Dynamics Training Manual:

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1. Introduction

Business Partners has implemented Microsoft Dynamics CRM 2011 as a combined platform on which various areas of functionality is implemented. This functionality includes custom functionality, tailored specifically to address the requirements of Business Partners, namely:

- Application Processing,
- Activity Management & Work Distribution, and
- Document Management

In addition to the custom functionality, the standard, built-in CRM 2011 functionality is also available, and should be used as extensively as possible to maximise the benefits of what Dynamics CRM 2011 has to offer. Some of the built-in functionality includes:

- Contact and Account Management,
- Task and Activity Management,
- Queue Management,
- Communications Management,

This Section of the document will (in no specific order) briefly introduce you to the functionality listed above.

1.1. Contact and Account Management

CRM stores information regarding individuals (Contacts) and organisations, companies or institutions (Accounts) in records accessible from most areas in the system. These records allow the user to access a single record to edit or update the information regarding the Contact or Account, and, in doing so, keeps a single version of the truth. Should one staff member at Business Partners learn about a change to the information pertaining to a record, and makes this change, immediately everyone else will see the updated information. Because there is only one record to maintain, no risk exists that multiple places will require updates, and inadvertently, information go missing.

Whenever another record within CRM is referenced, even in the *context* of another record, this reference becomes a clickable link which, when clicked, will open the related record in a new window for the user to see. Many such cross-references exist, for example, on an *Account* record, the user may choose a *Primary Contact*. This field is a look-up to the Contact entity. Once a Contact is chosen and displayed on the Account record, it becomes a clickable link to the specific contact's record.

1.2. Task and Activity Management

Tasks and activities in CRM represent work assignments created either for oneself, or for other users to complete. The designated *Owner* of the activity is the staff member responsible for completing such a task. These tasks may be created manually, in some cases, whilst others, such as alerts and escalations may be system generated.

Activities come in a variety of flavours, including:

- Tasks (General, non-descript Tasks)

- Faxes
- Email
- Phone Calls
- Letters
- Appointments

Email and Appointments will synchronise with the user's Exchange calendar and mailbox, should he/she be using the CRM for Outlook client.

Tasks and Activities have a status indicating whether they are Open (in Progress) or Closed (Completed). This allows the user to keep track in his/her own Workplace of work or assignments that are still outstanding. These records are also stored *against* other records to which they pertain, e.g. against Applications, Contacts or Accounts, and in doing so, allow the user to keep a running history of interactions with that particular record.

1.3. Queue Management

Queues represent buckets of work. Similar to Tasks and Activities, these work items also ultimately need to be completed by staff members, but in the case of Queues, these items are placed on a Queue from where they need to be assigned.

Queue Items may be assigned to a staff member manually, or staff members may choose to work on these items themselves. Whenever a Queue Item is assigned to a user, it is removed from the Queue and no longer visible there.

1.4. Marketing and Networking

Many staff members maintain lists of contacts which they regularly communicate with. Some of these lists are small and specific, often only referring to a handful of people, whilst others are more general and may include literally hundreds of people. CRM allows all users to store their own lists of people to communicate with as Marketing Lists. These marketing lists typically consist of one or more Contacts, although the system will also allow lists of Companies.

Often, a broader audience may benefit from combining these *personal* Marketing Lists.

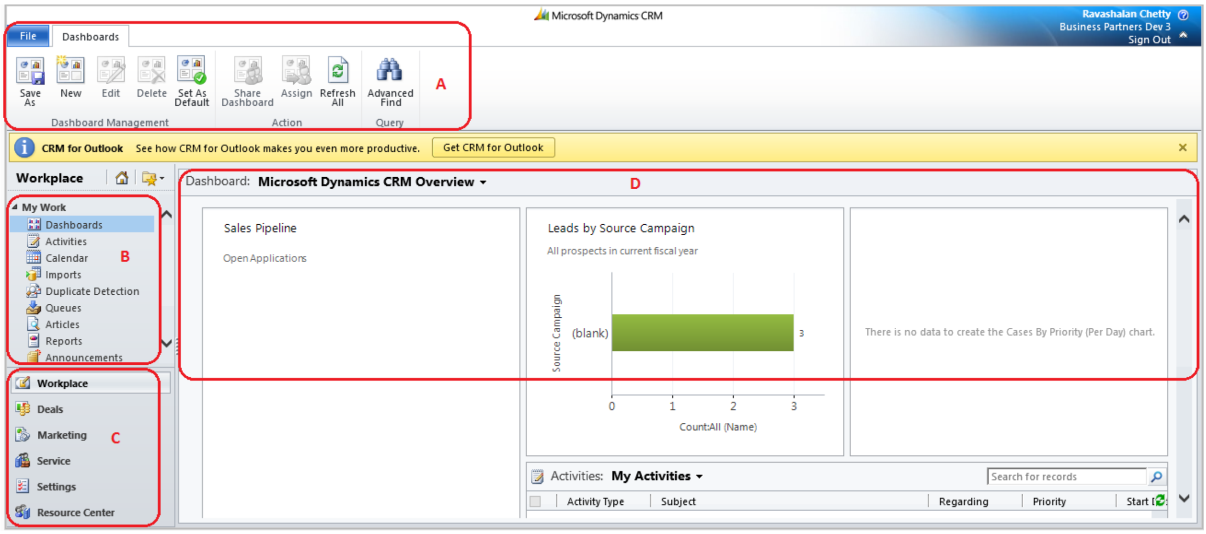
One or more Marketing Lists are required in every Campaign/Bulk Communication. CRM performs smart matching, and supposing one Contact exists in one or more of the Marketing Lists included in the Campaign, CRM will only treat this Contact as a single member.

Marketing Lists may be maintained on a central basis or as personal Lists for each user.

Note: CRM does not allow Marketing Lists containing Contacts *and* Accounts – Marketing Lists members have to be of the same type.

2. *CRM Basics*

The following screenshot shows the standard CRM user interface:



A. Ribbon

As can be seen, the ribbon resembles the standard Office Ribbon which you are familiar with. As with Office, depending on the operation you are busy with, the functionality and appearance of the Ribbon may change. The ribbon usually presents the user with short-cuts to commonly- or frequently used functions.

B. Navigation Links

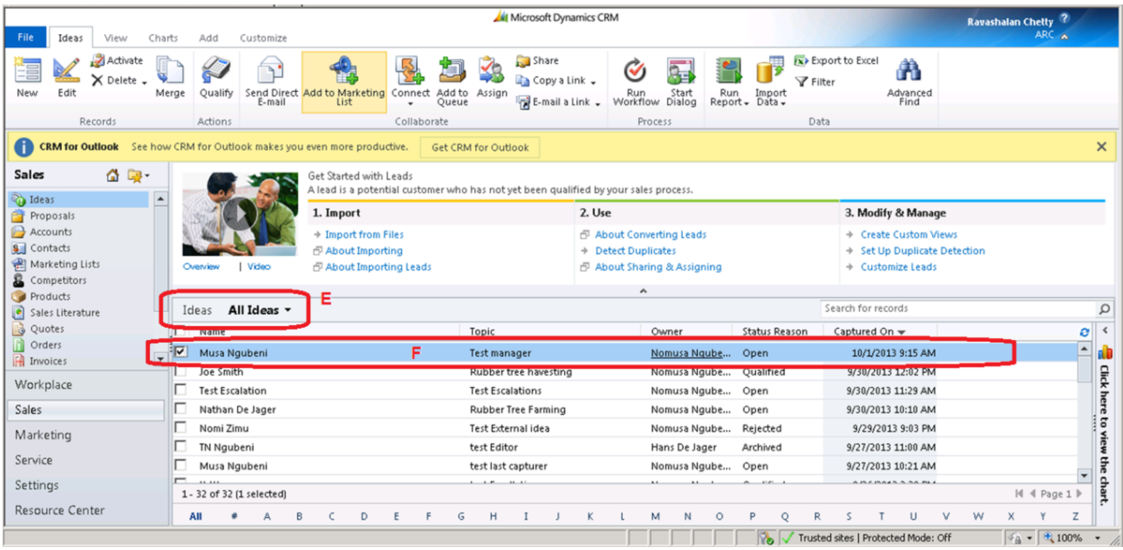
The Navigation Links allow the user access to specific areas of functionality, depending on which Navigation Pane (see below) button was chosen. In the example above, the Navigation Links shown are all related to the Workplace Navigation Pane button.

C. Navigation Pane

The Navigation Pane contains the main functional areas within CRM. These form collections of functionality that relate, e.g. all the Navigation Links shown under the Sales area will have some connection with the sales process in CRM.

D. Main Data Area

The main data area shows records or content chosen by the Navigation Link. In this example, the Dashboard Navigation Link is selected, and therefore the Main Data Area shows the Dashboard content page. Similarly, should the *Contacts* Navigation Link be selected, a list of Contact records will be displayed in the Main Data Area.



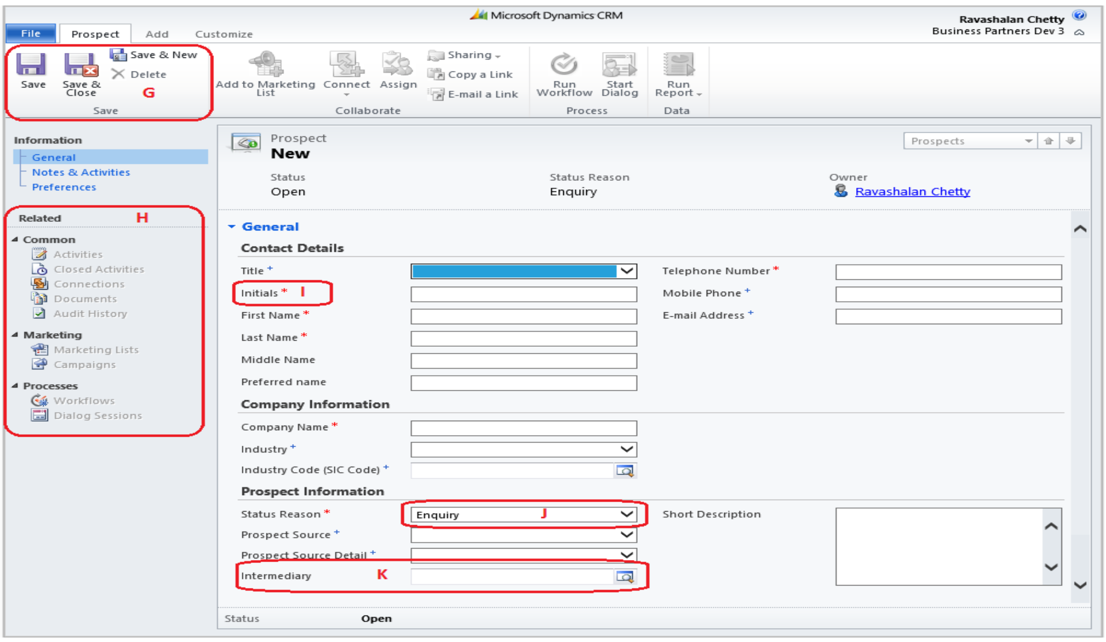
Above, a Navigation Link was selected which yields a list of records on the Main Data Area:

E. View Selector

CRM presents lists of record in what is called *Views*. Views contain one or more records, usually filtered on one or more criteria. On this view selector, the drop-down button allows the user to choose another, different view. Views provide the user more perspective on the information they are viewing.

F. Record

A record is a single instance of an entity, e.g. one Contact, one Account, etc. Although the view shows multiple records, and provide some information *on* those records, this is still an abbreviated view of the record. To view more detail, the actual record should be opened, and not just viewed on the view. To *Open a Record*, the user should select the record as shown, and either click the Edit button on the ribbon, or simply double-click the record on the blue selection area to Edit the record, or click the New button on the ribbon to create a new record.



The screenshot above shows a new (open) record.

