crmpartners

agri|life

CRM Partners - User Manual

Mathilde Verbrugge
CRM Partners BV
Baron van Nagellstraat 136m
3771 LL Barneveld
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1. Introduction

This document is a manual for CRM AgriLife users. AgriLife is a fully Microsoft Dynamics 365 integrated product from CRM Partners, specifically created for your agri business.
In this document, the applicable processes within both CRM and AgriLife are addressed and explained in such manner that the user will be able to find its way through and work with the AgriLife product.

AgriLife contains multiple functional units, namely: Customers, Sales and Service management. This solution is especially built for usage within these sectors:

- Feed. AgriLife is custom made for Feed suppliers: manage account characteristics dynamically, users can keep track of delivery lines to their accounts, keeping track of farm visits and participation in the service process.
- Crop. With AgriLife you can log farm visits, manage their details for marketing purposes, and plan your reseller's market approach. Service calls can be directed to the correct teams.
- Equipment. AgriLife enables you to manage end customers, dealers and equipment, and the related processes, like logging farm and machine details, dealer visits, account planning and service processes.

1.1 Goal

To give the AgriLife user insight into the processes and use of CRM in combination with AgriLife in order to create an optimal user experience.

1.2 About this document

This document is aimed at AgriLife users that would like to fully understand the translation of processes into functional use within the CRM-system.

Chapter 2 provides an explanation of the used symbols, abbreviations and field types in this document. This will increase the readability of this manual.

Chapter 3 gives insight into the operational use of CRM and the needed settings within Dynamics 365 and AgriLife.

Chapter 4 shows the complete datamodel, a visualisation of all mutual relations between entities in the AgriLife.

Chapters 5 to 8 describe the AgriLife processes per functional unit (ie. Customers, Sales, Service and Marketing).

Chapter 9 finally provides a description of all base tables that are part of AgriLife. The functional CRM owner is able to add and modify the base tables to align the business requirements.

2. Glossary of terms

The following abbreviations and terms are used in this document

AgriLife	All agricultural related businesses with a focus on feed, crop and equipment
Dynamics 365	
Entity	Grouped information such as Organization, Contact, Opportunity, Case, etc.
Record	A collection and grouping of business data that answers a question or aggregates data in some way.

2.1 Field types

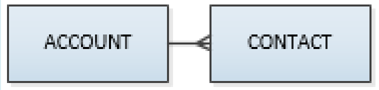
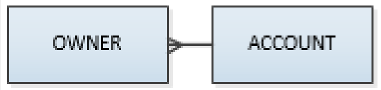
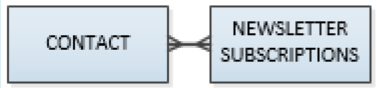
Each field in AgriLife can consist of a certain form of information depending one of the below mentioned field types.

Field type	Explanation
Date	Manually enter the date (dd-mm-jjjj) or choose from calendar
Single line of text	Simple text dependent on the size of the field, i.e. 100 characters
Whole number	Number without decimals, greater than or equal to ‘0’
Multiple lines of text	Simple text with multiple lines, i.e. 2000 characters
Option Set	Drop-down of predefined values
Lookup	Picklist of values from a tabe in a different entity
Status Reason	Drop-down of predefined status reasons
Two Options	Picklist of two predefined values, ie. ‘yes’ or ‘no’
Currency	Amount in the applicable currency

2.2 Datamodel

A datamodel is a schematic representation of relations between entities.

Figure	Explanation
ACCOUNT	Entity within the datamodel

	1:N relation between entity A and B
	N:1 relation between entity A and B
	N:N relation between entity A and B

3. Dynamics 365 standards and settings

This chapter describes the standard Dynamics 365 and AgriLife processes and settings. Some settings are one-off, but can be adjusted throughout the use.

The base tables for AgriLife (for example 'Sector Type' and 'Equipment Type') are further explained in chapter 5.

The following components are included in this document and are described in the following paragraphs:

- Menu structure and navigation
- Ribbon bar and buttons
- Views
- Dynamics 365 settings
- AgriLife settings

3.1 Menu structure and navigation

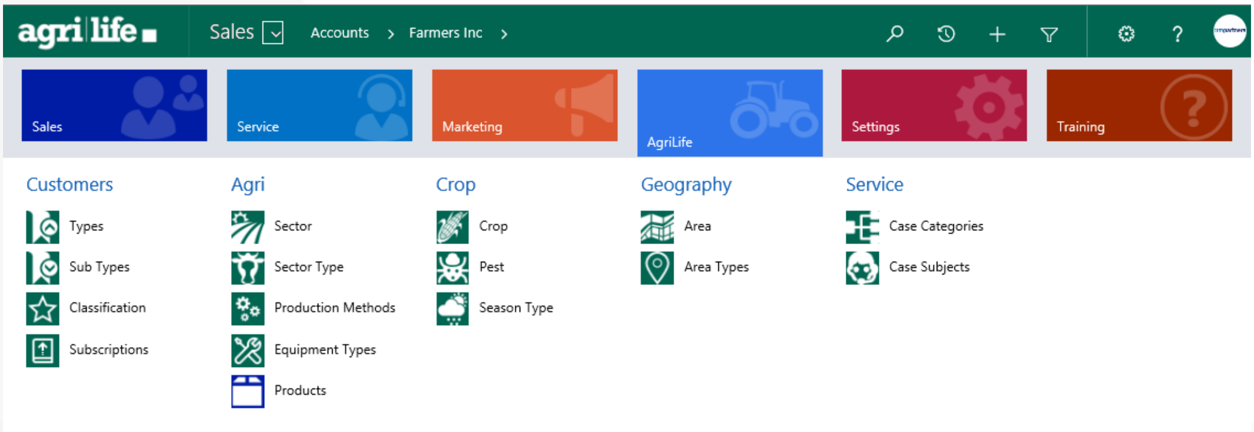
Navigating through the application can be done through the top menu bar and the navigation bar.

The AgriLife logo functions as the 'home' button which brings you back to the home page of the application, in most cases that would be your dashboards.

The navigation bar always shows where you currently are in Dynamics 365. There is a maximum of buttons that can be shown in the navigation bar, but always with the following logical order of buttons: main menu, entity and record.

By clicking on the arrow next to Sales 

(or any other main menu item for that matter), you will be able to open the full menu structure. The menu will give you the possibility to navigate through all components within Dynamics 365 per main menu item (Sales, Service, Marketing, AgriLife and Settings).



Next to each button, you can open an overview of all related components and information by clicking on this arrow: 

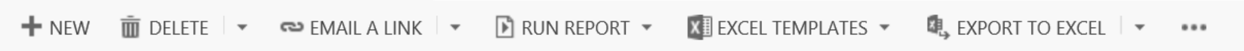
. In this overview you can also find all recently view records.

On the rightside of the menu bar there are multiple user-friendly options. From left to right:

- **Global search**
  With this search action you can search for a specified search item through all available data. The search item that you specify has to be exact and has to start with the same value as the record that you are looking for. If you are not aware of the exact record that you are looking for, place an asterix (*) before and after the search item.
- **Recently viewed**
  An overview with shortcuts to all recently opened views and records. There is also option to pin commonly used items in this overview.
- **Quick create**
  Easily add new records or activities.
- **Advanced find**
  This extensive search tool allows you to find data and set queries. You are also able to create and edit views, prepare data for exports, and many more.
- **Settings**
  To set up personal options and view privacy statements.
- **Help**
  For all help and training for Dynamics 365.
- **Profile image**

To set your image and log out.

3.2 Ribbon bar and action buttons



On each page you are able to use the action buttons for certain actions in the ribbon bar. What you can see in the ribbon bar depends on the security role that you have. Each page can show different action buttons in the ribbon bar, depending on your wishes and the functionalities within the entity. When the three dots on the right are shown, it means that there are more options available by clicking on these dots.

