

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.

The screenshot shows the Microsoft Dynamics CRM interface for a program named 'Kaysville UT Sr Cam...'. The interface includes a top navigation bar with a 'MENU' dropdown and a 'Create' button. Below the navigation bar is a ribbon with tabs for DASHBOARDS, PROGRAMS, STUDENTS, STAKES, WARDS, ACTIVITIES, AUDITING, and MARKETING LISTS. The main content area is divided into several sections:

- 1 Menu Bar:** The top navigation bar with the 'MENU' dropdown and 'Create' button.
- 2 Create:** The 'Create' button in the top right corner.
- 3 Program Admin Information:** A section containing fields for Name (Doe, John), Phone Number (801/555-4859), Email (Doe.J@ldschurch.org), and Program Area Name (US Utah Davis Area Office (91420)).
- 4 Current Year Statistics:** A table showing statistics for the current year (2014 (14-15)), including Potential (2,353), Registered (2,008 (85%)), and Not Enrolled (364 (15%)).
- 5 Stake and Ward Views:** A table showing statistics for the current year (2014 (14-15)) and next year (2015 (15-16)), including Potential and Registered counts.
- 6 Search:** A search bar labeled 'Potential Students' with a search icon.
- 7 Open Views:** A dropdown arrow next to the search bar.
- 8 Student Views:** A table listing potential students with columns for Last Name, First Name, Registered, Enrolled, Age (St...), School (Student), Ward, Stake, Grade (Stud...), and Graduation Year....
- 9 Sort by Column:** A dropdown arrow next to the 'Ward' column header in the student table.
- 10 Student Information:** A double-clickable area on a student's name in the table.

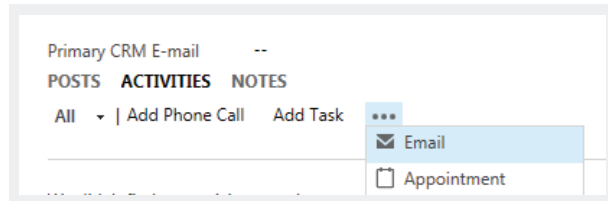
- 1 Menu Bar**
Access programs, students, stakes, and wards for your current assignment.
- 2 Create Activities**
Record tasks, phone conversations, emails, and appointments.
- 3 Program Admin**
Find quick links to easily contact local program administrators.
- 4 Program Statistics**
See current and next 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

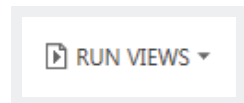
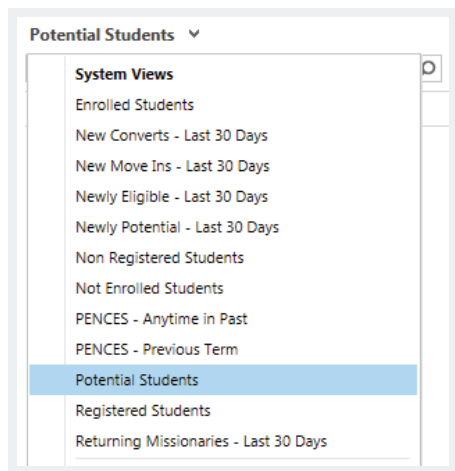
One of the most significant new features offered with Dynamics is the ability to easily track communication and recruitment activities. This will allow us to know which recruitment efforts are working most effectively.



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.