G. After making changes to a record, the user should always save records. CRM offers three alternatives:

   a. Save: Only saves the record, but leaves the window open for further editing.
   b. Save and Close: Saves the record, and closes the window when done.
   c. Save and New: Saves the record, closes the window, and opens a new, blank record.

H. Related Records

The list of links to the left of the record represent *other* records, which are, in some way, related to the current record being viewed. In the case of an Account, for example, a list of *Sub-Contacts* are shown. When clicked on this link, a view of Contacts are displayed on the Main Data Area of the record. The Contacts will all have one thing in common – they will all be related to the current Account record being viewed. This relationship, for example, constitutes by the *Parent Account* field on the Contact record pointing to the Account record.

I. Compulsory Field

CRM identifies three types of *Cardinality* with fields: the requirement level of fields determine how important, relatively, it is considered when completing the information on a record:

- Compulsory/Business Required Fields (Denoted by *) have to be captured. CRM will not save the record without these fields being captured.
- Business Recommended fields (Denoted by +) are not compulsory, but should be completed when possible. The more complete data, the better the value the data adds to the organisation. Business Recommended fields are not business critical but may potentially have some value to add, should it be completed.
- Optional fields (Remaining fields) may or may not be captured by the user. Again, for completeness' sake, it would be preferable to complete these, but is not important/critical.

J. Pick-List

A pick-list contains two or more values which the user may choose from. These values are set, and cannot change.

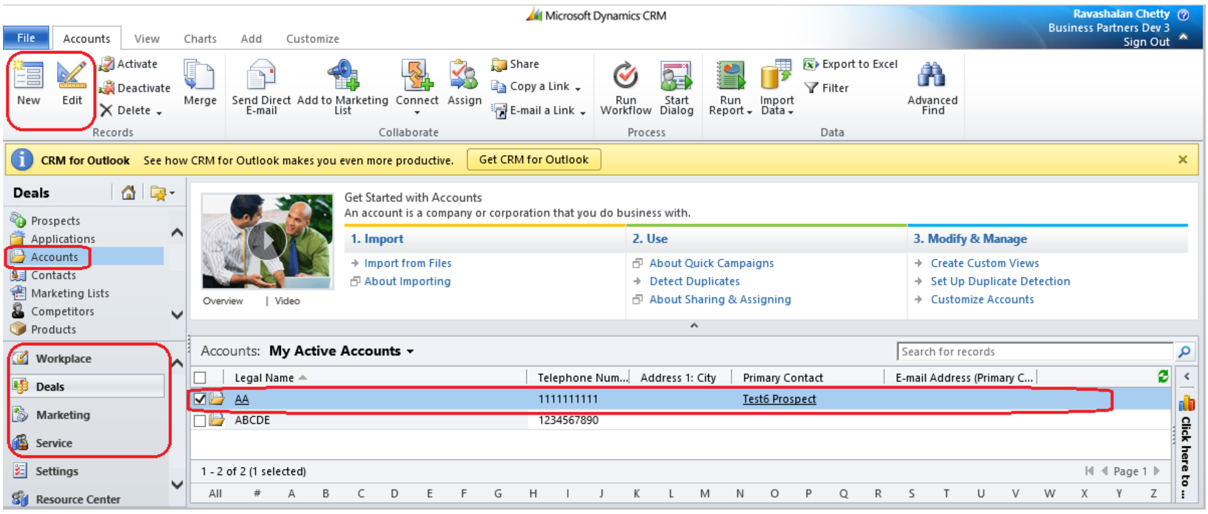
K. Lookup Field

Lookups resemble pick-lists in that they also offer the user multiple values to choose from. The difference lies in that lookups are maintainable by the CRM administrator, and new values may be added, old values delete or changed, and values may be searched. Lookups typically contain far more values to choose from than pick-lists (hence the searching functionality), but are also slower to use, as a separate window may need to load every time a lookup is used.

3. Contacts and Accounts

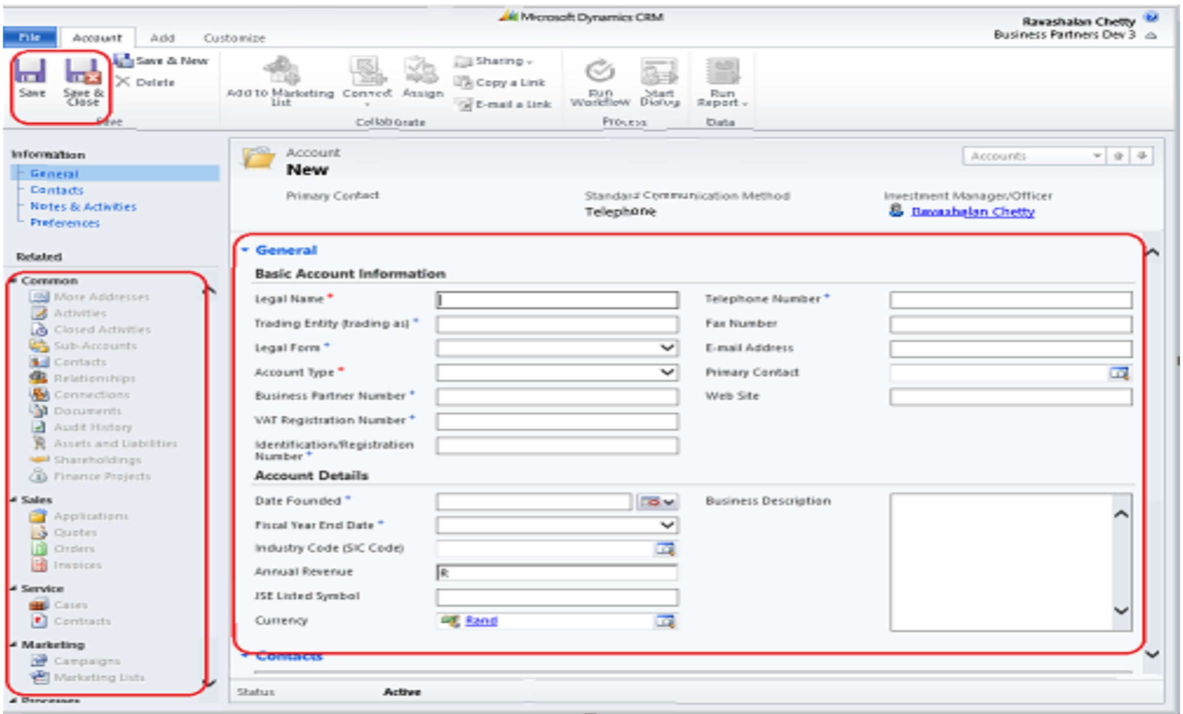
The introduction of this document describes the basics of Contacts and Accounts.

3.1. Managing Accounts



- Click any of the top four Navigation Pane Buttons (the Account- and Contact Navigation Links are available under all of the Navigation Pane Areas.
- Click the *Accounts* Navigation Link
- Either select the *Account* record from the view, and click the *Edit* button on the ribbon, or
- Click the *New* button on the ribbon.

The Account form now loads:



- Capture the Account information on the form, then Save the record.

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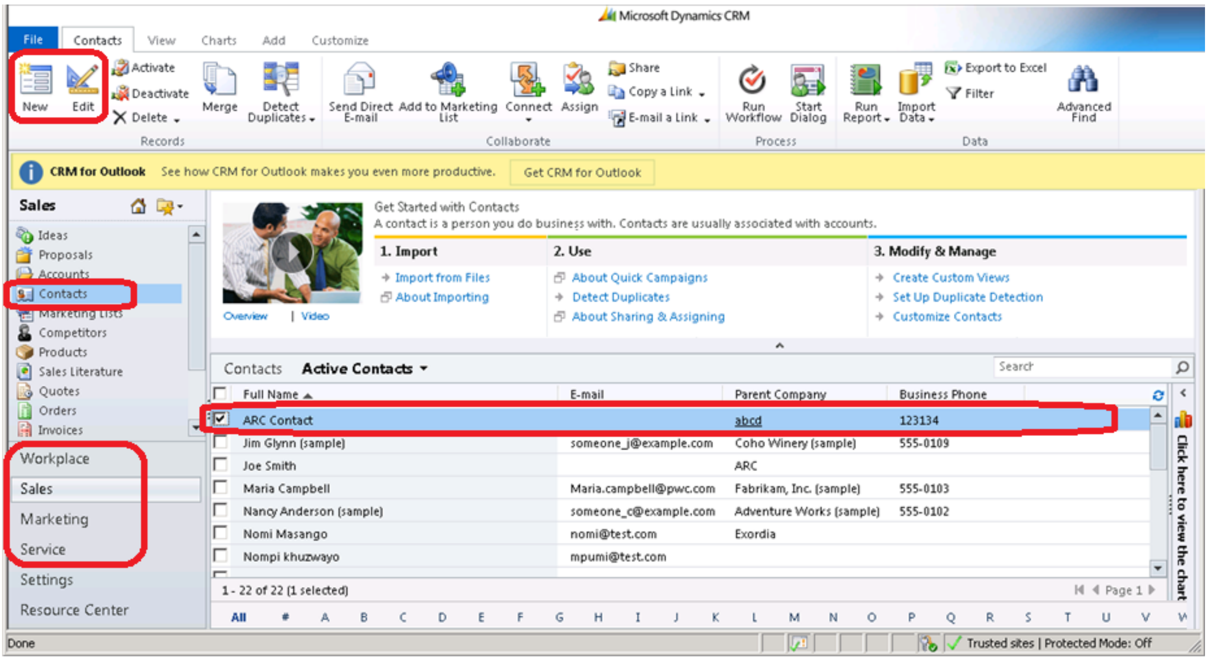
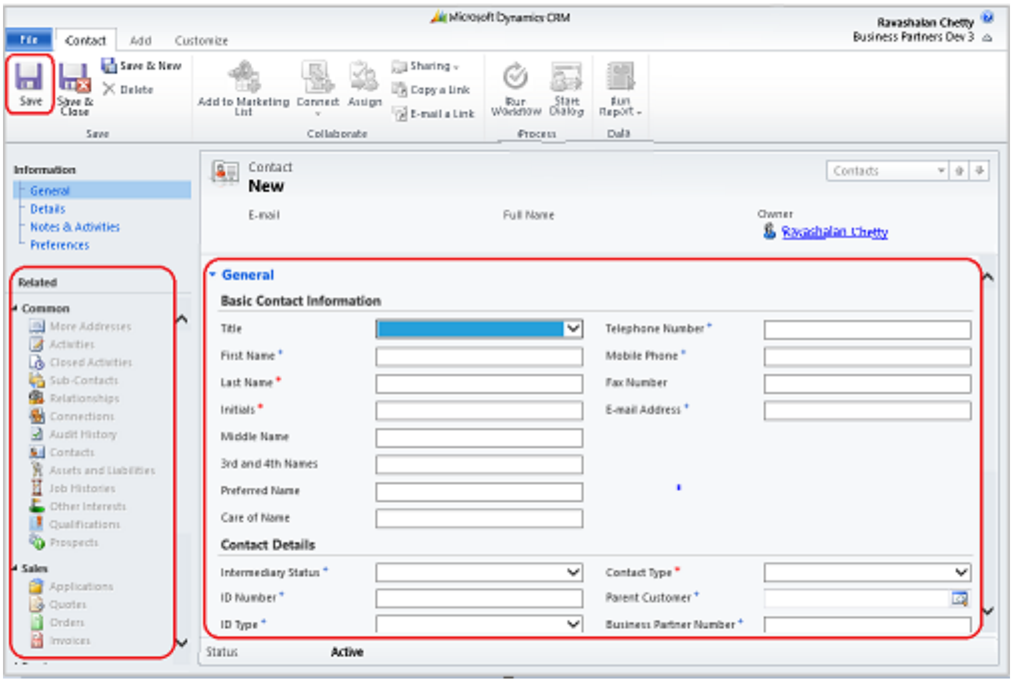
- After Saving the record, choose any of the Related records, and continue editing there if required.