You can encounter the following actions:

Action	Description
Activate	Activate selected record(s).
Add to Marketing List	Add selected record(s) to a Marketing List of choice.
Assign	Assign selected record(s) to another user or team.
Chart Pane	Shows the data in a chart.
Deactivate	Deactivate selected record(s).
Delete	Delete selected record(s) from the system.
Edit	Edit selected record(s).
Email a Link	Email the link from a/the selected record(s).
Excel Templates	Create an Excel Template.
Export to Excel	Export data to Excel.
Follow	Follow selected record(s).
Import Data	Import an Excel document.
Merge	Merge 2 selected records.
New	Create a new record.
Quick Campaign	Create a Quick Campaign with selected records.
Relationship	Create a relationship between 2 records.
Run Report	Run a report.
Run Workflow	Run a workflow.
Save	Save a record.
Save & Close	Save & Close a record.
Send Direct Email	Send a Direct Email to selected record(s).

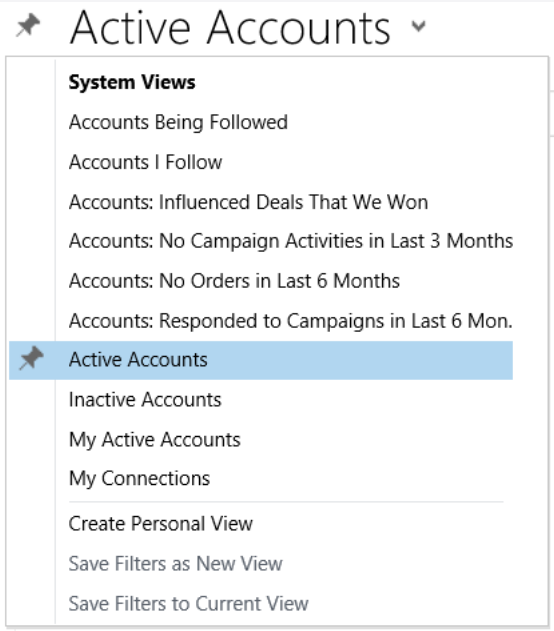
Share	Share selected record(s).
Start Dialog	Start a Dialog window.
Unfollow	Unfollow selected record(s).
Word Templates	Create a Word Template.

3.3 Views

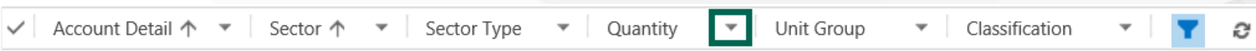
In a view you can create an overview of records from a certain entity based on predefined criteria. There are system views, available to all users and, there are personal views that can be created on a user-level. The functioning of a view is the same for each entitiy and consists of multiple components: view selection, search and filter.

3.3.1 View selection

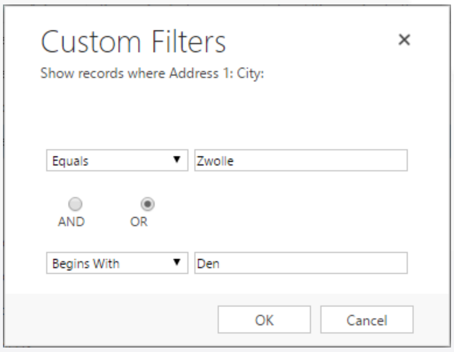
The default view is most commonly 'Active'. Per entity the defined and available views can differ. Below you find an example different system views.



3.3.2 Filter



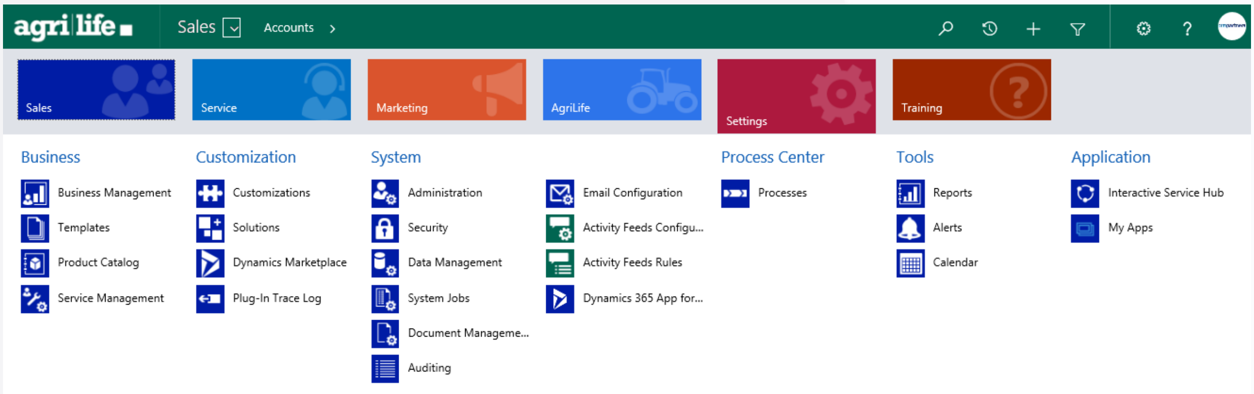
It is possible to refine a view when there is an overload of records. To do this, click on the icon in the upper right corner of the overview. This will allow you to filter each column using the icon. Per column you are able to select maximum 2 criteria by clicking on the **Custom Filter** option.



Another filter option is the index that is shown in the bottom of the overview (All – Z). The filtered result is based on the column that is used to sort the records, recognised by the arrow in the column title

. The filter result will change when you select another column.

3.4 Dynamics 365 settings



The Dynamics 365 Settings is a section for the System Administrator. **Business**, **Customization**, **System** and **Process Center** are standard CRM configuration options. **Application** gives you access to all connected Dynamics 365 applications.

3.5 Security roles

Every user in Dynamics 365 is assigned to a security role. Every user has the base role in order to use the system, as well as for example read-only permission to account and contacts. On top of the base role, other roles can be assigned to a user based on the functionalities they will need to use, such as Sales or Service.

3.6 Mobile application

It is possible to connect your Dynamics 365 to a Dynamics 365 app for phones and tablets. The app is a great help for representative to create visit reports when they are with the customer, directly enter problems or complaints and add pictures to Dynamics 365.

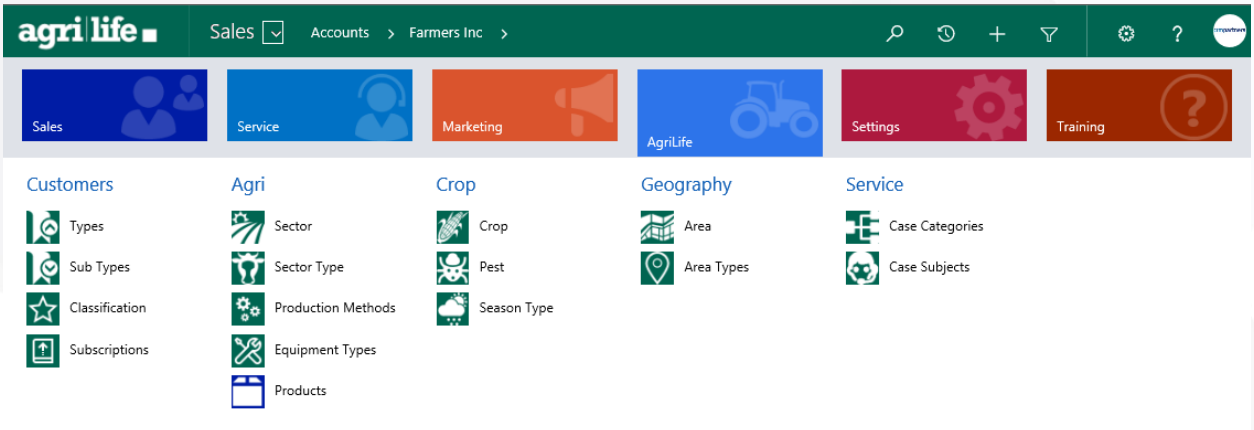
3.7 Product catalog

Under the business settings you find the Product Catalog section. This is where all products, price lists, discount lists and unit groups for your organization are listed.

