Microsoft Dynamics CRM

Welcome to Dynamics!

This new system will help you significantly in your recruitment efforts. This guide was created to help you become familiar with Dynamics. Take a look at some of the key features of this new system.


1 Menu Bar
Access programs, students, stakes, and wards for your current assignment.

2 Create Activities
Record tasks, phone conversations, emails, and appointments.

3 Program Admin
Find quick links to easily contact local program administrators.

4 Program Statistics
See current and next year's statistics at a glance.

5 Stake and Ward Views
Easily see seminary and institute status for all your stakes and wards.

6 Search
Search by name for any student in the current view. Use an asterisk (*) before or after your entry if you do not know the full name.

7 Student Views
Open 10+ different views to see a list of exactly the students you are looking for. Each view can also be printed or downloaded in a variety of formats.

8 Open Views
Use this dropdown arrow to open different views.

9 Sort by Column
Each column is easily sortable, just like in an Excel document.

10 Student Information
Double-click on each student's name to get more details, including general, membership, contact, and enrollment information.

RECRUITMENT TRACKING FEATURE

One of the most significant new features offered with Dynamics is the ability to easily track communication and recruitment activities. This will allow us to know which recruitment efforts are working most effectively.
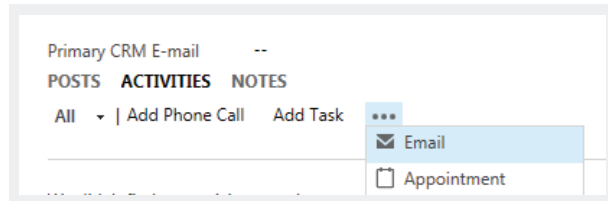
Using the **Activities** tab, you can easily track phone calls, tasks, emails, and appointments. With the **Notes** tab you can attach files, including registration forms, if needed. The activities section can be found in the middle column of each student page.

FILTERING STUDENT VIEWS

To focus your recruitment efforts, Dynamics provides a number of student views that will sort your program list of potential students. You can also sort your stake and ward potential lists by additional views.
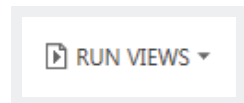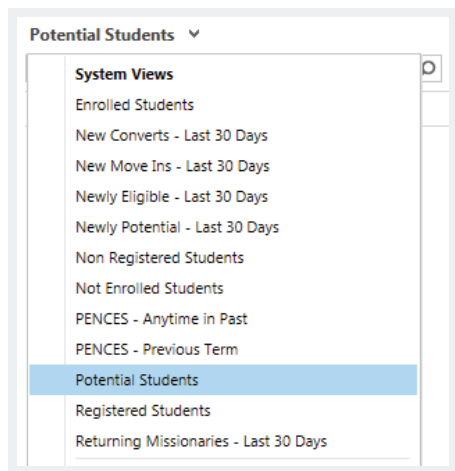
Each view can be exported in a variety of formats or printed using the **Run Views** feature at the top of the page.

OTHER FEATURES

This list will help you find commonly used Dynamics tools and features.

Looking For...	Menu Tab	Additional Navigation
Program potential, registered, enrolled, and not enrolled statistics	Programs	**Next Year Statistics**, top middle column
Not enrolled students who are potential for your program	Programs	**Not Enrolled** view, using dropdown arrow next to **Potential Students**
Students who are registered but not enrolled in a stake or ward	Stake, Ward	**Stake > Ward > Registered But Not Enrolled** view, using dropdown arrow next to **Potential (Seminary/Institute)**
Ward seminary/institute summary, to use when working with priesthood leaders	Ward	**Run View > Ward Potential (Seminary/Institute) Summary > Print or Export**
Stake registration/enrollment summary with ward breakdown	Stake	**Run View > Stake Potential (Seminary/Institute) Summary > Print or Export**
New converts, new move-ins, previously enrolled not currently enrolled students (PENCES), and returning missionaries	Programs	**System Views**, using dropdown arrow next to **Potential Students**

WHERE CAN I GET HELP?

For questions about Dynamics please use the following resources:

sidynamics-feedback@ldschurch.org
Global Service Desk, 1-800-453-3860 ext. 24357
Online tutorials coming soon.

THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

SEMINARIES AND
INSTITUTES OF RELIGION