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Maximizing Your Sales with Microsoft® Dynamics™ CRM 2011

Edward Kachinske, Timothy Kachinske, and Adam Kachinske

MAXIMIZING YOUR SALES WITH

MICROSOFT® DYNAMICS™ CRM 2011

Edward Kachinske | Timothy Kachinske
Adam Kachinske

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Library of Congress Control Number: 2011920278

ISBN-13: 978-1-4354-5882-6

ISBN-10: 1-4354-5882-6

eISBN-10: 1-4354-5883-4

Course Technology, a part of Cengage Learning
20 Channel Center Street
Boston, MA 02210
USA

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Printed in the United States of America
1 2 3 4 5 6 7 13 12 11

For Kay Pearson

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In previous sales roles at Microsoft, Winters has been responsible for selling Desktop, Server, ERP, and CRM solutions through partners to commercial customers in the Southern California and New York Metro markets. Before joining Microsoft, he worked for a Microsoft CRM Gold-Certified partner where he successfully assisted in the deployment of several complex CRM solutions to commercial and public sector customers. Winters began his career in the IT industry over 15 years ago as an Account Executive and Inside Sales Manager at a two-billion-dollar reseller of computer software, hardware, and services.

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Mark takes a businessperson's approach to CRM as a tool for driving business value, having been a user of sales and marketing management tools for over 25 years. Prior to Microsoft, Mark held several management and executive roles in the consumer electronics industry, including Sales Manager, Marketing Manager, and Merchandise Manager. Positions that he firmly believes would have benefitted greatly from a tool like CRM Online!

Currently based at Microsoft HQ, Mark lives in North Seattle with his wife and assortment of pets. They enjoy white water rafting, home improvement, collecting Washington wines from Red Mountain and Walla Walla, and traveling whenever possible.

Chris Kahl, Microsoft. Chris has spent the past two decades working in technical sales and consulting and has been focused on Sales Force Automation and Customer Relationship Management systems for the last ten years. He has worked with companies, large and small, to help them refine sales, marketing, and customer service operations and to apply appropriate technology solutions in support of well-defined business goals. Chris believes in focusing on the needs of the end-user of a system as the surest path to rapid adoption and effective collection of key business information which can, in turn, be used to drive better decision-making. Chris is currently employed as a CRM Partner Technology Advisor with Microsoft Corporation.

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Introduction

What Is Microsoft Dynamics CRM?

Microsoft Dynamics CRM is a customer relationship management tool. At its very core, Microsoft Dynamics CRM is a database. It's the place where you can enter information about your customers: Who works at the company, what are their roles, who at your company has communicated with them, what have they purchased, and have they had any issues? Need a phone number? Looking for a customer's latest support calls? Need to get a handle on your sales pipeline? You'll get all of this and more in Microsoft Dynamics CRM.

Microsoft Dynamics CRM goes way beyond traditional databases, though. It has many built-in tools to help manage the interactions you have with your customers.

There are a lot of CRM systems on the market. Microsoft Dynamics CRM is the first, however, to fully integrate into Microsoft Office Outlook. All of the instructions in this book will work both in the Microsoft Dynamics CRM web application and within Outlook.

For more information on purchasing Microsoft Dynamics CRM go to http://crm.dynamics.com or call 877-CRM-CHOICE (877-276-2464).

Chapter 1

Working with Leads

- Creating and deleting leads
- Viewing leads
- Qualifying leads

Creating and deleting leads

Leads are prospects. In many ways, they look and feel like contacts, but they have one big distinction. You haven't qualified them yet. You can add new leads manually, or you can import lists of leads. Then, as the leads go through your sales cycle, you'll come to a point where you either disqualify them or convert them to active customers.

Task A Creating a new lead

When entering a new lead, fields marked with a red asterisk (*) are required. Fields marked with a blue plus sign (+) are recommended.

Some options will not be available until you save the lead. If something you'd like to do is grayed out, try saving the lead.

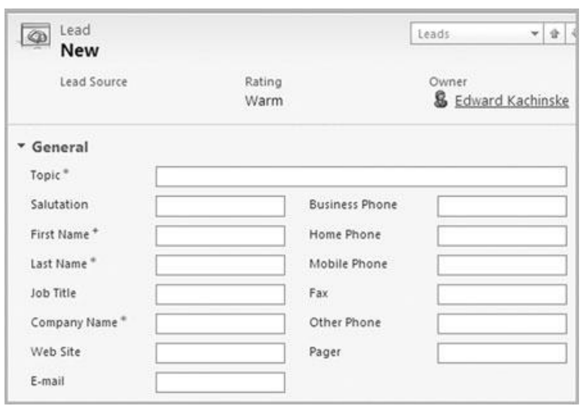
At any point, you can enter a new lead into the system manually. Maybe someone called with an inquiry about your services. Perhaps someone sent an unsolicited e-mail from a link on your website. Maybe you came back from a conference with someone's business card. All of these prospects can be entered into Microsoft Dynamics CRM as leads.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Leads.
2. On the Leads tab of the ribbon, in the Records group, click the New button.
3. Enter information about your lead into the form that appears.
4. On the Lead tab of the ribbon, in the Save group, click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Leads.
2. On the Leads menu, click the New button.
3. Enter information about your lead into the form that appears.
4. Click the Save and Close button at the top to save your changes.