3.2. Managing Contacts



- Click any of the top four Navigation Pane Buttons (the Account- and Contact Navigation Links are available under all of the Navigation Pane Areas.
- Click the *Contacts* Navigation Link
- Either select the *Contact* record from the view, and click the *Edit* button on the ribbon, or
- Click the *New* button on the ribbon.

The Contact form now loads:

v 

- Capture the Contact information on the form, then Save the record.

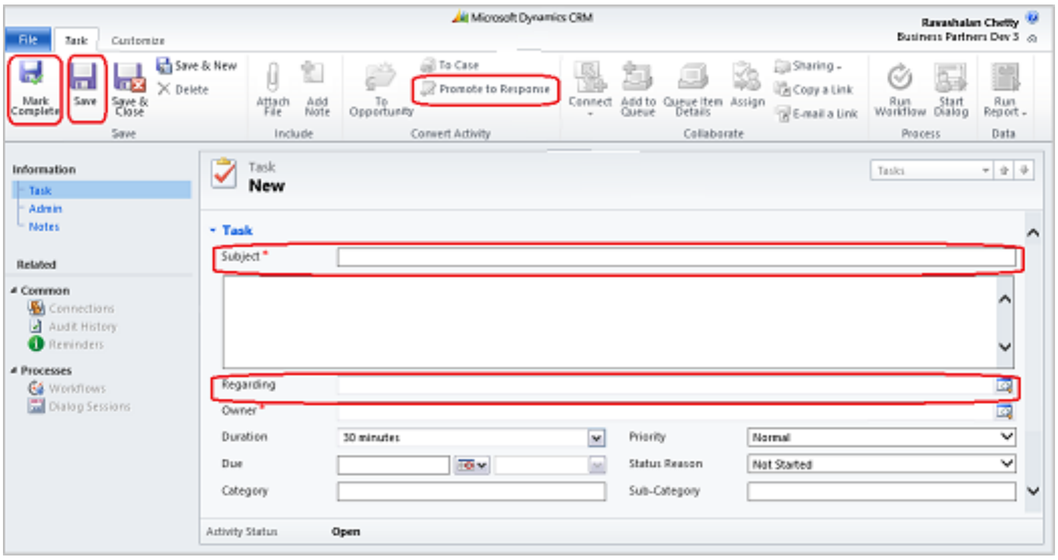
- After Saving the record, choose any of the Related records, and continue editing there if required.

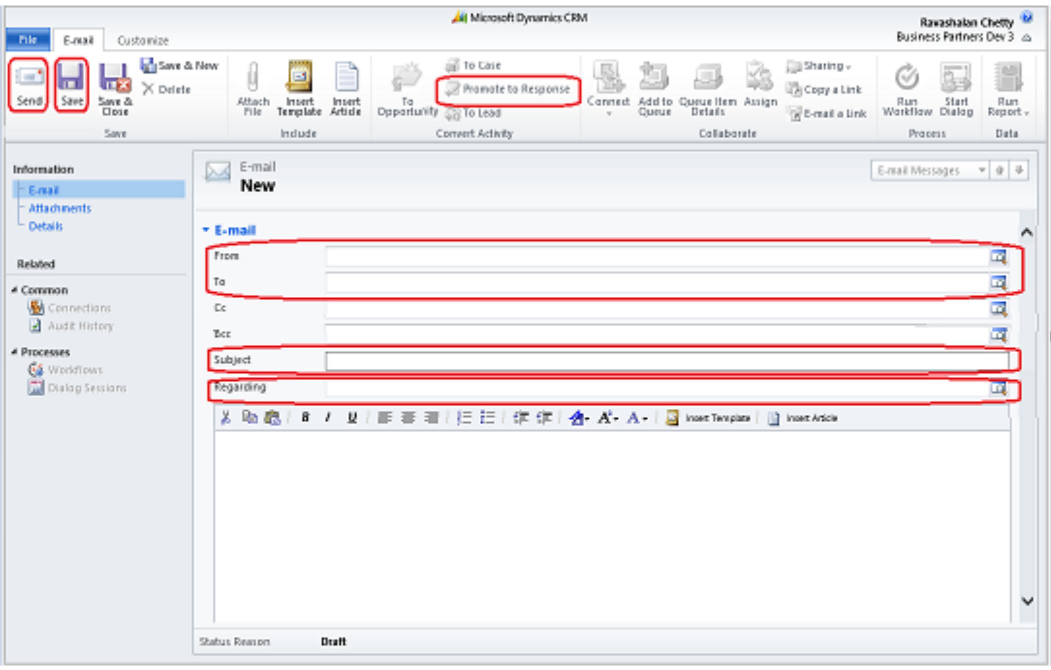
4. *Tasks and Activities*

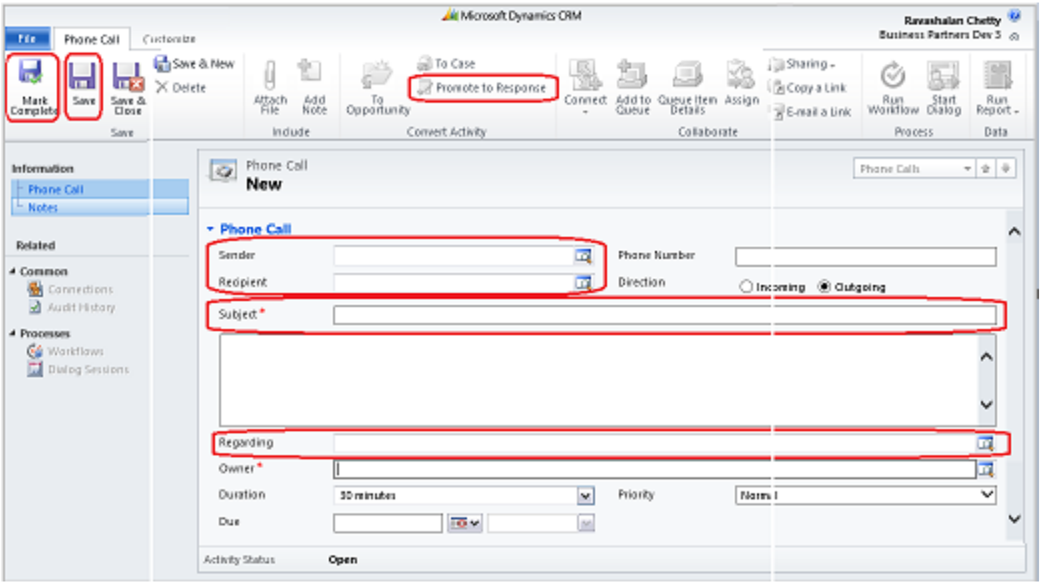
4.1.Introduction to Tasks and Activities

As mentioned earlier, Tasks and Activities represent work items or instructions assigned to a user. Also mentioned, there is a number of different types of Activity that may be created.

The following set of screenshots depict three main Activity Types:







4.1.1. Commonalities among Tasks and Activities

- Note how all the Activity record types have both a *Regarding*- and *Owner* field. The Owner is the user deemed responsible for completing the Activity. The Regarding field refers to the record to which the Activity pertains.
- All activities have a set of *Save* buttons. This means that Activity records may be saved, closed and re-visited or completed at a later stage. Although E-Mail records that have been sent already or that were received will automatically have the *Completed* status, all other E-mail records can still be edited and modified.
- Activities have a main *Status*: Completed or Open. Open Activities still need to be completed, whilst Completed Activities are closed, and made Read-Only. Some Activities have a "Save as Completed" button (which simply updates the Status to Completed). Other Activities also have a *Close Activity* button – this allows the user to provide more information regarding *how* the Activity was completed. Open Activities will be visible when clicking the "Activities" related link on the record shown on the Activity's *Regarding* field. Closed Activities, on the other hand, will be shown under the Closed Activities or History related link.
- Activities always show a "Promote to Response" button visible on the Ribbon (once saved for the first time). This will allow the user to identify a *Campaign Response* record.

4.1.2. Key differences among Tasks and Activities

- Senders and Receivers: Most Activities have some form of Sender and/or Receiver associated with it. Phone Calls and Faxes, for example, have fields for *Sender* and *Receiver* (along with a field indicating the Activity *Direction* – Incoming or Outgoing). E-Mail records have the customary *From*- and *To* fields. Tasks, however, do not have *Senders* and *Receivers* at all, as these are generic Activities.

- Intervention: Some Activities, specifically, E-Mail and Appointments actually propagate (in this case send) immediately. When an E-mail is captured, the user can literally click the *Send* button, and the message will be sent. The remaining Activity Types rather *represent* the fact that the communication has *happened* or should. In the case of the Phone Call, for example, the call script may be captured and saved, but the *actual* Phone Call still needs to be made. Similarly, Faxes will not be sent automatically, but the *content* of the fax may be attached on the Fax record, and saved.

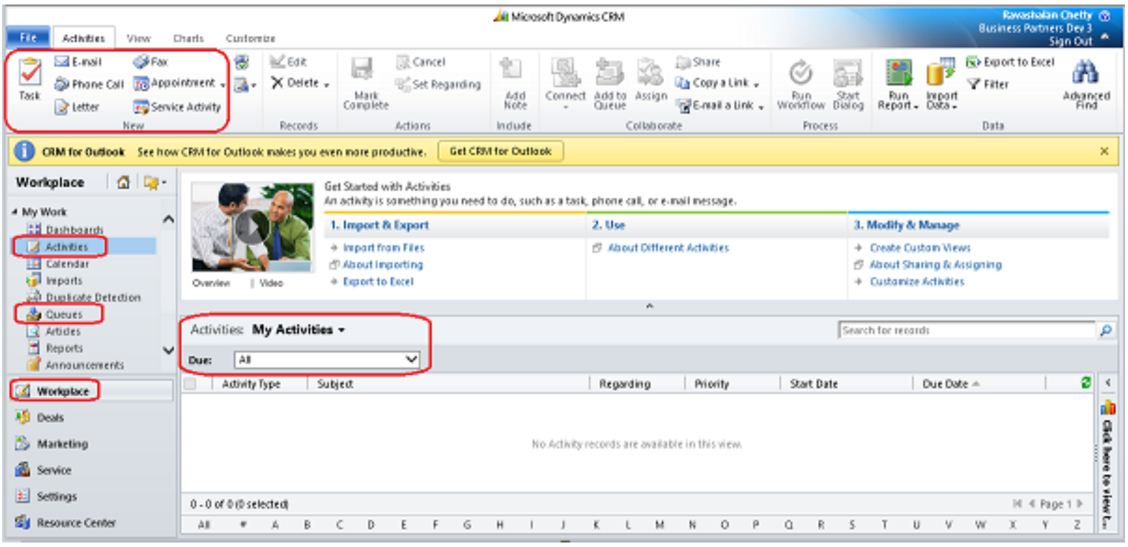
4.2. Visibility of Tasks and Activities

Tasks and Activities are shown in one of multiple views on the Workplace Area, specifically under the Activities Navigation Link. The default view of Tasks and Activities shows *My Activities* – all *Activities* which the current user is the designated *Owner* of.

As the user works on these work items, and closes the Activities as Completed (in which-ever way), they automatically drop off the list of Open Activities. In this way, the user has the ability to track which Activities still require attention.

Alternatively, Activities may be placed on a Queue (visible under the Workplace Navigation Pane Area's Navigation Links) as is the case with Business Partners. When a Queued Task or Activity is chosen, the user simply clicks the *Work on* button on the ribbon, which will allow the Activity to be *assigned* to the user.

