

CC | CRM - FOLLOWUPRECORDCREATOR

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1 General Information

This document describes the generic Cosmo Consult Solution "FollowUpRecordCreator"



1.1 Revision History

Version	modified on	modified by	comment
1.0	04.06.2019	Zehnder	first version



1.2 Project specific Term definition

term	explanation
CUS	Customer
COSMO	COSMO CONSULT SI GmbH
CRM	Microsoft Dynamics CRM



1.3 Disclaimer

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2 Functionalities of the FollowUpRecordCreator

The FollowUpRecordCreator is a generic solution in order to create dependent records. It can be configured per entity and provides the following features:

- Buttons to create a Follow-Up record out of any record and inherit information to the Follow-Up record.

Use Case: The Sales Manager wants to create tasks for other employees after an appointment with the customer and automatically inherit data from the appointment.

The Salesrep is able to create Follow Up Records via the RibbonButton:

The screenshot shows the CRM interface with the 'FOLLOWUP' ribbon button highlighted. Below it, the 'TERMIN' form is visible, containing fields for 'Erforderlich', 'Optional', 'Betreff', 'Ort', and 'Bezug'. The 'Betreff' field is filled with 'Productpresentation XYZ'. The 'Ort' field is filled with 'Office Neumarkt'. The 'Bezug' field is filled with 'JM 1'. The 'Anlagen' section is empty, showing '0 Anlagen für Termin. Wählen Sie "Hinzufügen (+)" aus.'

The Follow Up Record will be opened and based on the configuration data will be inherited (like the regarding object or the subject).

The screenshot shows the CRM interface with the 'AUFGABE' form. The 'Betreff' field is filled with 'Productpresentation XYZ: Send Marketing Materials'. The 'Beschreibung' field is empty. The 'Bezug' field is filled with 'JM 1'. The 'Dauer' field is filled with '30 Minuten'. The 'Priorität' is 'Normal', 'Fällig' is empty, 'Aktivitätsstatus' is 'Offen', and 'Besitzer' is 'Philipp Zehnder'.

Within the Follow Up Record Users can easily identify the originating record:



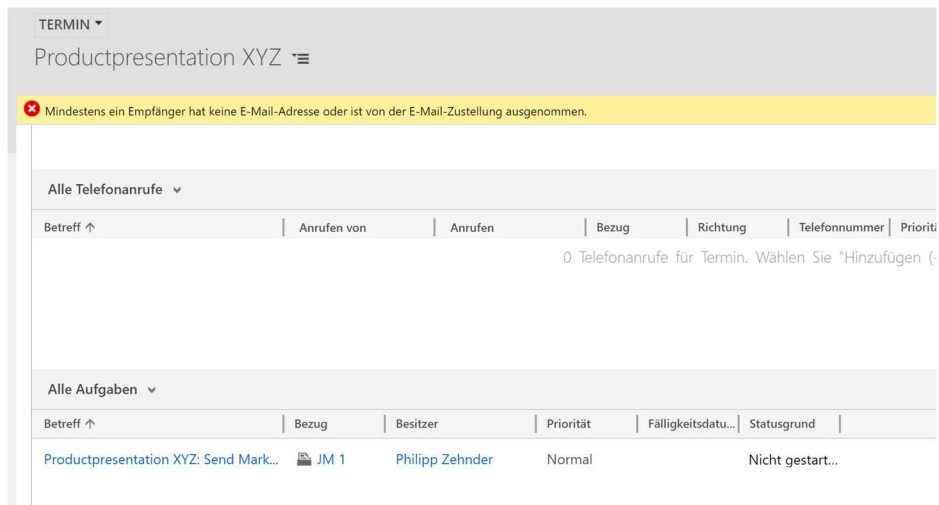
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Follow Ups

Origin Appointment  [Productpresentation XYZ](#)

- Configurable list of all Follow-Ups.

Use Case: The Sales Manager wants to see the status of the tasks he created out of an appointment.



TERMIN ▼
Productpresentation XYZ

✖ Mindestens ein Empfänger hat keine E-Mail-Adresse oder ist von der E-Mail-Zustellung ausgenommen.

Alle Telefonanrufe ▼

Betreff ↑	Anrufen von	Anrufen	Bezug	Richtung	Telefonnummer	Priorität
0 Telefonanrufe für Termin. Wählen Sie "Hinzufügen" (-)						

Alle Aufgaben ▼

Betreff ↑	Bezug	Besitzer	Priorität	Fälligkeitsdatu...	Statusgrund
Productpresentation XYZ: Send Mark...	 JM 1	Philipp Zehnder	Normal		Nicht gestart...

- Possibility to navigate to the "originating record".

Use Case: The Inside Sales employee wants to see where the task originated from.

Follow Ups

Origin Appointment  [Productpresentation XYZ](#)

In order to provide a useful solution the FollowUpRecord can be configured by the customer:

- Entities where the buttons should show up (=Source Record)
- Entities that are available as a Follow-Up entity (eg. Visit Report → Opportunity/Case) (= Target Record)
- Fields that should be inherited from the Source Record to the Target Record

HINT: The Solution can be used within the Browser, an App or even the D365 App for Outlook.



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