Microsoft®

Working with

Microsoft Dynamics™ CRM

Working with
Microsoft Dynamics CRM

Getting started with Microsoft Dynamics CRM

Con

Microsoft Dynamics CRM – as easy as that!

What does Microsoft Dynamics CRM contain and how easy is it to use?

We take a closer look at the system and its various components. We also take a look at how to use the systems basic functions.

Page 6

Getting started with Microsoft Dynamics CRM

What is the easiest way to get started with Microsoft Dynamics CRM? This chapter answers that and a lot of other questions. The chapter also describes a company that has successfully implemented Microsoft Dynamics CRM.

Page 18

The Sales Representative's typical working day

With Microsoft Dynamics CRM a Sales Representative's typical working day is more structured than before the introduction of the system in the company. The program helps focusing on relevant customers and keeps track of things that are promised to customers.

Page 26

The Sales Manager's typical working day

The working day of the Sales Manager has become more focused. Microsoft Dynamics CRM provides an overview and provides more time for coaching sales consultants and taking care of customers.

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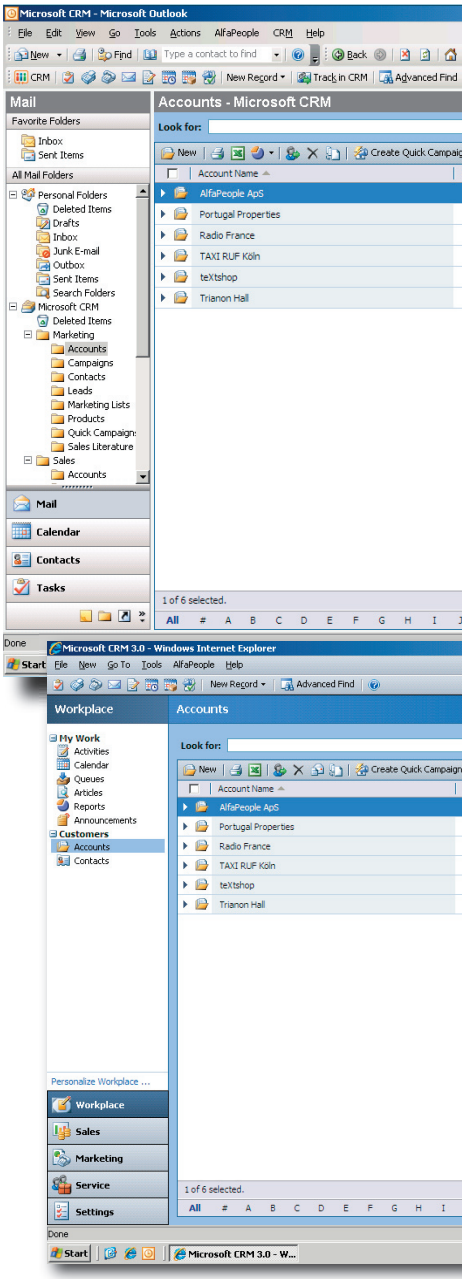

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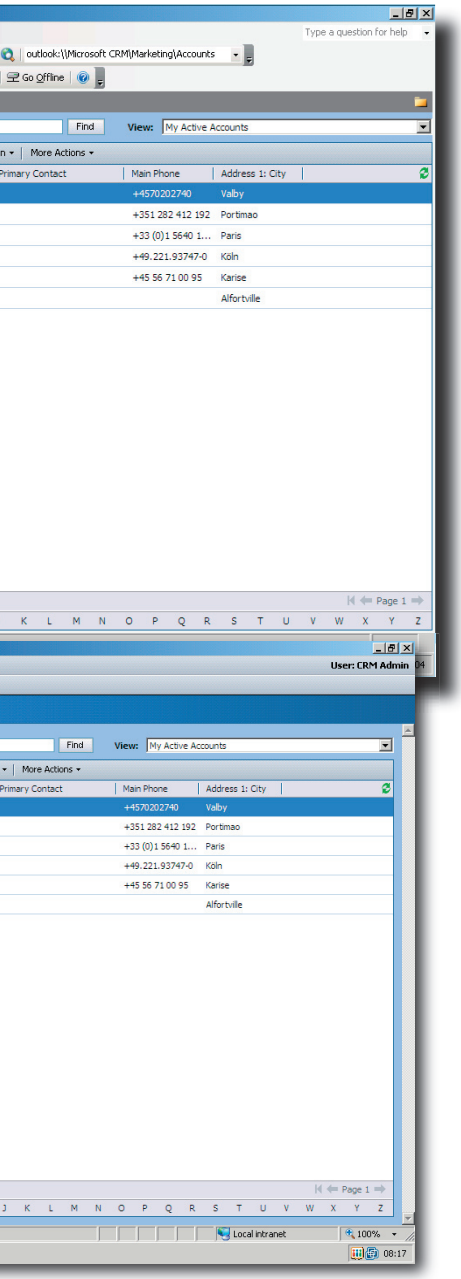

The Service Employees' working day

This chapter takes a close look at the Service Coordinator and the Service Employee's use of Microsoft Dynamics CRM. We look into how a Service Coordinator quickly finds the first available Service Employee and books the employee for new service assignments using the built-in service calendar.

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The Marketing Employee's typical working day

Marketing Employees used to spend most of their time working with an Excel spreadsheet when planning sales campaigns, invitations to exhibitions, or when arranging other marketing events. Now, things are much easier and the entire process – from preparation to follow-up – is supported by the system.

After the campaign you have a total overview of the response to and the result of the campaign.

Page 64

New features in Microsoft Dynamics CRM 3.0

Now it is even easier to give your customers a good experience of your company, regardless of whether they speak to employees in the sales and marketing department, or customer services. In Microsoft Dynamics CRM 3.0 all employees have access to relevant customer information. In addition, the program is easy to customize to the workflow and your type of business.

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Working with Microsoft Dynamics CRM

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Working with Microsoft Dynamics CRM

All employees in your company can benefit from using Microsoft Dynamics CRM. You can keep track of your customers throughout the company!

In this book we describe the typical working day using Microsoft CRM in different job profiles within a company. By doing this we explain the advantages to be gained from the system for the individual employees.

We start with an overview of getting Microsoft Dynamics CRM up and running, and we also look into what considerations to take before implementing the system. If you follow the implementation plan outlined in this book, the system will be a part of the employees' working day even during the implementation phase!

Same system, many faces

Even though it is the same system, the working day can be very different for the various job functions – precisely because Microsoft Dynamics CRM is easy to customize for individual user profile and the way the individual works.

In the last half of the book we give an overview of the daily work processes in Microsoft Dynamics CRM for a Sales Representative, a Sales Manager, a Service Coordinator, a Customer Service Employee, and a Marketing Employee.

In the working day chapters you will find a general review of the working day for the given user profiles. Let the chapters inspire you, and learn how individual employees use the system. You will also see how other companies have successfully introduced Microsoft Dynamics CRM into their company.

Enjoy!

Kristian Gotsch
EMEA Product Marketing Manager,
Microsoft Dynamics CRM

User-friendly and easy to implement

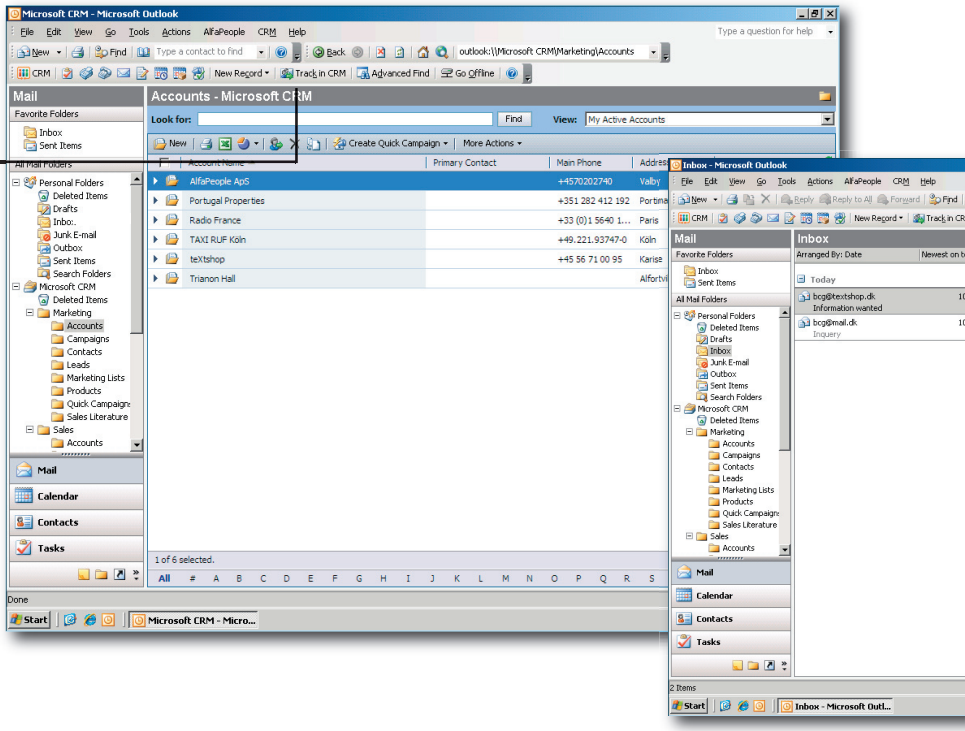
Microsoft Dynamics CRM 3.0 is built upon the common Microsoft virtues such as easy implementation, user-friendly interface, and numerous ways to customize the application. Furthermore, Microsoft's partners can develop tailor-made solutions. It is also easy to develop minor data units yourself, meaning that some adjustments can be made by the in-house system administrator.

Microsoft Dynamics CRM 3.0 is even more integrated with Microsoft Office Outlook. Compared to earlier versions, you can access the system directly from Outlook meaning that all users can manage their tasks in a program they already know.

In comparison to earlier versions of Microsoft Dynamics CRM, you don't have to manage two different inboxes in Outlook. All information is in the same inbox and you can link sent and received e-mails, contacts and tasks in Outlook to items in Microsoft Dynamics CRM simply by clicking a single button.

Two separate inboxes are a thing of the past – you can link all Outlook items to Microsoft Dynamics CRM by clicking the Track in CRM button.

Compared to earlier versions, practically the entire system can be accessed from Outlook meaning that all users can manage their tasks in Microsoft Dynamics CRM from a program they already know.



Microsoft Dynamics CRM – as easy as that!

Everyone in your company benefits from using Microsoft Dynamics CRM. In this book we describe typical working days using Microsoft Dynamics CRM for different job profiles within the company. We present the advantages of using the system for individual user profiles. What does Microsoft Dynamics CRM actually contain and how easy is it to use?

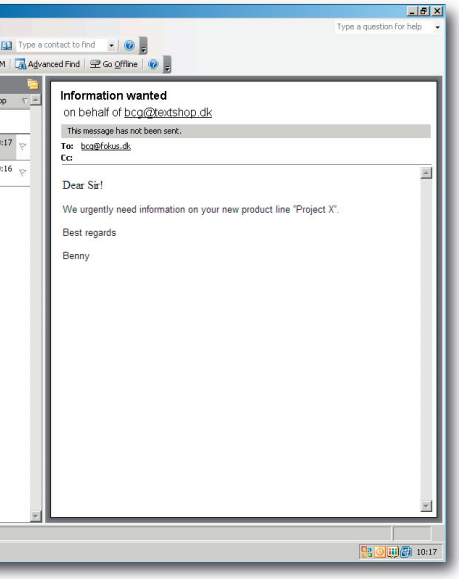
When your customers leave and choose to deal with your competitors it is often based on insufficient care and attention from your organization. Changing dealer is mostly done because the former dealer lost the feeling of the customer's specific needs and demands. When the customer feels invisible or feels that you don't listen to his needs, then you lose credibility and customers might "switch horses".

With Microsoft Dynamics CRM, the company gets closer to its customers and improves conditions for increasing sales, strengthening customer care across company departments and predicting customers' future needs.

Microsoft Dynamics CRM is a contact relations management tool that strengthens the company's relationships with customers and partners. Modules for sale, marketing and customer service ensure that employees share information and knowledge across the company's departments and provide unified and efficient customer service, regardless of where customer contact with the company occurs

Microsoft Dynamics CRM handles sales leads and opportunities, an overview of the customer's previous relations with your company, automatic service reports, options to direct service employees, and search in a knowledge base that contains information on the experiences employees have with products sold to the customers. Microsoft Dynamics CRM also has reporting tools that show predictions of, for example, the value of upcoming orders, and measurements of activity level, and efficiency in the sales and customer services departments.

Below you can see the normal Microsoft Office Outlook interface. That's how well the user interfaces are integrated!



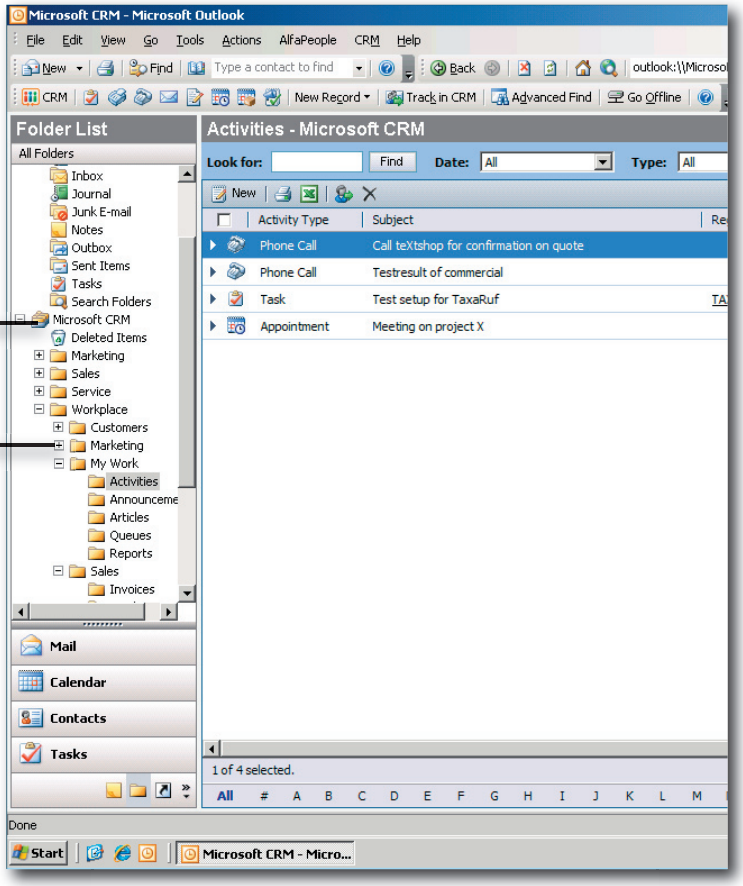
Daily use of Microsoft Dynamics CRM

Employees' daily work with Microsoft Dynamics CRM can mainly be managed from Microsoft Office Outlook. A web-based client is also provided. From the client you have the same options as in Outlook, and you can customize the system as required.

Most users are satisfied working with the system from Outlook. In general, you work with Microsoft Dynamics CRM the same way, regardless of whether you work in Outlook or from the Web client.

Working with the system in Outlook offers you the advantage of knowing the user-interface, and avoiding task switching between the Web client and Outlook to read e-mails, book meetings, etc.

Compared to earlier versions of Microsoft CRM, there is – with few exceptions – access to all parts of the system from Outlook. The most visible exception is **Settings** which you can only access from the Web client. Other exceptions are mentioned during this book's review of the system.



The CRM system appears as folders in the navigation pane to the left of the Outlook window.

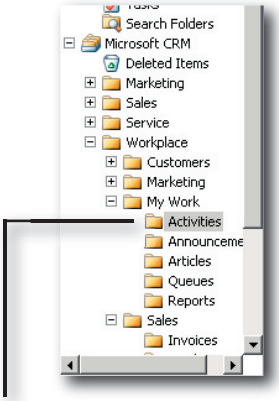
Click the **Plus** button by the folder when you want to display the sub-folders. They are displayed like sub-folders are displayed, for example, in Windows Explorer.

Navigating Microsoft Dynamics CRM

The system is accessible as folders in the navigation pane to the left of the Outlook window in the Microsoft Dynamics CRM folder. You have access to four main folders and their sub-folders. When you click the **Plus** button in front of a folder, the sub-folders are displayed in the same way as, for example, in the **Inbox** folder or Windows Explorer.

To open the CRM system's main menu click the **Microsoft CRM** folder in the Mail section navigation pane in Microsoft Office Outlook. There are folders for the system's four main areas: **Sales**, **Marketing**, **Service** and the **Workplace**, which provide a collective entry to applicable tasks.

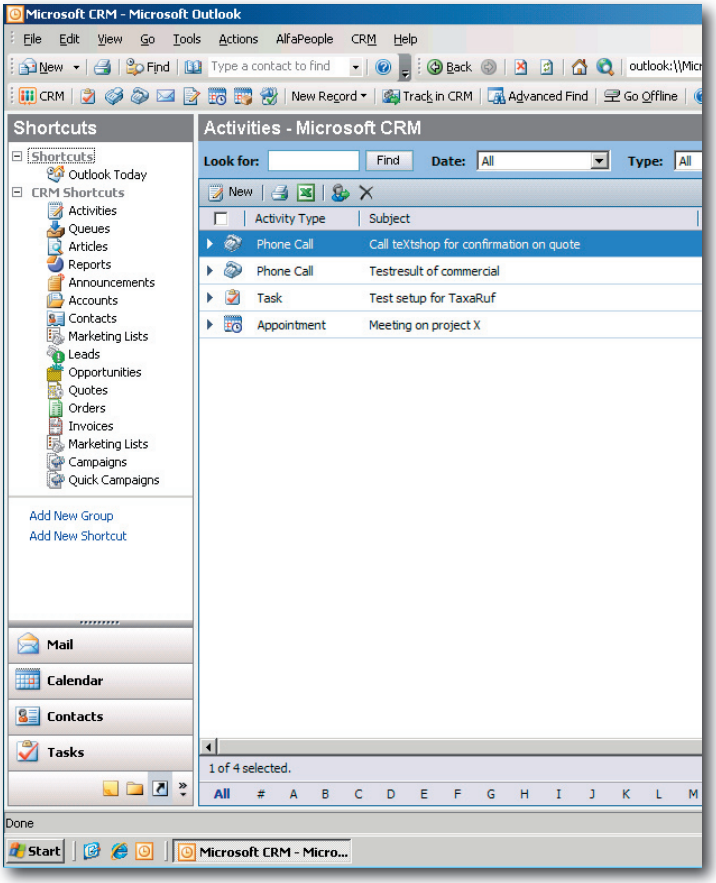
Most likely you will start your day in Microsoft Dynamics CRM by getting an overview of the day's tasks by clicking the **Activities** folder in **Workplace** | **My Work**.

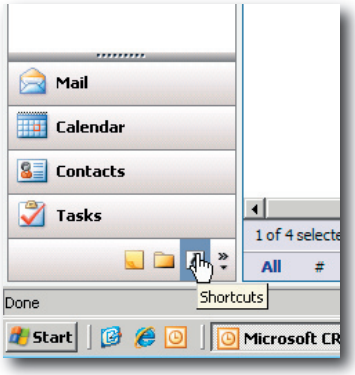


Most users will start by getting an overview of the day's tasks by clicking the Activities folder

Organize your shortcuts

The **Shortcuts** section in Outlook is used for creating shortcuts to the parts of the system you most often use. Shortcuts give you direct access to commonly used folders in the system so you don't have to navigate around the folder hierarchy.





Create shortcuts to the parts of the system you most often use in the Shortcut section in Microsoft Office Outlook. Shortcuts give you direct access to commonly used folders in the system so you don't have to navigate around the folder hierarchy.

The Web client

Microsoft Dynamics CRM's Web client almost looks like Outlook – but without the traditional Outlook folders for e-mails, calendar, and contacts.

The Web client is opened in an ordinary browser window without the menus and toolbars from Internet Explorer. The user interface in the Web client is very similar to Microsoft Office Outlook.

When you open the web client it displays the Activities list. This provides you with an overview of your open tasks and activities. To the left in the **Activities** list you will find the navigation pane with shortcuts to the parts of Microsoft Dynamics CRM that are most important to you. Click the **Personalize workplace** link at the bottom of the Workplace navigation pane to select the shortcuts to be displayed.

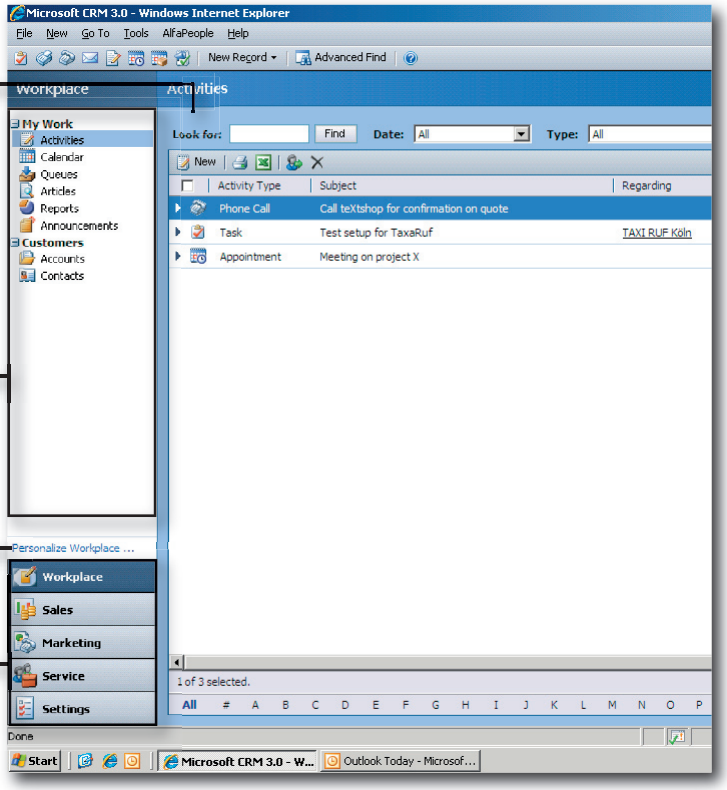
Note: Not all sub-folders can be reached by shortcuts from the **Workplace** section. For example, if you click the **Sales** section button you get access to sales leads, opportunities, companies, contacts, marketing lists, competitors, products, sales literature, quotes, orders, invoices, and quick campaigns. If you open the **Sales** folder from the Workplace folder you only get access to marketing lists, leads, opportunities, quotes, orders, and invoices.

When the Web client starts, the Activities list opens. This provides an overview of your current tasks and activities. Using the search, date, type, and view fields at the top of the pane you can customize the view of the items in the list.

To the left in the CRM window, there is a navigation pane with shortcuts to the parts of Microsoft Dynamics CRM that are most important to you.

Click the Personalize Workplace link at the bottom of the Workplace navigation pane to select the shortcuts to be displayed.

Click the buttons at the bottom left to switch between the CRM system's five main sections: Workplace, Sales, Marketing, Service, and Settings.



Switch sections

Click the buttons at the bottom left to switch between Microsoft Dynamics CRM's five main sections, **Workplace**, **Sales**, **Marketing**, **Service,** and **Settings**. It works in the same way as Outlook. When you click one of the section buttons, all sub-folders for that section are displayed.

Work with sub-folders

Click the applicable sub-folder in the navigation pane to open and work with the items in the folder. They are listed in the information pane to the right in the window.

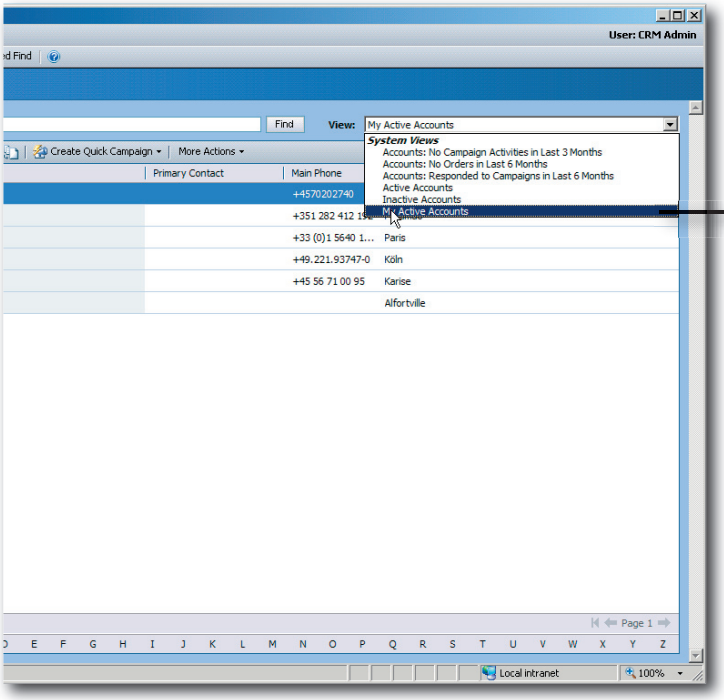
Select an item by clicking the appropriate link in the list. The applicable item is opened in a new window.

Customize the view in lists

Using the fields in the folder heading you are able to customize the view in lists. The options available depend on which folder you have opened.

There is a **Look for** and a **View** field in all sections. Using the **Look for** field you can search for items and using the **View** field you can choose between different views of the items in the applicable folder. For example, in the **Account** folder you can define the view to show only on-going companies for which you are sales responsible by selecting **My Active Accounts** in the **View** field.

In **My views** in the **View** field menu you find a shortcut to the reports and searches you have saved in the system. We will show you how to save searches and reports later in the book.



Using the **View** field you can choose how to display the items in the folder. For example, in the **Account** folder you can limit the display only to include the on-going companies for which you are sales responsible by selecting **My Active Accounts** in the display field.

Work with subjects

If you want to search for information about a specific account, a contact, a case, a sales lead or something else, click the shortcut for the appropriate item in the navigation pane to see a list of subjects.

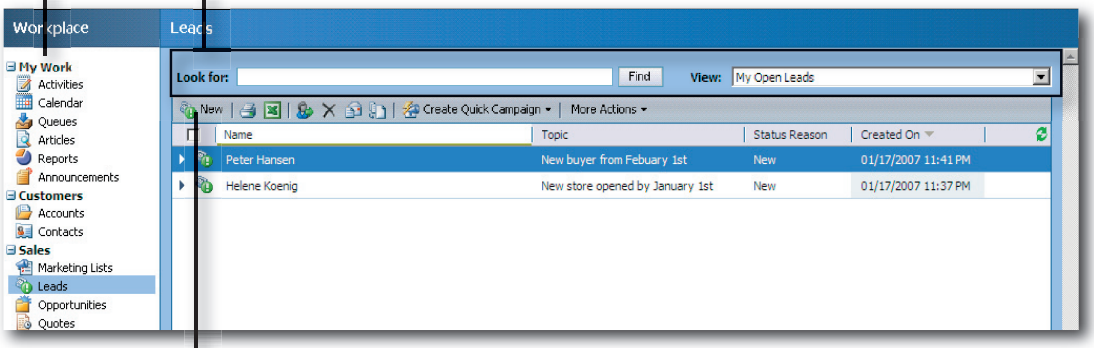
> ***Tip!***
>
> Even though we are reviewing the system in the Web client, you can follow the same procedure in Microsoft Office Outlook.