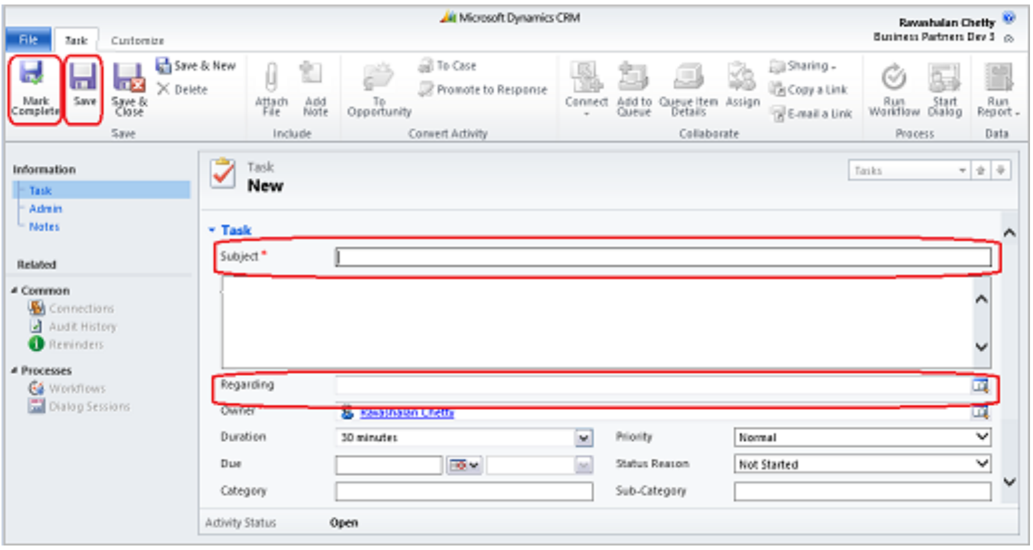
4.3. Capturing Tasks and Activities



To Capture a Task or Activity:

- Click the *Workplace* Navigation Area
- Click the *Activities* Navigation Link (Or *Queues* Navigation Link, to view Queued Activities)
- From here, the user may change the Views, and select an Activity from the list and click Edit on the ribbon, or click on one of the Activity Types on the ribbon to create a new Activity.

  Depending on the Activity Type clicked, the Activity Form loads:



- Complete the Activity record, and *Save* the Record.
- Once completed, click *Mark Complete* or *Close Activity* on the Ribbon.

5. Application Management

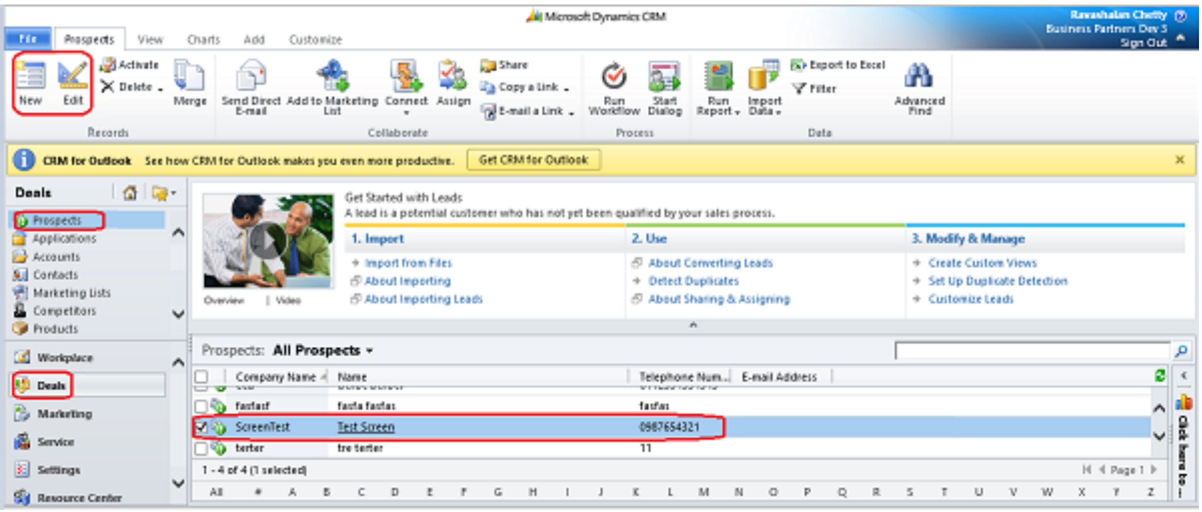
5.1. Application Processing

Business Partners would like to save information regarding inquiries from Prospects. Prospects either make an online or manual application. An assessment is done to verify if the prospect is viable or not using financial forecast models. The Fin Model is captured and stored on the system for future reference. Once the minimum requirements, as stipulated in the application form have been received, the process begins.

If desired, they may then be promoted to an Application.

Application records in CRM represent the process of managing an application from inception up to the point where the project kicks off. Like Prospect management, Application management also involves an approval/qualification process, but it is more detailed and stringent. A formal Due Diligence is conducted. Due Diligence is a verification of all information and data submitted to Business Partners. It involves internal and external role players. Progress of processes undertaken by third parties during the Due Diligence will be monitored by the Investment Manager. CRM also routes the Application through the refinement and approval process, and allows the team to store related documentation. Once the final documents are ready and signed off it is distributed to the Implementation Officer to process and capture the client in SAP for processing.

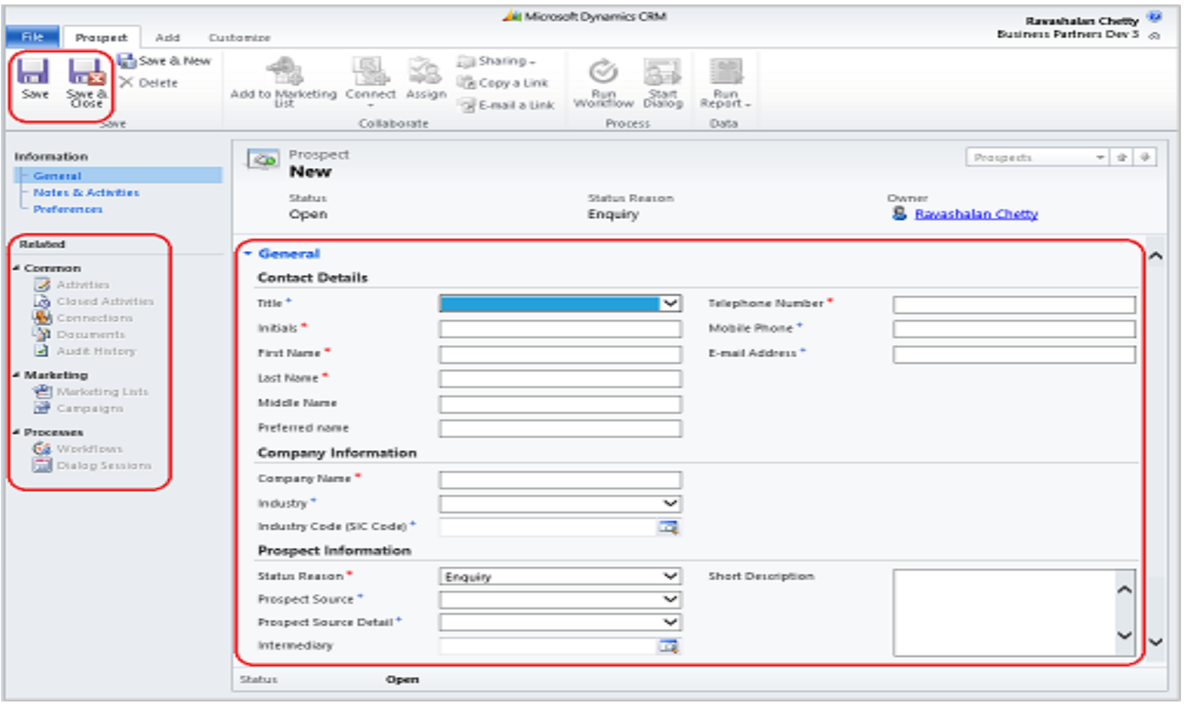
5.2. Capturing Prospects



To Capture a Prospect:

- Click the *Deals* Navigation Area
- Click the *Prospects* Navigation Link
- From here, the user may change the Views, and select a Prospect from the list and click Edit on the ribbon to edit the Prospect record, or click *New* on the ribbon to create a new Prospect.

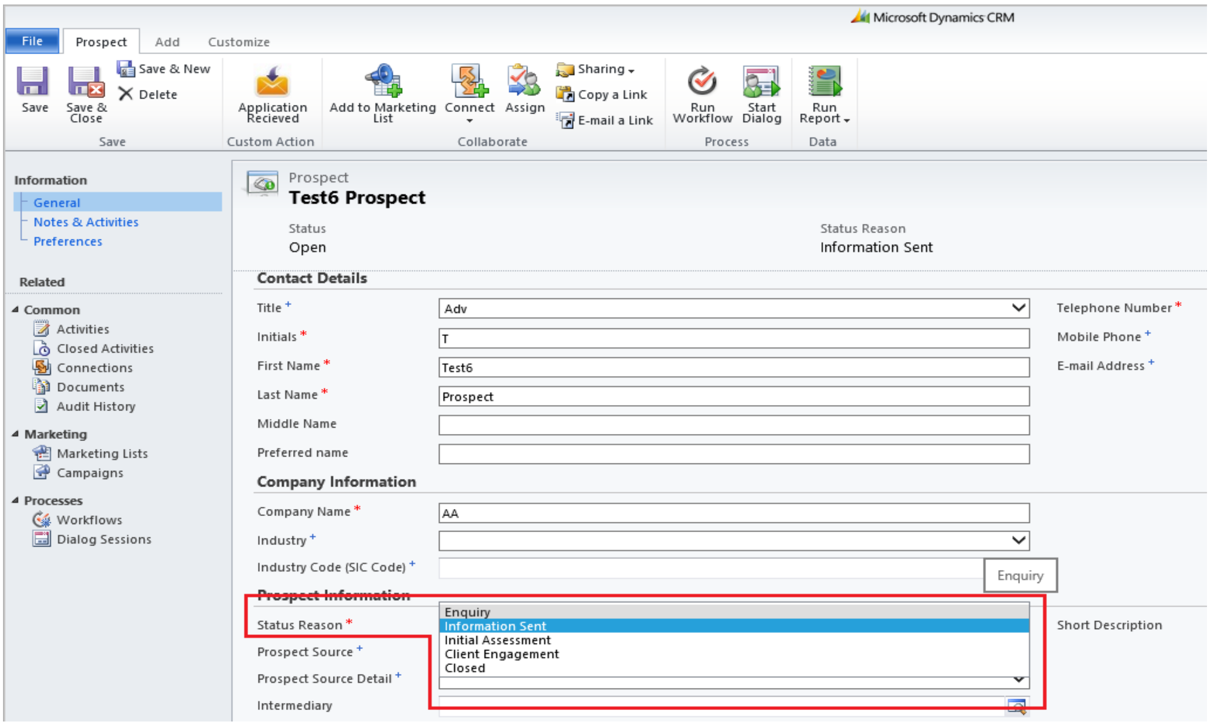
The Prospect Form now Loads:



- Capture the Prospect details and Save the record.
- An activity and reminders are automatically generated.
- Completion of tasks triggers a status change

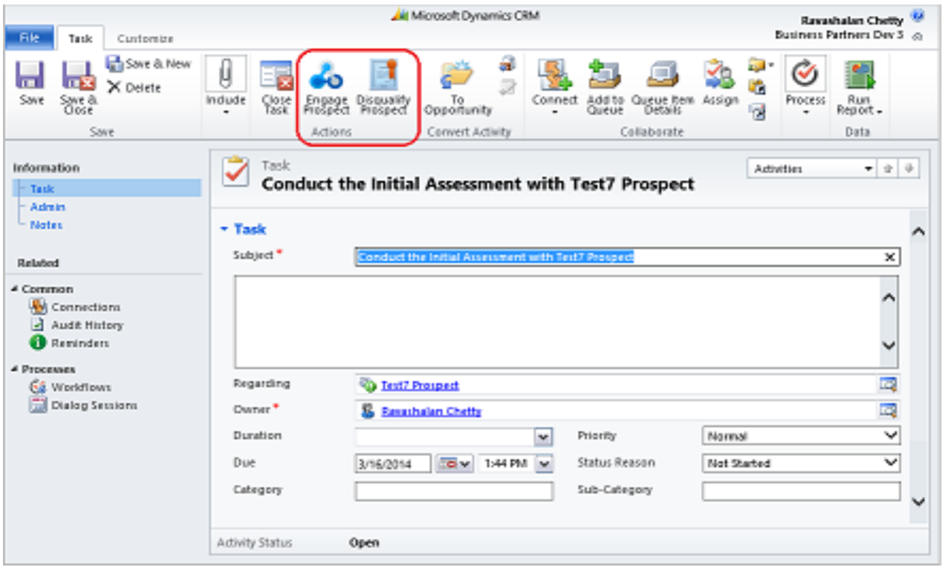
5.3. Updating Prospect Statuses

The implementation designed for Business Partners, specifically as it pertains to Prospects, depends a lot on Completion of Activities to drive the process. Below is a screenshot of the different statuses.



