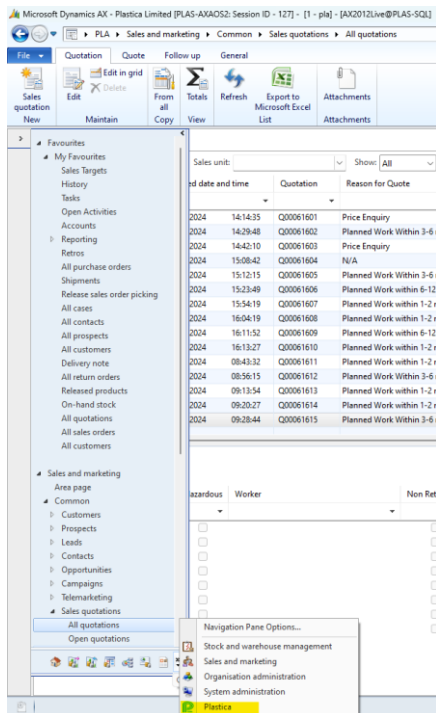


## Creating, editing and deactivating a contact in AX CRM

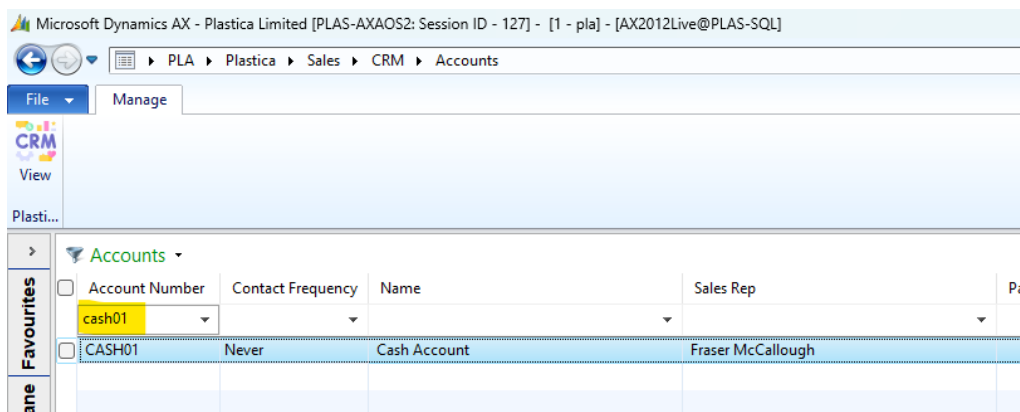
- Open AX navigation pane and find the Blue Plastica P icon, you may need to go to the configure buttons which are the arrows on the right.



- This will then open the area page, it can also be found by entering the route in to the bar at the top – “PLA/Plastica/Area page” and find accounts, this is usually located near the top of the right-hand column.

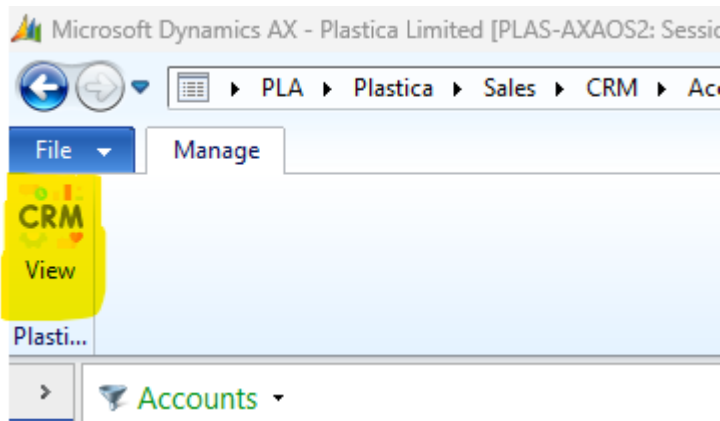


- This will then open the CRM account in the grid layout. Enter the account number in the relevant column search. If the search bar is not there then use CTRL + G.



## Creating, editing and deactivating a contact in AX CRM

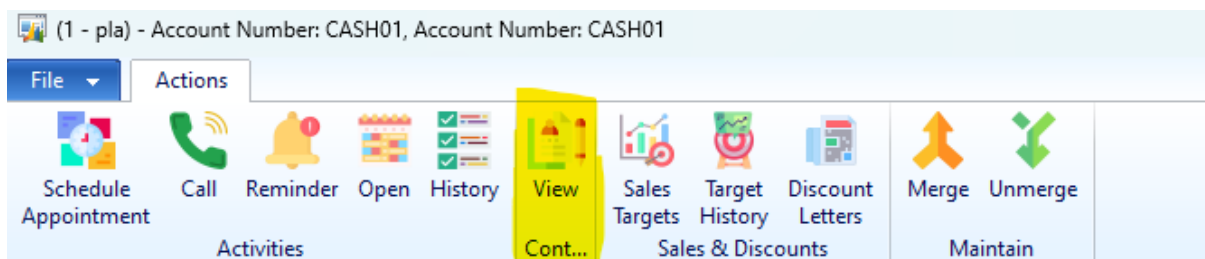
- Once found the account click view in the ribbon or double click the line to open the record.