For example, if you work with leads, click the **Leads** folder in the **Sales** section in the navigation pane to the left. Now you can search for leads using the **Look for** field at the top of the view. Type part of or the whole name and click the **Find** button. A list of leads which match the search string are displayed.

You can limit the view in the list by switching between various views in the **View** field. For example, show only the leads for which you are responsible, or the leads you have received but have not done anything with yet. It is possible to define your own user-defined views, for example, a view of leads that are expected to place an order within the next month, or whatever time horizon you are working with.

Select the folder in Microsoft Dynamics CRM by using the shortcuts in the navigation pane.

Define the view by filling out the Look for and the View fields



Click the New button to create a new subject – in this case a new lead.

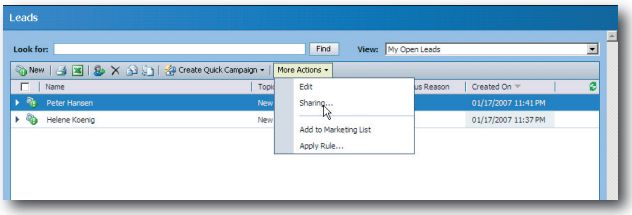
Using the More Actions button in the toolbar, you can create different actions with the lead(s) you highlighted in the list.

The toolbar

Create a new subject by clicking the **New** button in the toolbar above the list with leads. The buttons available in this toolbar depend on which section you have selected.

From the toolbar you can also print the list of leads in the current view or search. Or, export the list to Microsoft Office Excel by clicking the appropriate buttons on the toolbar.

Click the **More Actions** button at the bottom of the toolbar to perform different actions with the lead(s) you have selected in the list, for example, share them with other users, delete them, or assign them to a colleague.



Open a lead

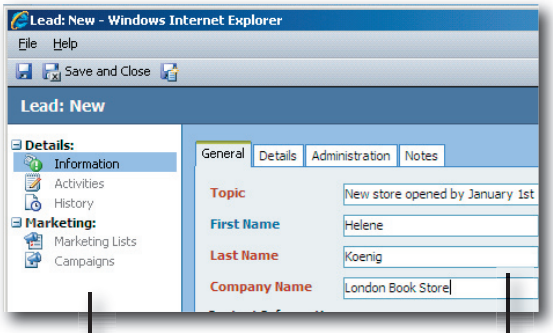
Double-click a lead from the list to view the details. You can fill-in and edit the fields according to the actions you want to perform.

Customize details in a window

The window shows the navigation pane to the left and the information pane to the right. In the navigation pane you can select which information to be shown for the applicable lead. The information is displayed in the information pane to the right. The information pane can be divided into tabs with more details for the selected type of information.

In our example you will see which activities, marketing lists and campaigns the lead has participated in by using the shortcuts in the navigation pane, and by viewing the information in the information pane to the right.

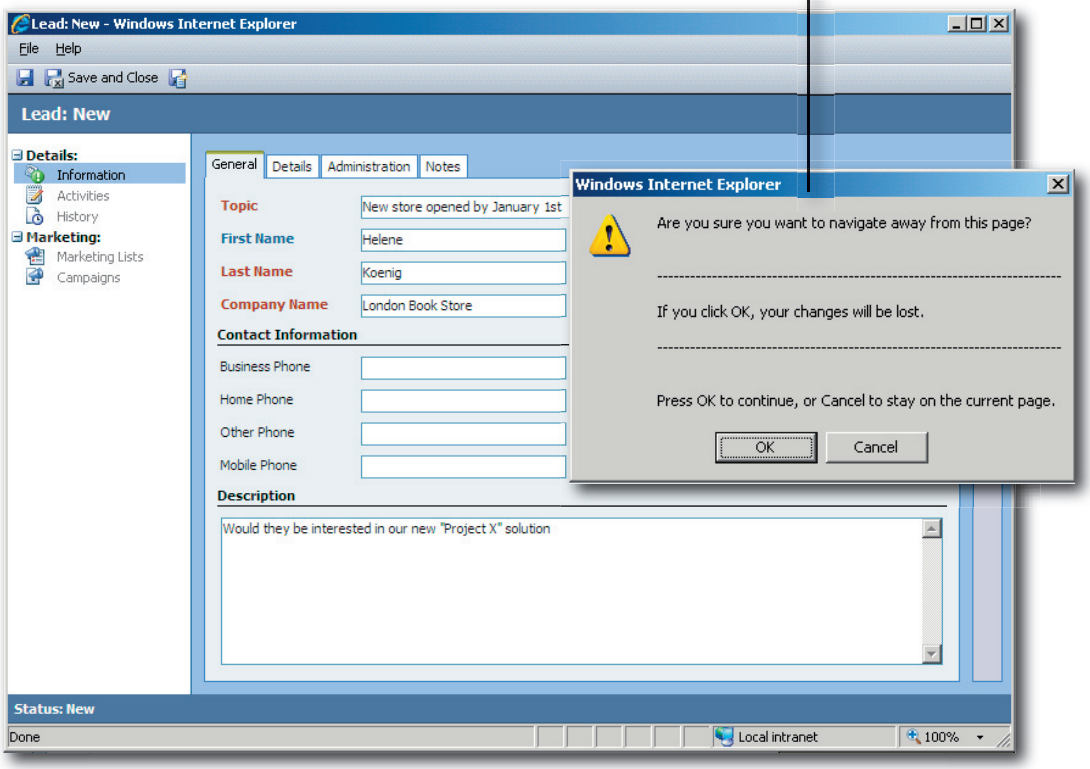
If you make changes to the subject, you must remember to click the **Save** or **Save and close** button before you close the lead window. The system displays a warning if you do not save changes before you close a form window.



Using the shortcuts in the navigation pane you can see the activities in which the lead is included.

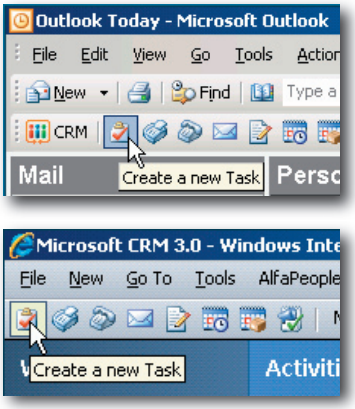
Information about the activities is displayed in the information pane to the right. The information pane can be divided into tabs with more details.

Remember to click the Save and Close button before you close a form window if you want to save your changes.



Create activities

In the Microsoft Dynamics CRM toolbar you have access to creating new assignments, customers, agreements, telephone calls, and other CRM activities.



The Microsoft Dynamics CRM toolbar: Two views of the same task in Outlook and the Web client, respectively.

If you need to register a telephone call to a customer, click the **Create new Phone Call** button.

A new **Phone Call** window opens. The window shows the **Phone Calls** and **Notes** tabs. To the right you open the **Form Assistant** pane by clicking the button with the double arrow at the top of the vertical bar to the right of the **Phone call** window.

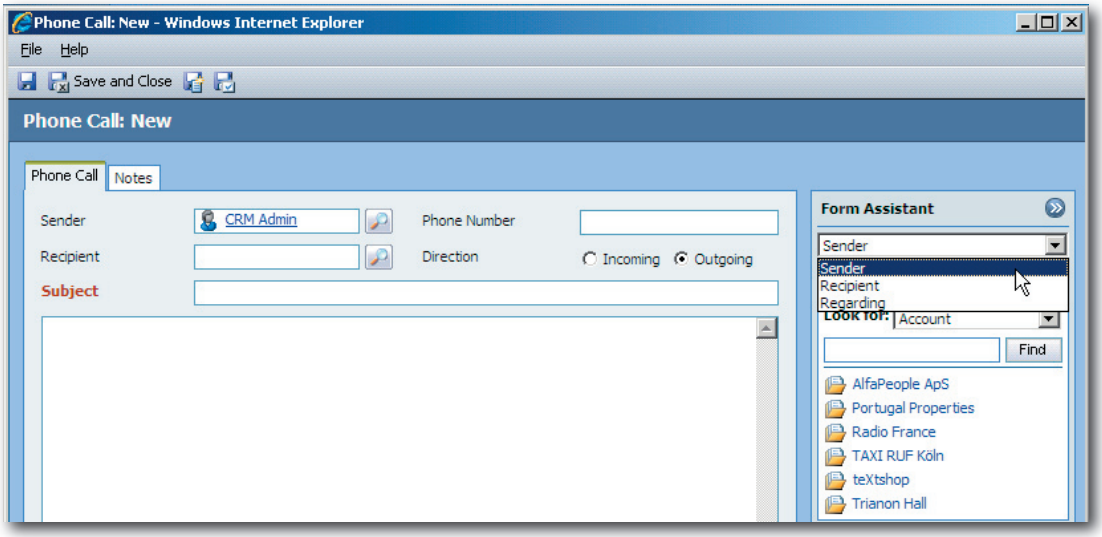
The **Form Assistant** pane opens, and for each field associated with a **Look Up** button (a magnifying glass), you have the option to search for the content of the applicable field directly in the task window instead of opening a new **Look Up** window. Using the list field at the top of the **Form Assistant** pane you can see which fields in the form you can obtain Look Up help for in the **Form Assistant** pane. You can enter information in the applicable fields by selecting from the drop-down menu in the lower part of the **Form Assistant** pane.

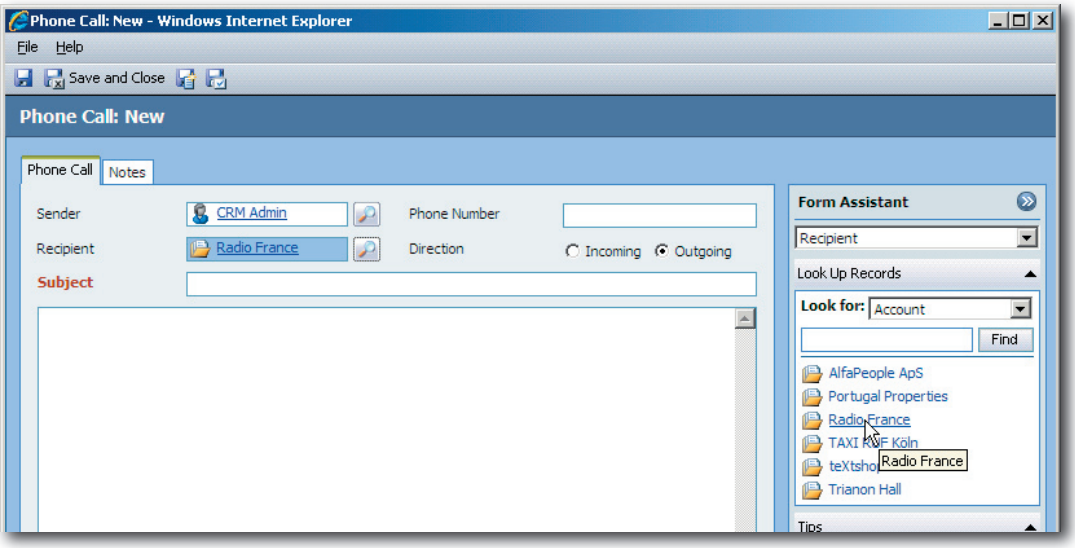
Who will make the call?

On the **Phone Call** tab you can select the CRM user who should make the call. By default you are registered as the sender but you can delegate the call to another user by selecting the person in the **Sender** field. When you highlight the **Sender** field, you can choose from a list of users in the **Form Assistant** pane to the right. You can select another user by typing part of the name in the **Look for** field and clicking the **Find** button, or by navigating using the list in the **Look for** list below.

You can enter incoming phone calls using this form, and you can also choose between accounts, contacts, and leads in the **Form Assistant** pane of the **Sender** field.

Using the list field on the task pane you get an overview of the fields from which you can get a list in the task pane. You can also fill out the applicable fields directly from the task pane by clicking the fields in the drop-down menu.





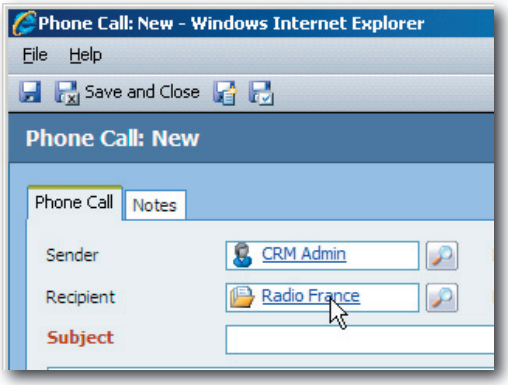
Fill out the Recipient field using the Form assistant assignment window.

Who should get a phone call?

Then click the **Recipient** field. Now the content of the task pane displays shortcuts for the companies, contacts, or items in the CRM system.

Type a part of the name in the **Look for** field at the top of the task pane and click the **Find** button. The phone number has to be specified in the **Phone number** field. By default, the **Phone number** field is not filled out but it is easy to find the phone number for the specified customer by clicking the contact from the account you have selected in the **Recipient** field.

Now specify a subject for the call and, if necessary, write a detailed description in the large text field under the **Subject** field. Also choose whether the call is incoming or outgoing using the appropriate fields.



By default, the Telephone number field is not filled in, but it is easy to find the telephone number for the appropriate person by clicking the contact of the company you have selected in the Recipient field and copying the telephone number from the contact card into the Telephone number field on the Telephone call tab in the Telephone call window.

Link the call to a record in the system

Remember to fill out the **Regarding** field. By doing this you can link the call to a specific campaign, case, contact, contract, invoice, lead or opportunity in the system. Again, you can search the items in the system using the **Form Assistant** pane. By default, **Account** is selected but you can also select other information types using the **Look for** field.

A practical example

If you want your colleague to call a customer regarding an opportunity, select the colleague as the sender in the **Sender** field, the company in the **Recipient** field, and a sales opportunity for the applicable customer, contact person or lead in the **Regarding** field. When you select **Sales opportunity** in the **Look for** field in the task pane, the active sales opportunities for the selected customer are displayed.

Remember to look up the phone number by clicking the company name in the **Recipient** field and copy it to the **Phone number** field.

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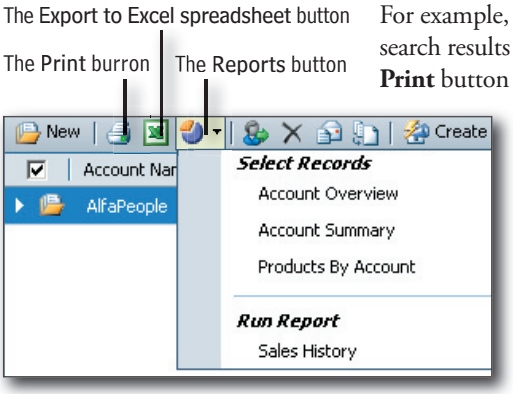
Reports

Microsoft Dynamics CRM provides a large selection of reports and printing options. The reports can be customized in an unbelievable number of ways, and the increased integration with Microsoft Office System makes it possible to build new reports in the programs in Microsoft Office.



For example, if you have performed a search for leads, you can print the search results directly from the list in the current view by clicking the **Print** button in the toolbar above the list.

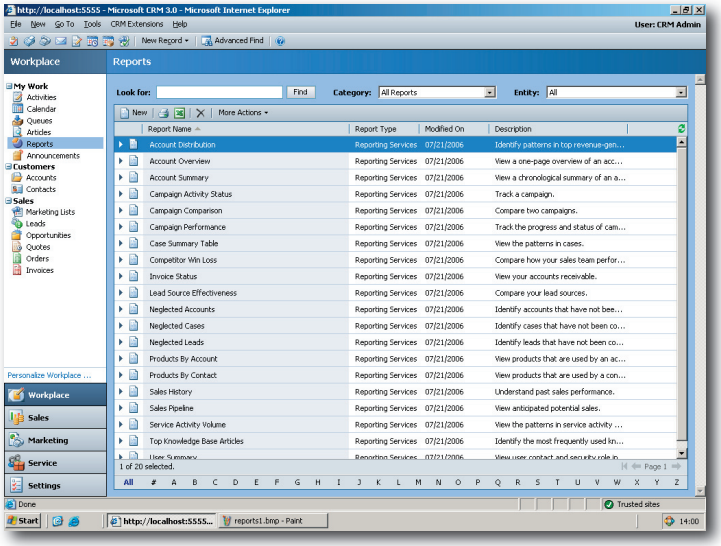
From the toolbar you have access to the reports created in the system for the applicable information type. The reports are listed in a menu when you click the **Reports** button. At the top you can see the reports that can be printed for a highlighted entry on the list, and at the bottom you can see the reports that can be printed for the applicable section, for example, **Sales overview of companies**. The report includes only data from the current view, but the entries to be included in the report can be customized in the **Report** window which is opened when the applicable report type is selected.

You can also export the current information to Microsoft Office Excel in order to use the information for further analysis, etc.

Get an overview of neglected customers

You have access to more specialized reports from **Reports** in the **Workplace** folder in Microsoft Dynamics CRM. You can get reports that list all the leads, accounts, and contacts that you have not contacted for a long time.

To print a report, double-click on it from the list. Select, for example, **Neglected Accounts**, if you want a list of the companies in the system that you have not had contact with for a long time.



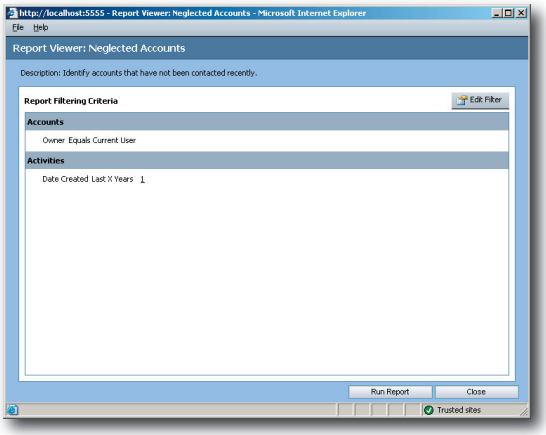
You have access to specialized reports from Reports in the Workplace section in Microsoft Dynamics CRM. It is possible, for example, to run a report that lists all the leads, companies and contacts that you have not had contact with for a defined period.

Customize report criteria

Now a **Report** window opens and you can customize the report's criteria. In the case of **Neglected accounts** you can select when the applicable company was created in the system. Doing so, you have the data filtered in the report so only accounts you have created in the system within the selected number of most recent years are included.

When you have customized the individual criteria for the report, click the **Run Report** button to retrieve data for the report.

The report is displayed, in this case a graphic overview of how many companies you have not been in contact with for the past 14 days.

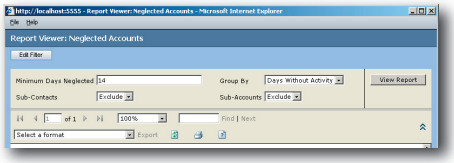


You can change a criterion in the Neglected Accounts window. Other reports have more comprehensive criteria definitions.

Customize the report's parameters

Using the fields at the top of the **Report** window, you can change the values of the report's parameters. For example, if you want to expand the interval for how long you have not had contact with an account, change the value in the **Minimum Days neglected** field at the far left.

You can then run the report again by clicking the **View report** button. The report is displayed with the companies that meet the new conditions.

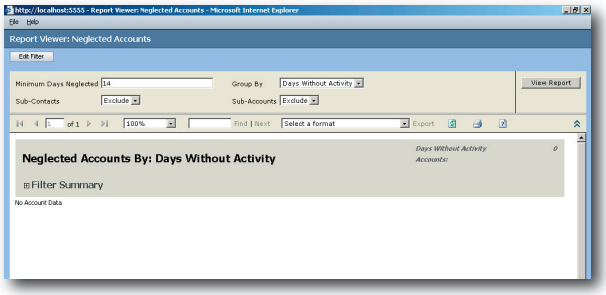


Using the fields at the top of the Report window, you can change the values of the report's parameters.

The report is active

If you want to see the list of specific companies this pertains to – instead of the graphic display of the number of companies – click the **View all** link under the graphic display.

A list of the applicable companies is now displayed. The individual lines in the report are links to the applicable accounts and contacts in Microsoft Dynamics CRM. You can use the report as a call list or open the contact dialogue box for the individual companies to create a new activity.



The lines in the report are links to the items in the CRM database.

Create reports in Microsoft Office System

You have the option to create new reports directly in Microsoft Office using the data integration between Microsoft Dynamics CRM and Microsoft Office System.

Tip!

For further information please read the report function in connection with the review of the typical working day for the employee profiles described in this book.

Who is going to use the system?

Most people consider CRM as a 'sales management tool'. But Microsoft Dynamics CRM is not only for the sales department. It is also for marketing, customer services, support tasks, etc. There are no limits.

By using Microsoft Dynamics CRM in every department of the company, you can easily enter all enquiries to and from customers and leads, and get an overview of the needs and potential of your customers in relation to your company. Use Microsoft Dynamics CRM to enhance sales and to get a closer relation-ship with your customers. For example, when the sales agent contacts the customer, he or she uses Microsoft Dynamics CRM to see all the company's previous activities with that customer, for example, sales, services, meetings, offers, etc. This is useful information when contacting customers, and good reasons for the enquiries could be asking about experiences with, for example, customer services. The customer feels good when taken care of – and you get important information regarding the customer's opinion of your company.

Do not focus only on tasks in the sales department. Focus on all departments that have contact with customers or leads.

Therefore, do not focus only on tasks in the sales department but focus on all departments that have contact with customers or leads. By registering all kind of contacts and relations with your customers, you get a true picture of who they are and where they are going.

Start by listing all departments and how they communicate with customers. List the customer information that is useful for the applicable departments, and which type of customer feedback they should enter in Microsoft Dynamics CRM.

It is also important to define which information the management group need from Microsoft Dynamics CRM. How is the management group's overview of sales and customer service activities today? Unless you are managing the sales department, you probably only have the sales figures from your ERP system when reviewing the sales figures month by month. Even if you are not a sales manager, it is always nice to have an overview of the sales activities and future sales opportunities in order to get an idea of the future turn over?

Therefore, review the information needed at management level and from where this information should be retrieved.

Getting started with Microsoft Dynamics CRM

What is the easiest way to get started with Microsoft Dynamics CRM? This chapter will answer a lot of questions for you. We will also visit a company that has successfully introduced Microsoft Dynamics CRM.

Introducing CRM in a company creates many expectations. CRM is often expected to be an IT-based sales management tool, while others see rationalization by introducing CRM and a possibility for analyzing sales opportunities. In other words, there are many expectations – both to the system and its benefits.

To match the expectations, it is important to make a list of tasks Microsoft Dynamics CRM should support. Which procedures should the system support and who should use the system?

Which working processes to support?

When you have an overview of the different kind of users and the kind of information they will enter or need to know about customers, it is time to consider the working processes which the system should support, and how it should be done.

This requires insight into how sales consultants, customer services employees, marketing people, and other employees work when they are in contact with customers. For example, what process does a lead undergo in the sales department to become a customer? How do customer services handle enquiries – and which type of enquiries do they receive?

In other words, this requires knowledge of the company, its employees, and their working methods, and working processes. During this process you will often find differences in the way employees perform their work, and most often you will find differences between individual departments within the company. Introducing Microsoft Dynamics CRM is an opportunity to customize and standardize the working processes in order to obtain the same service level from all employees and departments.

During this phase it is recommended to contact a Microsoft Dynamics CRM certified partner and ask the partner to analyze your company. The cost of this analysis will mostly be paid back from improved integration between the company's working processes and the system. The Microsoft Dynamics CRM partner knows the system well and can make an individual customization according to your type of business and your way of working with customers and leads in different departments. In addition, the Microsoft Dynamics CRM partner has experience from introducing the system in other companies and can get you safely through implementation.

From spreadsheet to goal-oriented customer management in three days

Julie Sandlau is the story of creative people who started to make jewellery at home in the kitchen. One left, but former model, Julie Sandlau, continued and today she owns a jewellery store with eight employees, that sells jewellery to exclusive customers throughout the Western world.

In the beginning, they kept track of the many item numbers and customers by using an Excel spreadsheet, but that solution could not work in the long run. The company's manager, strategist, and IT expert, Carsten Blom-Hanssen, quickly replaced the Excel spreadsheets with a customer management program in order to provide the best service to the growing customer base:

"We have to contact our customers two to four times a year. My worst scenario is to lose just one of them because we did not contact them in due time. If we don't contact customers, they will turn to our competitors instead and we would have to use a lot of resources to win them back," he says.

The requirements of the new system were first of all, ease of use in the daily management of customers, and, after that, the possibilities of growth as the company grows.

"We looked at several solutions but chose Microsoft Dynamics CRM. Mainly because we know Microsoft's interface and because it is integrated with Outlook," says Carsten Blom-Hanssen, who arranged a introductory workshop for employees:

"Our Microsoft Dynamics CRM partner was in the company for three days to ensure that we and the program got up and running. It was the right thing for us to do," he says and emphasizes that the company will need follow-ups in order to keep track of things in the hectic working day.

There is no doubt that Microsoft Dynamics CRM already has made its mark in the company, "The fact that e-mails are integrated in Microsoft Dynamics CRM is a useful feature. We use the system for newsletters, invitations to exhibitions, etc. We look forward to being able to benefit from individual customer management. When we make new budgets it is a great benefit to be able to see which customers might place further orders with us", explains Carsten Blom-Hanssen.

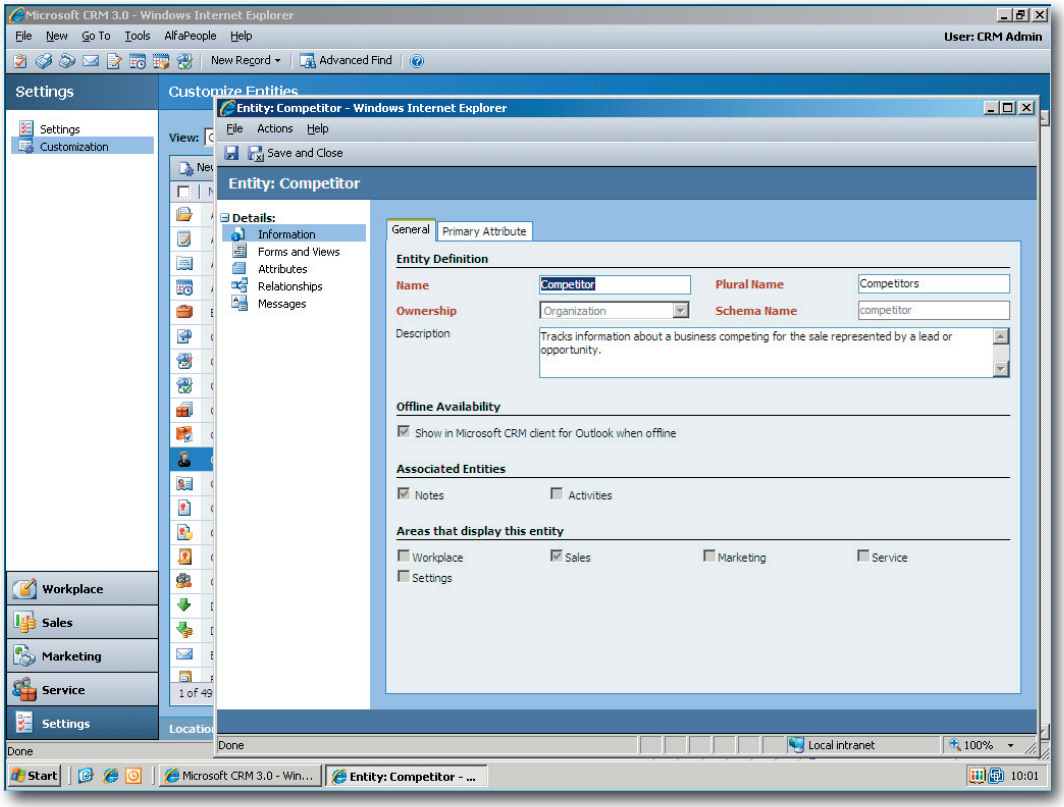
Install and customize Microsoft Dynamics CRM

The system administrator must consider how to roll out the system in the company before he begins installation. The system requires that all users have access to a server part on a central server in the company. A client must be installed on each user's own computer.