Prospect Status flow			
Process	**Status**	**Activity**	**Role**
Create Prospect	**Status:** Enquiry	• Create Prospect	• Author • Web Enquiry • Web Application
Verify Enquiry & Send Information	**Status**: Information Sent	• Application Form and Standard Letter sent to Prospect	• Investment Manager
Application Received	**Status:** Initial Assessment	• Create Required documentation • Do Assessment	• Investment Manager
Engage Prospect	**Status:** Engage Prospect	• Present deal to prospect • Get sign-off	• Investment Manager
Accept Deal	**Status**: Closed – Converted To Application	• Convert to Application • Create Account • Create Contact	• Investment Manager
Disqualify Prospect	**Status**: Closed - Rejected	• Close Prospect as Rejected	• Investment Manager

The Prospect has five statuses shown above. Initially, when a Prospect is captured, the Status is set to "Enquiry". On completion of the task created on create of the prospect, the status automatically changes to "Information sent". The status remains unchanged until the Application Received button is clicked and the status is automatically changed to "Initial Assessment". The button is available for the status change because there are tasks created which need to be completed to move to the next status. This triggers a task to conduct the Initial Assessment and the user has the option to "Disqualify Prospect" which will set the status to "Closed – Rejected" or "Engage Prospect" which will then change the status to "Engage Prospect", (see below).



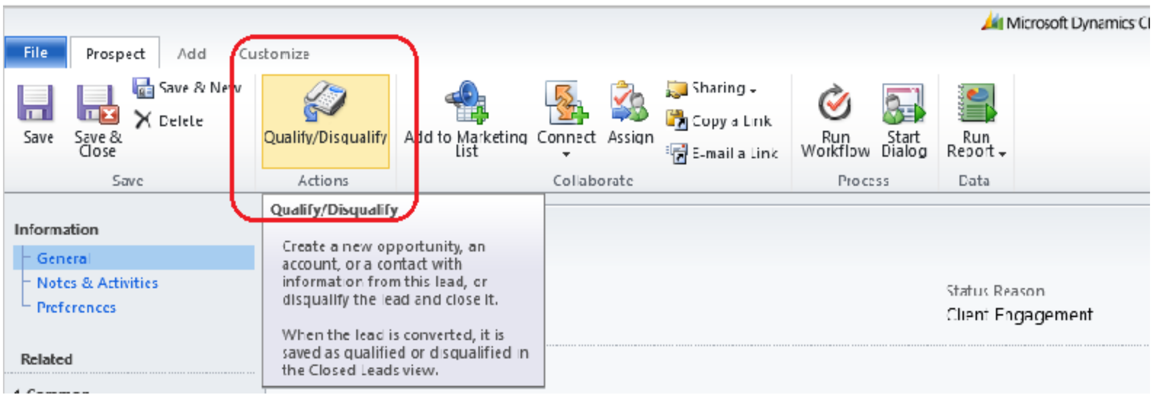
Once the deal is accepted the Qualify\Disqualify button is clicked and the status is then changed to "Closed-Converted to Application".

Note: The status is changed in the background, saving the open record may overwrite the changes.

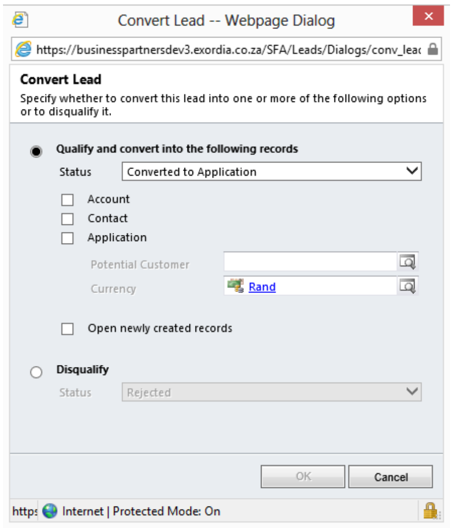
5.4. Converting Prospects to Applications

When the user wishes to convert a Prospect into an Application (essentially after the initial screening process has been completed), the following process should be followed:

- Open the Prospect record:

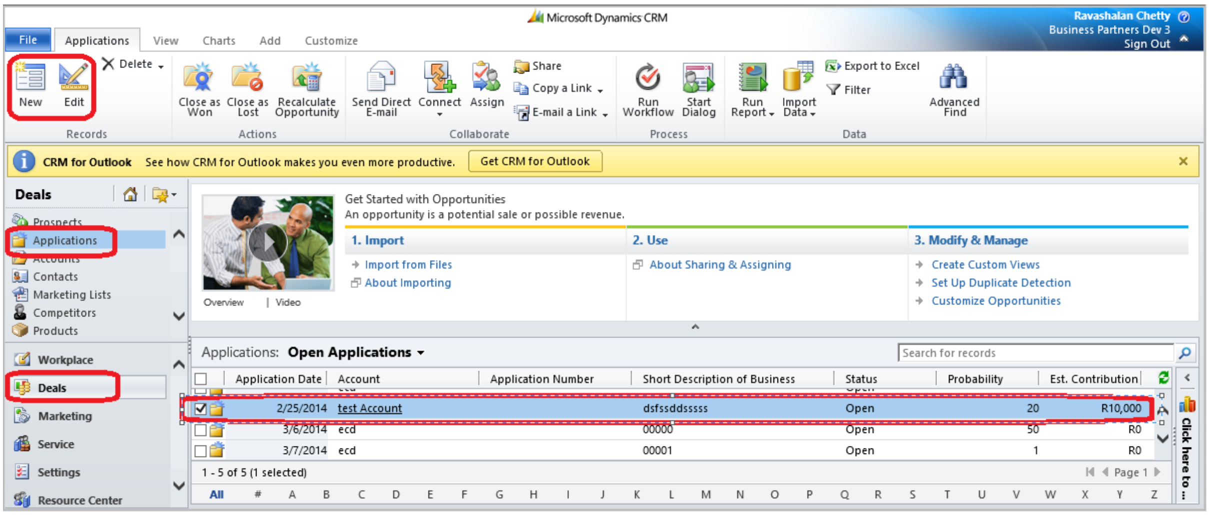


- On the ribbon, click the Qualify/Disqualify button. CRM opens a Convert screen:



- Choose to either Qualify or Disqualify the Prospect. Supposing the Prospect is Qualified, the user may choose whether or not to create an Account, a Contact and/or an Application. If no Contact or Account is created, choose a Potential Customer.
  Note: Best practice suggests using the Potential Customer lookup to see whether or not the Account or Contact exists before creating a new one.
- Click the OK button. The Application record (if chosen) will now be created.

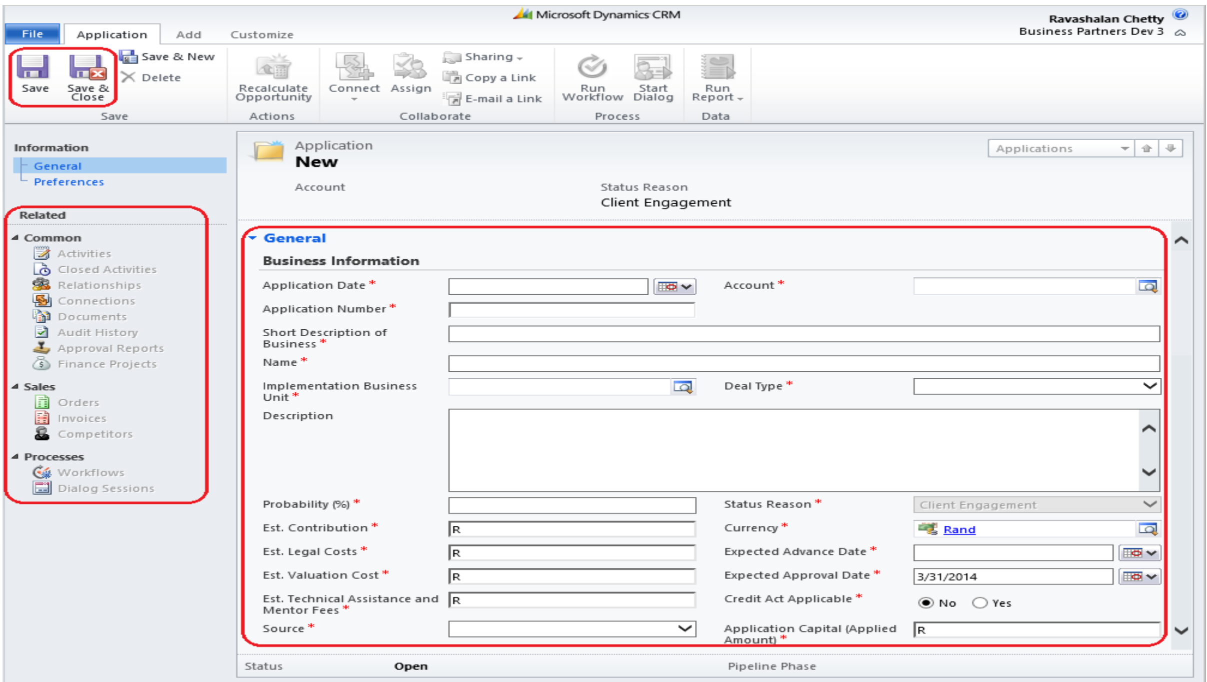
5.5. Capturing Applications



To Capture an Application:

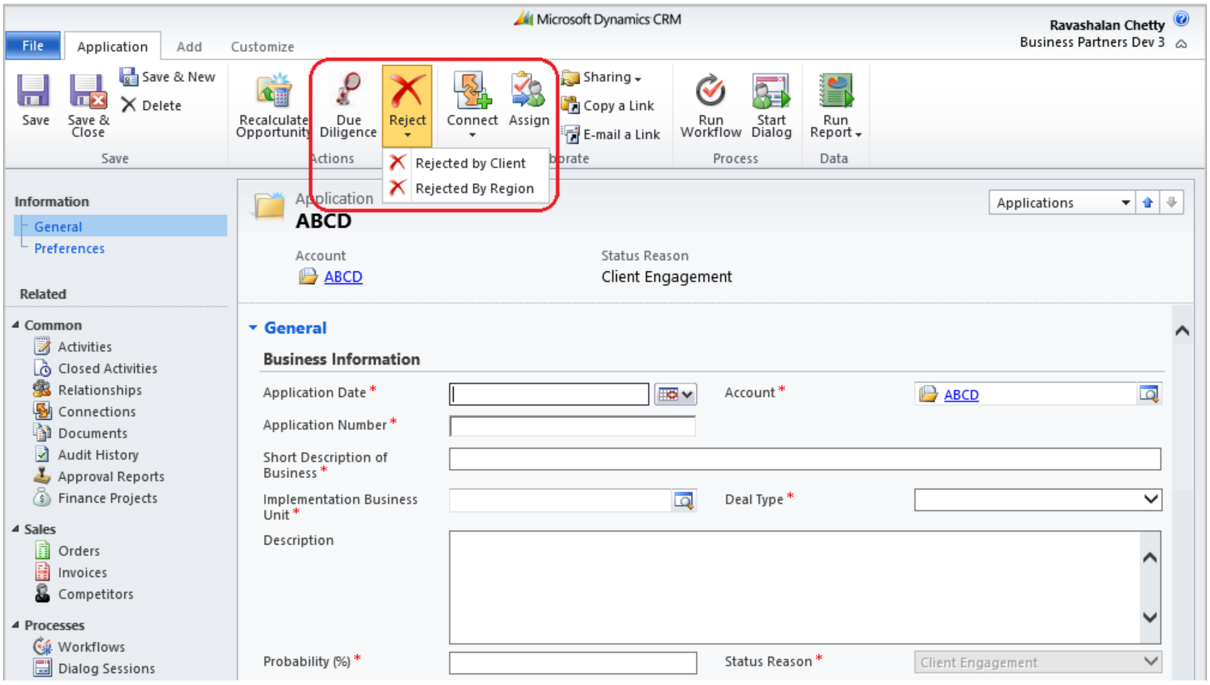
- Click the *Deals* Navigation Area
- Click the *Applications* Navigation Link
  From here, the user may change the Views, and select an Application from the list and click Edit on the ribbon to edit the Application record, or click *New* on the ribbon to create a new Application.