In order to use the price catalog, you must follow these steps:

1. Set up discount lists for different pricing based on for example the quantity
2. Set the unit groups that will be linked to your product amount, such as animals, weight, hectares (can be considered as a base table)
3. Create a product for the articles that you supply
4. Set up a price list
5. Add price list items to the pircelist to define the price of your products based on the price per unit of a product
6. Define the standard pricing for you products

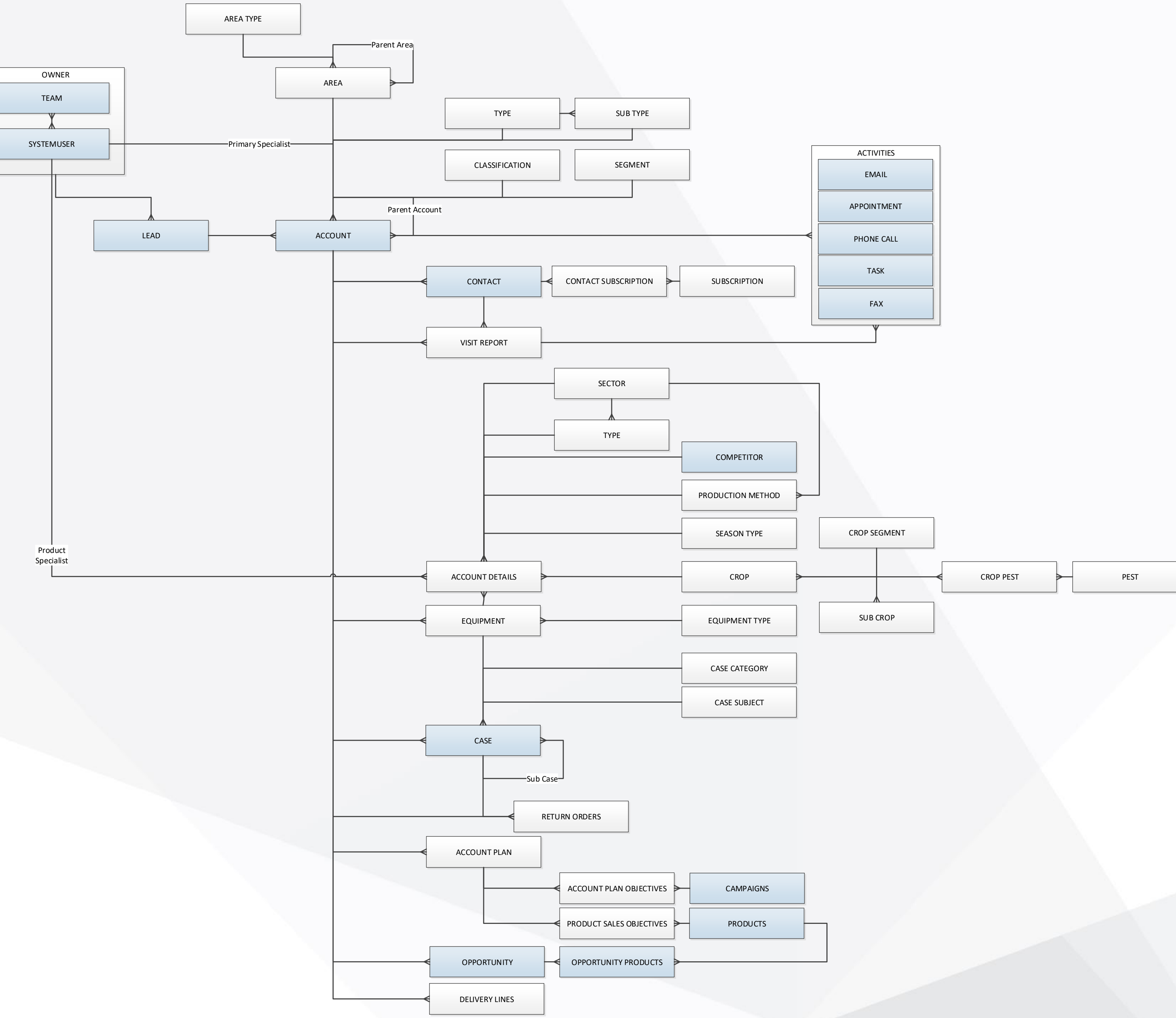
3.8 AgriLife business configuration



The AgriLife Business Configuration is divided into **Customers, Agri, Crop, Geography** and **Cases.** All entities are base tables that are prefilled and can still be modified and complemented. The functional CRM owner is able to add and modify the base tables to align the business requirements. All base tables are further explained in chapter 9.

4. Datamodel

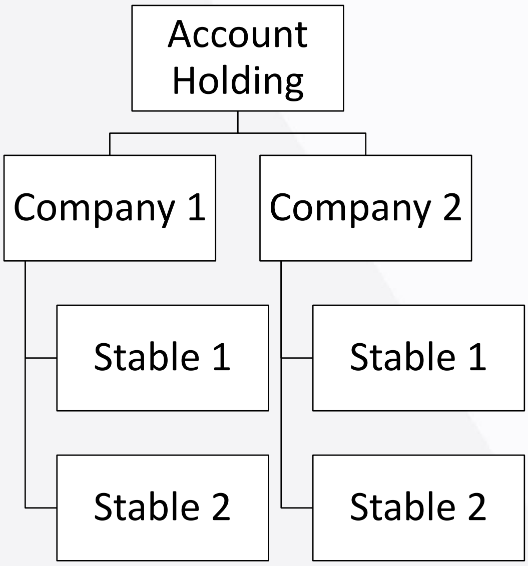
The data model visualizes the mutual relations between the entities that are existent within AgriLife (the 1:N, N;1, and N:N relations). Please see following pages for a more elaborate visualization of the datamodel.



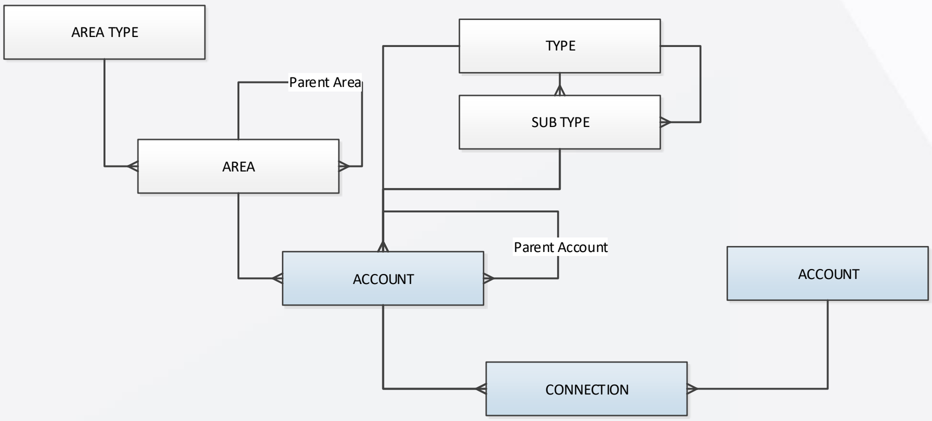
Account Structure

Small, simple accounts will be stored as one account, but it also possible to register accounts with a more complex structure. Think of a large farmer with a holding structure and different locations with multiple stables. Every single occurrence of the company will be registered as an account and linked to the parent account using the Parent Account lookup.

New account records will be created in case the Visit Address (physical address) is different than other registration(s). The field Type and Sub-Type can be used to identify the type of account.