Installation starts by installing of a Microsoft Dynamics CRM Server Prerequisites (pre-installation test) which prepares the server for installation of the CRM system. The pre-installation test analyzes both the server and the network for potential problems.

Next step is to install the Microsoft Dynamics CRM Server on the central company server that will handle the system. This installation is relatively simple and a setup guide helps the system administrator through the entire installation process. Finally, install the Microsoft Dynamics client on each user's computer.

When the software is installed, the system administrator can import customer data from the ERP system. This will provide useful information



from the very beginning. The system administrator can choose to install the example database. Using this is a good way to learn how to use Microsoft Dynamics.

Customize Microsoft Dynamics CRM

The next step is to customize the system according to the company's working processes. This is done by the system administrator from the Settings section in Microsoft Dynamics CRM 3.0. Here the system administrator can customize the advanced settings of the system. You can customize the workflow, create new forms, and customize the standard forms. You can create new functionality, install your own reports, customizations, and extra modules from your Microsoft Dynamics CRM implementation partner.

Most customizations and changes can be installed and ready for use without shutting down the system. It is not necessary to install any customizations on the client computers. Everything is managed from the server and accessible for users just after the installation on the server is completed.

Hardware Requirements

Microsoft Dynamics CRM

Microsoft Dynamics CRM 3.0 requires a Windows 2000 Server, Windows Server 2003 or Windows Small Business Server 2003. The system also requires that the latest Service Packs are installed and, as a minimum, a Microsoft SQL Server 2000, Service Pack 4, and a Microsoft Exchange Server on the server.

Regarding hardware, Microsoft Dynamics CRM runs on all computers with newer hardware. The minimum server requirement is an Intel Pentium III Xeon processor with 700 MHz and 512 MB of memory, while the recommended hardware requirements are Dual 1.8 GHz Intel Pentium 4 or equivalent standalone processor of the same speed with 1 GB of memory. As with all other programs, faster processors and more memory, provide increased performance.

Avoid trouble – get a hosted Microsoft Dynamics CRM solution

If your company does not have the required IT systems, you can get a hosted solution.

Your Microsoft Dynamics CRM partner hosts your CRM solution on a server which you access through a secure Internet connection.

All employees in the company log on to Microsoft Dynamics CRM 3.0 just as if the server was in the company. Because the solution is Internet-based, the employees can get access to the system wherever they have access to an Internet connection, for example, when visiting customers or when they are working from home.

When using an up-to-date broadband connection there are no significant delays compared to having the server on-site. Also, the company avoids managing the server, back-up and other IT issues. Your Microsoft Dynamics CRM partner takes care of all that for you.

The company pays a fixed amount per user per month and there is no initial investment. It is possible to try the program free of charge without obligation for one month.

A hosted solution is suitable for companies with 1–10 users.

You can read more about Microsoft Dynamics CRM hosted solutions on www.microsoft.dk/hostedcrm.

Ready to feel the advantages

The system is now up and running and ready for use. When all users are well prepared they can start using Microsoft Dynamics CRM for viewing and entering information about customers. They can also start working with the tasks connected to each customer or lead. When the users have had their first experiences with the system, you can continue customizing the system to get the best out of Microsoft Dynamics CRM.

When you really use the system and as many features as possible, you will know where to change settings or customize functionality. As users get more experienced, they come up with new ideas and needs for customizations.

Start using Microsoft Dynamics CRM

Short courses or workshops about job relevant tasks in Microsoft Dynamics CRM are almost a requirement before and while you use the system. Eventually you can divide the users into groups and match courses or workshops to their needs. Every user has a chance to obtain the required knowledge needed to get started.

When employees have had their first experiences with the system, you can continue with more training sessions where the user can get answers to questions he or she might have about the system. These training sessions are also useful for gathering and exchanging user experiences.

Repeat and develop these sessions on a regular basis during the first months of using the system. In this way, employees will have an opportunity of really getting to know the system and how to use it. This practice ensures that experiences, tips, and tricks are shared among users.

Business optimization

The training sessions can also be forums where the system administrator gets user feedback. As a group you can decide which customizations are needed in Microsoft Dynamics CRM. Development and customization of the system will become a process of which all employees will feel part of. This makes Microsoft Dynamics CRM a joint project for everyone in the company and not just something that has been decided by management.

When the system has been in operation for a period of time, the company will begin to feel the advantages of the system. When users feel more confident with the system, you can begin to optimize and automate working processes.

If you follow this procedure the company will quickly begin to feel the advantages of the system. When users feel more confident with the system, you can begin to optimize and automate working processes.

Some changes and standardizations of the working processes will probably follow the implementation of Microsoft Dynamics CRM. Further customization of the system may occur, just as the steps in a sales process may need to be adjusted. You will probably discover a number of procedures in the system that are standardized in a way so that they can be automated. This will provide more time for customer contact instead of spending time on administrative tasks in Microsoft Dynamics CRM.

Consider if any other IT systems in the company can integrate with Microsoft Dynamics CRM. An obvious one is the ERP system. However, instead of spending money on total customization, you can benefit by transferring key figures between the systems. For example, transferring each customer's purchase from the ERP system to Microsoft Dynamics CRM, or transferring invoice lines from Microsoft Dynamics CRM to the ERP system, etc. If suitable, you can develop the integration later on.

The final goal

The final goal of introducing if suitable is to give employees more time for customer contact by making it easier for them to keep track of their customers, automate time-consuming working processes and gather all information in one system (previously stored on yellow post-it notes or in the notebook of individual sales consultants).

Microsoft Dynamics CRM helps employees to focus their efforts on the right customers. At the same time you will achieve improved customer loyalty due to your more professional access to customers.

The integration with Microsoft Office Outlook means that users barely need to leave their normal user interface – the main part of all daily tasks can be managed from Outlook. E-mails, agreements, tasks, etc., created in Outlook can be connected to customer data in Microsoft Dynamics CRM simply by clicking the **Track in CRM**-button. The connection is now created and users get immediate access to all customer information. Users can view what others have entered on the customer record or what other actions have been taken.

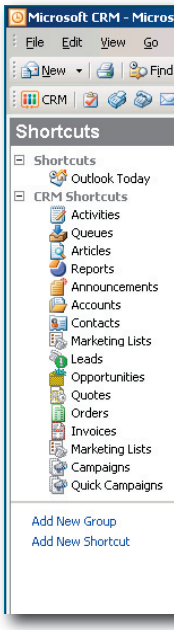
Employees can focus their efforts on the right customers and, hopefully, make more money from increased sales. A more efficient and focused sales process will be obtained. The company might also achieve greater customer loyalty due to your more professional access to the customers. It makes the company's business more streamlined, and by using the streamlining advantages of the system, the company can grow without needing to hire more employees for administrating customer contact.

The working day starts in Outlook

As a Sales Representative, your working day starts in Microsoft Office Outlook. Instead of displaying the good old Inbox, Outlook now displays the Microsoft Dynamics CRM Activities folder.

This is the main CRM overview in the Outlook client for Microsoft Dynamics CRM 3.0. The overview shows you what is in progress – what to do today, what was left over from yesterday, and what needs to be done in the near future.

Another important part of Microsoft Dynamics CRM is the queues. The queues contain your tasks and activities in progress and the ones that are planned, pending, upcoming etc.



Queues

To display your queues, select the **Queues** folder in the **Shortcuts**-section or in the navigation pane in the **Mail** section in Outlook. Microsoft Dynamics CRM displays the queues you can access or have chosen to see (you do not have to see all queues). The queues help you handle activities and tasks taht can switch owners and/or can be processed over a longer period of time.

By default, you will find two queues in the **Queues** folder, **Assigned** and **In progress**. However, your organization has most likely created more queues. For example, a queue for repair tasks, customer enquiries from the website, payment questions, general enquiries, and critical tasks. All Microsoft Dynamics CRM users have access to applicable queues and can accept tasks or have them assigned automatically from the system or from the queue manager.

An e-mail address can be assigned to a specific queue. People who do not use the system can add subjects to the queue just by sending an e-mail. When the queue receives an e-mail a new activity is automatically created in the applicable queue. The activity awaits to be processed and assigned by the Microsoft Dynamics CRM user responsible for the queue.

Microsoft Dynamics CRM also operates with Public queues. Public queues are temporary queues for activities or tasks that have not been assigned to an employee. Public queues are mostly used in Customer services, but are also useful in Sales and Marketing, for example, with regards to leads obtained from campaigns. All incoming leads are placed in the public queue and can be contacted by the next available sales representative.

You can learn more about queues later on in the book.

Tip!

If you assign an activity or a case to a queue, the ownership is not changed until it is accepted by another user. In contrast, if you assign a task or an activity directly to a Microsoft Dynamics CRM user, the ownership is transferred to the user immediately.

The Sales Representative's working day

A typical day in the life of a Sales Representative with Microsoft Dynamics CRM is a bit more structured than before the implementation of Microsoft Dynamics CRM. Microsoft Dynamics CRM helps focus on relevant customers, and ensures that promises to customers are not forgotten. At the same time, it is easier to keep track of all kind of contact customers have with your company.

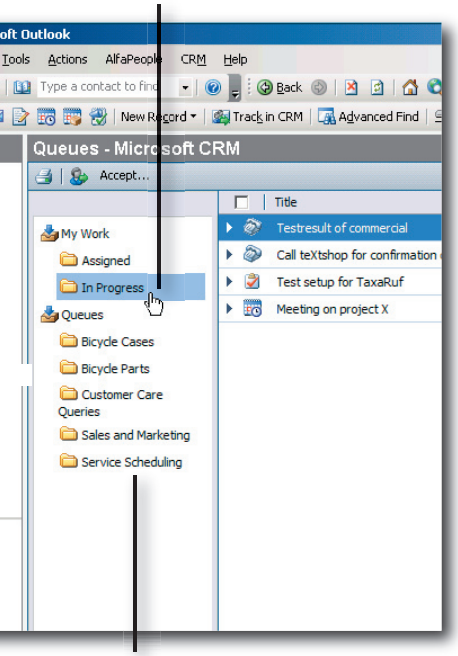
"Previously I was not able to a look up the ERP system, find my own customer notes, or check the spreadsheet to see the latest customer contact until the conversation with the customer was over. The mess took my concentration away from the conversation and made it difficult for the customer to get my attention," remembers Peter, who is a sales representative in a large international company.

"Often I forgot what I had promised a customer during a conversation, e-mail, or meeting. Or I forgot to research an obvious sales opportunity because I did not have CRM to enter and keep track of these ideas and opportunities. Now, when I think about a new product that is obvious for one of my customers, I just enter the product in Microsft Dynamics CRM for later use. This is just to be sure not to forget anything and to be able to look up my comments very quickly. This is a great possibility of earning money easier," he continues while pointing at the screen.

"So now I have everything on the screen when I speak with the customer. I can see what I previously discussed with the customer, which opportunities I or my colleagues spoke with the customer about, and how much sales we might expect from the customer within the next few months."

In the **Assigned** queue you will find tasks assigned to you.

In the **In progress** queue you find the activities you are currently working on.



You can create queues for different categories of tasks, for example, repairs, inquiries from the website and other types of tasks to be taken care of.

When employees have time in their calendar, they can accept a task from their queues.

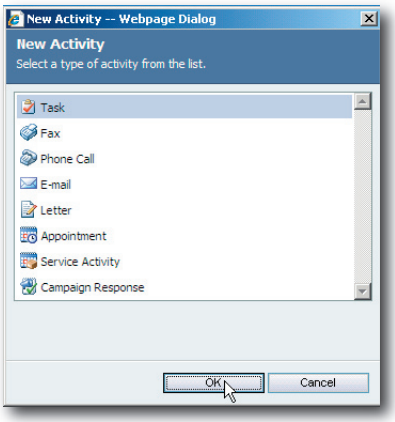
Working with activities

Activities are central when working with sales in Microsoft CRM. Whether you need to contact a customer, send a quote, or run a campaign, it is all about activities in Microsoft Dynamics CRM.

Open the **Activity** window to view all information about a certain activity. For example, responsible, purpose, tasks, contacts, schedule and priority. Click the link-icon in the **Regarding** field to open the customer or contact attached to the activity.

Create a new activity

On the toolbar in the top of the **Activities** folder, click the **New activity** button to create a new activity. Select **Task**, **Fax**, **Phone Call**, **E-mail**, **Letter** or **Appointment**. In this example we select a **Task** and click the **OK**-button to open the **Activity** window.

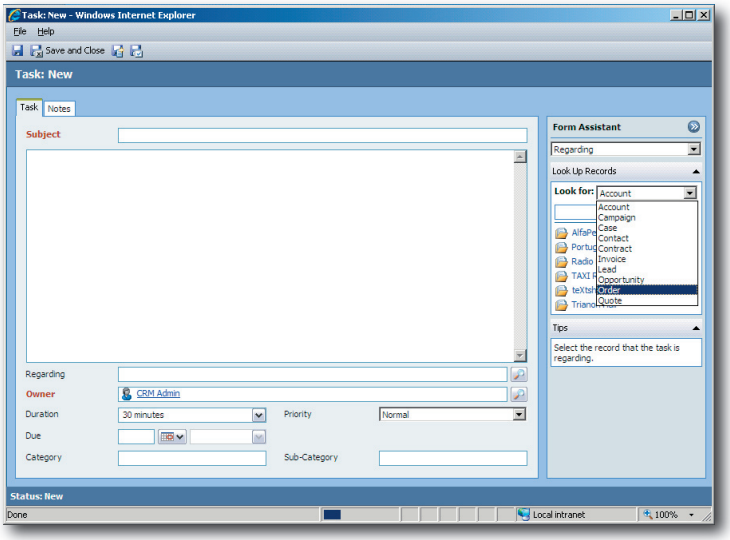


The layout of the **Activity** window depends on the type of activity.

Enter a heading for the activity in the **Subject** field and, if necessary, enter a detailed description in the field below. Additional information can be entered on the **Notes** tab.

Use the **Regarding** field to link the activity to, for example, an opportunity, an account, a contact, a product, or another category in Microsoft Dynamics CRM. You will find help for filling out the **Regarding** field in the Form Assistant pane to the right in the activity window. If you cannot see the assignment pane, you can open it by clicking the double arrow at the top of the grey, vertical bar to the right in the **Activity** window.

Use the **Look for** field to select a subject for the activity. Enter a search string in the field below and click the **Find** button. A list of search results opens. Fill out the **Regarding** field by clicking the appropriate search result.



Assign the activity to an owner in the **Owner** field. By default, it is assigned to yourself but you can assign it to another Microsoft Dynamics CRM user or a queue using the Form Assistant pane. Of course you can also click the **Look up** button to the right of the field and select a user from the list in the **Look up** window. The easiest way is to use the Form Assistant pane to manage all references from the **Activity** window.

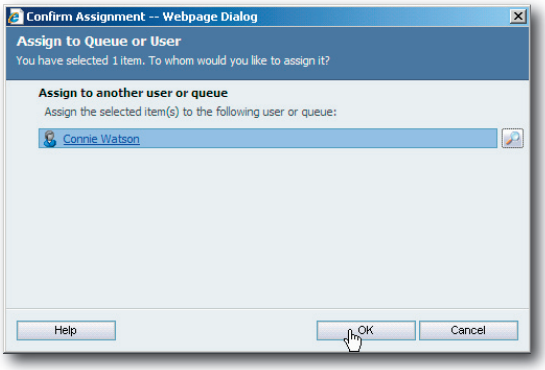
Enter a deadline for the activity in order to having it auto-

matically displayed in your **Activities** list or in the **Activities** list of the person to whom it was assigned.

When you have filled out the mandatory fields (marked with red), click the **Save** button to save the activity, or close and save the activity by clicking the **Save and Close** button. To save a new activity just to register a new action – for example, an unexpected call from the customer – on a specific account, contact, opportunity, or sales opportunity, click the **Save as finished** button. The activity is then saved and marked as finished immediately.

Assign an activity

A new activity will be assigned to yourself, another Microsoft Dynamics CRM user, or a queue, depending on what you selected in the **Owner** field. You can assign your activities to another user or queue in the CRM system by selecting **Assign** in the **Actions** menu from the open activity.



To assign an activity in your activity list, select the Actions menu | Assign. Here you can assign the activity to any user or queue in the system.

Accept an assigned activity

Activities assigned to you appear in the **Assigned** queue in the **Queues** folder. Open the folder and open any new assigned activity by clicking it. Accept the activity by selecting the **Actions** menu | **Accept** and click the **OK** button to accept the activity. Now the activity appears in your list of activities and you can start working with it.

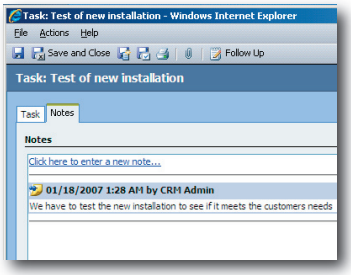
Add information to, or edit an activity

While you work with the activities you can add new information or change the existing information. You may, for example, want to change information in a field, change the activity status, add a note on the **Notes** tab, or change a date for when you need to do something about the activity.

This is done by opening the activity, making the changes and clicking the **Save and close** button to save your changes.

For example, if you want to add a note to an activity, open the activity by clicking it in the list on the **Activities** tab and selecting the **Actions** menu | **Add** note. You can also add the note from the **Notes** tab of the activity. Type the note, save it and click the **Save and Close** button to close the activity.

Attach documents to an activity by selecting the **Actions** menu | **Attach a file**.



Type the note, save it and click the Save and close button to close the activity card.

Working with e-mails, agreements, and contacts

E-mails, agreements, and contacts are Microsoft Dynamics CRM subjects you already know from Microsoft Outlook. You can still create them in the familiar Outlook user interface and connect to Microsoft Dynamics CRM using the Track in CRM button.

For example, if you want to create a new e-mail, just click the **New** button in the **Standard**-toolbar in the **Inbox** folder. Before you send the e-mail, click the **Track in CRM**-button and select the account, contact, opportunity, or other information type to which the e-mail should be linked by clicking the **Regarding** button.

The e-mail or appointment is linked to the selected activity in Microsoft Dynamics CRM and appears in your activity list and on the record of the associated account, contact, opportunity, or any type of information the activity is linked to.

In the same way, you can find contact information of recipients from the CRM system by clicking the **To** button in the **Message** window. The **Address** window opens and you can select **Accounts in CRM** or **Contacts in CRM** in the **Show names from** field.

You are also able to link received e-mails and meeting invitations to accounts, contacts, opportunities, or other types of activities by clicking **Track in CRM** and **Regarding** buttons.

Accounts and contacts

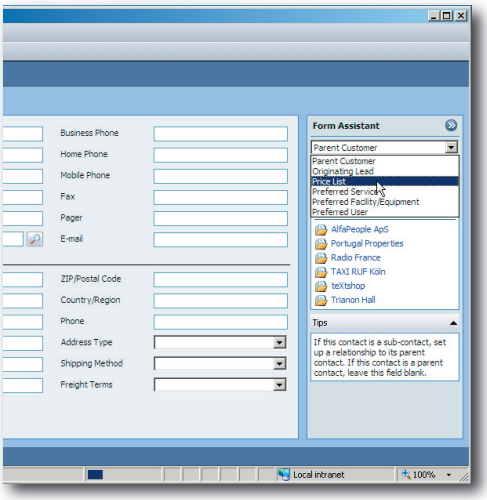
From the **CRM** toolbar, you can create new accounts and contacts directly from Outlook. Click the **New** button and select **Account** or **Contact**. An account or contact dialogue box opens in a new window.

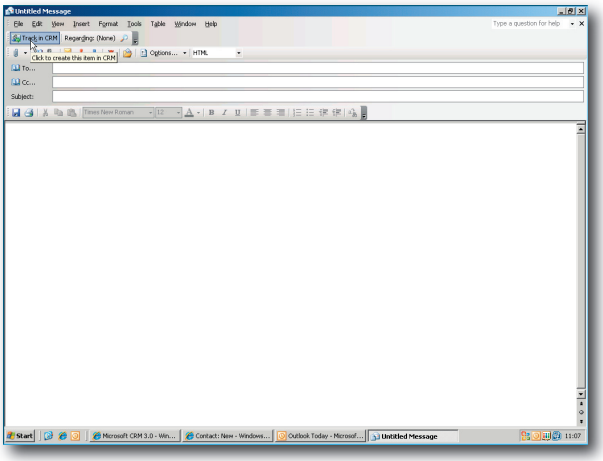
By using the Form assistant pane to the right in the window, you get help filling out the fields by looking up existing information from the system, for example, to link a contact to an existing account, or to link an account to a certain sales district. After filling out the appropriate fields, click the **Save** button to save the new account or contact in Microsoft Dynamics CRM.

You may now start to link activities, tasks, relationships, opportunities, etc., to the new account or contact using the shortcuts in the navigation pane to the left in the window.

Click the **Save and Close** button to save and close the contact window.

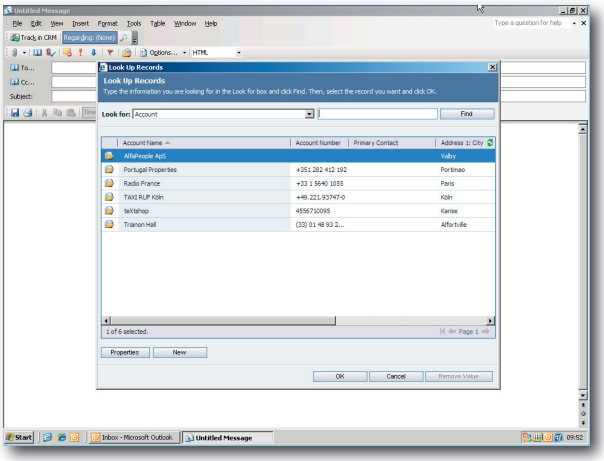
In the Form Assistant pane to the right in the window is a list of types of contacts.





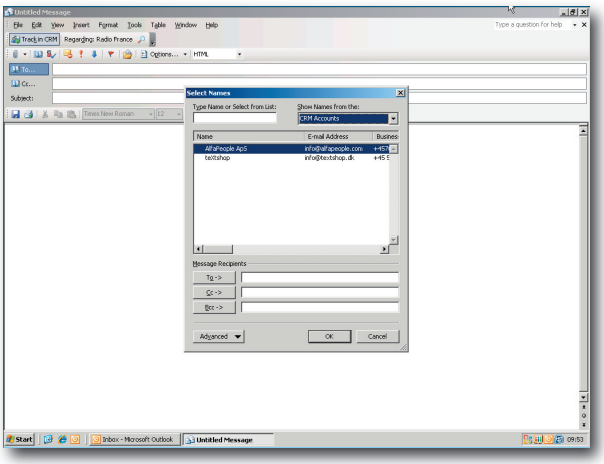
1 Click the **New message** button in the **Standard** toolbar in the **Inbox** folder to open the **New message** window.

Click the **Track in CRM** button to link the new (or any) message to a record in Microsoft Dynamics CRM.



2 Then click the **Regarding** button to open the **Look Up Records** dialogue box. In the **Look for** field, select an information category from the CRM system, for exmple invoice, account, campaign activity, contact, contract, lead, quick campaign, orders, tasks, opportunities, and quotes.

Now the list of available items in the selected information category is displayed. From this list, select the item that the e-mail is regarding and click the **OK** button to return to the **Untitled Message** window.



3 Specify a reciver in the **To** field. If the mail is for a colleague then enter his or her e-mail address.

On the other hand, if you want to send the e-mail to a contact person from the company you selected in the **Look Up Records** window, click the **To** button. The **Select Names** dialogue box opens. Select **CRM Accounts** or **CRM Contacts** in the **Show Names from the** field at the top of the **Select names** dialogue box.

Highlight the contact(s) in the list and click the To or CC button at the bottom of the d dialogue box to add the contact(s) as recipients of the e-mail.

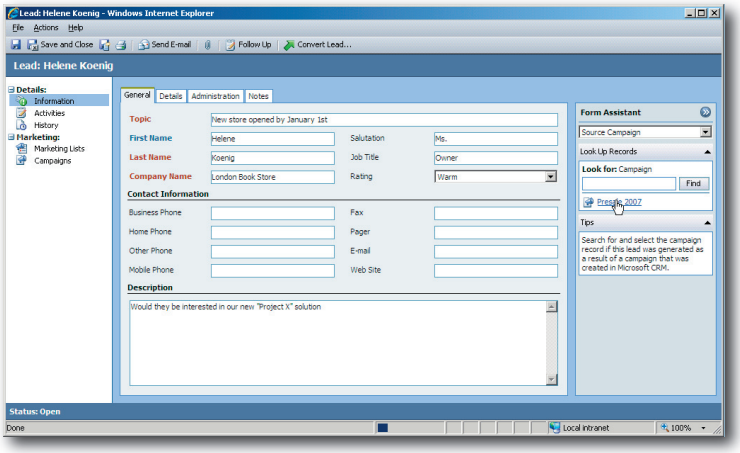
It starts with a lead

In most cases, your sales process starts with a lead. The lead might come from an exhibition, a personal contact, or any other kind of contact.

If you received the lead from a Microsoft Dynamics CRM campaign, you will find all information in the system. On the other hand, if you got the information from a business card or a hint from another customer you must enter information about the lead in Micrososft Dynamics CRM yourself.

Enter a lead in Microsoft Dynamics CRM

Enter a new lead in Microsoft Dynamics CRM by clicking the **Lead** folder under **Sales** in the navigation pane to the left in the Outlook window. Click the **Create a new lead** button in the toolbar at the top in the Lead folder.



Using the Form Assistant window, you can fill out the Source campaign field, even though it is on Administration tab.

Enter an informative description in the **Subject** field and specify last and first name and the name of the company. Enter phone number, e-mail address, website etc., in the fields in the **Contact Information** group. If necessary, add more details in the **Description** group at the bottom of the **General** tab. Detailed information about address, sales, and number of employees can be specified on the **Details** tab. This information can be filled in automatically if your company subscribes to an external address service for Microsoft Dynamics CRM.