The Application Form now Loads:



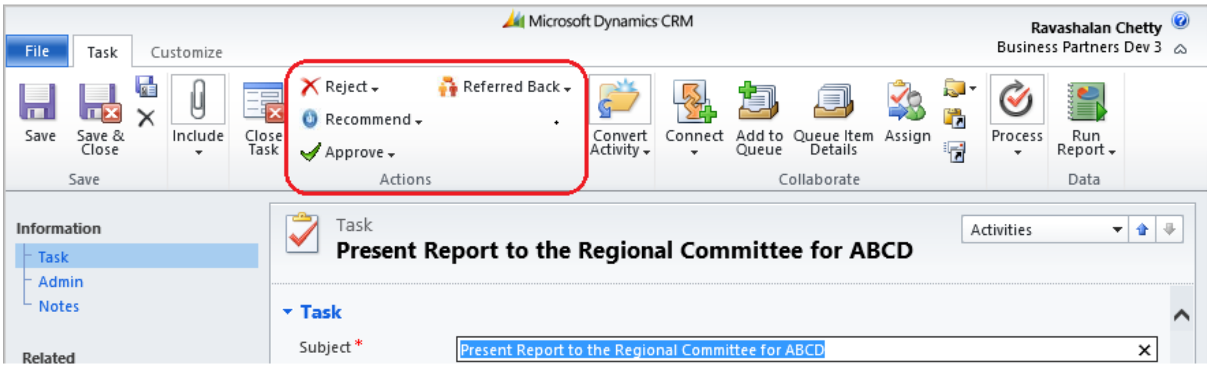
- Capture the Application details and Save the record.
- In the cases where there are no tasks to be completed, to move to the next status, a button will be available on the application form to move to the next status.

Opening an Existing Application



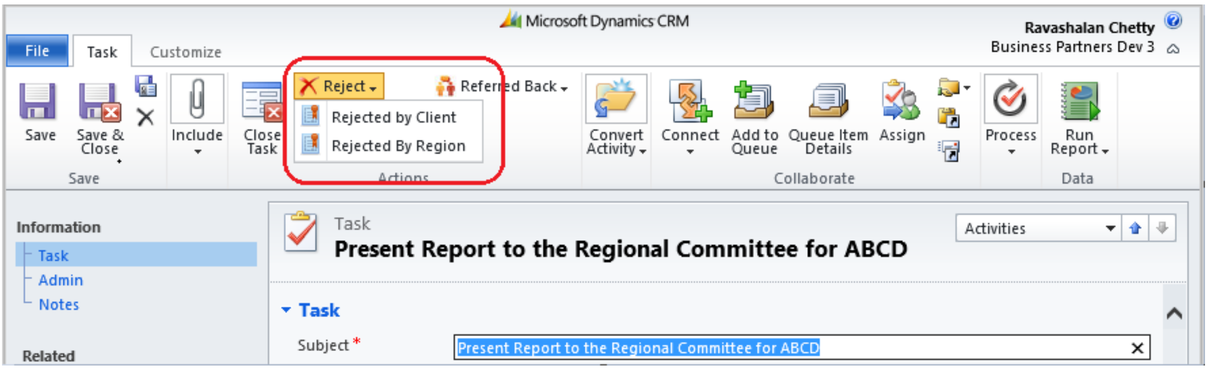
- On an existing application there is the "Due Diligence" and "Reject" buttons.
  - Due Diligence button generates tasks which need to be completed to drive the process and changes the status to "Due Diligence".
  - Reject button gives the user two options, "Rejected by Client" and "Rejected by Region".

Task buttons



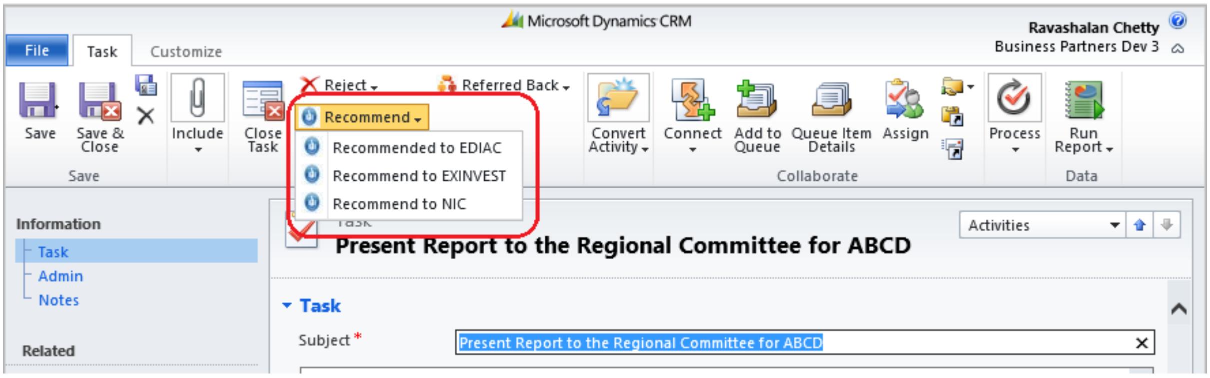
- Tasks have added features.
- Each button in the above screenshot has different options.(Screenshots of buttons below)

Reject

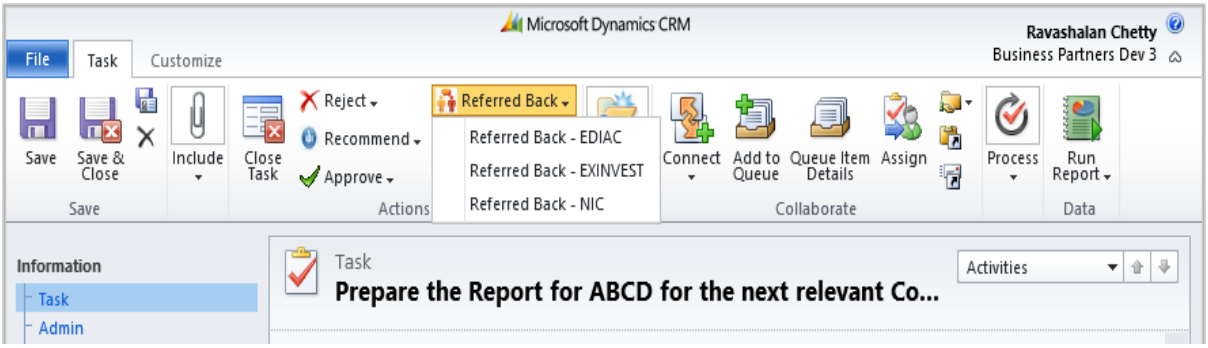


- The task can be "Rejected by Client" or "Rejected by Region".

Recommend

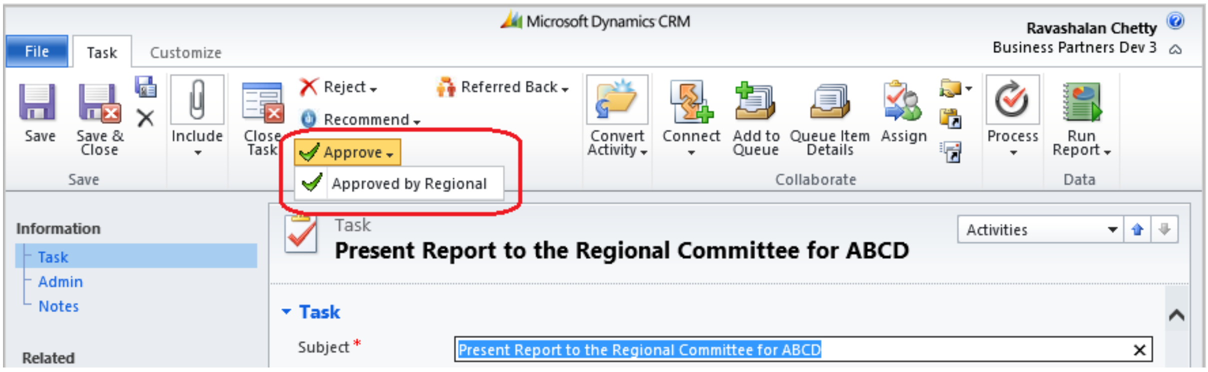


- The user clicks "Recommended to EDIAC", "Recommended to EXINVEST", or Recommended to NIC".
- Clicking one of the options generates a task as seen below.



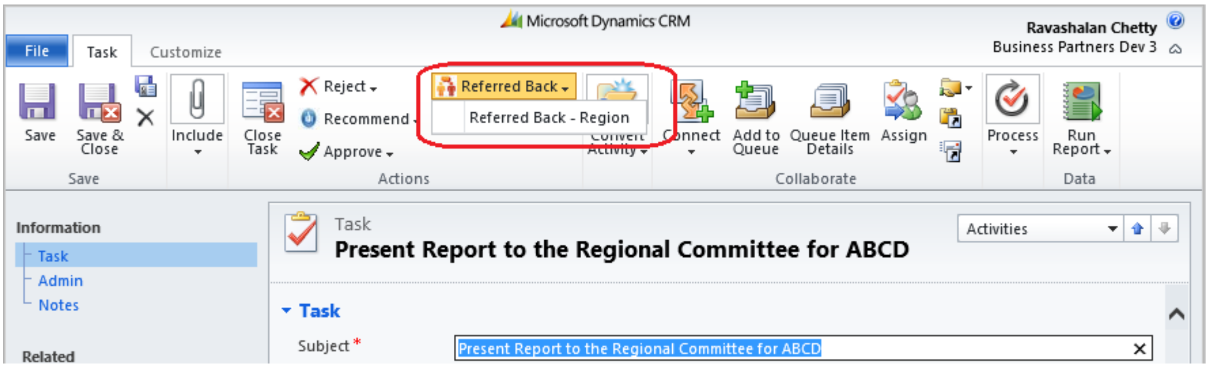
- The user now has the option to refer back to EDIAC, EXINVEST or NIC.