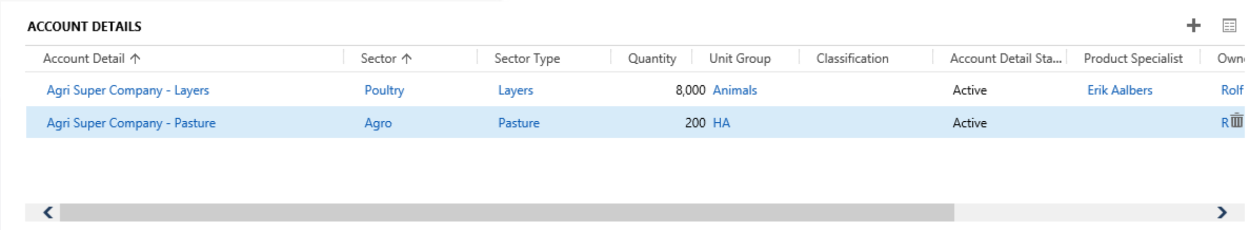
The structure is translated into CRM using the following datamodel.



To register the internal structure the Parent Account field will be used. For the registration of external relationships the connection functionality will be used.

Account Details

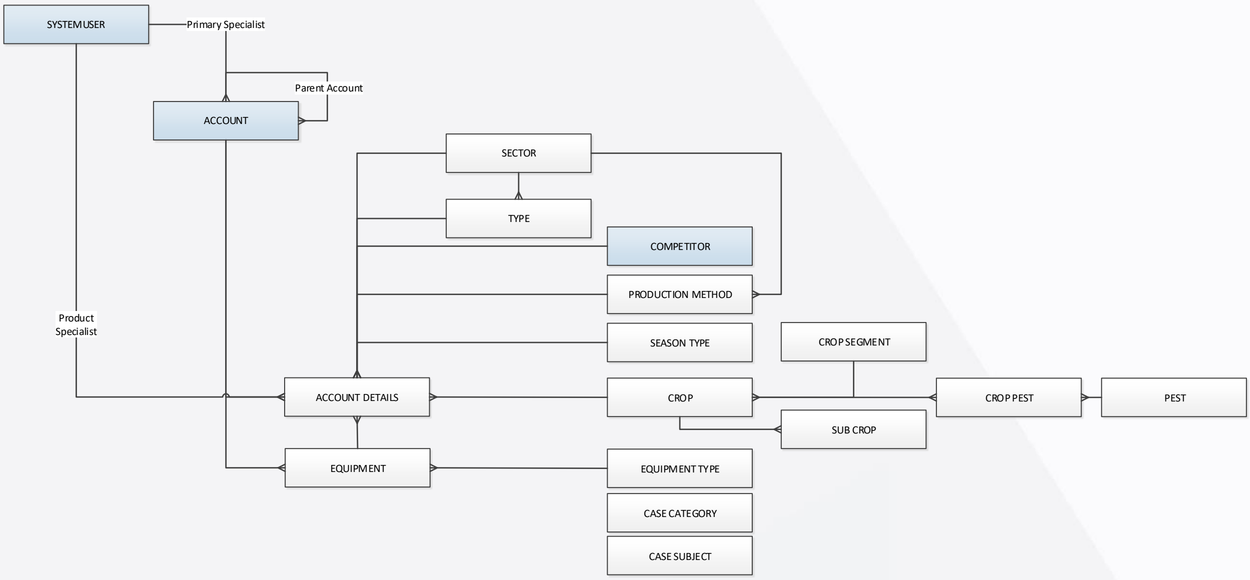
For the registration of the type of business the account is active in, the account details entity is used. Because this is a 1:n relationship with the account entity it is possible to have more than one registration in case of companies which are operational within different sectors. For example when the account is active in both Layers and Pasture:



ACCOUNT DETAILS

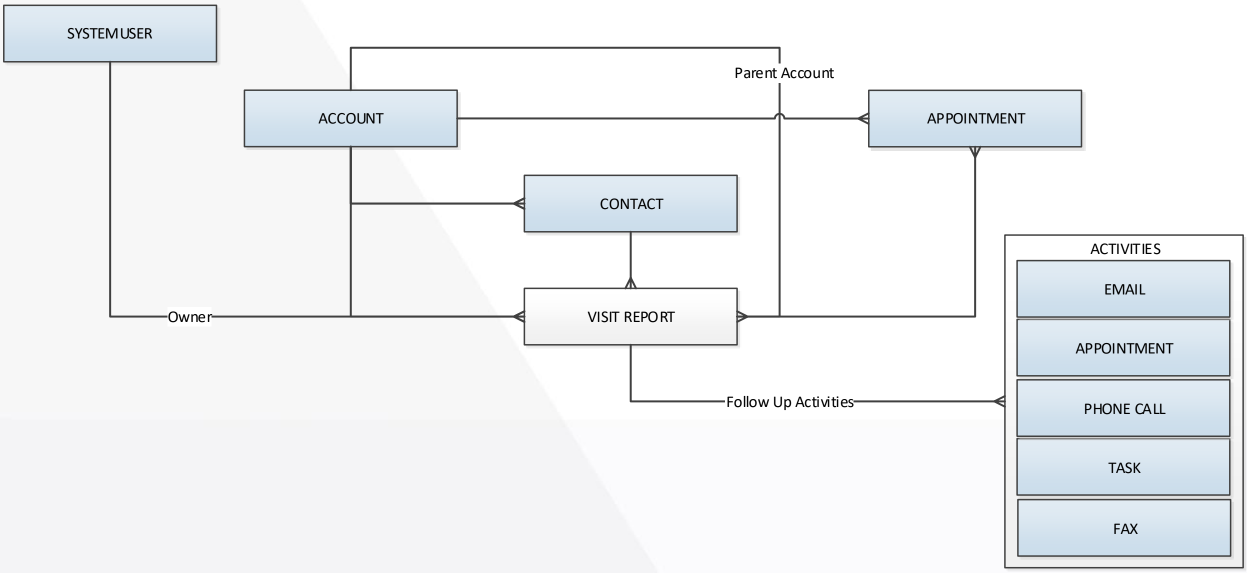
Account Detail ↑	Sector ↑	Sector Type	Quantity	Unit Group	Classification	Account Detail Sta...	Product Specialist	Own
Agri Super Company - Layers	Poultry	Layers	8,000	Animals		Active	Erik Aalbers	Rolf
Agri Super Company - Pasture	Agro	Pasture	200	HA		Active		R

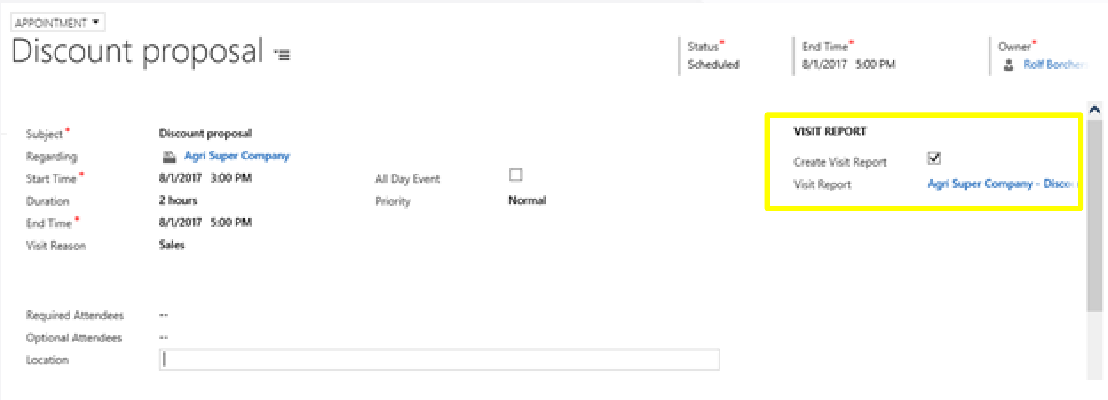
The datamodel structure in CRM is shown below. With a small update crop details/information can be linked to the account details.