When all contact information is entered, click the **Save and Close** button to save the lead.

Work with, and upgrade the lead

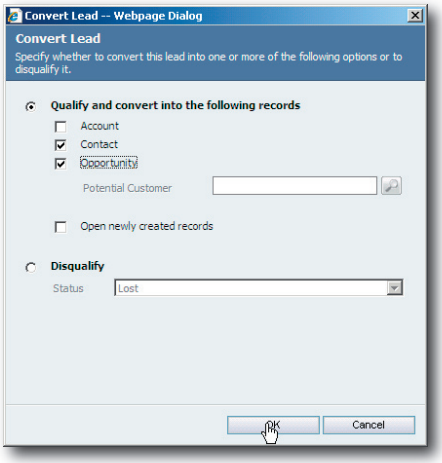
Now you can begin to work with the lead. When you get an opportunity of selling to a lead, you can convert the lead to an opportunity in Microsoft Dynamics CRM. You can also create a new account with the basic information about the company and new contact records for every person that your company is in contact with.

To upgrade the lead select the **Actions** menu | **Convert lead** or click the **Convert lead** button on the toolbar at the top of the lead card. The **Convert lead** dialogue box opens and you can select the new qualification of the lead.

Highlight the **Qualify this lead** field and select **Account**, **Contact**, **Opportunity**, or check all three fields at once. If you checked

Opportunity only, you manually have to specify which company or contact the opportunity belongs to.

All information about activities, products, relationships and notes you have entered for the lead is transferred automatically to the new account, contact, and opportunity.



Highlight the Qualify and convert into the following field and select to convert the lead to either Account, Contact, Opportunity, or check all three fields at once.

Disqualified leads

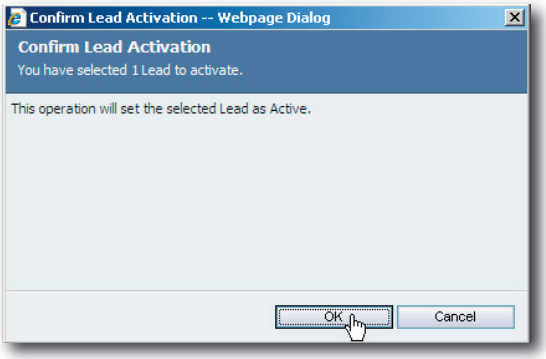
To disqualify a lead select the **Disqualify** field at the bottom of the **Convert Lead** dialogue box. Specify a reason of the disqualification in **Status** field. You can select **Lost**, **Cannot be contacted**, **No longer interested**, or **Canceled**.

When you have disqualified a lead, it is write-protected and cannot be deleted. In this way you can always see the type of contact your company has had with the applicable lead and why the lead was disqualified. Then you and your colleagues do not have to waste more time on this lead.

Reactivate a disqualified lead

You can reactivate a disqualified lead any time if the lead shows an interest in your products and/or services.

Open the lead from the **Leads** list and select the **Actions** menu | **Reactivate**. The lead is re-opened with status as new lead.



Open the lead from the Leads list and select the Actions menu | Reactivate. The lead is re-opened with the status as a new lead.

Delete a lead

To delete a lead, select the **Actions** menu | **Delete**. However, deleting a lead is not recommended because you or your colleagues risk wasting time on that lead later on.

Opportunities

When the lead is converted to an opportunity you can continue working with the opportunity. You can also link new opportunities to an existing company or a contact in Microsoft Dynamics CRM.

Select the **Actions** menu | **Add related** | **Opportunity** from the contact card of the applicable company or contact to enter a new opportunity to an existing company or contact. Or click **Create new opportunity** in the **Sales** group in the navigation pane. All opportunities are displayed in a list to the right of the window. Click the **Create new opportunity** button and enter a short description in the **Topic** field.

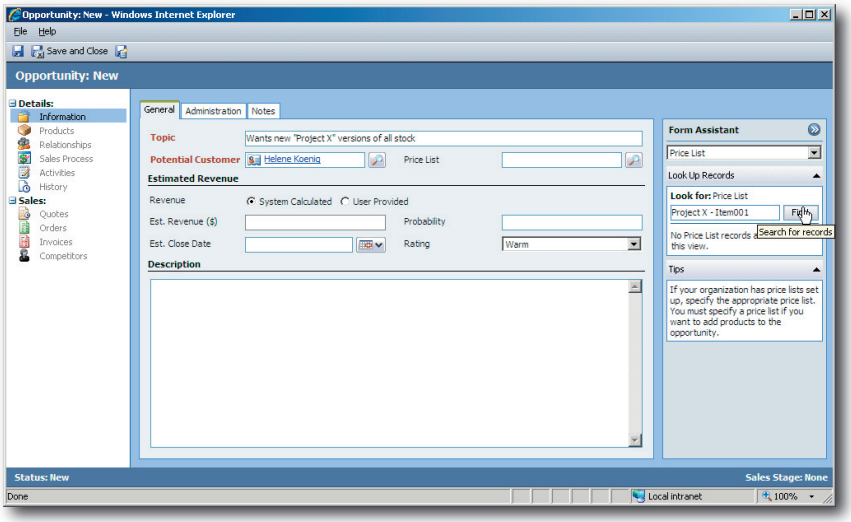
The **Potential customer** field is automatically filled in with the name of the company or the contact used to create the opportunity. If you entered an opportunity from scratch, you can search for the company or contact in the Form assistant pane to the right to insert the name.

Specify a description of the opportunity in the **Topic** field and select a price list (for example, **Wholesaler**, **Dealer,** or **Customer**) for the opportunity in the **Price List** field. Click the **Save** button to save the opportunity in CRM.

Add products to an opportunity

When the opportunity is saved in Microsoft Dynamics CRM, you can add products from the selected price list to the opportunity, just as if you printed an invoice from your ERP system. Select **Products** in the navigation pane to the left and click the **Add a new opportunity product for this record** button. Specify a quantity and discount rate and click the **Save and Close** button.

Always remember to classify the opportunity as Hot, Warm, or Cold in the Rating field. This makes it easy to find the best opportunities when you need a quick sale to reach your sales goal. Also remember to maintain the classification of your opportunities on a continuing basis.



When all items are added to the opportunity, click **Information** in the **Details** group in the navigation pane to the left and click the **Recalculate** button on the toolbar at the top of the **Opportunity** dialogue box.

If you select the **System Calculated** field in the **Estimated Revenue** group on the **General** tab, the expected turnover is displayed in the **Est. Revenue** field. If you have checked the **User Provided** field, you must enter the revenue manually.

Specify probability and rate the opportunity

In the **Probability** field, enter the probability as a percentage to get the order and specify an estimated closing date of the sale in the **Est. Close Date** field.

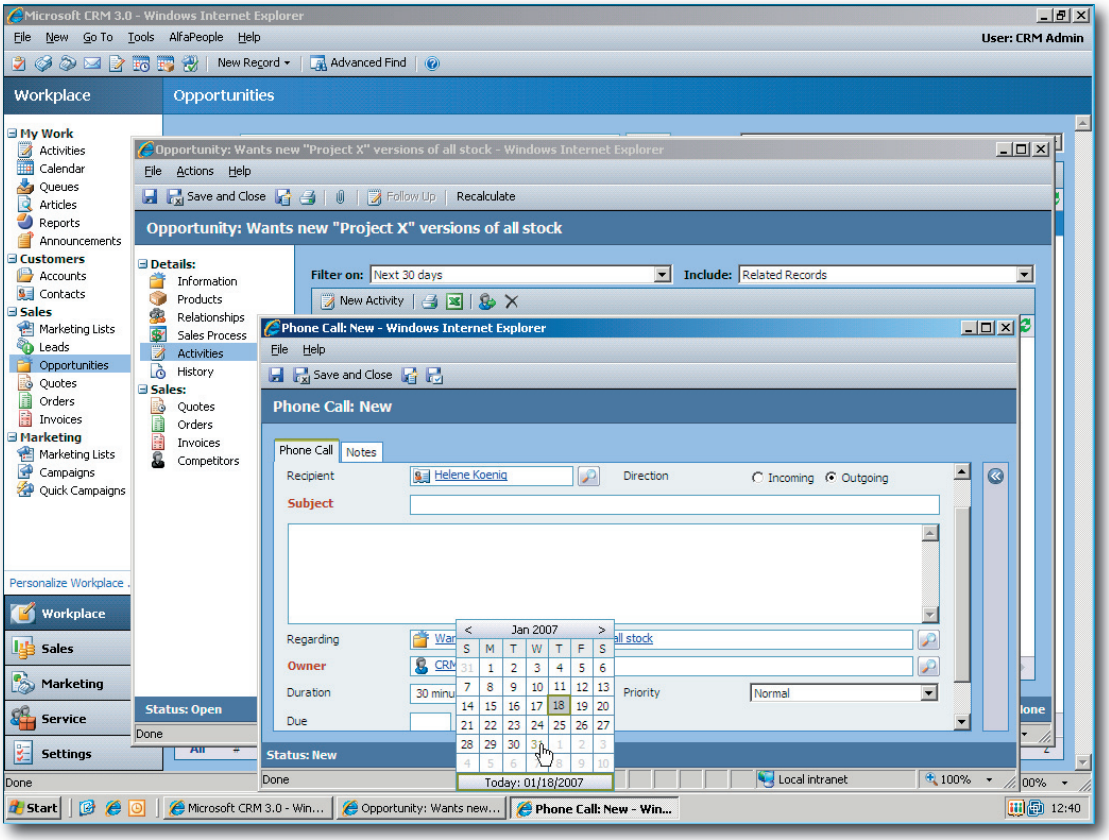
Finally, you can rate the opportunity as **Hot**, **Warm**, or **Cold** in the **Rating** field. Also remember to continually maintain the rating of your opportunities so you always have an up-to-date picture of which leads you need to work with.

You can link quotes, orders, invoices, and competitors to each opportunity, you can attach files with relevant brochures etc., and you can link follow-up activities to the opportunity to help you remember working with the opportunity.

Add a Phone call activity to the opportunity to help you remember follow-up.

Open the Activities folder in the Details group in the Navigation pane and click the Create new activity button, select Telephone call in the New activity dialog.

Enter a subject for the follow-up and the date on which you will make a follow-up call.

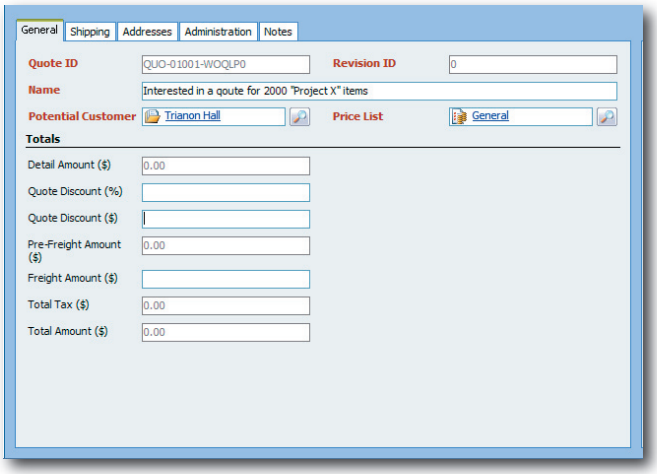


Send the customer a quote

When you work with an opportunity you will probably give the customer a quote. This quote can be changed to an order and finally to an invoice if the opportunity turns to customer.

The Quote ID and an Revision ID are automatically updated. The IDs are for Microsoft Dynamics CRM internal use only in order to track the quote. Quote ID can also be used as a reference for the customer.

You create a quote based on an opportunity. Select **Quote** in the navigation pane to the left of the opportunity and click the **Add a new quote to this record** button. Now, the opportunity appears both as an opportunity in the **Opportunity** folder and as a quote in **Quotes folder** in the system.



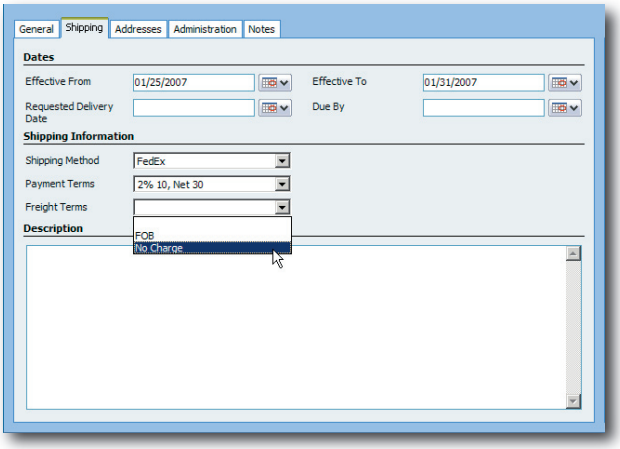
A **Quote** window opens with customer information and a list of items you can link to the opportunity. The **Quote ID** and the **Revision ID** are automatically updated. The IDs are for Microsoft Dynamics CRM internal use only in order to track the quote. The **Quote ID** can eventually be used as a reference for the customer.

On the **Shipping** tab you can enter four important dates: **Effective to** and **Effective from** which indicate the valid period of the quote, **Requested Delivery Date** which is the date the customer wants to receive the items, and the **Due by** which is the date the quote needs to be presented to the potential customer.

On the Shipping tab you can enter four important dates: Effective To and Effective From which indicate the valid period of the quote, Requested Delivery Date which is the date where the customer wishes to receive the items, and the Due by which is the date the quote needs to be presented to the potential customer.

On the **Shipping** tab you specify the type of shipping, freight terms, and payment terms from the list of options. The fields are probably already filled out with default data from the applicable account.

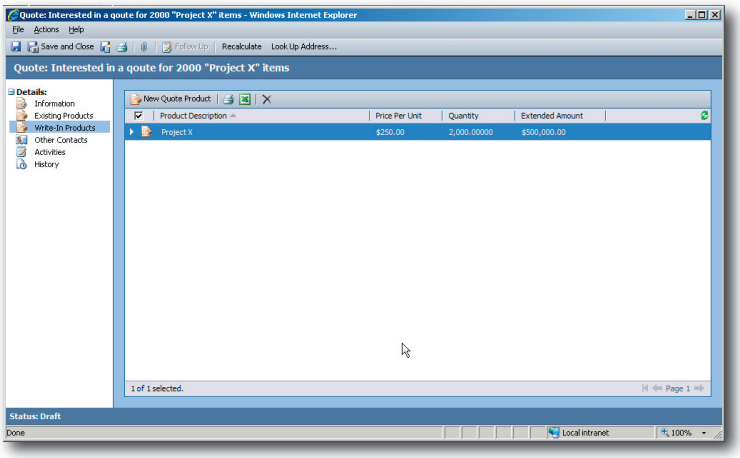
Select **Existing products** in the navigation pane to the left in the Quote window to see the products that are already linked to the quote (those that were originally created on the opportunity). To add further products or services to the quote, click the **Add a new Quote product to this record** button.



If products or services not in the Microsoft Dynamics CRM product register have to be added, you can enter the items directly in the quote by selecting **Write-in products** in the navigation pane to the left in the **Quote** window. Click the **Add a new Quote product to this record** button to add new products. Enter a product description and the unit price to ensure the product appears in the same way as the existing products in the Microsoft Dynamics CRM product register.

When you have added all further products and information regarding them, click the **Save and Close** button to update the quote.

Now you can return to the **Opportunity** window and continue your work with the opportunity.



Products which are created in Microsoft Dynamics CRM can be added from **Existing products**. Products that are not in Microsoft Dynamics CRM can be created from **Products that need to be ordered**.

A quote's lifecycle

By default, all quotes are created as drafts. When you forward the quote to a potential customer, the quote will change status to **Active** in Microsoft Dynamics CRM.

An active quote can either be closed – for example, because you did not win the order, or because the customer requested a new quote – or be marked as **Won**. A closed quote is write-protected and saved in the quote history in Microsoft Dynamics CRM. At the same time, you can close the opportunity to which the quote has been linked. Closed quotes cannot be reopened but can be used as templates for new, revised quotes.

A won quote is handled as a closed quote, except that it cannot be revised. But, you can convert won quotes to orders by changing the **Status**-field for a won quote to **Won**.

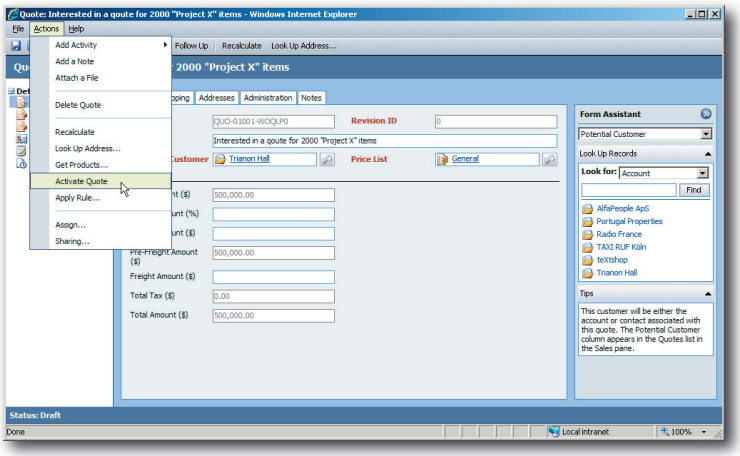
All quotes, closed or active, can be used as templates for a revised quote. The revised quote contains all information from the original quote and receives the same quote number (**Quote ID**) but a different revision number (**Revision ID**). The revision number increases for each new, revised quote created.

Each new, revised quote is handled as an independent quote. The original quote is write-protected if you close it – otherwise it remains active. We recommend that you close all irrelevant quotes so that they do not interfere in the overview of your active quotes.

When a quote has been activated you cannot make changes to it.

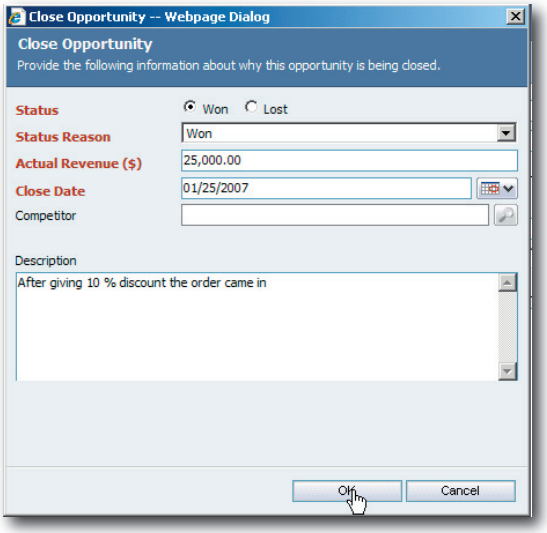
Activating a quote

Before you send a quote to a customer the quote must be activated. To activate the quote, open the quote or the opportunity in **Quotes** and select the **Actions** menu | **Activate Quote**. The quote status changes from **Draft** to **Active** and the quote is write-protected so it cannot be changed after it is sent to the customer. You can also activate a quote from the **Quote** folder in Microsoft Dynamics CRM.



Close an opportunity

When the customer has decided to accept or not accept the quote, you can close the associated opportunity.



To close an opportunity select the **Actions** menu | **Close Opportunity**. The **Close Opportunity** dialogue box opens. Select **Won** or **Lost** and, if relevant, enter the reason.

If you won the opportunity, you can specify the sale. By default, the calculated sale from Microsoft Dynamics CRM is shown. Edit the field if the actual revenue does not match the calculated revenue.

Finally, specify a closing date (by default, the system date) and add any additional description of the closing. If you lost the opportunity you can specify the competitor to whom you lost the sale. Click the the **OK** button to close the opportunity.

When you close an opportunity, the **Status**, **Status Reason**, **Actual Revenue**, and **Close Date** fields for the opportunity are updated and the opportunity is moved to the overview of the applicable opportunity and the applicable account (customer).

Re-open an opportunity

You can re-open an opportunity by opening the closed opportunity and select the **Actions** menu | **Reopen**. To get an overview of your closed opportunities, select **Closed Opportunities** in the **View** field in the **Opportunities** folder.

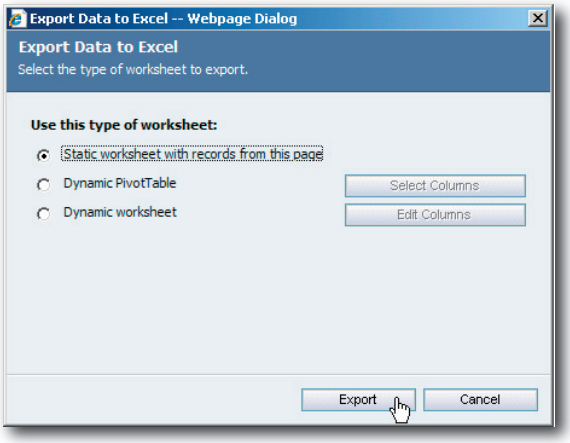
Delete an opportunity

Deleting an opportunity – even if it was lost – is not recommended. Lost opportunities should be kept for later analyses of your sales effort, the applicable customers' readiness to buy, and their interest. And also to have a record of which competitors win the sales you lose.

You can, however, delete an opportunity by opening the opportunity and selecting the **Actions** menu | **Delete Opportunity**.

How much revenue can I make?

It is always interesting to get an overview of how much revenue you can expect to make in the near future.

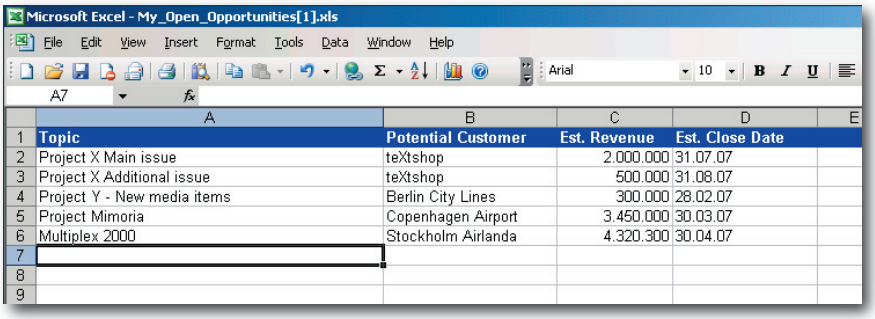


You can quickly get an overview of this by selecting **Opportunities** and adding up the sales figures from the list. The easiest way to do this is to select, for example, **My open opportunities** in the **View** field and then click the **Export to an Excel spreadsheet** button on the toolbar. If, instead, you want an overview of next month, select **Opportunities that will close next month** in the **View** field.

Now you have the option of either creating a new spreadsheet with data from the **Opportunities** list, by selecting the **Static worksheet with records from this page** field in the **Export Data to Excel** dialogue box, or creating a spreadsheet which is continually updated with new opportunities by selecting the **Dynamic worksheet** field. Alternatively, you can build a PivotTable in Excel using the updated information from Microsoft Dynamics CRM.

When the expected sales figures are copied to the spreadsheet it is easy to add up the **Est. Revenue** column for an overview of how much revenue you can make in the near future.

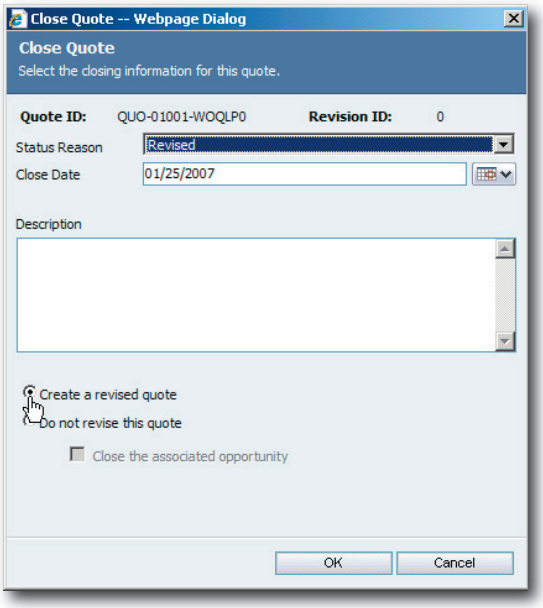
You can save the dynamic edition of the spreadsheet and re-use it as a report. You can repeat copying updated information about expected revenue from Microsoft Dynamics CRM any time you want. It is possible to insert the spreadsheet as a permanent report in your Microsoft Dynamics CRM user profile. This requires, however, that the system administrator inserts the spreadsheet in the system as a report.



	A	B	C	D	E
1	Topic	Potential Customer	Est. Revenue	Est. Close Date	
2	Project X Main issue	teXtshop	2.000.000	31.07.07	
3	Project X Additional issue	teXtshop	500.000	31.08.07	
4	Project Y - New media items	Berlin City Lines	300.000	28.02.07	
5	Project Mimoria	Copenhagen Airport	3.450.000	30.03.07	
6	Multiplex 2000	Stockholm Airlanda	4.320.300	30.04.07	
7					
8					
9					

From quote to order

When the customer accepts your quote you can convert the quote to an order. If the customer does not accept the quote you can either close it or create a revised quote based on the first quote.



In the Close Quote dialogue you can specify the closing date and the reason for closing: Lost, Canceled or Revised.

To close a quote, highlight it in the list in the **Quote** folder and select the **Actions** menu | **Close quote**. The status of the quote is changed from **Active** to **Closed**. The **Close quote** dialogue box opens. Specify a closing date and the reason for closing: **Lost**, **Canceled** or **Revised**.

In the same dialogue box, you can select to create a revised quote based on the quote that you are closing. You can also close the opportunity that the quote is linked to. Mark, respectively, the **Create a revised quote** or **Close the associated opportunity** field.

Click the **OK** button to close the quote. The quote is write-protected and saved in the quote history. Later on, you can re-use the closed quote as a template for a revised quote.

Revising a quote

You revise a quote by opening it from the list on the **Quote** tab. Select the **Actions** menu | **Revise**.

The quote is copied to a quote draft and the revision number (**RevisionID**) is updated. The original quote is closed and the **Status** field is changed to **Revised**.

Make your changes in the new quote and click the **Save** button to save the quote draft and update the fields in the quote. To activate the quote, select the **Actions** menu | **Activate quote**.

Convert a quote to an order

To create an order from an active quote, open the quote and select the **Actions** menu | **Create order** from the menu in the quote, or click the **Create order** button on the toolbar on the quote.

The **Create order** dialogue box opens. In the **Status** field, at the top of the dialog, the only option is **Won**. Enter the order date and select whether you want to close an associated opportunity or not.

In **Actual revenue is** field in the **Close opportunity** group you can specify the actual sale or calculate it from what is specified in the quote.

