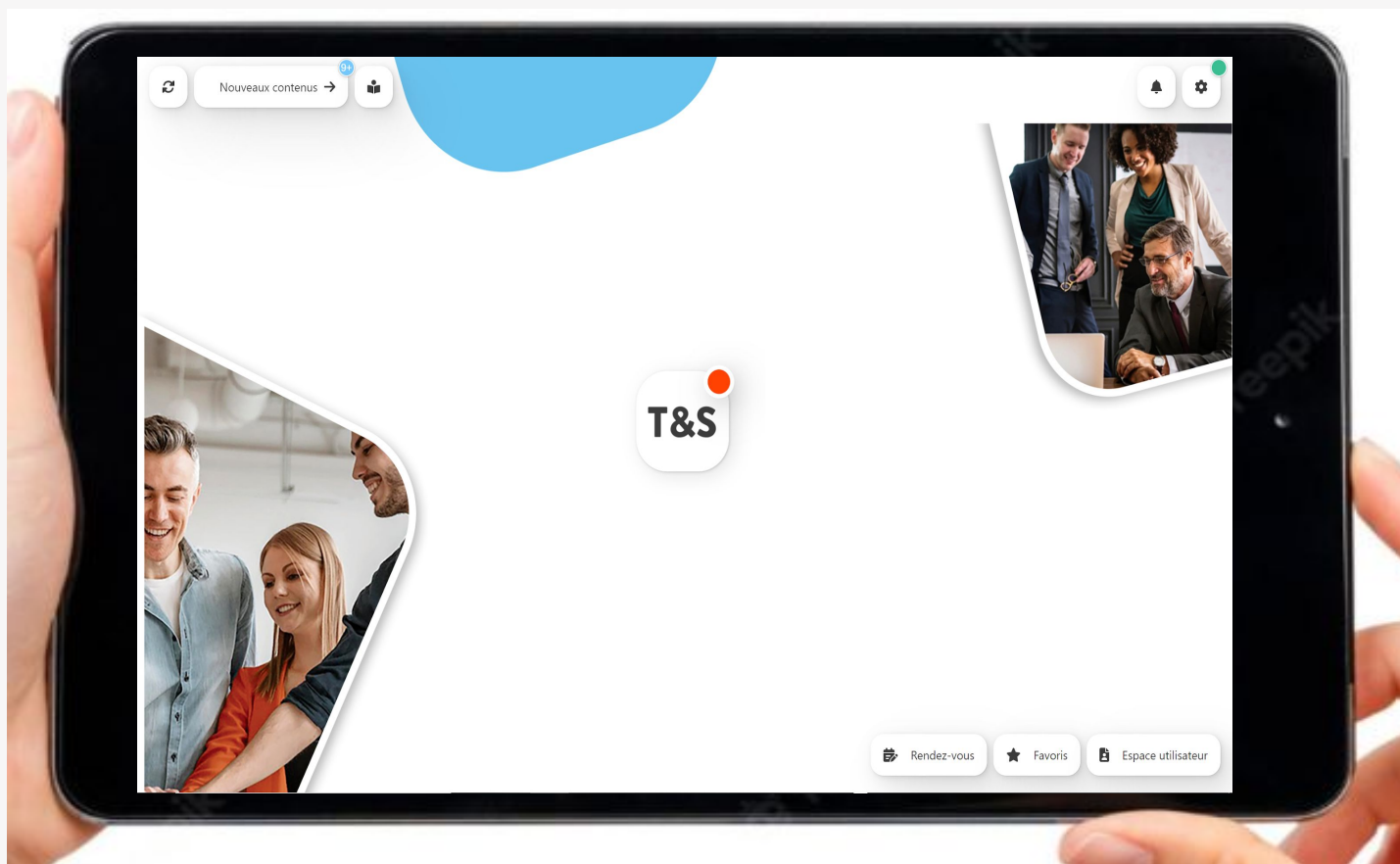


MS Dynamics // Touch & Sell - EN

v.22-12-22



In an existing account



A screenshot of the Microsoft Dynamics CRM interface. At the top, the account name 'Poudlard Express' is displayed with a red 'PE' icon. Below it, there are tabs for 'Summary', 'Details', 'Files', 'Document Sharings' (which is highlighted with a red box), and 'Related'. To the right, there are filters for 'Annual Revenue', 'Number of Employees', and 'Admin CRM' with a dropdown arrow. The main content area shows a table of document sharings. The table has two columns: 'Name' and 'Created On'. There are three rows of data. The first row has a blue link '2022-11-21T15:32:05.360+01:00' and the date '04/12/2022 16:37'. The second row has a blue link '2022-11-21T15:33:42.276+01:00 Samuel Hamelin' and the date '04/12/2022 16:37'. The third row has a blue link '2022-12-07T11:52:40.577+01:00' and the date '07/12/2022 12:40'. At the bottom left, it says '1 - 3 of 3' and at the bottom right, it says 'Page 1' with navigation arrows.