Approve

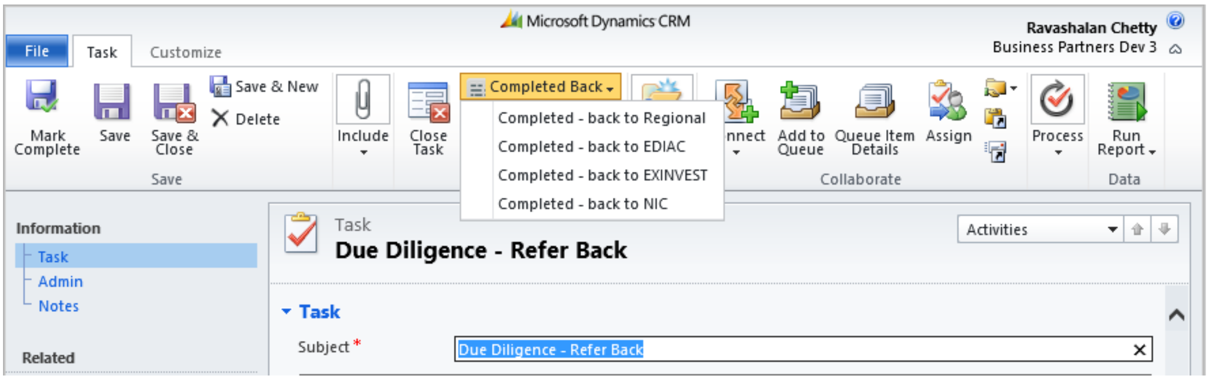


- The task can be “Approved by Regional”.

Referred Back

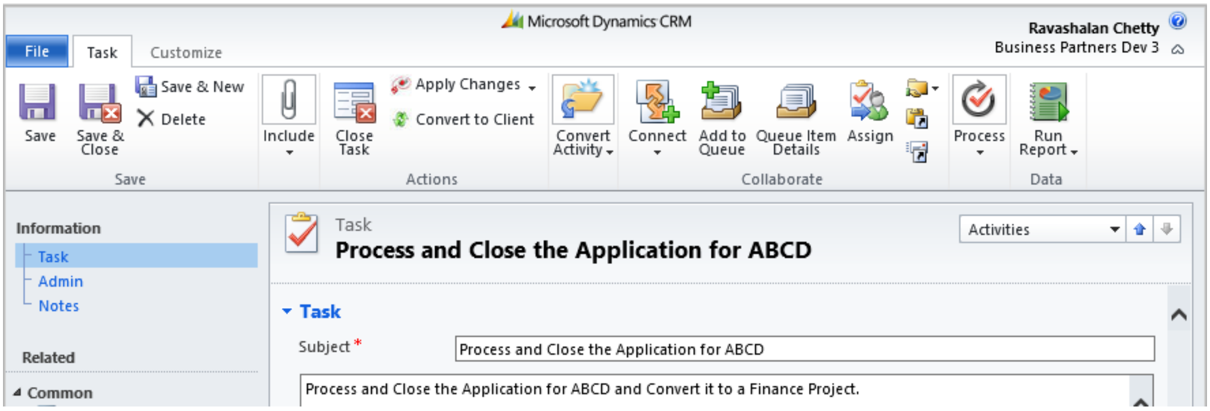


- Clicking “Referred Back – Region” will generate the below task.

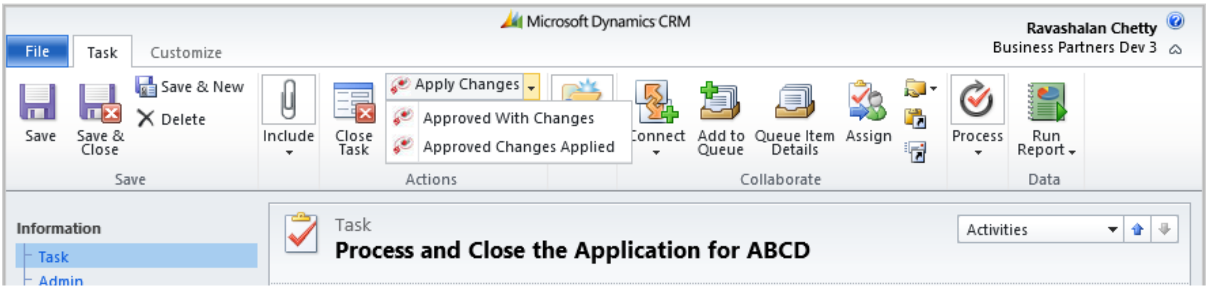


- Once completed the user clicks “Completed Back” and selects one of the options.

When the user selects “Approve by Region” a task is generated to “Approve and close the Application”.

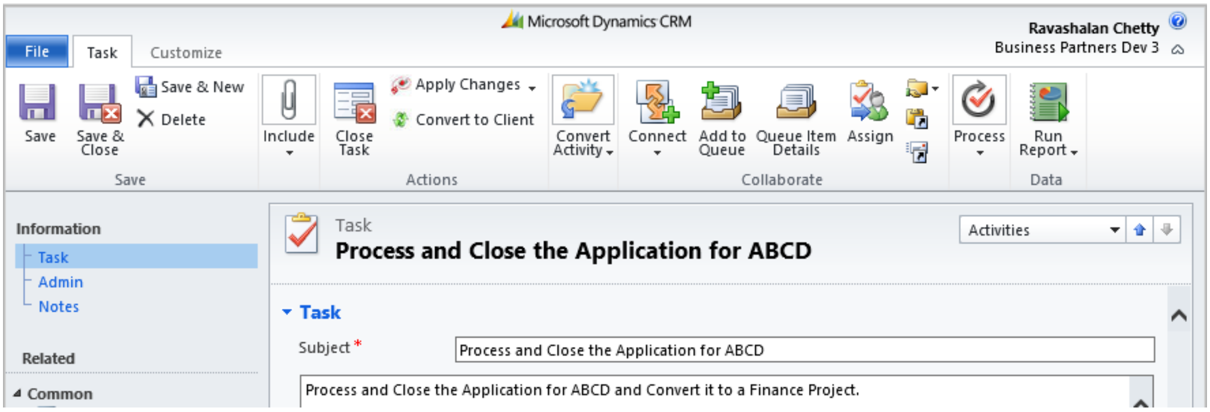


Apply Changes

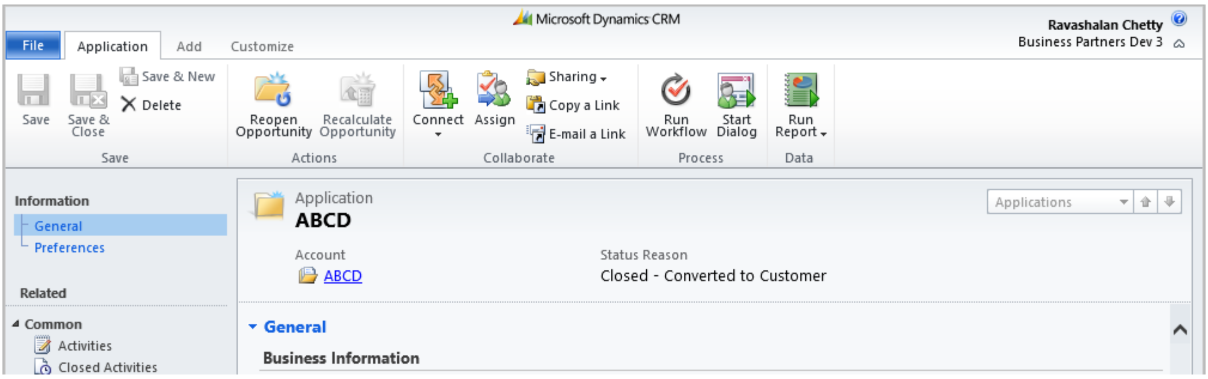


- The user can select “Approved with Changes” or “Approved Changes Applied”.

Convert to Client

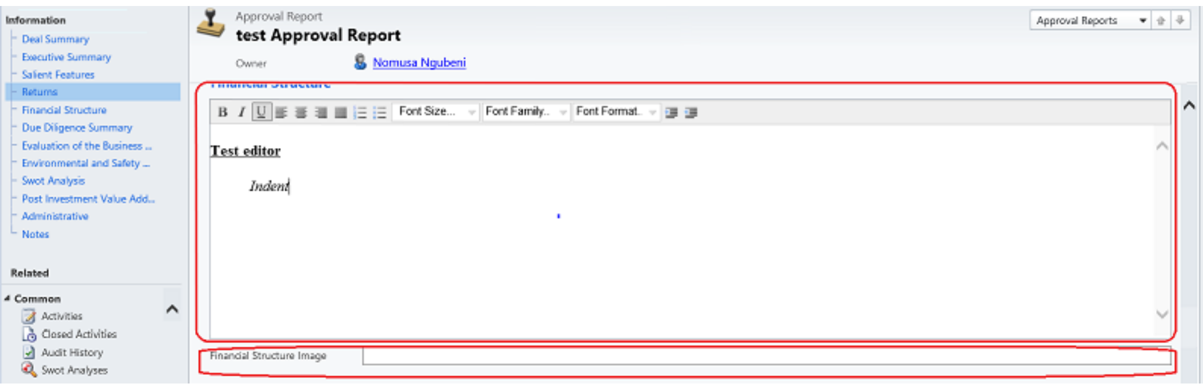


- The user clicks "Convert to Client" to close the Application. This changes the Status reason of the application as seen below.



- The Status Reason of the Application changes to "Closed – Converted to Customer".
- No further tasks are required to be completed on the Application once it is closed.

Text Editor Feature on the Approval Report.



- On the approval report there is a section with an Iframe which contains a text editor. The user can write in the block and add italics, bold, indent etc. Copying and pasting of tables from word are also allowed.
- The form needs to be saved for the user to see the text the next time the report is opened.

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- Users can add a URL in the text field "Financial Structure Image" below the Iframe. This is a clickable field so clicking on it will take the user to the saved image.

- The Application and Approval report status flow is as follows:

Application Status flow

Process	Status	Activity	Role
Create Application & Engage	**Status:** Client Engagement	• Create/Capture New Application • Convert Prospect to Application • Engage with Client	• Investment Manager
Due Diligence	**Status**: Due Diligence	• Perform due diligence	• Investment Manager
Due Diligence done	**Status:** Due Diligence Done	• Change status • Finalise approval report	• Investment Manager
Review Due Diligence	**Status**: Due Diligence Review	• Legal Manager review • Area Manager review	• Legal Manager • Area Manager
Regional Approval	**Status**: Submitted for Regional Approval	• Regional approval meeting • Recommend or Reject	• Regional Approval Committee • Regional General Manager
Recommended	**Status**: Recommended to EDIAC **Status**: Recommended to EXINVEST **Status**: Recommended to NIC	• Approval Committee meeting • Approve • Reject • Approved with Changes • Refer back to Due Diligence	• Approval Committee
Approved	**Status**: Approved by EDIAC **Status**: Approved by EXINVEST **Status**: Approved by NIC	• Capture Approved Documentation And Distribute	• Implementation Officer • Meeting Secretary
Apply Changes	**Status**: Approved with Changes **Status**: Approved Changes Applied	• Apply changes required	• Investment Manager
Convert to Client	**Status**: Closed – Converted to Client	• Close Application as Converted • Close Approval Report	• Implementation Officer
Rejected	**Status**: Closed – Rejected by Client **Status**: Closed – Rejected by Region **Status**: Closed – Rejected by EDIAC **Status**: Closed – Rejected by EXINVEST **Status**: Closed – Rejected by NIC	• Close Prospect as Rejected	• Investment Manager

Status "Due Diligence"

There are various tasks to complete during the Due Diligence to obtain all the information required for the Approval report. At this stage the owner of the application must be the Investment Manager. The following tasks will be created in CRM with due date of 7 days from current date for the owner of the record:

- Site Visits
- Negotiations
- Property Valuations
- Assess Financial Impact & Viability
- Source Documentation
- List Of Assets / Equipment With Serial Numbers
- Life Assurance And Short Term Insurance
- Conditions Related To The Sale
- Lease Agreement
- Building Plans
- Occupancy Certificate
- Entrepreneurial Assessment
- Consent For Further Bonds From 1st Bond Holder
- Due Diligence Checklist

Status "Due Diligence Done"

The following tasks will be created for the owner of the record in CRM due in 2 days:

- Finalise Addendum A.
- Prepare Approval Report.