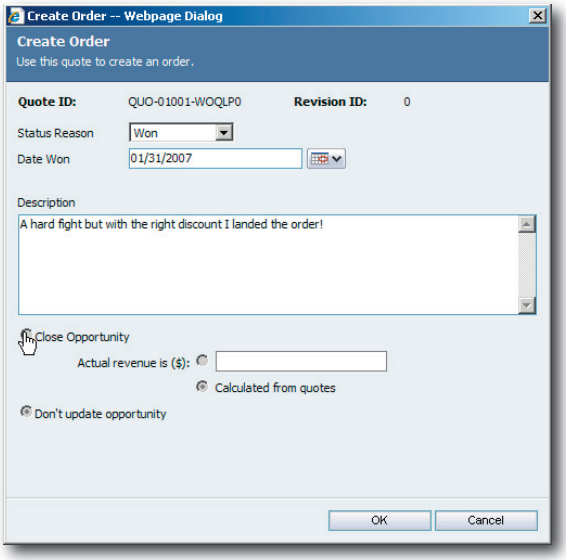
If the quote is linked to an opportunity, you can choose not to update the status of the opportunity. Otherwise the opportunity is closed as an open opportunity when you convert the quote to an order.

Click the **OK** button to create the order based on the selected quote. Now the quote is closed and its status changes to **Won**.

All details from the quote are transferred to the order. Further work on the order is very similar to that used for the quote.

The order is created as a draft and must be activated before it can be sent to the customer. You can close or win the order, and you can create revised orders – just like you could with quotes.

Just as a quote can be converted to an order, an order can be converted to an invoice. We'll get back to that very soon.



In the Create Order dialogue you can close quotes and any associated opportunity, and convert the quote to an order, at the same time.

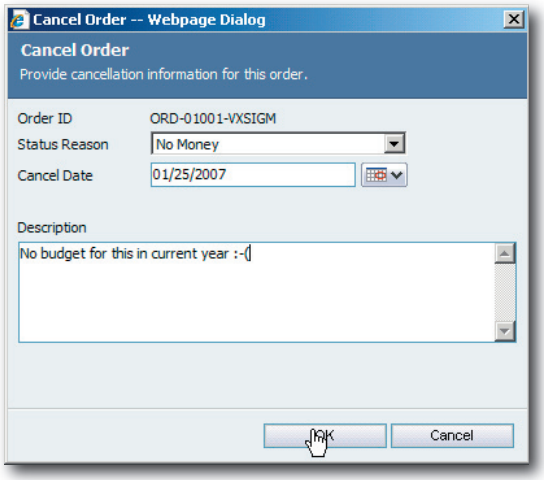
Create an order from scratch

To create an order from scratch, select the **Orders** folder in the **Sales** section in the navigation pane to the left, either in Outlook or in the Web client window. Then click the **New** button on the toolbar. The procedure is the same as described in the quotes section – and orders are handled the same way as described above.

Cancel an order

Open the order that needs to be canceled and select the **Actions** menu | **Cancel Order**. The **Cancel Order** dialogue box opens. Enter the status and the date of cancellation. The status may be, for example, **No Money**. You can enter further comments to the cancellation in the **Description** field in the bottom of the **Cancel Order** dialogue box.

Click the **OK** button to cancel the order. The order is moved to the list on the **Overview** tab.



Enter a status and the date of cancellation in the Cancel Order dialogue. You can enter further comments to the cancellation in the Description field at the bottom of the dialogue.

From order to invoice

When the customer has accepted an order, convert it to an invoice.

To convert an order to an invoice, open the order and click the **Create invoice** button on the toolbar.

The invoice is created and all information from the order is transferred to the invoice. Give yourself some time to review the tabs and check that all details match the actual delivery.

Working with invoices is very much like working with quotes and orders and the lifecycle for invoices is similar to these also. The only difference is that invoices are active as soon as they are created. Using the **Status reason** field you can keep track of all invoices from **Partially delivered** to **Invoiced**.

Click the **Save** or **Save and close** button to save the invoice.

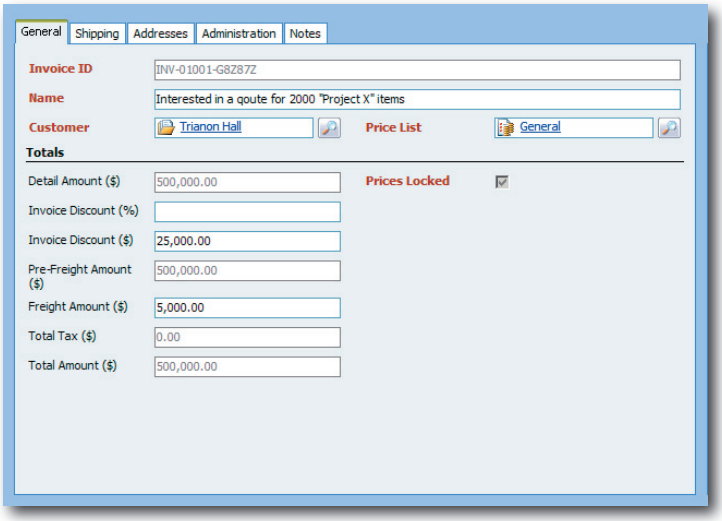
Edit an invoice

You can edit an active invoice, for example, add or remove products, change pricing, or change status reason. Click the **Save** or **Save and close** button to save the changes of the invoice.

Close an invoice

When the customer pays, or the customer cancels the order after the invoice is created, you have to close the invoice. To close an invoice, open the invoice and select the **Actions** menu | **Close invoice**, or click the **Close invoice** button on the toolbar.

The **Close invoice** dialogue box opens. Select the status of the invoice you are closing. You can select **Cancel** or **Paid in full**. Click the **OK** button to close the invoice.



You cannot change the invoice's total amount – but you can give a discount on the entire amount by entering the discount amount in the Invoice Discount field.

Reports

Microsoft Dynamics CRM contains a number of reports that provide an overview of customers, opportunities, and leads.

We have already described the possibilities of printing reports from CRM in the description of exporting opportunities to Microsoft Excel. Microsoft CRM contains a number of other reports that provide an overview of customers, opportunities, and leads. CRM has reports for many different purposes. Which reports you have access to depend on your rights in CRM. Some of the interesting reports include:

- Reports that summarize your work with leads, opportunities, companies, and contacts
- Reports that find leads, accounts, and contacts that have not been contacted for a long time
- Reports that measure the quality of the leads you are working with or have worked with

There are also traditional reports with sales figures, addresses, your top10 customers, if customers pay their bills, how your leads and customers are distributed among various demographic and financial key figures, etc.

The reports are an excellent tool that provides an overview of your customers, leads, orders, etc.

You will find the reports in **Reports** in the **Shortcut** folder in Microsoft Outlook. Note: You only have access to the **Report** module when you are connected to the Microsoft Dynamics CRM server. If you are 'on the road' you can print reports from the system using the **Export to Excel spreadsheet** button. You can read more about working offline with Microsoft Dynamics CRM later in this chapter.

To customize a report, click the **Customize filter** button in the report. The filter shows how the report is structured, which settings you can change and any predefined values you can change.

In most of the reports you can add new settings and set up relationships between settings. For example, you can search for customers from a specific city, or customers you have not visited for a long time although they have bought a lot from you anyway.

There are many options, and by experimenting you can build the reports you need. When you have printed the report, you can export the results to, for example, an Excel spreadsheet, a PDF file, an XML file with the report settings, or publish it on your website, your Intranet, or a SharePoint site.

CRM on the road

Most Sales Representatives need to take customer information with them, for example, for meetings in the city, or on a sales trip around the country. If you use a laptop, you can take a copy of Microsoft Dynamics CRM with you on the road and have access to the required information, even though you are out of the office.

To take Microsoft Dynamics CRM with you, switch to offline mode. A local copy of all the customer information you have access to is transferred from the Microsoft Dynamics CRM server.

When you work offline from the server, all edits and additions you make are saved. When you re-connect to the Microsoft Dynamics CRM server your local data is synchronized with the server. Changes that other Microsoft Dynamics CRM users have made in the meantime will be available to you when you re-connect to the server.

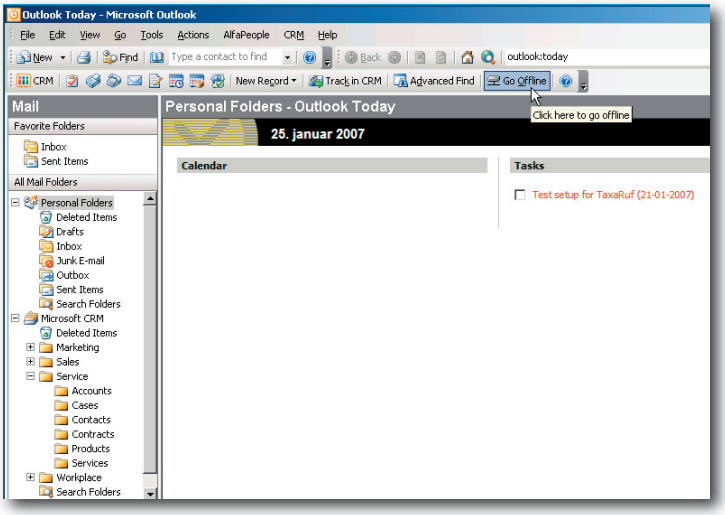
You have no access to the Reports module while you are offline because reports only run on the server. The only way to print reports from Microsoft Dynamics CRM when you are offline is by using the **Export to Excel spreadsheet**-button.

Switch to offline status

Before shutting down your laptop, click the **Go Offline** button. The **Synchronize Microsoft CRM data** dialogue box opens and you can see which information is being synchronized between your computer and the Microsoft Dynamics CRM server.

A local copy of the Microsoft Dynamics CRM database is transferred to your laptop. Only subjects and information you have access rights for are synchronized.

As long as you work offline, your changes to the records in Microsoft Dynamics CRM are only changed in your local copy of the



Before you can take the computer with you, a local copy of the Microsoft Dynamics CRM database is transferred to your laptop. Only items and information you have access to are synchronized.

database. Changes made by other users while you are offline will, of course, not appear in your version of the Microsoft Dynamics CRM database before you re-connect to the server. Then your changes will also be available to your colleagues.

Switch to online status

When you are back in the office, re-connect your laptop to the network, turn it on and open Outlook. Click the **Go Online** button to synchronize your local changes with the changes made by other Microsoft Dynamics CRM users on the Microsoft Dynamics CRM server while you where offline.

When you are re-connected to the Microsoft Dynamics CRM server – and online – all your local changes are updated on the server, and you have access to the changes made by others.

You can switch between offline and online status using the **Go Offline/Go Online** button on the **CRM** toolbar in Microsoft Office Outlook.

A normal day

As a Sales Manager your working day starts, like the Sales Representative's, in Microsoft Office Outlook. From here you can keep track of sales and the Sales Representatives' performance.

Click the **Shortcut** button at the bottom of the navigation pane in Microsoft Office Outlook to access shortcuts to commonly used Microsft Dynamics CRM folders. You have access to your activities, queues, items in your knowledge base, reports, accounts, and contacts in Microsoft Dynamics CRM.

In **Activities** you will find a list of the activities you need to work with today. You can enter new activities or delegate them to your employees if needed.

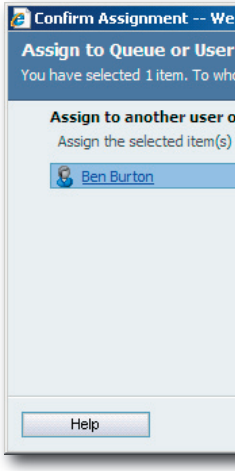
By using the views in the **Queues** folder you can keep track of the sales process and the campaigns you, or the marketing department, have started. If you find a lead, an assignment etc., which appears to be stocked in one of the queues, you can delegate it to the employee you consider best for the assignment.

Create assignments

You can create new assignments, leads, or opportunities and assign them to the applicable queue. The next available Sales Representative will take care of the assignment when he/she opens the queue. Microsft Dynamics CRM can delegate the assignment automatically using rules you define in cooperation with the system administrator. You are also able to assign assignments to a specific employee. For example, if it is something that needs to be handled immediately or requires certain competence.

Delegate an activity

To delegate an activity, an opportunity or a lead, open the applicable activity and select the **Actions** menu | **Assign** in the toolbar at the top of the activity. The **Confirm Assignment** dialog will open, and you can select the employee to whom you will assign the activity.



You are also able to assign specific accounts and contacts to specific employees using the **Preferred user** field on the **Administration** tab of the applicable account or contact. Colleagues can work with or serve the customer too. But, if the customer has or you have a preferred employee, then the customer should be forwarded to that employee.

The Sales Manager's working day

The typical working day of the Sales Manager has become more focused. Microsoft Dynamics CRM provides the overview. So now you have more time to coach the Sales Representatives and take care of key customers.

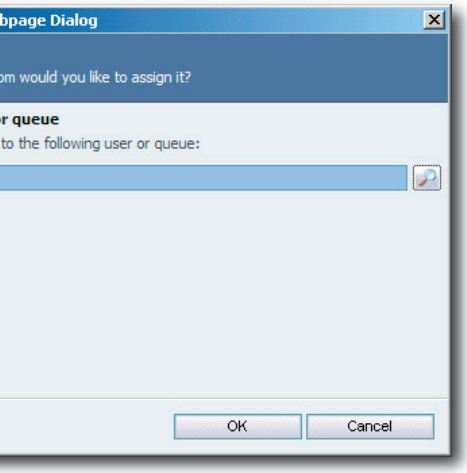
"It was great the first time I could tell the management group that there were orders ahead for about 2 million within the next month," John remembers. John is the Sales Manager of a large Dutch wholesaler. "They just looked at me and suddenly they understood why I had fought so much to introduce Microsoft Dynamics CRM to our company."

"I don't have to follow up as much on the Sales Representatives to get a picture of how things are. I can keep track of them from CRM and from a few reports I can quickly spot who is doing well and who is not. Then I can praise them or coach them as needed."

"At the same time we don't end up not knowing about our customers if the Sales Representatives leave us – the new Sales Representative can get familiar with the customers quickly when he or she takes over."

"When I participate in meetings with customers, I do not need to ask about things that the customer has already told the Sales Representative. I can find all the information in Microsoft Dynamics CRM before the meeting. That makes me more secure during the meeting and I feel that I appear as a credible Sales Manager – also to my own Sales Representatives."

Entering an activity in one of the company's Public queues is done in the same way as delegating an assignment to another employee.



Working with queues

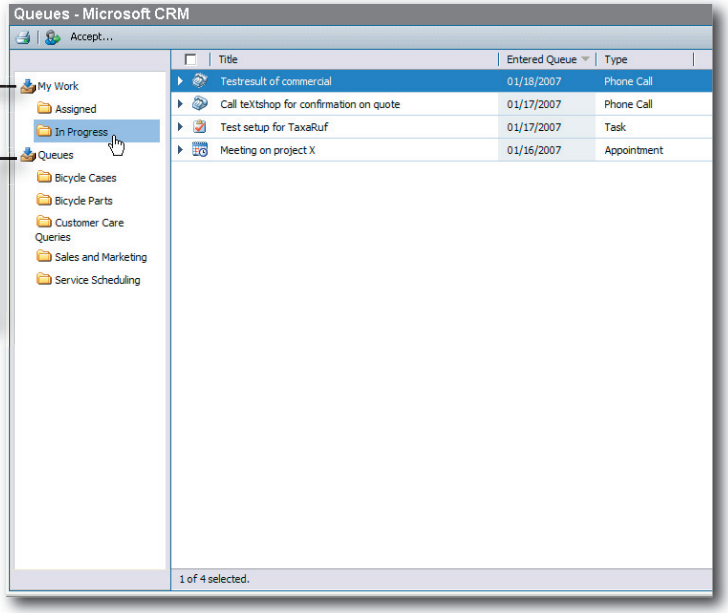
The queues in Microsoft Dynamics CRM are an excellent tool to simplify and delegate the workload in a department. You can benefit from introducing queues in the sales department, for example, to process enquiries from the website, process leads that have not yet been classified, or when an activity cannot be immediately linked to an employee.

Everybody can see the content of the queues but the user rights determine which subjects in the queue users can take care of. How the queue handles new tasks can be determined using rules. For example, certain users get warnings/messages about enquiries from VIP customers or high priority tasks.

As a Sales Manager you can use the queues to assign leads directly to specific Sales Representatives. It is also possible to direct assignments that do not need immediate response to the first available Sales Representative by putting the assignment in one of the queues.

All Microsoft Dynamics CRM users can assign activities, leads, etc., to a queue. From the queue the activity can be taken over by/assigned to another user. If employees who are not Microsoft Dynamics CRM users should be able to create activities or if there is a need for allowing customers to create activities in queues, you can assign e-mail addresses to any queue. Any e-mails sent to the queue, automatically creates a new activity in the queue. In this way, you can, for example, handle enquiries from Internet users.

The use of queues offers the benefit that you, as a Sales Manager, – or the one responsible for the queue – can see the workload of the queue. You can see how long the enquiries stay in a queue before they are taken over by a Sales Representative etc. The view of queues provides information on needs for reallocating resources to overloaded queues.



By default, there are two personal queues for every user: The **In progress** and the **Assigned** queue. The **In progress** queue contains the activities you are currently working on. The **Assigned** queue contains the tasks and activities assigned to you but which you have not yet accepted or rejected.

Public queues are temporary holding places for activities which are not yet delegated to an employee.

The personal queues

By default, there are two personal queues: The **In progress** and the **Assigned** queue. In the **In progress** queue you will find the activities you are currently working on. As soon as a task is closed, the activity no longer appears in the list of the **In progress** queue. The activity will, however, still be available under **Information** on the applicable item.

The **Assigned** queue contains the tasks and activities that other users have assigned to you but that you have not yet accepted or rejected.

You can accept, delete, or delegate the entries in the **Assigned** queue. Highlight or open the activity you will accept or delegate and click the **Assign** or **Accept** button on the toolbar at the top of the **Assigned** queue.

An accepted activity is transferred to the **In progress** queue. The activity can be viewed in the **Activities** list when the deadline for the activity is approaching. When you delegate an activity to another user, it is transferred to the relevant user's **Assigned** queue for further accept or delegation by the user.

Public queues

Public queues are temporary holding places for new activities which are not yet delegated to an employee. They are assigned to an employee in the department, either manually by the employees themselves when they "pick" and assign activities from the public queue, or by you, as a Sales Manager, when you decide to assign the activity to an employee.

In addition, rules can be set up for automatic assignment of activities according to specific criteria. The criteria depend on which activities are entered in the applicable queue and the rules are created in cooperation with the Microsoft Dynamics CRM system administrator.

Put a task or activity into a public queue

You put a task or an activity into a public queue by assigning the task or the activity to the applicable queue. This can be done from the **Actions** menu | **Assign** when you create the new activity, or, highlight the activity from a queue window and click the **Assign** button on the toolbar. Instead of assigning the subject to another Microsoft Dynamics CRM user, you can select a public queue. The subject will be transferred to the selected queue.

Overview of sales activities

As a Sales Manager it is important to have an overview of all sales activities, and to be able to communicate sales figures to employees, the management group, and other relevant parties.

Microsoft Dynamics CRM contains a large number of tools for getting a complete overview of all facets of the company's sales activities. The reports in Microsoft Dynamics CRM and the opportunity to export information from the system to, for example, Microsoft Excel are especially useful.

Overview from reports

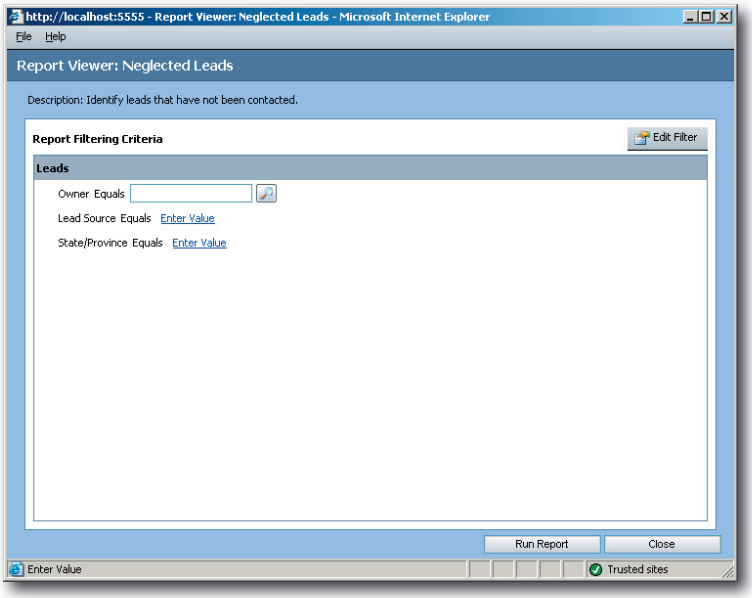
There are several types of reports in Microsoft Dynamics CRM. There are standard reports to print from the system. There is also an option to export the information to Microsoft Office Excel, and finally the option to create your own reports in the Microsoft Office programs using the integration to Microsoft CRM. Open **Reports** from the **Shortcut** folder in Microsoft Outlook or in **Workplace | My work** in the navigation pane in the **Mail** section of Outlook.

You can customize a report by clicking the **Edit filter** button. The filter shows the structure of the report, the parameters you can set and the predefined values you can change.

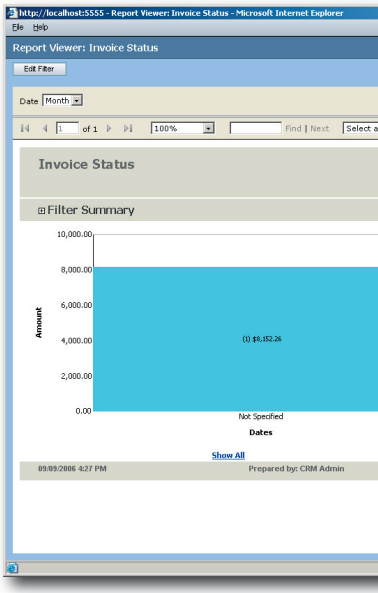
Note:

You can only access the **Report** folder when you are connected to the Microsoft Dynamics CRM server – That is, when you are online.

1 Settings



2 Overview using graphics



You can customize a report by clicking the **Edit filter** button. The filter shows the structure of the report, the parameters you can set and the predefined values you can change.

In most reports you can add parameters and build relations between the parameters, for example, to list customers who have not been paid a visit for a long time, or, customers who do not place orders with you anymore. Delegate the lists of these customers to the Sales Representatives in order to follow up on customer enquiries.

By default, you will find a number of standard reports in the **Reports** module. From them you can print traditional information such as realized sales, sales by area, or sales or other information from Microsoft Dynamics CRM. Most of the reports can be displayed graphically which makes the overview even better.

Microsoft Dynamics CRM also has reports that provide an overview of expected future sales, customers, leads who have not been contacted for a long time, the profit of the leads the sales department is currently working on, status of the sales process for every customer and lead, and campaign status.

As you can see, there are many features and by a little experimenting you can build the reports you need. When you have created the report, you can export the results to, for example, an Excel spreadsheet, a PDF file, an XML file with the report settings, or publish it on a website, on your Intranet, or SharePoint site.

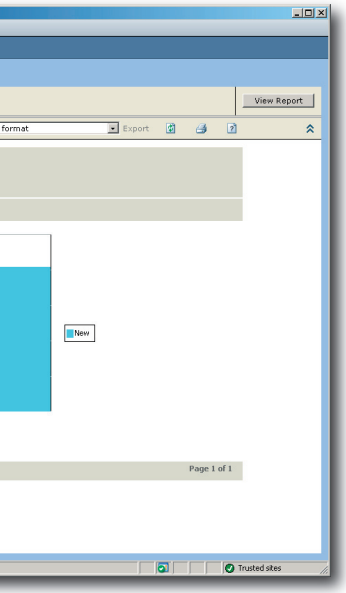
Step by step

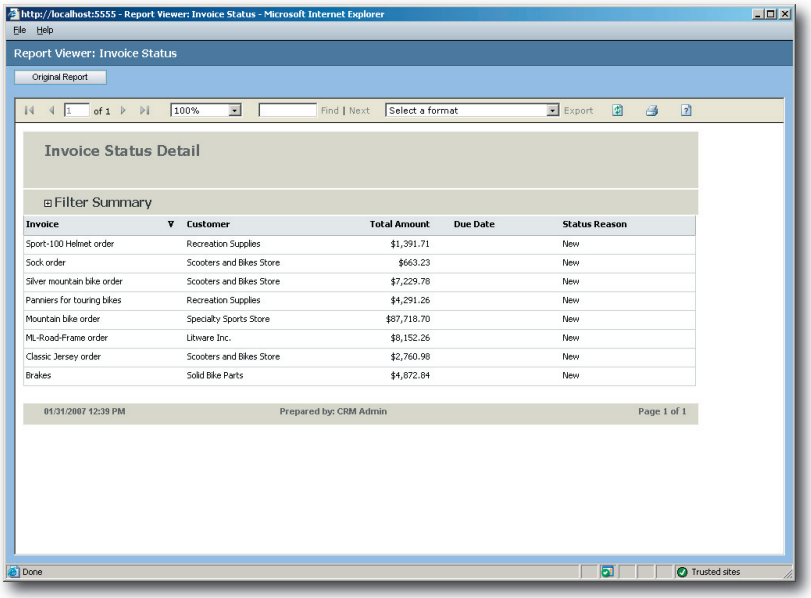
1. Start by setting up criteria for the report by clicking the Specify values links. Click the Edit filter button to add or remove parameters. Finally, click the Run report button to print the report

2. By default, the graphic view is displayed. Click the Show all link to see the list display instead.

3. The report is displayed as a list. Using the toolbar you can export data from the report, print it or make a search.

3 View the report as a list





Working with CRM information

All lists can be exported to Microsoft Excel, and you can build your own reports in Microsoft Office.

Advantages of dynamic reports

Dynamic reports automatically retrieve the latest information from Microsoft Dynamics CRM when you open the Excel spreadsheet to which you exported the information. By this you can design overviews in Excel which always retrieves and displays updated information from Microsoft Dynamics CRM.

Dynamic reports can be placed in Microsoft Dynamics CRM and opened directly from the system. Talk to your system administrator about the possibilities.

You can export all list views from Microsoft Dynamics CRM to Excel – either as a static spreadsheet or using a dynamic link to Microsoft Dynamics CRM. If you use a dynamic link the information in the spreadsheet is updated with the latest data from Microsoft Dynamics CRM every time you open the spreadsheet.