- The record will then open in a new window.

The screenshot shows the 'Account Details' form for account CASH01. The form is divided into several sections: 'Account Details', 'Data Protection', 'Activity History', 'Sales History', and 'Sales by Group'. The 'Account Details' section includes fields for Account Number, Name, Street, City, Postcode, Telephone, E-mail, Account Status, Sales Rep, Sales district, Customer group, Line discount, Mode of delivery, Credit limit, and Invoicing and delivery on hold. The 'Sales History' section shows a table with columns for 'This Year', 'Last Year', '2 Years Ago', and '3 Years & All time', with rows for YTD, Same Month, and Total. The 'Sales by Group' section shows a table with columns for Group, Units, Value, Units LYTD, Value LYTD, Units PYTD, Value PYTD, Units TYD, Value TYD, Units LY, and Value LY. The 'View' button in the ribbon is highlighted with a yellow sticky note.

- To access the contacts click view in the ribbon.

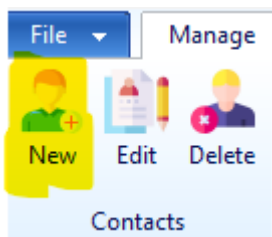


## Creating, editing and deactivating a contact in AX CRM

- This will then open another window. Any existing contacts will be in there. Like much of the rest of AX you can right click on the column headers to personalise to add “authorised to buy regulated chemicals” and anything else you may find useful.

| Status | Authorised to buy Regulated Chemicals | First Name | Last Name | Role | Telephone No. | Mobile No. |
|--------|---------------------------------------|------------|-----------|------|---------------|------------|
| Active | <input type="checkbox"/>              |            |           |      |               |            |
|        |                                       |            |           |      |               |            |
|        |                                       |            |           |      |               |            |
|        |                                       |            |           |      |               |            |
|        |                                       |            |           |      |               |            |
|        |                                       |            |           |      |               |            |
|        |                                       |            |           |      |               |            |
|        |                                       |            |           |      |               |            |

- To add a new contact click new in the ribbon.



- This will open another window.

Microsoft Dynamics AX (1)

Add CRM Contact

First Name:

Last Name:

Role:

Email:

Tel No.

Mobile No.

OK Cancel

## Creating, editing and deactivating a contact in AX CRM

- Enter as many details as you have on the contact and press OK.

Microsoft Dynamics AX (1)

**Add CRM Contact**

First Name:

Last Name:

Role:

Email:

Tel No.:

Mobile No.:

Internet e-mail address

- That window will then close and the contact will show in the previous window.

(1 - pla) - Account Number: CASH01, Account Number: CASH01

File Manage

New Edit Delete

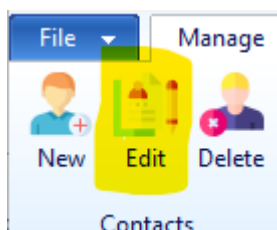
Contacts

| Status | Authorised to buy Regulated Chemicals | First Name | Last Name | Role                     | Telephone No. | Mobile No. |
|--------|---------------------------------------|------------|-----------|--------------------------|---------------|------------|
| Active | <input type="checkbox"/>              | Gina       | Williams  | Customer Service Manager | 01424 857710  |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |
|        |                                       |            |           |                          |               |            |

Navigation icons: Back, Forward, Home, Search, Print, etc.

Bottom bar: (0) GBP pla initial Close

- If there is any other information to enter you can highlight the line the contact is on and press edit in the ribbon to reopen the contact. This also applies to edit any information or deactivate the contact.



## Creating, editing and deactivating a contact in AX CRM

- To edit just over type the boxes. We try not to delete contacts, unless people exercise their right to be forgotten or contacts are put on in error, if someone no longer works for a company then we deactivate them using the status drop down in the top right and change them to deactivated.

Contact Details (1 - pla) - Account Number: CASH01 Account Number: CASH01

File Manage

Attachments

Add

ContactId: CON-02515 Account Number: CASH01 Status: Active

**Personal Information**

First Name: Gina Full Name:

Last Name: Williams Role: Customer Service Manager

**Contact Details**

E-mail: gina@plasticapools.net

Telephone No. 01424 857710

Mobile No.

**GDPR and Notifications**

Share with public: ☐ Order Updates: ☐ Last Checked:

Mailing List: ☐ Order Tracking: ☐ Checked by:

**Security & Compliance**

Authorised to buy Regulated Chemicals: ☐ Authorised Date:

Navigation icons: Back, Forward, Home, Search, etc.

GBP pla initial Close

### Points to note:

- When adding multiple contacts and authorising reportable and regulated chemicals there is currently a glitch in AX where it automatically authorises someone, go back to the edit step and uncheck any boxes that should not be checked and delete the dates.
- You will need to complete and close the top box before going back to a previous window.
- We are looking to use this for marketing integration in the future so as many details need to be entered as possible and they need to be entered with care.
- There is an ability to attach things in CRM however the decision was made to only attach to AX All customers so there is only one place to search.

|                |            |
|----------------|------------|
| Created by     | Lizi Irwin |
| Created on     | 25/09/2024 |
| Process number | SP5        |
| Version        | 1          |
| Review on      | 25/08/2025 |