Visit Reports

The Visit Report is the outcome of an appointment and therefore linked to the appointment entity. The user can create a Visit Report directly form the appointment. From the Visit Report follow up activities can be created.

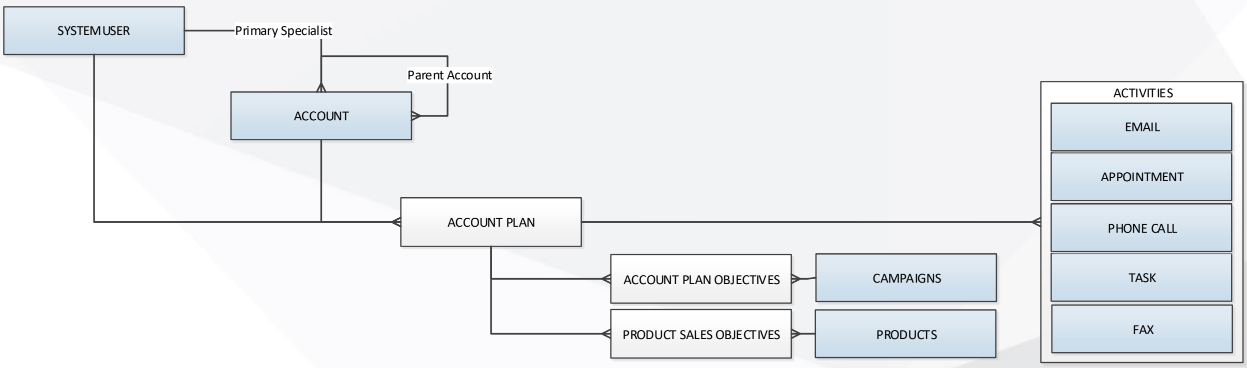




Account Plan

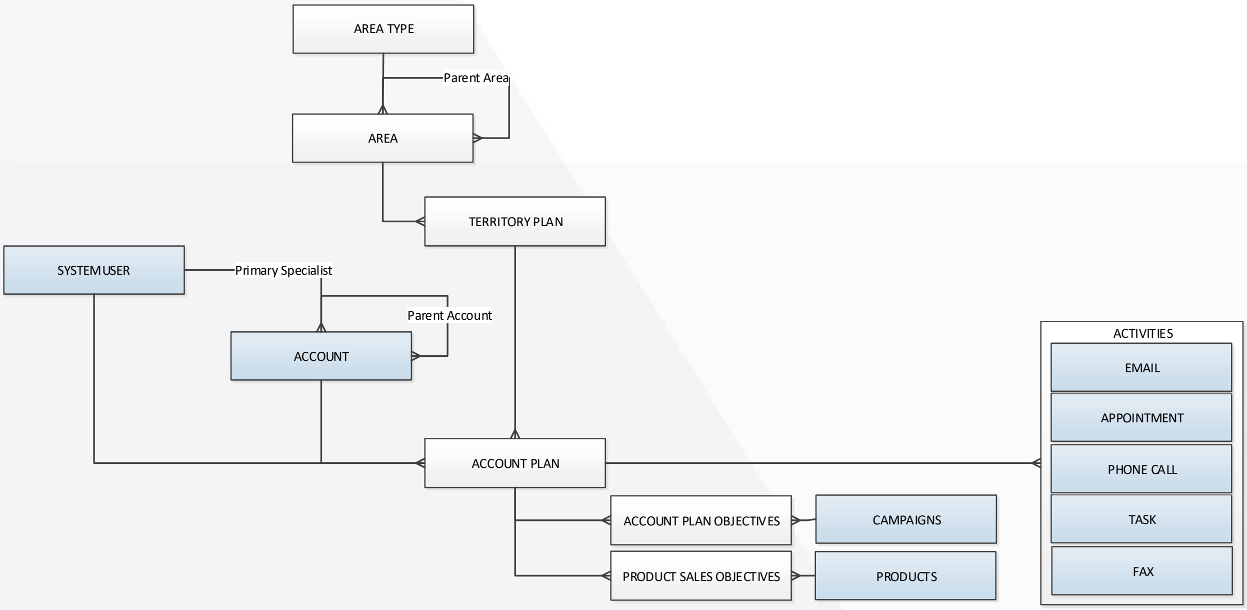
An account plan is linked to an account and is used to do the account plan planning:

- Products → Product Sales Objectives with rollup of totals to the account plan
- Actions → Marketing action and therefore linked to Campaign



In a future update of the account plan functionality, territory planning will be added as can be seen below. Account plans will be linked to an area or territory and rollup of the totals of the account plan will be done to the territory plan.

Areas/territories can be defined by the CRM user using free format Area Types and create one or many levels within the hierarchy.



5. Customers

Customers in AgriLife consist out of both accounts (organizations) and contacts (persons). Examples of an Account record can be: a dealer or reseller, a farm, an enterprise in the network of a dealer or farm (e.g. accountancy, veterinary practice or contractor) Contacts are the individual people working for an account. The users of AgriLife are not registered here. The user-administration is located elsewhere in the system. Another component of the customers section are the Visit Reports.

5.1 Account

The Account Entity is customized to store and attach all relevant Agri-related information. To do so, the Account entity is extended with attributes to store this information, relations to other entities, and a form and views to access this information.
The entity constists of all accounts with whom you are having contact, such as companies, clients and buyers. The Account can be layered, ie. parent accounts with one or multiple subsidiaries.

5.1.1 Form

The form is designed in a way that detailed main information is saved in the General Tab, together with the Social Pane and Contact and Connections data. The second tab holds detailed information about the Company profile, structure, financial info and marketing information. The 360 View holds Account Details and Equipment information, as well as Visit Reports and Cases. The Sales Tab holds Opportunities and Account Plans. Lastly, the Address and Administrative tabs hold Address information and auditing information. Except the General Tab, all tabs are collapsed by default.
The views contain relevant information for classifying and identifying the accounts, as well as auditing information (last modified, modified by, etc.)

5.1.2 Attributes

Field Name, label	Type	Description
Form header		
Owner	LookUp	The user or team that is the owner of this Account record
Overview – Account data:		
Account*	Single Line of Text (160)	Name of the Company, Client, Customer, or Account. Hereby also the identification of the Account. The name of the company, customer, partner, farming site, etc.
Phone	Single Line of Text (50)	The (main) telephonenumber of the Account.
Parent Account	LookUp	A parental Account that is connected to this Organization in a 1:N relationship.
Website	Single Line of Text (200)	The website-URL of the Account.
Overview - Visitor address:		
Adress 1	Multiple lines of tekst	Consists of Street, number, addition, postal code, city, country.
Overview – Postal address:		

Postal address is equal to visitor address	Two options (Y/N)	To mark whether the postal address is equal to the visitor address. If yes, postal address cannot be entered.
Address 2	Multiple lines of text	Consists of Street, number, addition, postal code, city, country.
Primary contact person	Lookup	First person to contact in an Organization
Details – Account		
Territory (crmp_areaid)	Option set	To store the (sales) territory an account belongs to.
BRS Name (crmp_brsname)	Single Line of Text (50)	To store the name, the account is registered under at the BRS (Bedrijfsregistratiesysteem) of the Dutch Economic Affairs Department.
COC Number (crmp_cocnumber)	Single Line of Text (50)	Number of the account at Chamber of Commerce
Date Last Visit (crmp_datelastvisit)	Date	Date of last reported Visit (to be depreciated)
Date Last Visit Rollup (crmp_catelastvisitrollup)	Date and Time	Date of last reported Visit (Rollup Field, automatically calculated)
Relationship Type (customertypecode)	Option set	Type of relationship with the account.
SAP ID (crmp_sapid)	Single Line of Text (100)	ID at SAP System
Subtype (crmp_subtypeid)	Lookup	Sub Type of the Account
Type (crmp_type)	Lookup	Type of the Account (type of customer)
UBN Number (crmp_ubnnumber	Single Line of Text (100)	Unique herd number of the farm.
VAT Number (crmp_vatnumber)	Single Line of Text (100)	VAT Number of the account
Visits per year (crmp_visitsperyear)	Whole Number	Number of planned visits per year for this account.
Details – Description		
Description	Multiple lines of text	2000 characters available to register complementary information.
Details – Marketing		