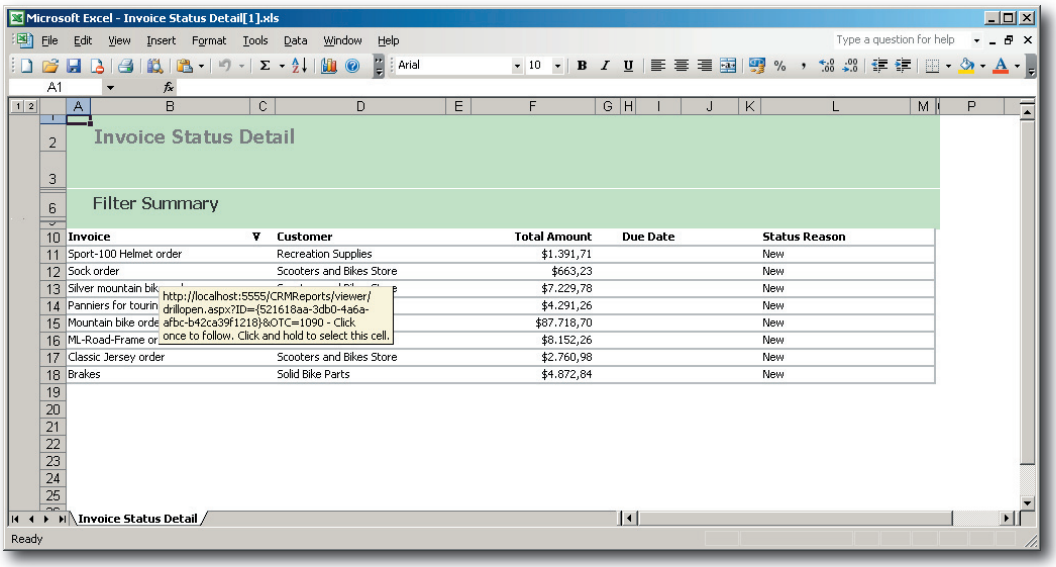
You can work with the information using Excel's tools for analysis and calculation, for example, PivotTable, consolidation, etc., or use Excel's advanced functions to create diagrams for sales meetings and presentations for the management group.

Using the **Look up** and **View** fields at the top of the list views you can filter lists so that they only show the information you need. Then click the **Export to an Excel spreadsheet** button on the toolbar of the list.

In the chapter on the Sales Representative's working day there is an example of how a Sales Representative creates an overview of how much revenue he or she can expect to make from his or her opportunities by exporting the list of opportunities to Excel and adding up the figures in a spreadsheet.

Use the spreadsheet's advanced functions (such as PivotTable and consolidation) to get an overview of larger and more comprehensive lists.

Even after the list is exported to Microsoft Excel, you can look up the records in Microsoft Dynamics CRM by clicking on them in the spreadsheet.



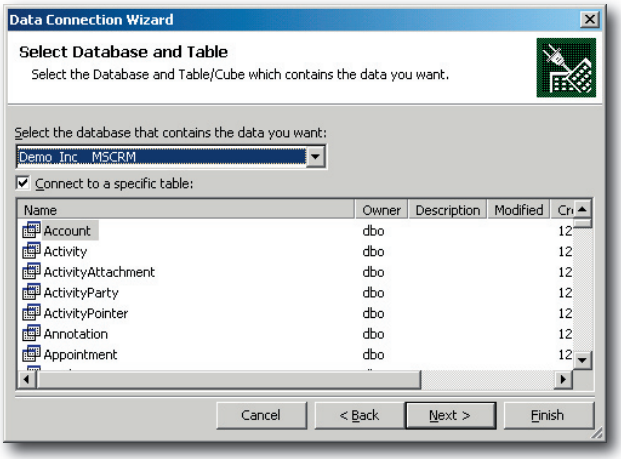
Build your own reports

You can build your own reports in Microsoft Office. This requires a database connection between Microsoft Office System and Microsoft Dynamics CRM 3.0. In addition, you should be familiar with the structure of the database in Microsoft Dynamics CRM to know from where to retrieve information from the system. You can, of course, get help from the Microsoft Dynamics CRM system administrator to construct the reports if you are not familiar with databases.

In addition to traditional use such as exporting information to an Excel spreadsheet or retrieving addresses for a mail merge in Word, only your imagination limits the information exchange between Microsoft Office and Microsoft Dynamics CRM 3.0. As a Sales Manager you will certainly find interest in creating a report in Microsoft PowerPoint that has a nice layout and the latest sales figures, ready for presentation on your weekly status meeting with the Sales Representatives.

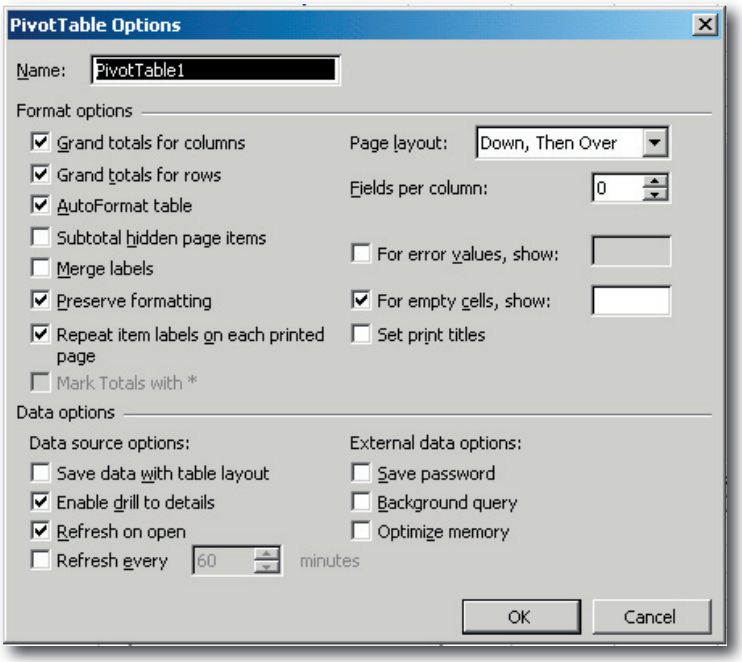
During the meeting, you can even retrieve the sales figures for the PowerPoint presentation "on the fly" in order to show the most recent sales entered just before the sales meeting. From Microsoft Dynamics CRM you can get an even more detailed updated sales report, ready on your computer, just before the meeting starts.

Soon the Sales Representatives will bring their own reports and presentations from Microsoft Dynamics CRM outlining their own sales efforts during the week. Make it a recurring entry on the agenda for the weekly sales meeting that each Sales Representative brings a short presentation of their results. It will inspire the Sales Representatives to learn to use the features in Microsoft Dynamics CRM and take advantages of the advanced features provided by the system.



Using a data connection between Microsoft Office System and Microsoft Dynamics CRM 3.0 you can design your own reports from Microsoft Dynamics CRM in other programs in Microsoft Office.

Mark the **Refresh on open** checkbox in the PivotTable options to retrieve updated data from Microsoft Dynamics CRM each time the spreadsheet is opened.



Quick campaigns

If your revenue needs a brush up, a campaign is the most common solution. It does not have to be big and fancy – simply use the quick campaign tool in Microsoft Dynamics CRM.

Often Sales Managers also have the marketing responsibility of the company, or work closely together with the marketing department on new campaigns and advertising. As a Sales Manager you should be familiar with the marketing features in Microsoft Dynamics CRM which provide tools for creating and managing campaigns, and viewing the results.

A campaign, for example, focuses on certain customers or leads.

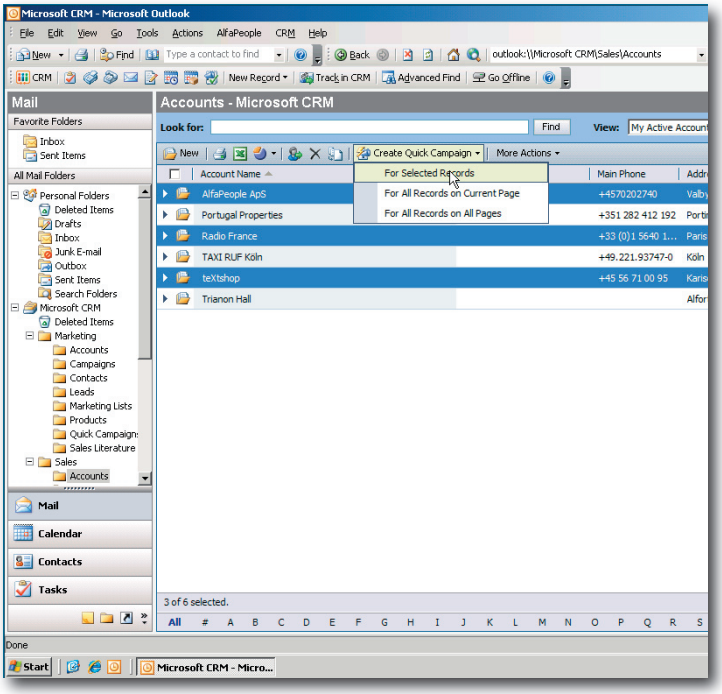
Sometimes, a campaign starts with a direct mail sent to all leads. The lead receives a short letter signed by the account manager of the applicable district or customer group.

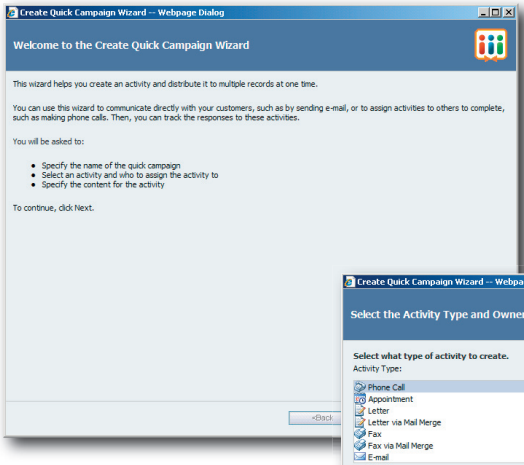
Afterwards the Sales Representative or a call center will call every lead to classify them. During the campaign the response from the leads is entered in Microsoft Dynamics CRM to keep track of how things develop. In addition, you get an overview of how many new customers and potential leads the campaign has provided. You can use the response as inspiration and experience for future campaigns.

Quick campaigns

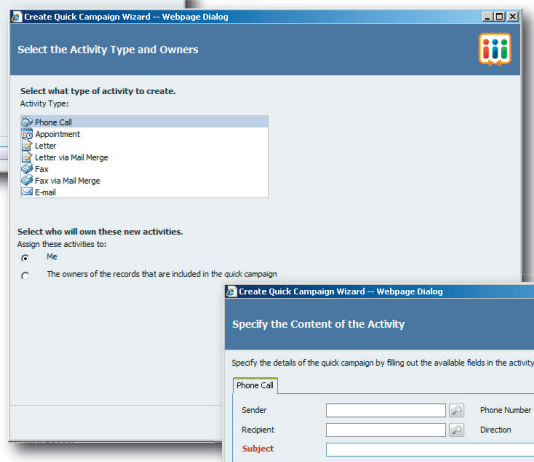
Campaigns do not need to be big or fancy. Using the quick campaign tool you can create small campaigns by selecting a few accounts or contacts from Microsoft Dynamics CRM.

1 Highlight the leads to be included in the quick campaign, then click the Create Quick Campaign button. Select For Selected Records.

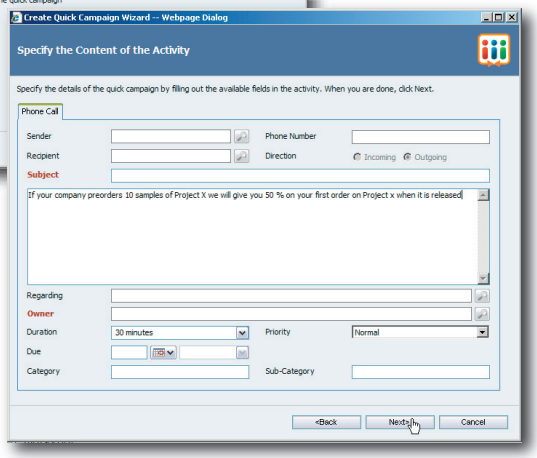




2 The **Create Quick Campaign Wizard** opens. Enter a description for the campaign, enter an activity type, and add any further information on the activity. Eventually you can assign the campaign to a sales employee. Click the **Next** button to name the campaign and click the **Next** button again.



3 In the third step of the guide, select the activity type of the quick campaign. For example, select Phone Call if the quick campaign will run as a telemarketing campaign. Click the **Next** button.



4 Now specify further details for the type of activity – in this case a telephone call. Click the **Next** button and, eventually, assign the quick campaign to a sales employee or forward it to one of the queues.

You can, for example, use a quick campaign for a telemarketing campaign. You mailed first and then followed up with a phone call. Or you can use quick campaigns to pick a certain number of customers you want one of your Sales Representatives to pay special attention to. Quick campaigns are also relevant as a calling list for contacting 10 to 20 of your most important customers right away.

Quick campaigns can be created quickly from any list display in Microsoft Dynamics CRM. For example, if you want to work with specific leads, highlight the leads you want to include in the campaign in the **Lead** list, and click the **Create Quick Campaign** button on the toolbar above the **Lead** list. Select **For Selected Records**.

The **Create Quick Campaign** wizard opens. Enter a name for the quick campaign, select an activity type, enter further description and, if necessary, assign the campaign to another Microsoft Dynamics CRM user.

Please refer to *The Marketing Employee's working day* chapter later on to learn how to use the campaign tools.

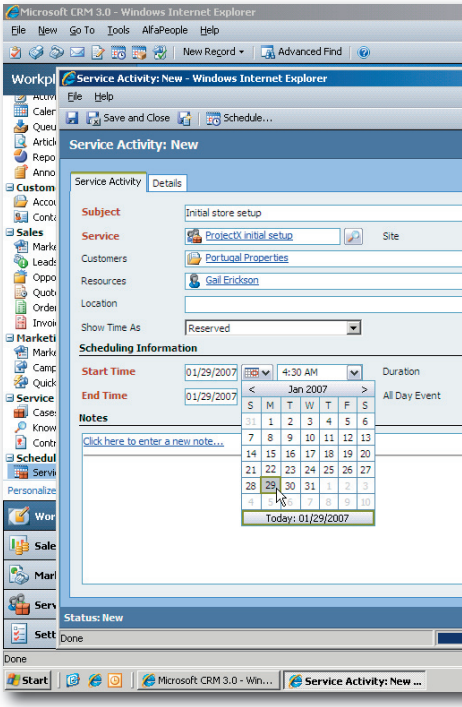
The Dispatcher uses the Web client

As a Dispatcher or Service Coordinator your working day starts in the Microsoft Dynamics CRM Web client. You have access to the service calendar used for assigning tasks to the company's Service Technicians.

When you receive a call from a customer, enter the customer data, if it is not already in Microsoft Dynamics CRM, and open the applicable contract to ensure all invoice information is correct from the beginning. If it is a guarantee matter, the service contract of the manufacturer for whom you are performing the guarantee repair is linked to the service task in the **Regarding** field on the **Details** tab in order to invoice the time spent.

Then you start your research on what the enquiry pertains to. You might use the knowledge base in the system containing information on previous service tasks, and maybe also a knowledge base provided by the manufacturer. To simplify the work for the Service Employee, create a note on the activity regarding which article contains information on the subject in any of the knowledge bases.

Book a service resource in the **Service Calender** in the **Scheduling** section in the Microsoft Dynamics CRM Web client and select a suitable date for the customer. From this information Microsoft Dynamics CRM lists the next available service technician who can take care of the assignment. If there are several service technicians available, they are all displayed in the list of available resources.



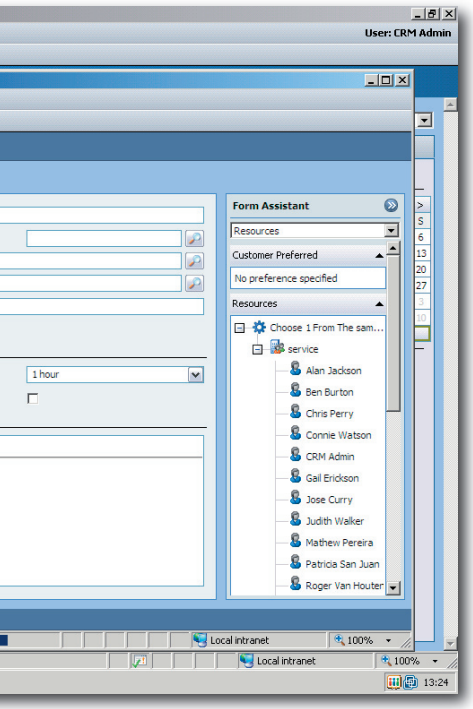
Now, it is a simple task to find an available and competent technician to perform the assignment. The selected Service Technician can view all his/her bookings in the Microsoft Office Outlook calendar, and all information entered about the task.

The incoming assignments can be put into a queue and then be assigned to the first available Service Technician or Customer Service Employee.

The Service Employees' working day

The Dispatcher or Service Coordinator of customer services handles service enquiries from customers, and assigns the service tasks to the Service Employees. The Dispatcher can use the built-in service calendar in Microsoft Dynamics CRM to find the first available Sales Employee and assign the new service assignment.

When the basic data for the case has been registered, you can make an appointment with the customer by clicking the **Schedule** button. How this is done in practice is reviewed in this chapter.



The Dispatcher's overview has been improved and it is easier for the Service Employee to plan his or her working day. No more updating an Excel spreadsheet or a Modulex board manually and no more having to print lists for the Service Technicians. Everything is handled in Microsoft Dynamics CRM and every service matter is entered in the system.

"Now I have a much better overview of what the Service Technicians I supervise are doing and it is much easier to book them for new service tasks. This means no waiting time for the customers when they call about a service request. When I have identified the problem, I quickly find the first available Service Technician in Microsoft Dynamics CRM and book the time that suits the customer the best," says Dorothy, who is a Service Co-ordinator in a large service company in the household appliance industry.

"We have 20 Service Technicians who service our customers – typically private customers where the washing machine, stove or dryer has broken down. Each morning the technicians synchronize their laptop computers with our Microsoft Dynamics CRM system via a VPN connection and receive the day's task list. At the same time, reports on the cases that they solved yesterday are transferred to the system. Next step will be to equip our Service Technicians with a mobile Internet connection in order to get the reports even faster. That will make it easier for us to handle customer cases even faster."

Plan a service task

When the basic data has been entered for the service task, the Service Co-ordinator uses the planning function to select the appropriate Service Employee and book available time in his or her calendar.

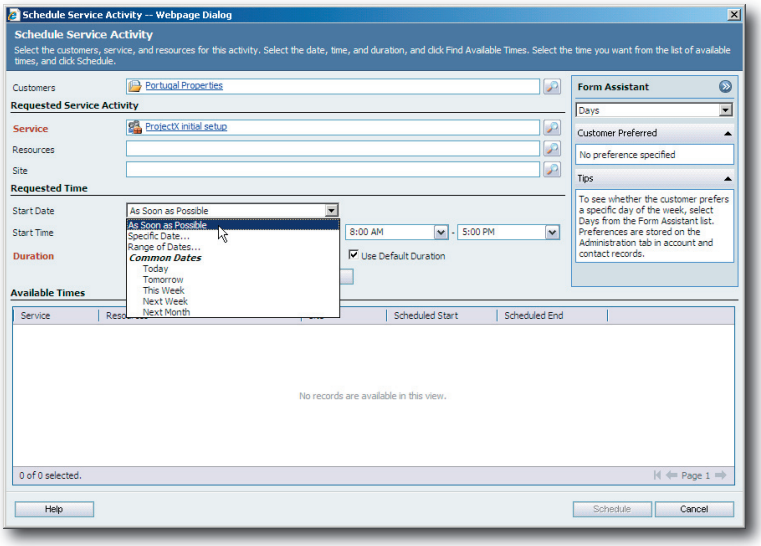
This is done by clicking the **Schedule** button on the toolbar at the top of the **Service activity** window. The **Schedule Service Activity** dialogue box opens.

All fields with information about the customer, service assignment, resources and location are already filled in and from the fields in the **Requested Time** group, you can find a suitable time to perform the service.

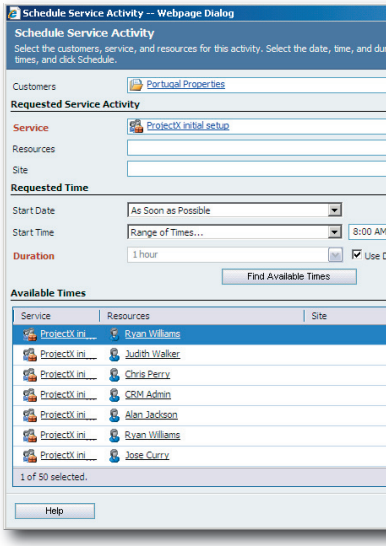
In the **Start Date** field you can select the time horizon for the service task to be performed. Most often this will be **As soon as possible**, which is also the default setting, but you can also enter a **Specific Time**, a **Range of Times** within this week or next month.

In the **Start Time** field you can specify when the service task starts. This is of course most relevant if the customer needs to be present when your Service Employee arrives. You can also select to be a little less specific and choose **Tomorrow**, **Afternoon** or **Evening**, or **Any Time** if the time is less important.

How much time to be spent on the service task is entered in the **Duration** field. By default, duration is set to the duration entered on the applicable service task in Microsoft Dynamics CRM. If you delete the check mark from the **Use Default Duration** field, you can specify a longer or shorter duration of the service activity.



1 Start by entering a start date, start time and duration in the fields in the Requested Time group at the bottom of the Schedule Service Activity dialogue box.



2 When all fields are filled in, click the F
times for the selected resource are di

How does Microsoft Dynamics CRM know about your organization?

Optimized booking of service tasks in Microsoft Dynamics CRM requires specification of standard service tasks in the system – what they pertain to, the average time spent, and required equipment. Furthermore, the tree structure in the knowledge base has to be defined and the relevant knowledge must be entered in the knowledge base. The specification of service tasks and the tree structure is set up by the system administrator using the Settings module in the web-based edition of Microsoft Dynamics CRM.

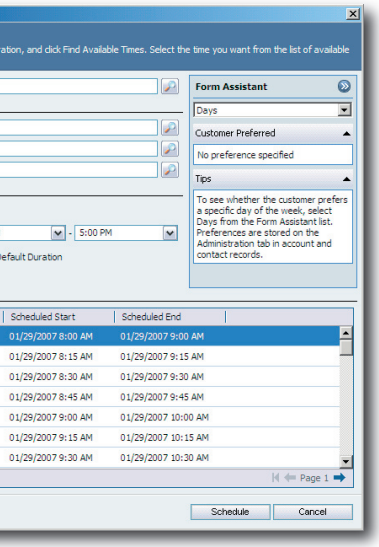
Then specify the Service Technicians in Microsoft Dynamics CRM and for each Service Technician select the service tasks he or she can handle, the geographic area in which he or she operates and other applicable information used for selecting the appropriate Service Technician.

When the structure of the knowledge base has been created, the Service Employees can begin to enter problems and solutions in the knowledge base. Eventually, knowledge bases from the manufacturers can be imported to Microsoft Dynamics CRM's knowledge base. This saves time for the Service Employees and gathers information in the system.

When all information is entered, click the **Find Available Times** button. The system displays available time in the applicable Service Employee's calendar that suits the desires of the customer and the duration of service task best.

Select the time from the list that suits the customer best or perform a new search and edit any of the settings, for example, duration of the service activity, or select another service technician with the same qualifications.

When you have found a suitable time, highlight it in the list and click the **Schedule** button. The service activity is created in the Service Employee's calendar and you can save the service task by clicking the **Save and Close** button in the **Service Activity** window.



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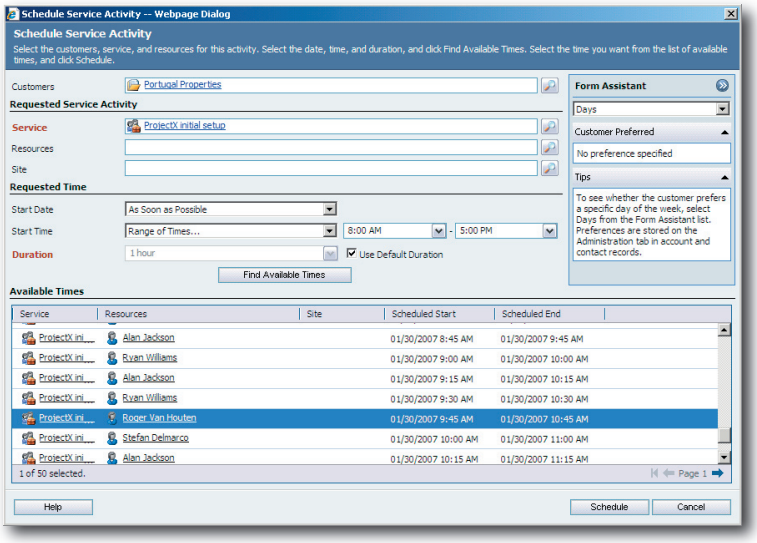


3 Select the time that suits the customer best and click the **Schedule** button. The service activity is entered in the Service Employee's calendar.

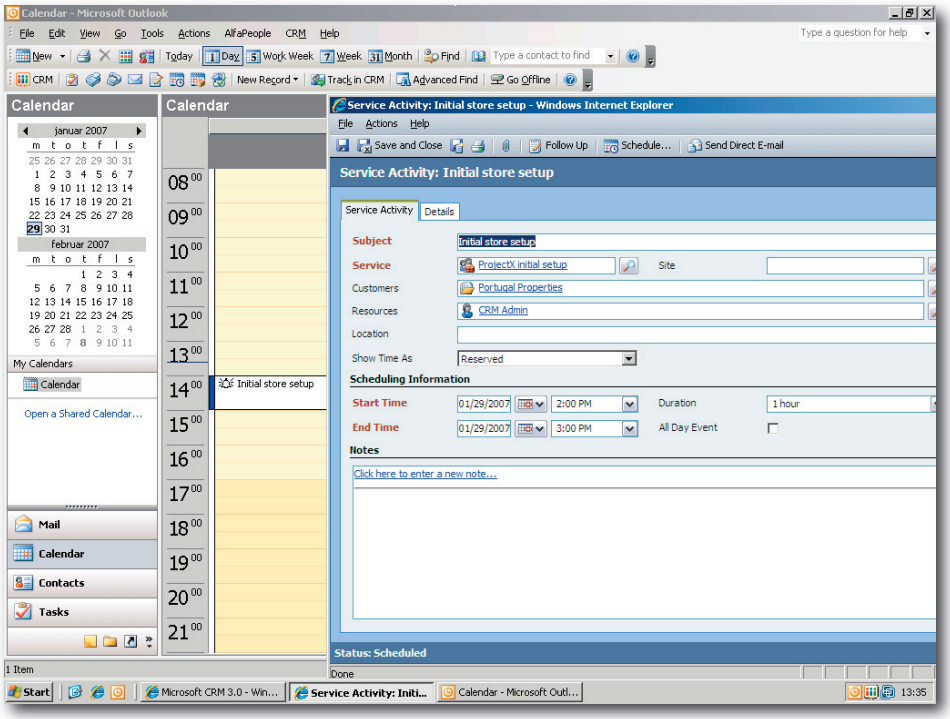
The Service Technician's working day

The Service Technician or Service Employee's working day starts in the Microsoft Office Outlook calendar. In the calendar they can view the service activities booked for him/her. By clicking the bookings in the calendar, the Service Technician can view all details of the service tasks.

If you have a Dispatcher to perform the booking of service activities, the Service Employee's working day usually starts in Microsoft Office Outlook.

The calendar provides an overview of all service tasks booked for the applicable date. If necessary, available time can be used to handle miscellaneous tasks from the service queue which are not booked on a certain date or with a deadline.

