



Atrio Last Contact

Version 8

User Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of using Atrio Last Contact.

Atrio Last Contact is a CRM utility that tracks your last interactions with Leads, Accounts, Contacts, and Opportunities.

Features:

- Automatically update Last Contact date fields on all records based on phone calls, appointments, and service activities
- Custom views on Account, Lead, and Opportunity:
 - My Neglected Records
 - All Neglected Records
- Neglected Customer Dashboard
 - Neglected Accounts, Leads, and Opportunities views
 - Neglect Accounts, Leads, and Opportunities charts by owner


Using Atrio Last Contact


To use Atrio Contact, simply update CRM as you normally would. Regarding phone calls, emails, service activities, or appointments updates the Last Contact field. **Note:** some of the processes may be turned off by a system administrator (see the installation and configuration guide).


The activities that appear in the social pane will match with the field date. For example, this Contact was called on 7/29/16. You can tell this from the social pane, or in the field date found under the **Last Contact** tab in the Lead, Account, Contact, or Opportunity form.


POSTS ACTIVITIES NOTES


All ▾ | Add Phone Call Add Task ...

 **Alex Wu**
Discuss Beaver Co. Sale
Completed by Jenna Hardin **7/29/2016 8:53 AM**


 **Alex Wu**
Alex expressed definite interest in the X series. Says that Northwind will be making a decision soon.
Completed by Jenna Hardin 7/26/2016 10:11 AM

 **Greg Chapman**
Greg was out of the office on 2/23. Will call back on 2/25
Completed by Allie Bellew (Sample Data) 7/26/2016 10:11 AM

 **Meet with Alex**
Due Date 12/1/2015 1:00 PM
Modified by Jenna Hardin 7/26/2016 10:11 AM

 **Remind me to add anytime upgrade to Northwind Traders.**
Priority Normal

▾ Last Contact

Last Contact Date  7/29/2016

Last Activity Subject  Phone Call - Jenna Hardin: Discuss Beaver Co. Sale

View Neglected Records

Atrio Last Contact allows for a quick look at which records need attention. This product comes with system views and a Last Contact Dashboard.

Views

Go to any Lead, Account, Contact, or Opportunity list. Under the view list will be system views that list records that have not been contacted in the last 3 months in order of oldest Last Contact Date. **Note:** this range may be modified by your system administrator (see the Installation and User Guide). These views filter which record has been neglected, so you can easily see who you need to contact.

➔ Active Accounts ▾

System Views

- Accounts Being Followed
- Accounts I Follow
- Accounts: Influenced Deals That We Won
- Accounts: No Campaign Activities in Last 3 Mont...
- Accounts: No Orders in Last 6 Months
- Accounts: Responded to Campaigns in Last 6 Mo...
- Active Accounts
- Customers
- Inactive Accounts
- My Active Accounts
- My Connections
- My Neglected Accounts
- Neglected Accounts
- Neglected Accounts I Follow
- Vendors

Main Phone	Address 1: City
+86-23-4444-01...	Guangzhou
425-228-1740	Redmond
465-555-0156	Bellevue
+27-264-1234567	Johannesburg
425-235-7948	Renton
+43-1-12345-0	Vienna
425-488-7759	Renton
138-555-0118	Seattle
425-485-7548	Bothell
425-644-7824	Seattle
425-556-9533	Bellevue

Last Contact Dashboard

Go to **Navigation->Sales->Dashboards** to open up system dashboards. Select **Last Contact** to get a quick overview of all neglected records in CRM.

Last Contact ▾

Neglected Accounts

Last Contact Date	Name	Owner	Main Phone
12/17/2014	eBusiness	Anuradha Palepu	(248) 555-6644
8/14/2015	Adventure Works	Hanoudi, Rayan	(212) 555-0155
9/2/2015	ASG/Sprint Center	Marketing, Atrio	816.940.7211
9/17/2015	Alpine Ski House	Hanoudi, Rayan	(111) 555-0155
10/2/2015	City Power & Light (sample)	Demoe, Brian	248555-0155
12/17/2015	Atrio Systems	Becker, Bryan	9204191414
2/8/2016	A. Datum Corporation	Hanoudi, Rayan	1234567890

Neglected Open Opportunities

Last Contact Date	Name	Potential Customer	Est
2/8/2015	Omnia 9	Adventure Works	

Neglected Open Leads

Last Contact Date	Name	Lead Source Details
1/1/2015	Becker, Bryan	Cold Call

Accounts by Owner
Neglected Accounts

Owner	Count
Marketing, Atrio	1
Hanoudi, Rayan	3
Becker, Bryan	1
Anuradha Palepu	1
Demoe, Brian	1

Top Opportunities
Neglected Open Opportunities

Name	Est. Revenue
Omnia 9	250,000

Leads by Owner
Neglected Open Leads

Owner	Count
Hanoudi, Rayan	1

Support

Please send any product issues or suggestions to support@atriosystems.com.

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