Marketing materials	Two Options	Whether this account accepts marketing materials (Y/N)
Details – Contact preferences		
Contact method	Option set	Preferred method of contact.
Email	Two Options	Whether the Organization accepts direct email sended from CRM.
Bulk email	Two Options	Whether the account accepts bulk email sended out of campaigns in CRM. If it does not, an Organization can still be added to marketing lists, but it will be excluded from emails.
Phone	Two Options	Acceptance of phone calls.
Fax	Two Options	Acceptance of fax.
Mail	Two Options	Acceptance of mail.
Details – Billing		
Currency	Lookup	Local currency for the contact to make sure the right currency is reported.
Credit limit	Valuta amount	The credit limit of an Organization. This is a helpful reference when bills and other administrative/financial problems are discussed.
Credit hold	Two Options	Whether the credit is on hold or not.
Payment Terms	Optionset	Tells in which timeframe the customer has to pay the total amount.
Social Pane		Related messages, activities, and notes.
Contact persons		Related contact persons.
Child Accounts		Related Accounts.

5.1.3 Relations

Entity	
Account Details	Specific details about the herd and farmland of the account
Account Plan	Structured plan on how to manage the account.
Contact Subscription	Subscription for a Contact, related to an Account

Delivery Line	Delivery lines, delivered to this account
Delivery Line	Delivery lines, delivered at this account's address
Delivery Line	Delivery lines, billed to this account's address
Equipment	Equipment, from the Account
Equipment	Equipment, delivered by the Account as a Distributor
Visit Report	Visit Report for a visit to the Account

5.2 Contacts

In AgriLife the contacts in Contact management are individual persons connected to various accounts. It can hold personal information, name information to be used for direct marketing, address information, etc.

5.2.1 Form

The form is designed in a way that all relevant info can be accessed easily and is presented orderly.

5.2.2 Attributes

In this paragraph, a definition is given of each of the fields. Per field, the Name, Type and the Description.

Fieldname	Type	Description
Form header		
Owner*	Lookup	The user of Team that is the owner of this record.
Overview - Contact:		
Full Name*	Single Line of Text (160)	Shows the combination of First and Surname
Job title	Lookup	Job title of the contact. This field can also determine the Salutation
E-mail	Single Line of Text (100)	Primary email address of the contact
Business Phone	Single Line of Text (50)	Contact's Business phonenumber

Mobile phone	Single Line of Text (50)	Contact's mobile phonenumber
Birthday	Date	Contact's Date of birth
Overview – Visitor address:		
Adress 1	Multiple lines of Text	Consists of Street, number, addition, postal code, city, country.
Overview – Postal address:		
Postal address is equal to visitor address	Two options (Y/N)	To mark whether the postal address is equal to the visitor address. If yes, postal address cannot be entered.
Address 2	Multiple lines of Text	Consists of Street, number, addition, postal code, city, country.
Details – Personal		
Gender	Two options (M/F)	The gender of the contact this field also determines the salutation in all moments of contact with the contact.
Marital status	Optionset	The marital status of the contact. this field also determines the salutation. (Miss, Misses, Maiden name)
Spouse/Partner Name	Single Line of Text (100)	Name of the contac's spouse.
Anniversary	Date	For instance; Date of Wedding or Job anniversary
Details – Personal other		
Initials	Single Line of Text (100)	Contact's initials
Maiden Name	Single Line of Text (100)	Maiden name female contact, can be used for salutation.
Prefix	Optionset	Prefix of Surname used in communication
Suffix	Optionset	Suffix of Surname used in communication
Details –Description		
Description	Multiple lines of Text	Additional information about the contact
Details – Marketing		
Marketing material	Two options (Y/N)	Does the contact want to receive things like flyers and catalogs (Yes/No)
Details – Contact preferences		

Contact method	Option set	Preferred method of contact.
Email	Two Options	Whether the Organization accepts direct email sended from CRM.
Bulk email	Two Options	Whether the Organization accepts bulk email sended out of campaigns in CRM. If it does not, an Organization can still be added to marketing lists, but it will be excluded from emails.
Phone	Two Options	Acceptance of phone calls.
Fax	Two Options	Acceptance of fax.
Mail	Two Options	Acceptance of mail.
Social Pane		Related messages, activities, and notes.
Organization	Lookup	The related Organization for this contact

5.2.3 Relation

Entity	
Contact Subscription	Subscriptions for a certain contact
Visit Report	Visit Reports, the contact is involved in

5.3 Account details

The Account Details entity can hold all farming related characteristics, connected to an account. Based on the type of characteristic, a customer potential is calculated, which can be rolled up to the account. The basis of the potential calculation is maintained in the Sector Type records. Furthermore the (type-specific) characteristics can be used to capture specific data structurally and use this as input for other processes.

5.3.1 Form

The form holds the most important fields (Sector, Sector Type, Quantity, Unit Group, Product Specialist and Competitor) in the General Tab. Other fields can be displayed in the Details Tab. There is also a Quick Create Form available.

5.3.2 Attributes

All customized fields in AgriLife:

Fieldname	Type	Description
Account (crmp_accountid)	Lookup	Account, the Account Detail refers to
Account Detail (crmp_accountdetail)	Single line of text (100)	Primary (name) field
Calculated Potential (crmp_calculatedpotential)	Whole number	Calculated potential for this Account Detail (calculated field)
Classification (crmp_classificationid)	Lookup	Classification for this Account Detail
Competitor (crmp_competitorid)	Lookup	Competitor for this Account Detail
Equipment (crmp_equipmentid)	Lookup	Equipment for this Account Detail
Grazing (crmp_grazing)	Two options	Indication for Grazing
Parent Account (crmp_parentaccountid)	Lookup	Parent account of the account related.
Product Specialist (crmp_productspecialistuserid)	Lookup	Product Specialist for this Account Detail
Quantity (crmp_quantity)	Whole number	Quantity of the Sector Type for this Account Detail
Season Type (crmp_seasontypeid)	Lookup	Season applicable for this type
Sector (crmp_sectorid)	Lookup	Sector this Account Detail belongs to
Sector Type (crmp_sectortypeid)	Lookup	Sector Type for this Account Detail
Share (crmp_share)	Whole number	Share of the potential which is valid for this Account Detail
Unit Group (crmp_unitgroupid)	Lookup	Unit Group, applicable for the quantity
Unit (crmp_unitid)	Lookup	Unit for this quantity (to be depreciated)

5.3.3 Relations

Do not apply to Account Details

5.3.4 Background logic

The name of a newly created record is automatically filled. There is a calculated field, which calculates the potential for the Account Detail, based on the potential of the Sector Type used, the Quantity and a correction for the Share.

5.4 Visit report

In the Visit Details tab, all detail information is captured, as well as the Agenda for the visit. The Summary tab (to be filled out during or after the visit) contains the Summary, Actions and Internal notes. Activities and Notes can be found under the tab with the same name. The Adminstrative tab holds auditing information.

A Quick Create form is configured for Visit Report.

5.4.1 Form

The form holds the most important fields (Sector, Sector Type, Quantity, Unit Group, Product Specialist and Competitor) in the General Tab. Other fields can be displayed in the Details Tab. There is also a Quick Create Form available.