On an existing client, with the email used during the sharing, the linking can be done on the contact and then the account in MS Dynamics.

The board shows one line per sharing with the corresponding date. Each sharing is clickable and take you to the details.

If there are multiple users sharing, they will all be cumulated in this list in the same MS Dynamics Account.

The data is updated once a day, in one direction only from T&S to MS Dynamics.

Detail of the sharing



All the details of the sharing are displayed:
Subject, message, a link to the Touch & Sell sharing page, date, user, etc.

The sharing can be attached to an opportunity.

On the right the list of sent documents with a link to their details.

2022-12-08T15:06:10.783+01:00 Remi Desloire - Saved

Document sharing

AC Admin CRM Owner

General Related

Name	* 2022-12-08T15:06:10.783+01:00 Remi Desloire	Documents
Subject	Partage de documents	<input type="checkbox"/> Name ↑ Created On ↓
Email body	Bonjour, Veuillez trouver ci-après les documents que vous avez souhaité recevoir lors de notre rendez-vous.	Halo 5 Reasons De (1) optimisée 08/12/2022 15:...
Signature	En vous souhaitant bonne réception. Excellente journée,	One_pager_développement Personnel_passeg... 08/12/2022 15:...
Opportunity	---	1 - 2 of 2 Page 1
Lead	---	
Contact	Rémi Desloire	
Account	Local Bocal	
Date sent	08/12/2022 15:06	
Link to the appointment tracking	https://bo.touch-sell.net/3886/meetings_follo...	



Details of the shared documents

A link to the document is also available.

The downloaded documents are visible with their respective dates.

As a reminder, a download is counted when a receiver of a sharing documents downloads a content from the sharing page.

Halo 5 Reasons De (1) optimisée - Saved
Document

AC Admin CRM Owner

General Related

Name	* Halo 5 Reasons De (1) optimisée
Document Sharing	2022-12-08T15:06:10.783+01:00 Remi Desloire
Download link	https://usercontent.touch-sell.net/medias/62...
Type	m4v
Size	8 111 258

Downloads Events

<input type="checkbox"/>	Name ↑	Created On
	2022-12-08T15:09:07.415+01:00	08/12/2022 15:20

1 - 1 of 1 Page 1

The contact does not exist: Creation of a lead

T&S

If the email used for sharing is unknown to MS Dynamics a lead will be created.

The sharing is visible on the right. The link on the title takes you to the details of the sharing.

(no name) (no name) - Saved
Lead · Lead ▾

Lead Source: --- | Rating: Warm | Status: New | Owner: Admin CRM (AC)

Lead Source: --- | Rating: Warm | Status: New | Owner: Admin CRM (AC)

Lead to Opportunity Sal... (Active for 19 months) | Qualify (19 Mo) | Develop | Propose | Close

Summary | Details | Files | Document Sharings | Related ▾

First Name* (no name)
Last Name* (no name)
Job Title ---
Business Phone ---
Mobile Phone ---
Email valentin@touch-sell.com

Search timeline
Enter a note...
Auto-post: Lead (no name) (no name) created (no name) (no na...

Stakeholders: No data available.
Competitors: No data available.
0 - 0 of 0 | Page 1

In a dedicated list



All sharing documents can be listed and filtered

Here is the list filtered on an account, then on a specific contact.

The date, the account, the contact, the user, etc. are information of the list.

The link shows the detailed information.

Name	Created On	Account	Email
2022-12-08T15:06:10.783+01:00 Remi Desloire	08/12/2022 15:20	Local Bocal	remi@touch-sell.com
2022-12-07T17:18:02.217+01:00 NOM TEST123 PRENOM TEST123	08/12/2022 10:30	Touch & Sell	racha@touch-sell.com
2022-12-07T18:06:55.006+01:00 NOM TEST123 PRENOM TEST123	08/12/2022 10:30	Touch & Sell	racha@touch-sell.com
2022-12-08T09:43:10.403+01:00 Rémi Desloire	08/12/2022 10:10		remi@touch-sell.com
2022-12-08T09:48:19.990+01:00 Racha Tazi	08/12/2022 10:10		racha@touch-sell.com
2022-12-08T09:40:48.310+01:00 Agathe Macquart	08/12/2022 10:10		agathe@touch-sell.com
2022-12-07T18:06:41.817+01:00	07/12/2022 18:11		racha@touch-sell.com
2022-12-07T18:06:41.817+01:00	07/12/2022 18:11		valentin@touch-sell.com
2022-11-22T16:26:36.455+01:00 Support Touch & Sell	07/12/2022 17:21		support@touch-sell.com
2022-12-07T11:55:07.125+01:00	07/12/2022 17:21		support@touch-sell.com
2022-11-24T09:13:36.400+01:00	07/12/2022 17:21		racha@touch-sell.com
2022-12-07T17:17:41.410+01:00 NOM TEST123 PRENOM TEST123	07/12/2022 17:21		racha@touch-sell.com
2022-12-07T11:53:30.694+01:00	07/12/2022 12:40		samuel@touch-sell.com