When the Service Employee needs details on a service task, the employee simply double clicks the activity in the calendar to open the associated **Service Activity** window and view information about the service activity.



When the Service Employee clicks the individual service activity in the calendar, the associated Service Activity window opens.

Look up information in the knowledge base

In the knowledge base the Service Employee looks up information about known problems and maintenance tasks associated with the product he or she is working with.

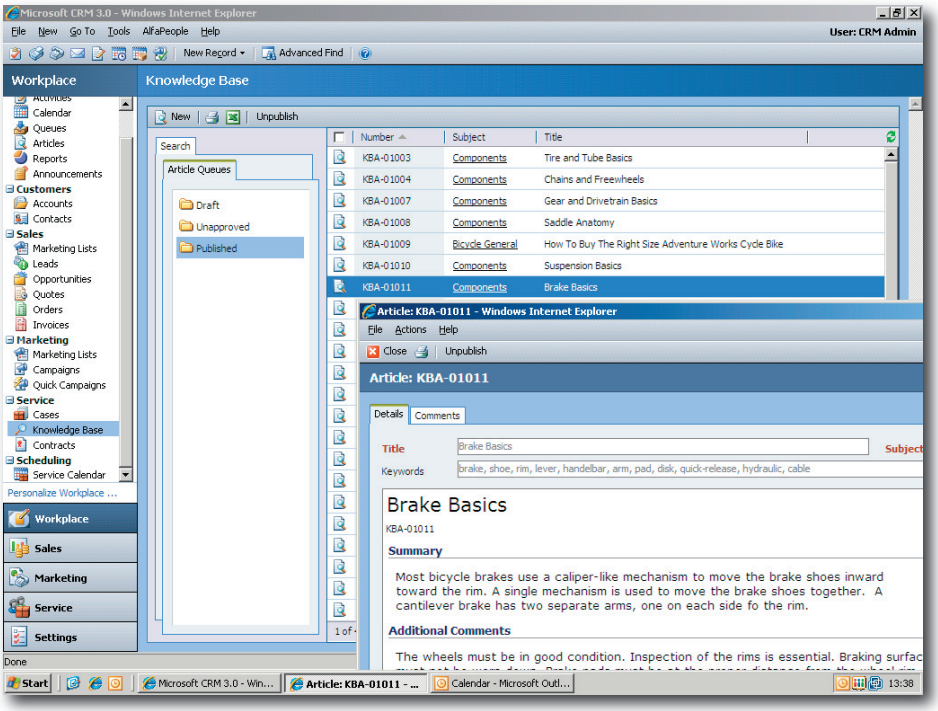
The knowledge base can either be built internally in the company or provided from the manufacturer of the product.

The easiest way to find information about a product is by clicking the **Search** tab in the knowledge base in the Microsoft Dynamics CRM Web client and select **Subject search**.

A tree display of articles in the knowledge base is displayed grouped by products, error possibilities, or how you have chosen to group the knowledge base.

From the tree structure you can quickly find the item that contains information about the problem you are trying to solve.

If you cannot find the applicable knowledge or you find a new solution you can add it to the knowledge base yourself.



The easiest way to find information about a product is by clicking the Search tab in the knowledge base in the Microsoft Dynamics CRM Web client and select Subject search.

A tree structure of all articles in the knowledge base is displayed by products, error possibilities, or however you have chosen to structure the knowledge base.

Create a new article in the knowledge base

If you discover a problem which is not yet in the knowledge base or find new solutions to a known problem, you can add this information to the knowledge base. Your colleagues will benefit from this knowledge as soon as the knowledge base administrator has edited and released your information.

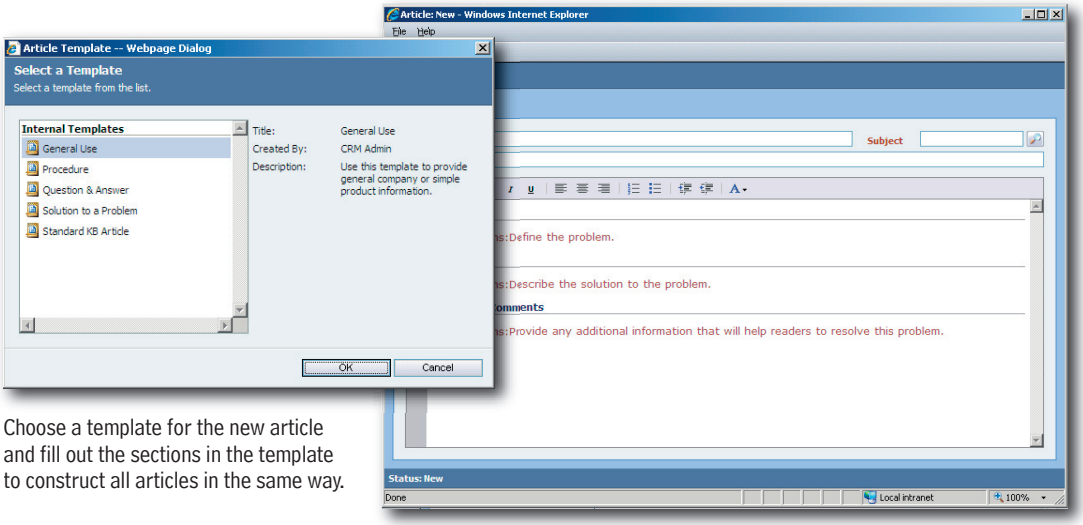
Every employee can create new articles in the knowledge base by clicking the **New** button in the **Knowledge base** folder in the Microsoft Dynamics CRM Web client.

First, you must select the template you want to use for the article. Several templates have been created according to types of articles, for example, **General Use** or **Solution to a Problem**. The templates have been created by the system administrator in cooperation with the knowledge base administrator.

Write the new article and add the information to the sections of the article that are used in the applicable template. Remember to select the subject that the article will be connected to in the **Subject** field.

When you have completed the new article, save it by clicking the **Save and close** button. The article is then saved in the **Draft queue** in the **Knowledge** folder. The articles in the **Draft queue** folder can be viewed by clicking on the **Article queue** tab to the left in the **Knowledge** folder and then the **Draft queue**.

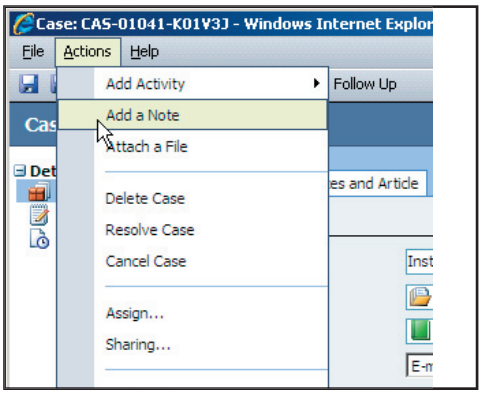
When the knowledge base administrator has reviewed and accepted the article, the article will be released for use in the company's knowledge base. All employees will have access to the new knowledge.



Choose a template for the new article and fill out the sections in the template to construct all articles in the same way.

Reporting

When Service Technicians or Customer Service Employees handle customer enquiries, they can record what has been done on each task. This takes place in the Service Activity window of the applicable service task.



This means that everybody in the company can see work and services performed on the applicable customer, what the problems were, and how tasks were handled. In this way, each task is included in the knowledge base, not only for the applicable Service Employee but for all Service Employees in the company. The Service Coordinator (the Dispatcher) can also use the knowledge for new customer enquiries.

At the same time, it can be helpful for Sales Representatives to have the applicable task to talk about the next time they speak to the customer. Moreover, the Service Coordinator or another Service Employee have the option to continue the dialog with the customer, if the person calls regarding previous service tasks.

Reporting is performed by creating new activities in the **Activities** folder in the **Service activity** window of the applicable service activity. You can add new notes to the service task to describe what you have done, just as you can attach any relevant documents to the service activity by selecting the **Actions** menu | **Attach a File** in the **Service Activity** window.

Overview of customer services

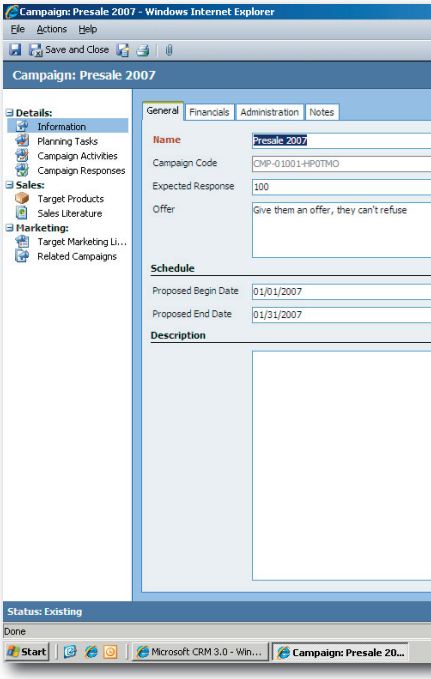
You can extract statistics of the individual Service Employee's work, task handling, etc. From this, the Service Coordinator can get an overview of the workload for each Service Technicians and how efficiently they work. This is handled from the Reports module described in more detail in *The Sales Manager's typical working day* chapter.

Campaigns, from idea to response

If you need to set up a campaign from scratch, start by creating the campaign in Microsoft Dynamics CRM and specify objective, expected result, and budget.

Probably, you will create a number of campaigns when you make the budget for the new fiscal year. New campaigns can be set up without specifying anything other than a name and budget for each campaign and perhaps a description of the campaign's objective.

Later, when the campaign budget for the new fiscal year is accepted, you can begin to edit and plan the campaigns in detail. You can link one or several marketing lists from Microsoft Dynamics CRM to each campaign. The lists are probably maintained on an ongoing basis by the marketing department – or the account manager of each area. From the marketing lists you will get the most relevant leads for your campaign by linking the relevant marketing lists to the new campaign. Also, you can create a new marketing list and link it to the campaign.



Then link the products and the price list that will be used in the campaign and plan the campaign activities. The activities will appear in the activity list of every relevant employee in the sales and/or marketing department. You can export all relevant information and assign, for example, a call center to follow up by phone on the campaign's leads.

When the campaign ends you can use the reports in Microsoft Dynamics CRM to get an overview of the response, the turnover from the campaign, and other relevant statistical information. Using the reports you can analyze the effect of the campaign and the results can be distributed and used for future campaigns.

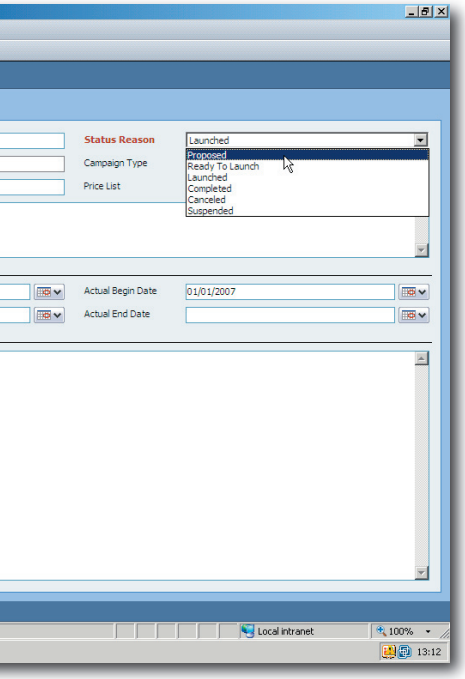
The Marketing Employee's working day

Marketing employees used to spend most of their time working with an Excel spreadsheet when sales campaigns were planned, invitations for events sent out or other marketing events were arranged. Now things are much easier and the entire process – from preparation to mailing and follow-up – is supported by Microsoft Dynamics CRM. After the campaign you will have a complete overview of the response and of how the campaign went.

As a Marketing Employee you start your working day in Microsoft Office Outlook to continue working on the campaigns – new, ongoing, and finished campaigns. Which campaigns you can access depends on your user setup.

Compared to the traditional Excel spreadsheet, the features in Microsoft Dynamics CRM are many. And you have the option of tailoring and arranging the campaigns in detail – including sales materials and all relevant product information.

Microsoft Dynamics CRM provides information for outsourcing, for example, a telemarketing campaign to a call center, and subsequently have the company's own sales department to follow up on the positive respondents.



When you plan a campaign, the Status Reason field is set to Proposed and when the campaign is ready for use, the Status Reason field is changed to Ready To Launch.

Plan a new campaign

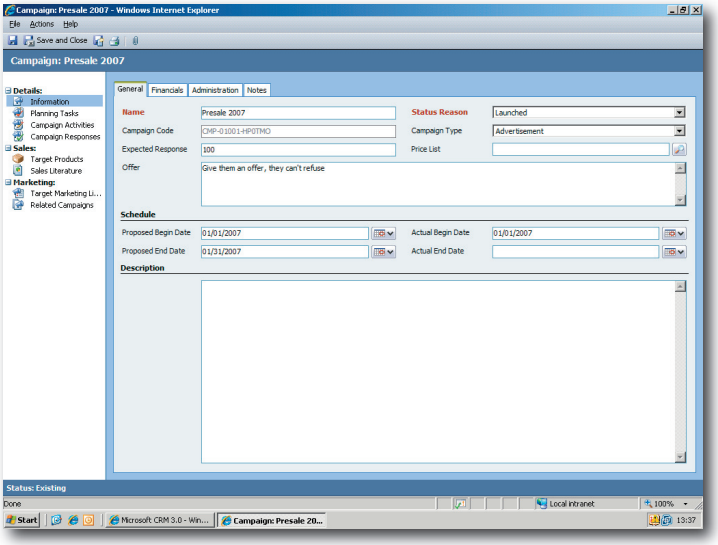
To set up a campaign from scratch in Microsoft Dynamics CRM, start by creating the new campaign, give it a name, and enter campaign status.

Do this by selecting **Campaign** in the **Marketing** module in the navigation pane – either in Outlook or in the Microsoft Dynamics CRM Web client. Click the **New** button to open the **Campaign: New** window for a new, blank campaign.

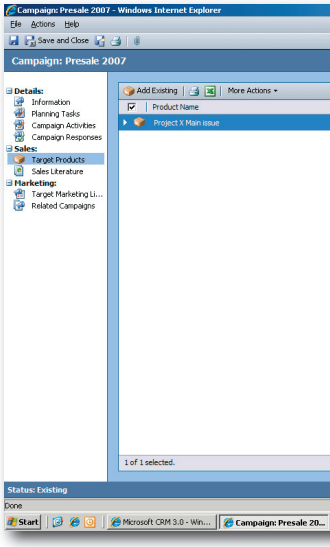
Enter a name for the campaign in the **Name** field and a status in the **Status Reason** field. If the campaign is not going to run right now, for example, because it must be planned first and then approved, select **Proposed** in the **Status Reason** field.

Specify the type of campaign in the **Campaign Type** field and the expected response in the **Expected Response** field. Link a price list to the campaign in the **Price List** field. There might be, for example, a new specific price list offering special prices for this campaign. In the **Campaign Code** field enter either your own designation or use the code which is generated automatically from the system, when you click the **Save** button.

In the **Offer** field, enter a brief description of the type of products and services you offer in this campaign. The campaign can be described in detail in the **Description** field at the bottom of the **General** tab.



1 Start by indicating the basic data about the campaign – name, purpose, expected sales and when it will be active. Then click the Save button.



2 Then specify the activities to be perfo
products included in the campaign an

In the **Schedule** group enter a proposal for the campaign's duration in the **Proposed Begin Date** and **Proposed End Date** fields. Later, you can specify the actual start and end date in the applicable fields to the right in the group.

On the **Financials** tab you can specify the budget for the campaign and how much sales you expect to make. The expense figures can either be a rough estimate or retrieved from the company's marketing budget. The expected revenue can be a rough estimate, calculated from the expected average purchase per respondent, or the model being used for this kind of campaign sales calculations in your company.

On the **Administration** tab you can find information about who created the campaign and when, as well as dates of changes made to the campaign. Finally, add notes to the campaign on the **Notes** tab.

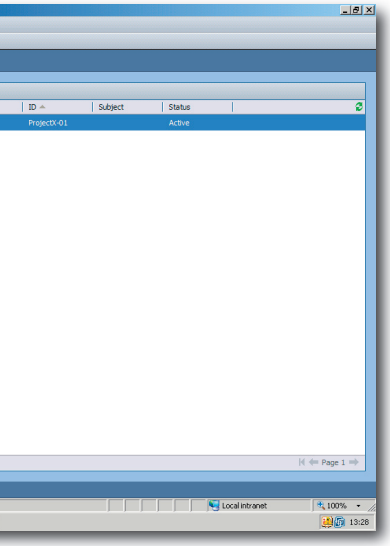
When all basic data is entered, click the **Save** button. When the campaign is saved for the first time, you will get access to more folders in the navigation pane to the left in the **Campaign** window.

Here, you can specify which activities are to be performed during the planning phase before the campaign launch, those that will run during the campaign, and when the campaign has ended you will get an overview of how the respondents reacted to the campaign.

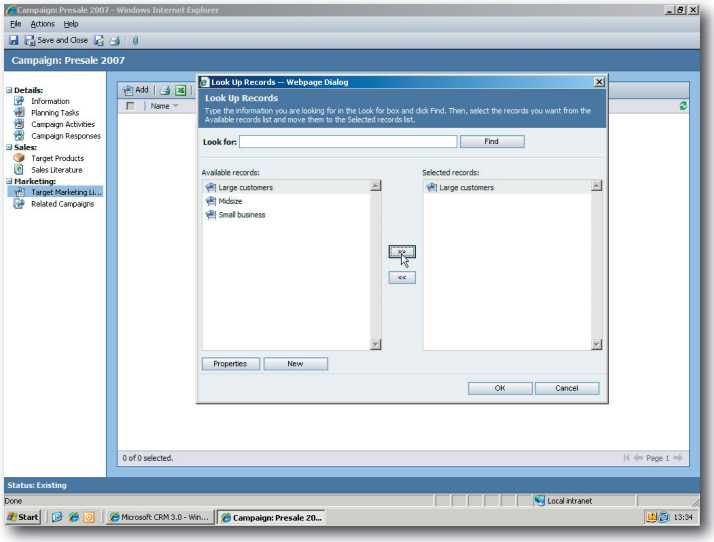
In **Target Products** you can specify the products from your product catalog which are included in the campaign and in **Sales Literature** you can add the sales literature to be used in the campaign.

In **Target Marketing Lists** you can link the marketing lists to be used in the campaign. The marketing lists are probably created in advance and updated continually, but you can also create a special marketing list under **Marketing Lists** in the **Marketing** module in Microsoft Dynamics CRM.

If you want to remove a marketing list from a campaign, highlight the marketing list and click the More actions button | Remove.



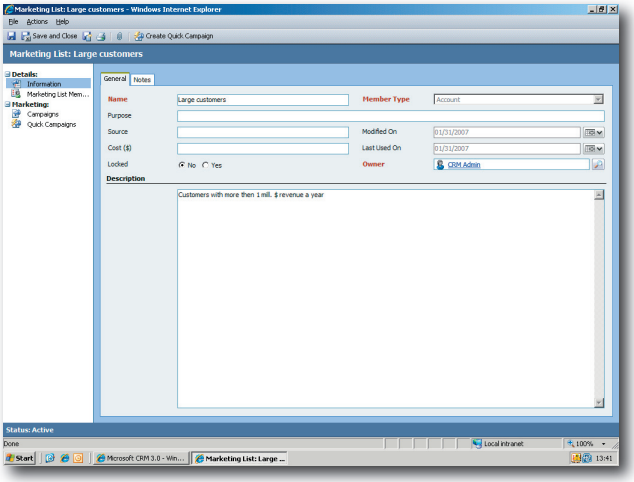
rmed before or during the campaign, the
d the sales materials to be used.



3 Add the marketing list with the respondents for the campaign. You can create a special list for each campaign.

Marketing lists are the key driver

Updated marketing lists are the key driver in every marketing campaign. In Microsoft Dynamics CRM, you can create and maintain a number of marketing lists of existing accounts, leads and contacts from the system combined with addresses imported from external data sources. Imported addresses can come from, for example, a comma separated file from the ERP system or purchased from an address provider.



You administer the marketing lists by clicking **Marketing Lists** under the **Marketing** module in the navigation pane to the left in the program window.

Create a new marketing list

To create a new list, click the **New** button on the **Marketing Lists** toolbar and enter a name for the list in the **Name** field. In the **Purpose** field, specify the use of the list and in the **Member Type** field enter the type of members of the list. You can select **Account**, **Contact,** or **Lead**.

The **Owner** field is by default filled out with the name of the user who creates the marketing list. Click the **Save** button to save the list in the system. Then click **Marketing Members List** under **Details** in the navigation pane to the left in the **Marketing List** window.

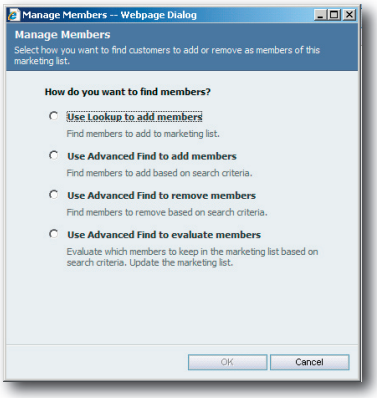
You must save a new marketing list before you can add members to it. This is done by clicking the Save button.

Add members using the Lookup function

From here you have the option of adding leads, accounts or contacts, in Microsoft Dynamics CRM to the list. This is done by clicking the **Manage Members** button. A wizard opens and you can start adding members to the list either by using the **Lookup** function or the **Advanced Find** to add members.

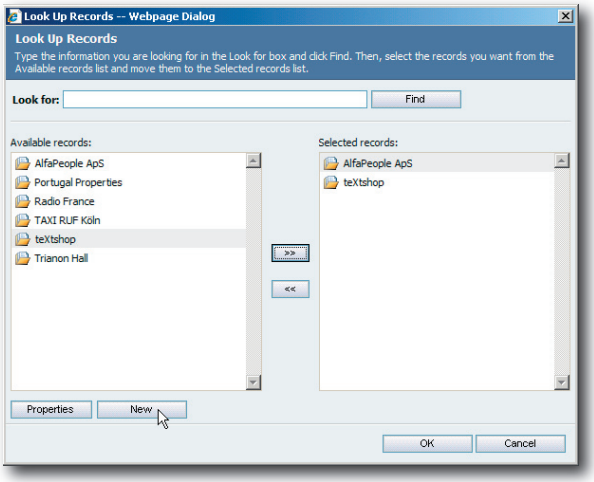
If you select **Use Lookup to add members**, a new dialogue box opens and you can search for companies, contacts, or leads by name. For each search the subjects found are displayed in the list to the left. You add subjects to the marketing list by highlighting the subjects and clicking the >> button in the center. The selected elements are transferred to the list of selected members of the marketing list to the right in the dialogue box. You can repeat the search by typing a new text string in the search field and clicking the **Find** button to add new search results to the marketing list.

Add new members either by looking up or using advanced search.



Quickly create new members

You can create new members quickly by clicking the **New** button in the pane to the left of the dialogue box. The **Quick Create** dialogue box opens and you can enter the account cortex name for a new lead. Click the **OK** button to close the **Quick Create** dialogue box and return to the **Look Up Records** dialogue box and click the **>>** button to add the new member to the marketing list. When you have finished your selection of leads for the marketing list, click the **OK** button to close the **Look Up Records** dialogue box.



You also have the option to create new leads by clicking the New button in the pane to the left in the Look Up Records dialog.

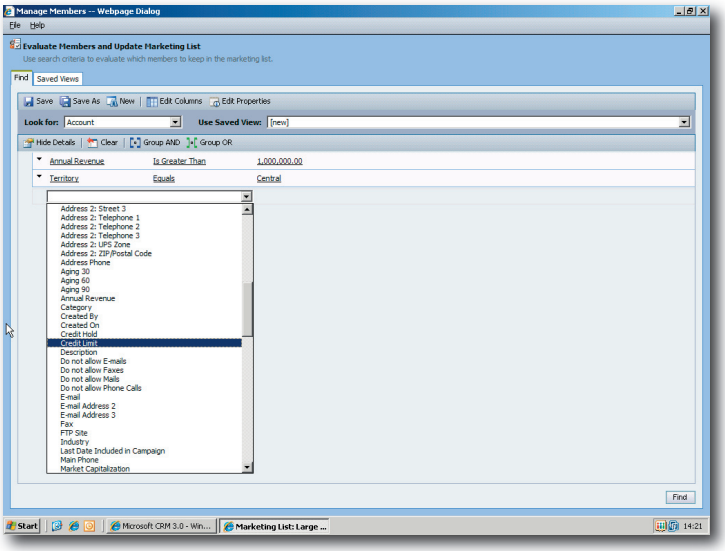
Add members by advanced search

From the **Manage Members** dialogue box you can also select **Use Advanced Find to add members** and click the **OK** button. Now the **Manage Members** dialogue box opens, and you can set up advanced search criteria for selection of leads, accounts or contacts from the Microsoft Dynamics CRM database.

You can, for example, create a search of contacts in a specific geographic area with specific annual sales, with a specific number of employees or, for example, contacts who have not purchased anything from you within the past year. There are many options, and when the search criteria have been entered, click the **Find** button to search for the leads, accounts or contacts that match the search criteria.

You can choose to add all of the contacts the search has found by highlighting the **Add all members returned by the search to the marketing list** field or only adding the contacts you have highlighted in the list by clicking the **Add only the selected members to the marketing list** field and clicking the **Add to Marketing List** button.

You can repeat both the simple and the advanced search and in this way add contacts to the marketing list that match even special criteria.



Add members to the marketing list using advanced search.

Administer marketing lists

You can move members from one list to another just as you can import members from a comma-separated text file.

It is incredibly easy to administer the marketing lists so that they are always updated.

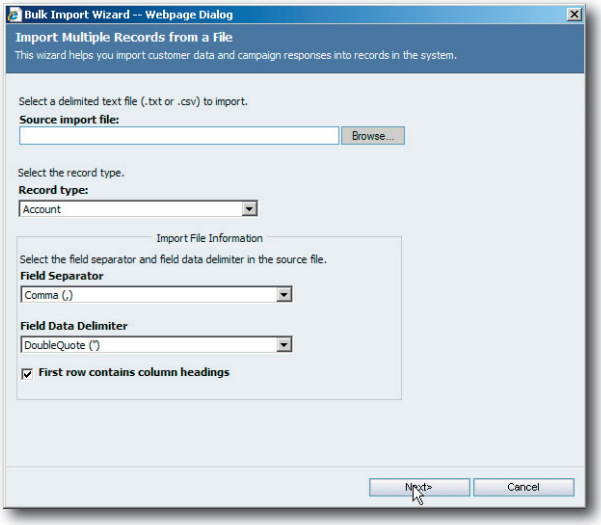
Copy members from one list to another

You can copy members from one marketing list to another by highlighting the list you want to copy from and selecting the **Actions** menu | **Add to Another Marketing List**. In the **Look Up Records** dialogue box, select the marketing list to which you want to copy the members.

Click the **OK** button to confirm your selection and then the **Save and Close** button to close the marketing list.

