***Search*** button
8. Click the correct constituent from the results
9. The *Add an interaction for "constituent name"* popup window will display

Update Interaction

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***Update Interaction***
4. The associated interaction will display with the ability to edit

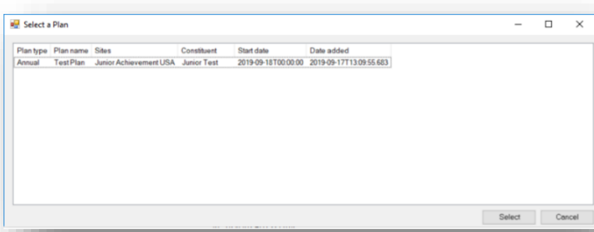
Other

View Fundraisers

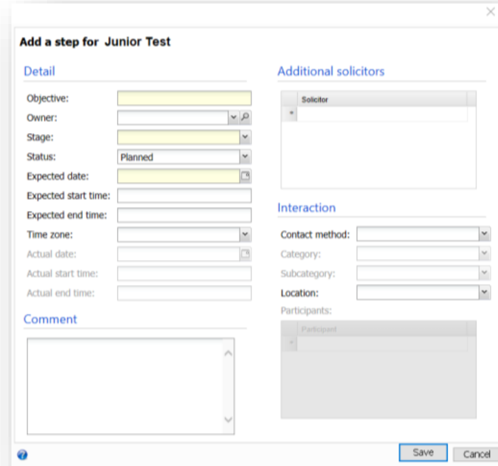
1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***View Fundraisers***
4. The first time a constituent is looked up using the integration the user must search for and select the constituent
5. The ***Fundraisers*** popup view will display

Add Plan Step

1. Highlight an email in Microsoft Outlook
2. Click the ***CRM Integration*** tab
3. Click ***Add Plan Step***
4. The first time a constituent is looked up using the integration the user must search for and select the constituent
5. The ***Select a Plan*** popup view will display



6. Highlight the plan name
7. Click the ***Select* button**
8. The ***Add a step for "constituent name"*** popup window will display



9. Add information to the window
10. Fields with a yellow background are mandatory
11. Click the ***Cancel*** button to close the popup window without saving the step
12. Click the ***Save*** button to save the new step to the constituent's prospect plan

View Planned Step

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***View Planned Steps***
4. The first time a constituent is looked up using the integration the user must search for and select the constituent
5. The ***Prospect Plan Steps*** popup view will display a listing of all steps with the ***Planned*** status

Contact report

Contact Report Summary

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***Contact Report Summary***
4. A popup window will display the contact report information related to the email

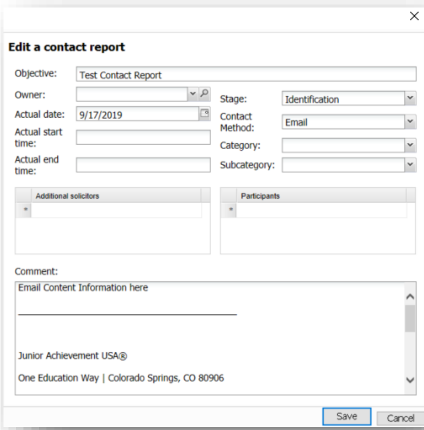
Add Contact Report

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***Add Contact Report***
4. The first time a constituent is looked up using the integration the user must search for and select the constituent
5. The ***Select a Plan Step*** popup window will display
6. Highlight the plan from the ***Select a Plan Step*** window
7. The ***File a contact report*** popup window will display

8. Add information
9. Fields with a yellow background are mandatory
10. Click the ***Save*** button

Update Contact Report

1. Highlight an email in your Microsoft Outlook mailbox
2. Click the ***CRM Integration*** tab
3. Click ***Update Contact Report***
4. The ***Edit a contact report*** popup window will display with the information related to the contact report created for the email

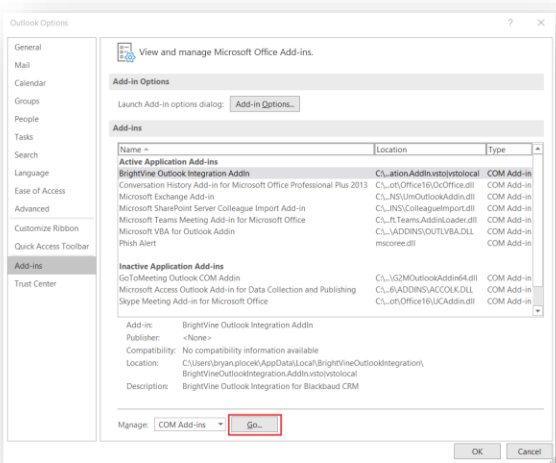


Tips & Tricks

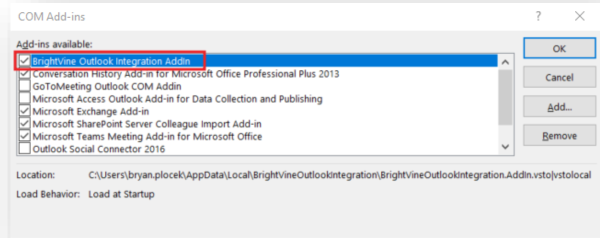
Outlook Settings

Prevent Outlook from Deactivating Add-In

1. Open Microsoft Outlook
2. Click **File**
3. Click **Options**
4. Click **Add-ins**
5. Click **Go**



6. Check the box next to "BrightVine Outlook Integration AddIn"



7. Click **OK**