5.4.2 Attributes

All customized fields in AgriLife:

Fieldname	Type	Description
Account (crmp_accountid)	Lookup	Account, this Visit Report refers to
Actions (crmp_actions)	Multiple Lines of Text	Actions, agreed upon during this visit
Advice (crmp_advice)	Multiple Lines of Text	Advice, provided during this visit
Agenda (crmp_agenda)	Multiple Lines of Text	Agenda for this visit
Appointment (crmp_appointmentid)	Lookup	Appointment, this Visit Report originates from
Contact (crmp_contactid)	Lookup	Primary contact for this Visit Report.
End (crmp_dateend)	Date and Time	End date and time for this Visit
Finding (crmp_findings)	Multiple Lines of Text	Findings discussed during this Visit

Internal (crmp_internal)	Multiple Lines of Text	Internal notes, which originate from or are relevant for this Visit Report. Not to be included in external communication
Parent Account (crmp_parentaccountid):	Lookup	Parent Account for the account, this Visit Report applies to (if applicable)
Subject (crmp_subject)	Single Line of text (100)	Subject for this Visit Report
Summary (crmp_summary)	Multiple Lines of Text	Summary of the Visit
Visit Reason (crmp_visitreason)	Option set	Reason for this visit
Visit Report (crmp_visitreport)	Single Line of text (100)	Name of this record (Primary field)
Visit Type (crmp_visittype)	Option set	Type of visit

5.4.3 Relations

Entity	
Appointment	Appointments, which originate from the visit or are planned during the visit.
Activity	Activities, originating from this visit or agreed upon during this visit.

5.4.4 Background logic

A workflow which sets the Primary field and Subject automatically, is active. It is recommended to use a custom plugin to fill an email template with Visit Report data, in order to send the Visit Report via mail to its attendants.

6. Sales

In the Sales module of AgriLife you can find all information regarding the Sales proces. Of course, Accounts and Contacts are represented here, but also Account Plans.

6.1 Account plans

Account Plan is the entity in which the commercial planning and definition of market approach for an individual (key) account is done. Strategy, SWOT and targets can be logged on the Account Plan, objectives per Product can be logged in the related Product Sales Objectives.

6.1.1 Form

The form consists of multiple tabs. A General tab with all general information of the Account Plan including the duration and the turnover. In the other tabs you can find the SWOT analysis, Product Sales Objectives and the Account Plan Objectives.
A Quick Create form is not configured for this entity.

6.1.2 Attributes

All customized fields in AgriLife:

Fieldname	Type	Description
Account (crmp_accountid)	Lookup	Account the Account plan applies to
Account Plan (crmp_accountplan)	Single line of text	Title of the Account Plan
Account Plan ID (crmp_accountplanid)	Lookup	Account Plan this Account Plan is part of
Approval By (crmp_approvalbyuserid)	Lookup	User that approved this Account Plan
Approved On (crmp_approvedon)	Date and Time	Date the Account Plan is approved
End (crmp_end)	Date and Time	Date until the Account Plan is valid
Objective (crmp_objective)	Multiple lines of text	Strategic objective for the scope of this Account Plan

Opportunities (crmp_opportunities)	Multiple lines of text	Opportunities for the Account
Start (crmp_start)	Date and Time	Date when the Account Plan starts
Strenghts (crmp_strengths)	Multiple lines of text	Strenghts of the Account
Territory Plan (crmp_territoryplanid)	Lookup	Territory Plan associated with the Account Plan
Threats (crmp_threats)	Multiple lines of text	Threats for the Account
Turnover Planned (crmp_turnoverplanned)	Currency	Turnover, planned for this product at this account during the scope of the Account Plan
Turnover Planned PVY (crmp_turnoverplannedpvy)	Currency	Turnover Planned for this account plan at this account the previous year
Turnover PVY YTD (crmp_turnoverplannedpvyytd)	Currency	Turnover Planned for this account plan at this account the previous year
Weaknesses (crmp_weaknesses)	Multiple lines of text	Weaknesses of the Account
Year (crmp_year)	Single line of text	Turnover, realized in the actual year, to date, for this product at this account
Year option (crmp_yearoption)	Option set	Year in which the Account Plan is valid

6.1.3 Relations

No custom relationships are configured for this entity.

6.1.4 Background logic

No background logic is enabled for this entity.

6.1.5 Product sales objectiue (PSO)

6.1.5.1 Form

The form consists of two tabs: a General tab with all detailed information, and an Administrative tab which holds auditing information. The General tab holds two sections, one with base data, and one with the figures (Quantity and Turnover).

A Quick Create form is configured for this entity.

6.1.5.2 Attributes

All customized fields in AgriLife:

Fieldname	Type	Description
Account (crmp_accountid)	Lookup	Account, the PSO applies to
Account Plan (crmp_accountplanid)	Lookup	Account Plan, the PSO applies to
Name (crmp_name)	Single line of text	Name of the PSO record (primary field)
Price Per Unit (crmp_priceperunit)	Currency	Price per Unit, for this product, specified in this PSO
Product (crmp_productid)	Lookup	Product for this PSO record
Quantity (crmp_quantity)	Single line of text	Quantity, to be expected to be sold for this product, during the scope of the Account Plan, related to this PSO
Quantity PVY (crmp_quantitypvy)	Whole number	Quantity, turned over in the previous year, for this product at this account
Quantity YTD (crmp_quantityytd)	Whole number	Quantity, turned over in the actual year, to date, for this product at this account
Turnover Planned (crmp_turnoverplanned)	Currency	Turnover, planned for this product at this account during the scope of the Account Plan
Turnover Planned Previous Year (crmp_turnoverplannedpvy)	Single line of text **Reconsider**	Turnover Planned for this product at this account the previous year
Turnover YTD (crmp_turnoverytd)	Currency	Turnover, realized in the actual year, to date, for this product at this account
Unit Group (crmp_unitgroupid)	Lookup	Unit Group for this PSO
Unit (crmp_unitid):	Lookup	Unit for this PSO

6.1.5.3 Relations

No custom relationships are configured for this entity.

6.1.5.4 Background logic

A Workflow is active to set the name of the record automatically.

6.1.6 Account plan objective

6.1.6.1 Form

The form captures the most important fields: the Name, Deadline and Description. In an Administrative tab, auditing information is captured. There is also a Quick Create Form configured.

6.1.6.2 Attributes

All customized in AgriLife:

Fieldname	Type	Description
Account Plan (crmp_accountplanid)	Lookup	Account Plan, the APO applies to
Account Plan Objective (crmp_accountplanobjective)	Primary Key	Account, the Account Detail refers to
Campaign (crmp_campaignid)	Lookup	Campaign associated with APO
Deadline (crmp_deadline)	Date and Time	Date before APO has to be achieved
Description (crmp_description)	Multiple lines of text	Description of the APO
Name (crmp_name)	Single line of text (100)	Title of the APO

6.1.6.3 Relations

No custom relationships are configured for this entity.

6.1.6.4 Background logic

No background logic is enabled for this entity.

6.2 Delivery lines

Delivery Lines are intended to store individual delivery lines. Its figures can be rolled up to Account level in order to establish segmentation.

6.2.1 Form

The entity form contains the most important characteristics of the Delivery Line, like the Account buying, where it is delivered to, quantity and unit of the delivered product, and pricing info. The Administrative tab holds auditing information.

6.2.2 Attributes

All customized in AgriLife:

Fieldname	**Type**	**Description**
Account (crmp_accountid)	Lookup	Account, who has procured this product
Billing Address (crmp_billingaddress_accountid)	Lookup	Account the delivery is billed at
Billing Date (crmp_billingdate)	Date and Time	Date delivery line was billed/ invoiced
Delivery Address (crmp_deliveryaddress_accountid)	Lookup	Account that is delivered at
Delivery Date (crmp_deliverydate)	Date and Time	Date delivery line was delivered
Delivery Line (crmp_deliveryline)	Single line of text	Delivery line identifier
Delivery Line ID (crmp_deliveryline)	Lookup	Other, associated delivery line
Discount (crmp_discount)	Currency	Discount for this delivery line
Gross Amount (crmp_grossamount)	Currency	Gross Amount, for this delivery line
Item Number (crmp_itemnr)	Single Line of text	Item Number for the Product for this Delivery line
Net Amount (crmp_netamount)	Currency	Net Amount for this delivery line
Order Date (crmp_orderdate)	Date and Time	Date delivery line was ordered

Product (crmp_product_productid)	Lookup	Product for this delivery line
Quantity (crmp_quantity)	Decimal Number	Quantity of this product for this delivery line
Silo (crmp_silo)	Single line of text	Silo, the product is delivered in
Tax (crmp_tax)	Currency	Tax, owed for this delivery line.
Unit (crmp_unitid)	Lookup	Unit, applicable for this delivery line.
Price per Unit (crmp_unitprice)	Currency	Price of the product, per delivered unit.