Status "Due Diligence Review"

Two tasks will be created for the Area Manager to review the Approval Report and Addendum A with a due date same day.

A task will be created for the Legal Manager to review the Addendum A with a due date same day.

Status "Submitted for Regional Approval"

A task will be created for the owner of the record to present the report to the Regional committee with a due date same day.

Status "Recommended to EDIAC" or "Recommended to EXINVEST" or "Recommended to NIC"

A task will be created for the owner of the record to prepare the report for presentation at the next relevant committee meeting.

Status "Approved by EDIAC" or "Approved by EXINVEST" or "Approved by NIC" or "Approved Changes Applied"

When the deal is approved it is important to assign the Application to the Deal Administrator or Implementation officer who will be working with it before the status is changed to Approved.

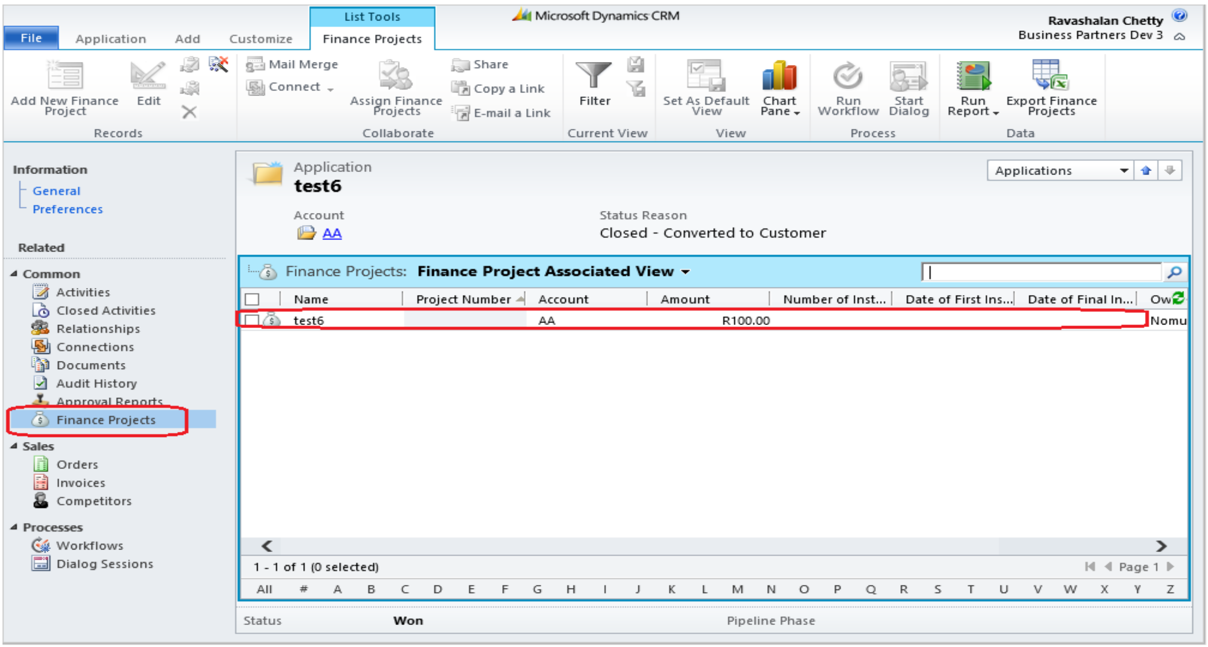
A task will be created for the owner of the record (Deal Administrator) to process and close the Application and convert the application to a Finance Project due on same day.

Status "Approved with Changes"

At this stage the owner is still the Investment Manager; a task will be created for the Owner to update the details as per the minutes of the meeting due on same day.

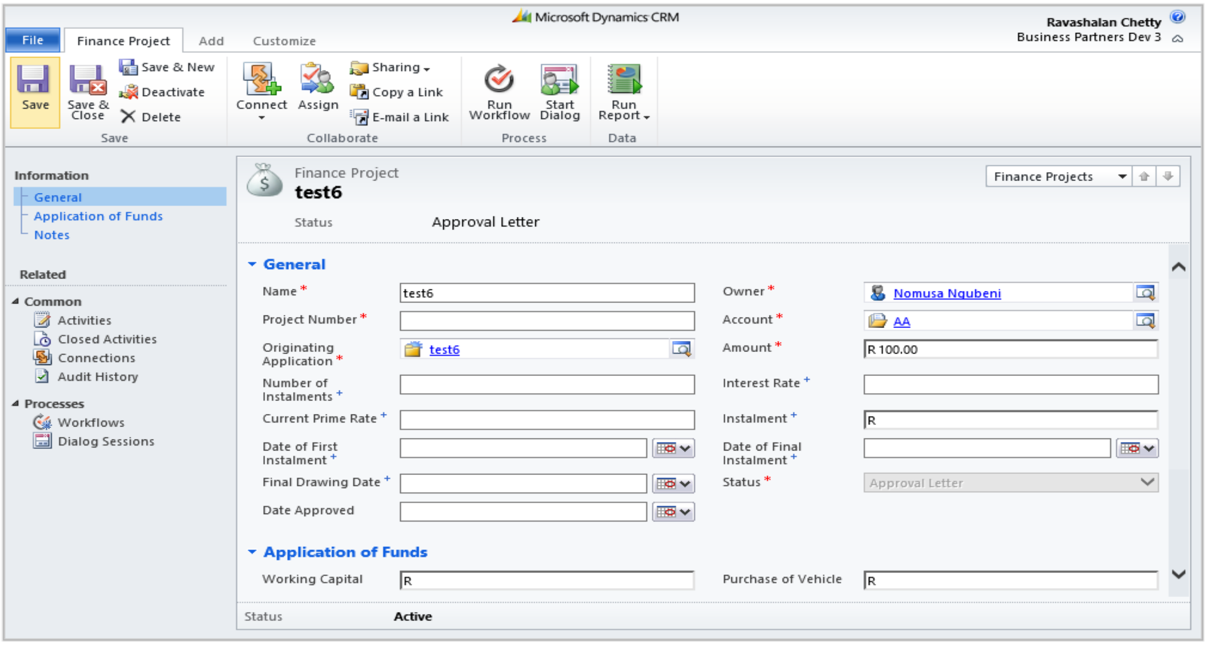
Status "Closed – Converted to Customer" or Status "Closed – Rejected by Client" or "Closed – Rejected by Region" or "Closed – Rejected by EDIAC" or "Closed – Rejected by EXINVEST" or "Closed – Rejected by NIC"

Converting an Application to a Customer creates a Finance Project.



- Clicking on the Finance Project will open the Finance Project form.

Finance Project form.



- Capture the Finance Project details and Save the record.
- In the cases where there are no tasks to be completed, a button will be available to move to the next status.

The Finance Project status flow is as follows:

Finance Project Status flow

Process	Status	Activity	Role
Create Finance Project	**Status:** Approval Letter	• Generate Approval letter and sign off	• Implementation Officer
Client Documentation	**Status**: Obtain Documentation	• Obtain all required customer and company documentation	• Implementation Officer
Loan Document	**Status:** Create Loan Document	• Create Load Document	• Implementation Officer
Loan Document Review	**Status**: Loan Review	• Review Loan Document • Instruct Bond Registration if required • Conduct Pre-Implementation Meeting • Present for Sign-off	• Legal Manager • Implementation Officer
Loan Sign-off	**Status**: Loan Signed-off	• Sign-off	• Implementation Officer • Legal Manager • Investment Manager • Client
Provisional Audit	**Status**: Provisional Audit Done	• Perform all tasks needed to complete the Deal	• Implementation Officer
Final Audit / Finalise Deal	**Status**: Final Audit Done	• Do Final Audit • Bank Authorisations • Authorise Advances • Prepare Welcome Pack	• Implementation Officer • Legal Manager
Project Active	**Status**: Active	• Monitor Project	• Regional General Manager • Head of Implementation
Project Concluded	**Status**: Closed	• Close Project	• Implementation Officer

Finance Project:

Status "Approval Letter"

Create a Task for the owner (Implementation Officer) to create approval letter due in 3 days.

Status "Obtain Documentation"

Create a Task to the owner to obtain the following documentation due in 5 days:

- Certified ID
- Marriage Certificate

- ANC
- Lease agreement (if applicable)
- Purchase and Sale Agreement (if applicable)

Status "Create Loan Document"

Create a Task for the owner to create the Loan Document due same day.

Status "Loan Review"

Create a task for the Legal Manager to sign off Loan Document and Instruct Bond Registration Attorneys due same day.

Create tasks for Owner to organise Pre-implementation meetings and Sign-off meetings as required due in 7 days.

Status "Loan Signed-off"

Create tasks for the Owner as follows:

- The Bond/Covering Bond Registration due in 60 days.
- SNB/GNB due in 60 days.
- Cession of Shares due in 5 days.
- Life Assurance and Short Term Insurance due in 20 days.
- Opening of / or Confirmation of Bank Account due in 20 days.
- VAT Registration (new Company) due in 90 days.
- Section 34 Advertisement of Sale of Business due in 60 days.
- Compliance Certificates due in 30 days.
- Lease Agreement due in 30 days.
- Building Plans due in 60 days.
- Occupancy Certificate due in 60 days.
- Compliance with other Conditions Precedent due in 3 days.

Status "Conduct Provisional Audit"

Create task for Legal Manager to conduct provisional Audit (Include Audit Checklist in task) due in 5 days.

Status "Provisional Audit Done"

Create task for the owner to arrange for approval of deviations if required due in 5 days.

Create task for the Legal Manager to conduct Final Audit due same day.

Status "Final Audit Done"

Create a task for the owner to obtain authorisation and Bank Confirmation due same day.

Create tasks for the Legal Manager to Authorise Advances, comply with other conditions and Load all documentation on system due on same day.

Create a task for the owner to prepare the welcome pack due same day.

Status "Active"

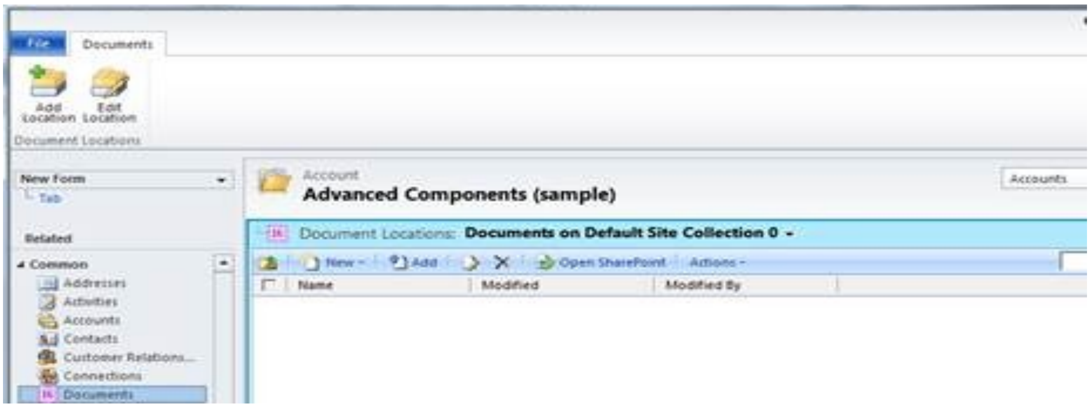
No further tasks are required once active.

Status "Closed"

No further tasks are required once closed.

5.6. Document Management

In order to manage documents in CRM, the Record needs to be saved first. Once saved, open the Record again:



- When open, click the Documents Related Records Navigation Link
- Use the Controls on the SharePoint ribbon to navigate.

Note: Users who do not have credentials for/Access to SharePoint may not be able to access this functionality.