Import addresses from a text file

If you want to import addresses from a comma-separated or another type of file, select the **Tools** menu | **Import** in the **Microsoft Dynamics CRM 3.0** window. The **Bulk Import Wizard** opens and you can specify the location of the file and how the fields in the text file are separated – commas or semicolons. In addition, you specify whether the addresses will be imported as accounts, contacts, leads or campaign response.



If you had a call center telemarket your campaign, you can import the campaign response in Microsoft Dynamics CRM using the Bulk Import Wizard.

Click the **Next** button. Now all fields from the file are displayed to ensure you have selected the correct separator characters in the wizard's first step. Specify which marketing list you want to import the addresses from the text file into, and link the fields from the text file with the fields in Microsoft Dynamics CRM database into which they will be inserted. You can also choose to create a new marketing list from the addresses in the text file by clicking the **New** button in the **Look Up Records** dialogue box – where you selected which marketing list you wanted to import the addresses to.

Click the **Next** button and click the **Import** button to import the addresses from the text file to the marketing list. The addresses are imported from the text file to the selected marketing list in the system.

The campaign starts

When the campaign details are specified, the status is set to "Ready to launch" and when it starts the status is set to "Started". Then, all associated activities and assignments appear in the respective employee's list of activities.

As the leads from the marketing list of the campaign are contacted, the responses are recorded by clicking **Campaign Response** in **Details** in the navigation pane in the **Campaign** window.

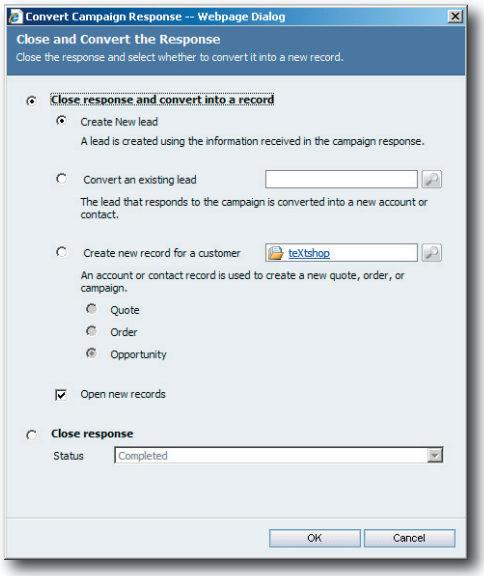
For each response, click the **New** button. The **Campaign Response: New** dialogue box opens. Start by selecting the subject by using the Form Assistant pane to the right and specify the response from the lead in the **Subject** field at the bottom of the **Campaign Response** tab. In the **Response Code** field at the top of the **Campaign Response** tab you specify whether the subject was interested, not interested, did not want more material sent, or was simply a mistake to include in the campaign.

Regarding campaign statistics, it is important to record the response for all leads in the marketing list. If the campaign is conducted by a telemarketing bureau, all recorded responses can be imported from a comma separated file in the same way as described in the section about marketing lists.

If the lead is interested, specify this by selecting **Interested** in the **Campaign Response** field and specify in the **Subject** field what element of the campaign had the lead's interest. Click the **Save** button.

Convert campaign response

When the response is recorded in Microsoft Dynamics CRM, new buttons are displayed on the toolbar of the **Campaign Response** dialogue box. If, for example, you want to convert the subject to a lead, click the **Convert Campaign Response** button and select whether the subject should be created as a new lead, linked to an existing lead, or converted to a customer. If converted to a customer, record the extent to which a sale, an order, or only an opportunity should be created.



In the Convert Campaign Response dialog, you select whether the subject will be created as a new lead, if the subject will be linked to an existing lead, or if the subject will be converted to a customer.

When the campaign ends

When the campaign ends, the response is reviewed and all positive subjects are delegated to the Sales Representatives using the **Convert Campaign Response** button as described in the previous section.

When this has been done, the campaign is closed by selecting **Completed** in the **Status Reason** field on the **General** tab in the **Campaign** window for the applicable campaign. Now the campaign is concluded and can be included as basis for future campaigns.

The user interface has changed

The user interface has been redesigned in the new version of Microsoft Dynamics CRM 3.0. It is easier to navigate and provides even faster access to the various functions.

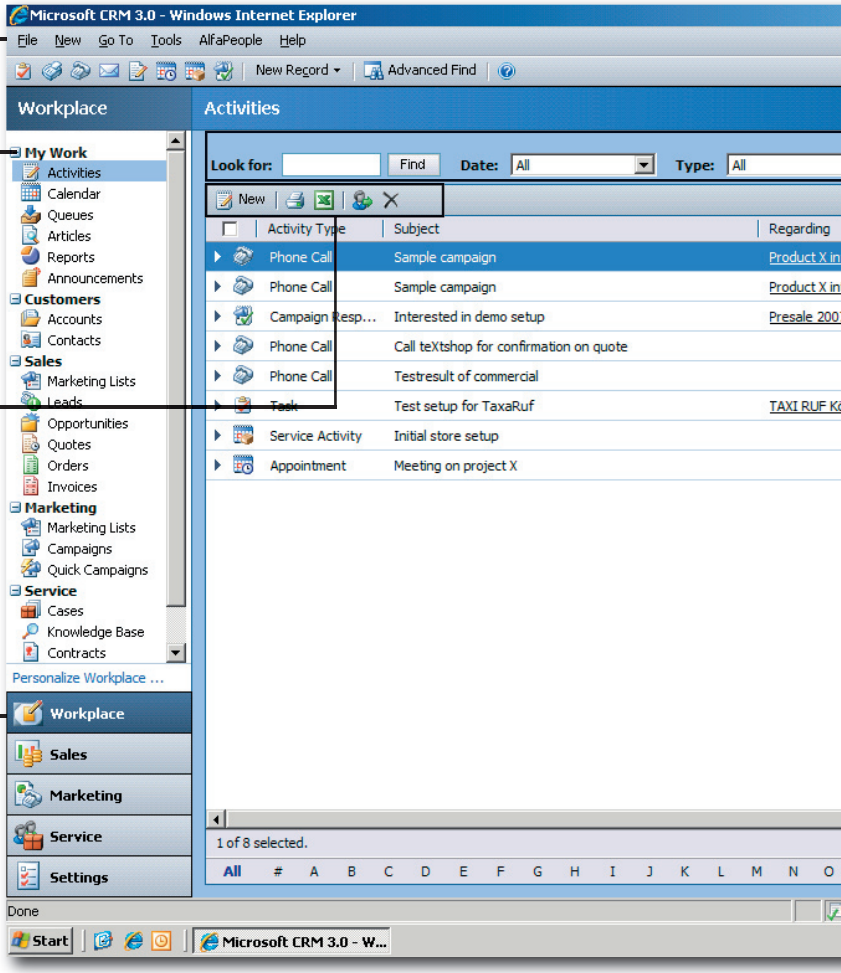
The user interface in Microsoft Dynamics CRM 3.0 resembles the user interface you already know from Microsoft Office Outlook 2003. To the left in the window is a navigation pane which replaces the tabs in version 1.2. At the bottom of the window are buttons for the main areas: **Workplace**, **Sales**, **Marketing**, **Service** and **Settings**.

In the top of the window you find the menus and the toolbar.

In the top of the navigation pane you have access to the different folders of the Microsoft Dynamics CRM system.

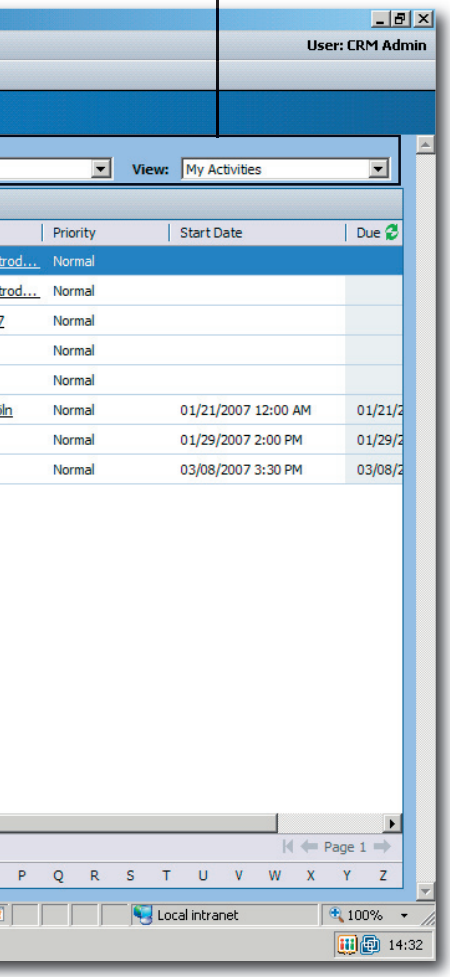
Using the buttons in the toolbar, you can create a new item, print, delegate and delete items and export the current view to an Excel spreadsheet.

In the bottom of the navigation pane you find buttons for the program's main sections: When you switch main section, the content of the top part of the navigation pane changes.



What's new in Microsoft Dynamics CRM 3.0

Use the search fields in the top of the window to customize the view to suits your work assignments.



It is now even easier to give your customers a good experience with your company; regardless of they speak with a sales and marketing employee or customer services. Using Microsoft Dynamics CRM 3.0, each employee has access to all relevant information about the customers. Also, the program is much easier to customize to your processes and type of customers.

The new version of Microsoft Dynamics CRM can be customized both to your company's work processes and to the individual employee's way of working. It also works the way the IT department expects it to do!

Microsoft has used the experience from the first versions of Microsoft Dynamics CRM to develop an even better product, which, to an even higher degree, can support your customer relationship and give you an overview of important trends and movements in the market.

One of the essential aims at the design was improved user-friendliness and improved tools to provide better overviews which make it even easier to get a picture of the business regardless of whether it applies to sales in the sales department or the quality of task management in customer services.

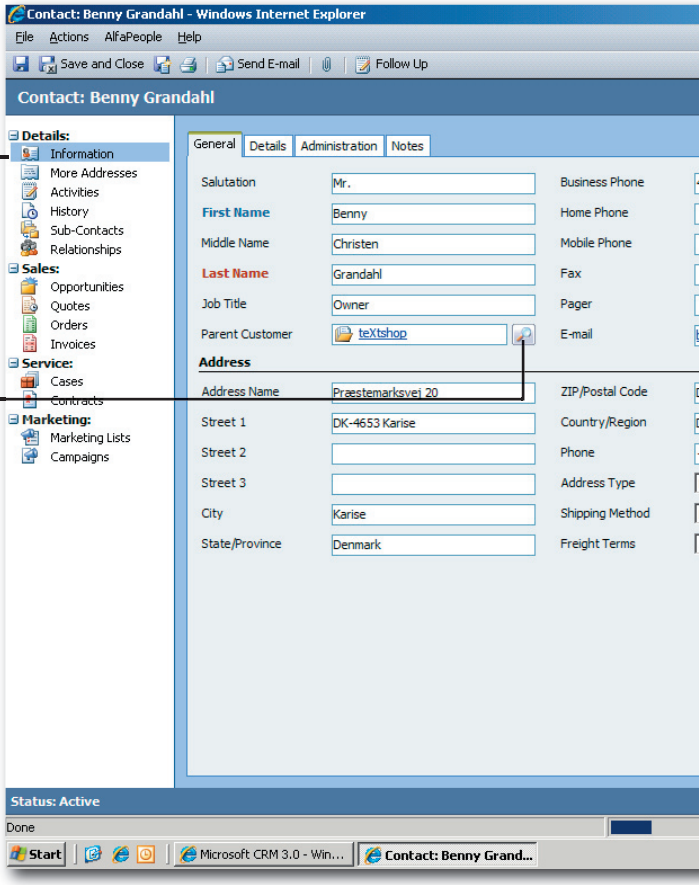
Take a shortcut with the Form Assistant pane

Another new feature is the Form Assistant pane to the right in the window. From the pane you always have access to shortcuts applicable to the task in progress. You can select to display a list of all contracts for a specific account when you work with the customer record or select to display shortcuts to other customers.

Select the content of the task pane from the list field in the top of the task pane. Here, you always find the options that belong to the CRM window you are working in. Shortcuts to the subjects you worked with lately are displayed and you can search in the applicable entity using the **Look for** field.

Using the navigation pane in the individual windows you can quickly find information about, for example, service cases, opportunities, submitted quotes, closed sales, etc. concerning the contact, or the company where the contact works.

Instead of clicking the Look up button to the right of the fields and opening a new window, you can search for the information in the Form assistant task pane to the right.

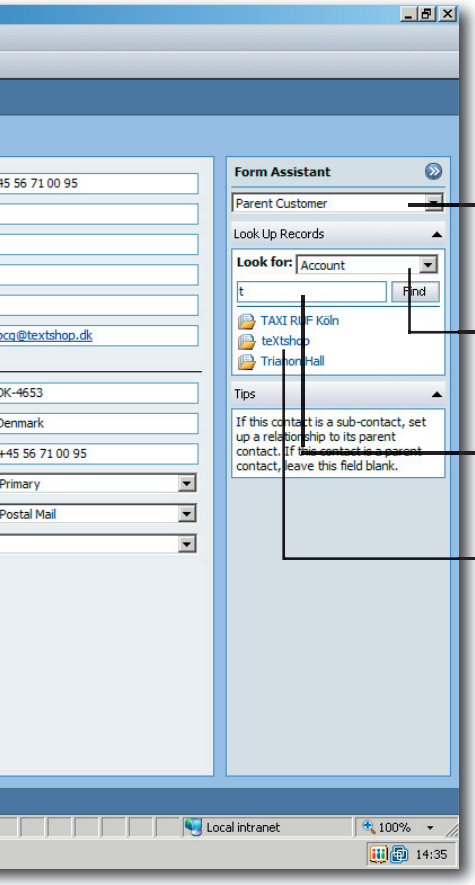


The Form Assistant pane makes it easier to fill out the many different forms in Microsoft Dynamics CRM because the pane makes it possible to look up information for the individual fields without having to open another **Look-up** window. You avoid having several windows open in order to fill out the fields of a single window.

Using the Form Assistant pane

If, for example, you want to link an account to a contact in a **Contacts** window, highlight the **Parent Customer** field or select **Parent Customer** in the top of the Form Assistant pane. A list of all accounts in the system displays in the pane and you can search for the company using the **Look for** field.

You can use other criteria for searching; for example, search for contacts linked to the applicable account in the system. When you select a contact from the list in the task pane, the **Parent Customer** field is filled in using the company information from the selected contact.



Using the Form Assistant pane to the right in the program window, you always have access to relevant information for the selected field in the form window.

1 Select the field in the form you want to enter information into or highlight the field in the form.

2 Select the type of information to insert into the field.

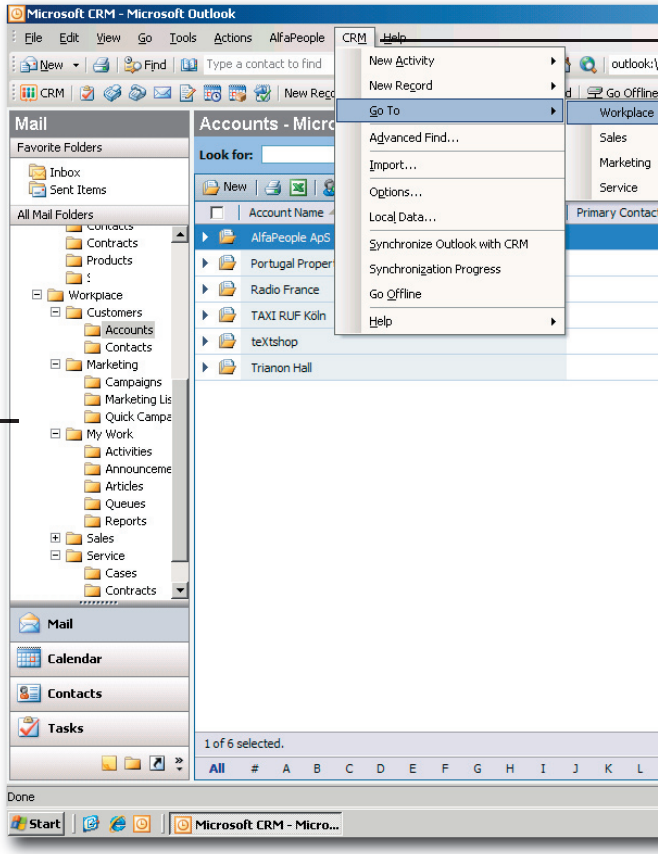
3 Search for the information to insert into the field using the search field.

4 Click the information to insert into the field.

Improved integration with Outlook

The integration with Outlook has been improved in several ways. All Microsoft Dynamics CRM modules (including Sales, Marketing and Customer Service) are now in Outlook's navigation pane and you do not have to switch windows anymore to work with Microsoft Dynamics CRM – and now you have only one inbox!

The navigation pane in Microsoft Office Outlook 2003 now has shortcuts to all Microsoft Dynamics CRM modules. Access the modules by clicking the **Plus** button next to the module folder. You navigate in Microsoft Dynamics CRM like you navigate in the **Inbox**, **Calendar** and any other folder in the navigation pane in Outlook. If you know Outlook, you are able to navigate in Microsoft Dynamics CRM right away.



You can access the CRM folders from the navigation pane in Microsoft Office Outlook 2003.

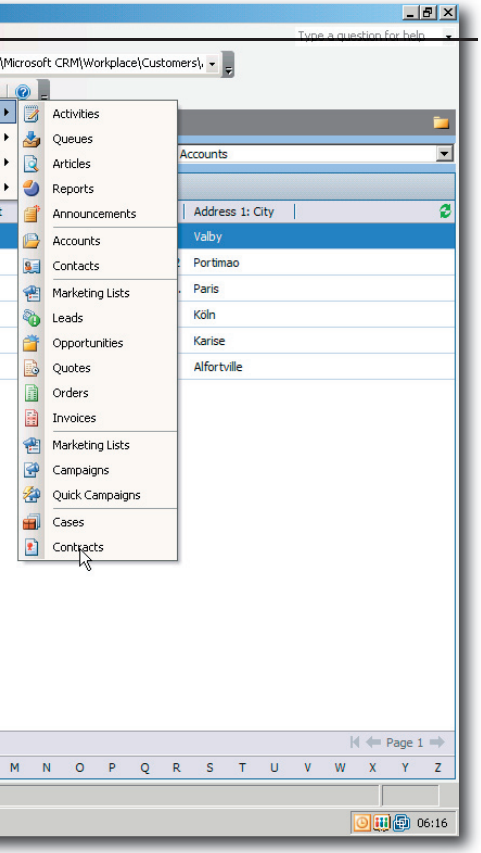
Now there is only one inbox

From now on you only have one inbox in Outlook. All e-mails, appointments, tasks, contacts and other Outlook subjects can be linked to Microsoft Dynamics CRM by clicking the **Track in CRM** button.

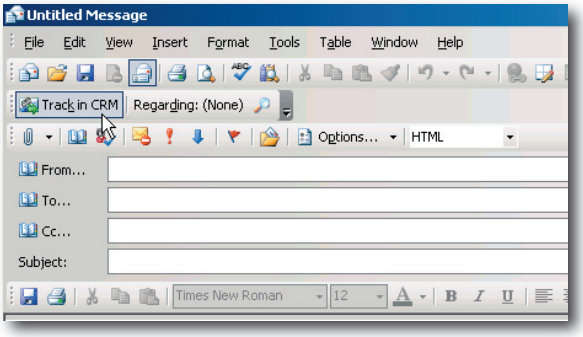
This means that all contacts, appointments and tasks entered from Outlook can be linked to a contact, acoount or another type of record in Microsoft CRM simply by clicking the **Track in CRM** button in the applicable Outlook task to select the item in Microsoft Dynamics CRM to which the applicable contact, assignment, agreement from Outlook will be linked.

The fast shortcut: The CRM menu

Using the special **CRM** menu you can quickly switch between the **Workplace**, **Sales**, **Marketing** and **Service** modules in the Microsoft Dynamics CRM system just as you can enter new activities and new **Account** and **Contact** records directly from the **CRM** menu. The menu also provides access to your personal settings where you can customize displays and data updating, etc.



Using the CRM menu you can quickly switch between all folders in the Workplace, Sales, Marketing and Service modules.



Microsoft CRM no longer uses separate inboxes for personal e-mails and CRM e-mails. All e-mails, appointments, tasks, contacts and other Outlook subjects can be linked to the CRM system by clicking the Track in CRM button and selecting the record in the CRM system to link the Outlook subject to.

Improved reporting tools

In addition to new standard reports, the reporting tool in Microsoft Dynamics CRM 3.0 is improved significantly. It is much easier to create your own reports and you can design reports in the Microsoft Office programs.

Earlier in the book we described how to export views from Microsoft CRM to Microsoft Office Excel. In addition, you can create reports using Microsoft Office Word by importing data from Microsoft Dynamics CRM into the document and use the formatting and other functions in Word to polish the report.

If, for example, you make a weekly report for a department meeting, you can create a PowerPoint presentation which automatically retrieves information from the CRM system in order to always have an updated version of the report.

Improved standard reports

The standard reports in Microsoft Dynamics CRM 3.0 are improved significantly and many new reports are added. It is easier to get answers on critical business questions and a quicker overview, for example, of missed tasks and leads, the quality of task handling and the sales departments handling of leads and many other matters.

Quick access to reports

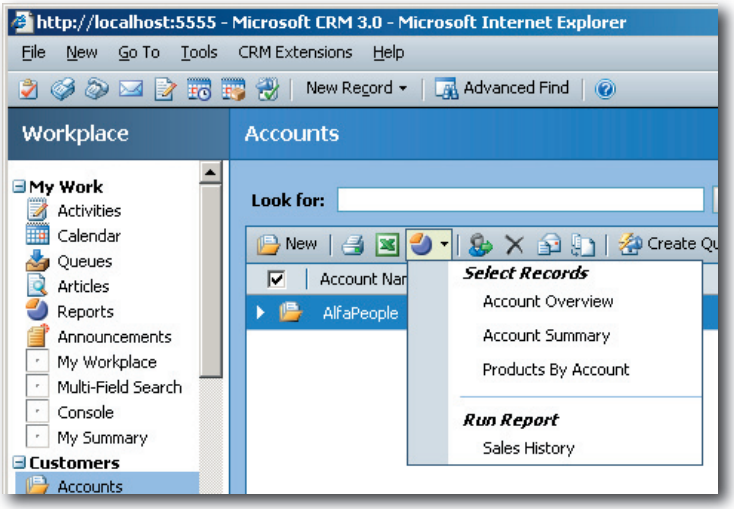
You can print reports from every part of Microsoft DynamicsCRM. Regardless of whether you are working with a customer, an account or in the sections you always have access to reports by clicking the **Reports** button in the toolbar at the top pane. A menu displays the reports available for the applicable area.

When you click a subject e.g. an account name in the report window, you get access to the applicable item in the system. From this you can quickly get an overview of details of, for example, large customers, customers who suddenly stopped buying from you, or customers with an extreme number of inquiries to your service and support department.

Easier report development

The development of new reports is simplified and does not require any system-critical administrative rights. A special Report Manager user group makes it possible to divide or delegate the administrative tasks regarding report customization and development to others without giving the applicable user any administrative user rights.

The administrator can create new report categories, add, rename or delete reports and determine in which modules, for which subject types and displays the applicable report is displayed. It is also possible



Easy access to reports! Simply click the **Reports** button on the toolbar at the top of the tab. From the menu opened you have access to available reports within the applicable area.

to determine which users and user groups should have access to the reports.

The reports can be developed using the built-in reporting tool or the report could be built in any Microsoft Office program or other third-party reporting tools. All reports are displayed in the same place for the users by clicking the **Reports** button on the toolbar in the list display in the modules. It is also possible to insert links to applicable Web-based reports in the **Reports** menu. This makes it possible for users to print reports from areas of CRM they usually do not have access to.

New features for CRM administrators

Not only the users benefit from using Microsoft Dynamics CRM 3.0. The CRM administrator will also benefit from a number of new features and a much simpler and quicker way to get the CRM system up running in the organization.

Easier rolling out in the company

Microsoft Dynamics CRM 3.0 is significantly easier to roll out on the company's servers and the users' computers. This is due primarily to a number of diagnostics tools which search the server and the network for obstacles before the installation starts.

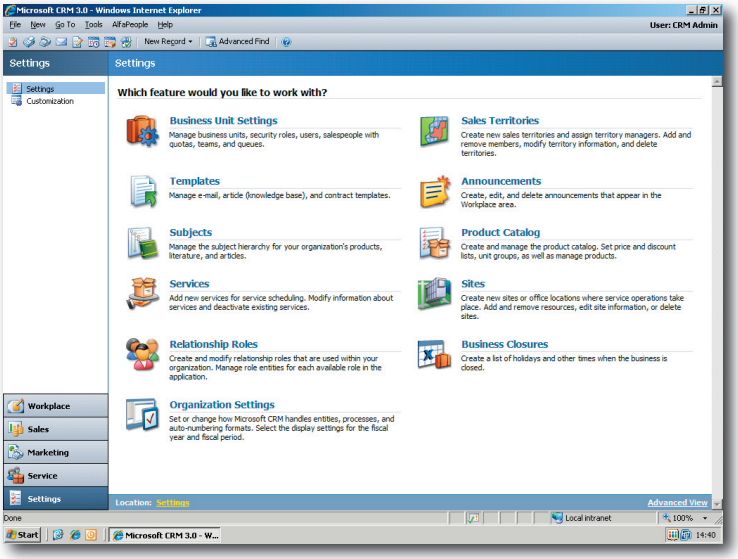
The Outlook client is installed automatically and does not require data to be saved locally on the individual client computer. All data is saved on the server and can be accessed from the Outlook client. This ensures that no business-sensitive data is left on the individual client computer or that updates have to be installed on the client computer later on.

Easier upgrading, expansion and maintenance

Upgrading from Microsoft CRM 1.2 is performed using a special updating wizard which guides the system administrator through the updating process and automatically performs the necessary conversion of the databases.

New and modified modules can be installed on the CRM server simply by importing the new module and the associated forms and views in the system. New (specially developed) and customized modules have the same rights as standard modules and can be displayed in the user interface in the same way as the standard modules.

Using the same diagnostics tools that analyzed the company's IT system before the installation of the CRM system, the system administrator can keep track of the system on an ongoing basis and discover and remedy potential problems before they occur.



Under **Settings**, the Administrator can change general settings and customizations of the system. Each user can only change his or hers own settings.

Microsoft

Working with

This book describes the working day for a number of different job profiles using Microsoft Dynamics CRM and explains the benefits of CRM for the individual employee.

Even though the same system is used, a working day can be quite different for the different job profiles as Microsoft Dynamics CRM can be customized for individual job functions and for the way the individual works.

The book combines the individual employee profile's working day with the use of Microsoft Dynamics CRM. It also inspires with case studies of how other companies successfully introduced Microsoft Dynamics CRM.

Finally, the book takes a closer look at how to get the system up and running, and which considerations should be taken into account before implementing Microsoft Dynamics CRM.

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