6.2.3 Relations

No custom relationships are configured for this entity.

6.2.4 Background logic

No background logic applies to this entity. This entity is intended to be filled by an integration to an external system.

7. Service

In the Service section of the AgriLife all Service processes can be accessed. The Case entity is the most important here, but return orders, related to a case are relevant, too.

7.1 Cases

This entity holds all information related to a service call, namely a request, problem or complaint from a customer. This includes the related activities and detailed information such as Case type, category. The concerning delivery line, product, account detail, etc. are also noted.

7.1.1 Form

The General Tab contains the most important fields: Case Type, Case Category, Customer, Related product and the Description.

Under Case Relationships you find all Child, Similar and Merged Cases. There is also a Quick Create Form configured.

7.1.2 Attributes

Fieldname	Type	Description
Account Detail (cnm_accountdetailid)	Lookup	Account Detail, this Case refers to
Case Category (cnm_casecategoryid)	Lookup	Category of the Case
Case Subject (cnm_casesubjectid)	Lookup	Subject of this Case
Date of Notification (cnm_dateofnotification)	DateTime	Date, one is notified of this case
Delivery Line (cnm_deliverylineid)	Lookup	Delivery Line, this Case refers to
Equipment (cnm_equipmentid)	Lookup	Piece of Equipment, this case refers to.

Parent Account (cnm_parentaccountid)	Lookup	Parent account of the account, connected to this Case
Sector (cnm_sectorid)	Lookup	Sector, this Case belongs to
Customer (customerid)	Customer	Customer, this Case refers to.

7.1.3 Relations

A relation to Return Order was configured for Case.

7.1.4 Background logic

No background logic applies to this entity.

7.2 Equipments

This entity can hold all equipment, connected to an account. Using Equipment Types can bring structure in this. Using dates can help placing reminders for events regarding the equipment. Equipment can be linked to a specific Account Detail, too.

7.2.1 Form

The General Tab contains the most important fields: Name, Equipment Type, Account, Date of Purchase, Replacement Date, Distributor and Serial Number. There is also a Quick Create Form configured.

7.2.2 Attributes

All customized in AgriLife:

Fieldname	Type	Description
Account (crmp_accountid)	Lookup	Account, the Equipment refers to
Date of Purchase (crmp_dateofpurchase)	Date and Time	Date of Purchase of the equipment.
Distributor (crmp_distributoraccountid)	Lookup	Distributor of the equipment
Equipment Type (crmp_equipmenttypeid)	Lookup	Type of Equipment

Name (crmp_name)	Single line of text	Name of the record
Parent Account (crmp_parentaccountid)	Lookup	Parent Accouint for the Account, related to this Equipment
Replacement Date (crmp_replacementdate)	Date and Time	(Planned) Replacement Date.
Serial Number (crmp_serialnumber)	Single line of text	Serial Number of the Equipment

7.2.3 Relations

Entity	
Account Details	related to this Equipment
Cases	related to this Equipment

7.2.4 Background logic

There is a workflow to automatically set the Primary field of the Account Plan. In order to use the Turnover YTD fields, an integration to an external system, holding turnover data, should be achieved.

7.3 Return orders

Part of service call could be a return of a delivered order. To support this return process, return orders can be linked to a Case.

7.3.1 Form

The form of Return Orders is very clean. The most important information is the concerning Delivery Line, Reason and Expiry Date. The Account and Delivery Information is directly shown from the Account and Delivery Line records.

7.3.2 Attributes

Fieldname	Type	Description
Account (cnm_accountid)	Lookup	Account, the Return Order refers to

Comments (cnm_comments)	Memo	Additional comments for this Return Order
Delivery Line (cnm_deliverylineid)	Lookup	Delivery line, this Return Order refers to
Expiry Date (cnm_expirydate)	DateTime	Date, the Return Order should be fulfilled
Name (cnm_name)	String	Name of the Return Order record
Reason (cnm_reason)	Picklist	Reason, the goods should be returned
Case (cnm_returnorder_incidentid)	Lookup	Case, this Return Order originates from
Owner (ownerid)	Owner	Owner of the Return order (responsible to fulfil it)

7.3.3 Relations

No custom relationships are configured for this entity.

7.3.4 Background logic

No background logic applies to this entity.

8. Marketing

In this chapter the marketing component of Dynamics 365 is explained. All standard Marketing funcationalities are available and can be used within the agri sector. For example the Marketing Lists, a mailing list to send (marketing) material to.

8.1 Marketing lists

Marketinglists are being used in AgriLife as a mailinglist within Events, for example for sending emails to all persons or Organizations that are connected to that event. You can set up a Marketing list for one or for multiple events. A marketinglist can consist of contacts and Organizations.

Fields

In this paragraph a definition is given of each of the fields. Per field, the Name, Type and a further explanation is given.

Fieldname, label	Type	Description
Form header		
Owner*	Lookup	The user of Team that is the owner of this marketinglist.
Overzicht - Organisatiegegevens:		
Name*	Single Line of Text (128)	Name for identification of the Marketinglijst
List type*	Locked	Static, this means members are manually selected
Targeted At*	Locked	Only contact can be added to the marketinglist
Modified on	Date/time	Toont datum en tijdstip waarop het record het laatst werd bijgewerkt.
Last used on	Date/time	Toont datum waarop de Marketinglijst voor het laatst is gebruikt in een Campagne of bij het maken van Activiteiten of Verkoopkansen
Owner*	Lookup	The user of Team that is the owner of this marketinglist
Description	Multiple lines of Text	Additional information used to describe the marketinglist

Notes		One or multiple notes (with attachments) can be added
Members		Selected contacts

9. AgriLife business configuration

In the AgriLife Business Configuration, all base tables are configured. The base tables function as … aanvullen

9.1.1 Types

Types contain the main types of accounts, like a farming lot, a relation of a farming lot, or a reseller.

9.1.2 Sub Types

Sub types contain the more specific description of an account, subordinate to the type. For example a Feed supplier, veterinary practice, governmental organisation or farming location.

9.1.3 Classification

9.1.4 Subscriptions

Subscriptions contain a corporate outing, to which a contact can subscribe. Individual subscription of a contact can be found under Contact Subscriptions.Sector

9.1.5 Sector Type

Sector Types contain specific types of animals, subordinated per sector. E.g. fattening pigs or dairy calves.

9.1.6 Season Type

Type of season.

9.1.7 Production Method

This captures a certain method of production in farming, e.g. organic farming.

9.1.8 Crop

This entity contains various crops, a farm can grow.

9.1.9 Pest

In this entity, individual pests can be captured, which treathen growing crops or raising animals.

9.1.10 Equipment Types

This entity provides a classification of the various types of equipment, which can be linked to an account via the Equipment entries.

9.1.11 Area

An Area is a geographical area, assigned to a sales or service manager or used in reporting to get insight in company performance over various regions.

9.1.12 Area Types

Areas can be classified in various types, e.g. sales or service regions.

9.1.13 Case Categories

Case Categories are used to divide all cases in categories, in order to identify and support distinguishable service processes to the various categories. Case Categories are also used in reporting, in order to monitor performance of various parts of the enterprise (as represented by the Case Categories).

9.1.14 Case Subjects

Case Subjects are linked to Case Categories and contain a more descriptive, predefined subject of the case, e..g. ‘Delivered wrong product’.