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|  Rev. 09.30.2019 |  |
| **Name**: Open | **Job Title**: Dynamics 365 CRM Administratoristrator |
| **Department:** Sales and Marketing | **Dated:**  |
| **Shift:** Days M-F  | **Work Hours:** As Needed |
| **Reports to:** Director of Special Projects | **Status/Classification:** Hourly / Non-Exempt |
| **JOB DESCRIPTION DYNAMICS 365 CRM ADMINSTRATOR**  |

**POSITION SUMMARY/OBJECTIVES:**

The **Dynamics 365 CRM Administrator** (CRMA) has direct responsibility for managing all aspects of our Dynamics 365 CRM platform. The CRM Administrator is solely responsible for the onboarding and training of all users including related documentation. The CRM Administrator will function as a technical expert, architect, and system admistrators to all CRM system users. The CRM Administrator will also design, develop and customize the platform to promote adoption and streamline business processes. The CRM Administrator will also play a critical role in the specification, design and implemention of the integration between Dynamics 365 and our Dynamics ERP platform.

The **Dynamics 365 CRM Administrator** will also work closely with our marketing department to insure that we are utilizing our Click Dimension Plug In to provide our sales teams with viable leads. The Administrator will also provide the related reports and dashboards to provide analytics to senior mangers.

The **Dynamics 365 CRM Administrator** must treat people with respect, work ethically, have integrity, accept responsibility for own actions and uphold the vision, values and objectives of Eagle Roofing Products.

**DYNAMICS 365 CRM ADMINISTRATORS PRIMARY FUNCTIONS:**

* Understand company’s policies, products, data and information to ensure Dynamics 365 CRM is optimally configured.
* Develop and maintain a comprehensive understanding of Dynamics 365 Administratoristration tasks including creating profiles, roles, users, page layouts, email alerts and communications, data management, approval processes, workflows, reports, dashboards and activities.
* Audit, uncover and resolve data integrity issues utilizing a variety of tools and reports.
* Design, implement and test customizations and processes in Dynamics 365 always keeping the end user in mind.
* Create and manage custom entities, fields, formulas, analytics snapshots and reports including the development of custom reports and dashboards. Will require development of validation rules and custom workflow and approval processes.
* Collaborate with the sales teams to identify best practices and opportunities to streamline procedures. Execute these ideas from start to finish.
* The 365 CRM Administrator will be responsible for all training including onboarding new team members as well as continual training for existing users. Additionally, the CRM Administrator will be responsible for developing end user documentation including application training and online resouces. Documentation should be provided in both writing and video when possible.
* Stay informed regarding new Dynamics 365 features, technologies and best practices.
* Complete bulk improts and exports of dataBatch reassignment of accounts and opportunities based on organizational changes.
* Integrate Dynamics 365 with other internal business systems ie. Dynamics ERP.

**POSITION REQUIREMENTS:**

**Education and/or Experience:**

1+ years Microsoft Dynamics 365 experience or D365 cerification preferred but not required.

Bachelor’s degree in Computer Science or equivalent experience.

Knowledge of Microsoft Excel, SQL, MS Outlook, Sharepoint or Teams a plus.

Knowledge of cloud based Dynamics 365 preferred.

Designing and configuring forms, developing workflows and generating reports and dashboards.

Excellent communication and analytical skills.

**Language Skills:**

Ability to read and interpret documents. Ability to respond effectively to inquiries or complaints. Must possess excellent communication skills both verbally and in writing. Experience in presenting information and/or training in a professional environment is beneficial.

**Reasoning Ability:**

Ability to define problems, collect data, establish facts and draw conclusions.

**Teamwork:**

Must work harmoniously with all personnel, including all other departments, and follow all company rules, regulations and procedures associated with professional sales/marketing methods and requirements. Must be able to work independently and collaboratively.

**Project Management:**

Must be able to manage multiple projects and complete them in a timely manner.

This is to acknowledge I have read the job description outlined above and on the preceding page; I am aware that the essential and additional functions may vary. The job requirements and responsibilities will not be limited to those listed and may change at the discretion of management.

Employee Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Human Resources Department\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Prepared By:** **Position:**

**Approved By:** Suzanne Ashworth **Position:** Director Customer Satisfaction

**Approved Date:** **Signature:**

A/job description/salary/war room