Task B Importing a list of leads

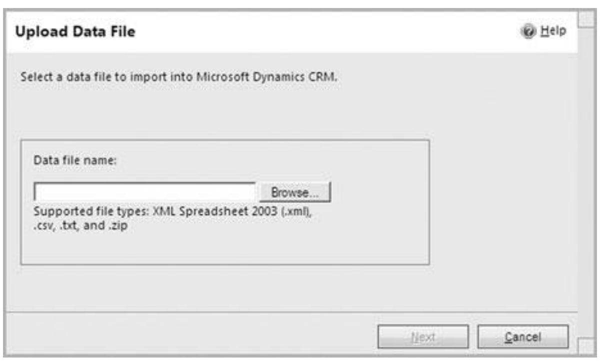
Using the Import Data Wizard, you can mass import lists of leads from a spreadsheet (XML), comma-separated value (CSV) file, delimited text (TXT), or ZIP file. Importing leads saves a lot of keystrokes, and you can use this saved time to focus on selling to customers.

Outlook 2010/Internet Explorer:

1. On the Leads tab of the ribbon, in the Data group, click the Import Data button.
2. In the Data File area, click the Browse button to select a data file for import.
3. Check to make sure that your text delimiters are accurate.
4. Click the Next button.
5. Choose a data map. If this is your first time importing this format of file, you may need to create a data map.
6. Follow the wizard steps until you have finished your import. The steps may vary depending on the nature of your import job.

Outlook 2003/2007:

1. On the Leads menu, highlight Import Data, then click the Import Data button.
2. In the Data File area, click the Browse button to select a data file for import.
3. Check to make sure that your text delimiters are accurate.
4. Click the Next button.
5. Choose a data map. If this is your first time importing this format of file, you may need to create a data map.
6. Follow the wizard steps until you have finished your import. The steps may vary depending on the nature of your import job.



Importing is generally a task restricted to just a few people in your company. Check with your administrator if you're not sure if importing data is enabled for your user profile.

If the column headers in your import file are exactly the same as the CRM Attribute Display names, then the import will automatically map the fields for you.

Deleted leads cannot be undeleted. For this reason, most Microsoft Dynamics CRM users will deactivate records instead of deleting them.

Task C Deleting a lead

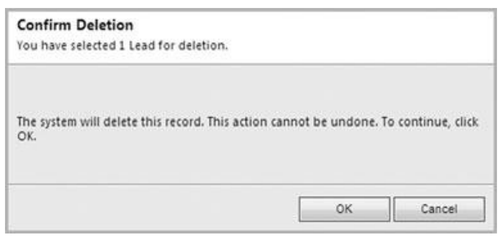
If you no longer need a lead in the database, you can delete it. Deleting a lead is different from disqualifying, closing, or converting a lead. When you delete a lead, the lead and all related activities are removed from the database and is no longer available for reporting purposes. Most of the time, you won't want to delete a lead; rather, you'll disqualify it. If you accidentally enter a duplicate lead, however, you'd want to permanently delete the duplicate.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Highlight the lead you'd like to delete.
4. On the Leads tab of the ribbon, in the Records group, click the Delete button.
5. Confirm your deletion by clicking OK.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Highlight the lead you'd like to delete.
4. On the Leads menu, highlight Delete, then click Delete.
5. Confirm your deletion by clicking OK.



Viewing leads

If you're a salesperson, your lead list is probably the most important thing in Microsoft Dynamics CRM. It's easy to find a specific lead in a one-off situation. If you find yourself looking for a set of leads often, you can create a view to instantly bring up leads that match a specific query.

Task A Finding a lead

One of your prospects calls you, and you want to record information about the lead in Microsoft Dynamics CRM. You can perform a quick search in the Leads view to bring up any specific lead. When searching, all fields are searched, so you can enter a name, company name, lead topic, or any other information to bring up related leads.

Outlook 2010/Internet Explorer:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Enter a search term into the Quick Find field above the list of leads on the left and press Enter.
4. Microsoft Dynamics CRM will search for your search term in all lead fields.
5. The list of matching leads will appear on the screen. To remove the search filter, click the X button to the right of the Search field.

Outlook 2003/2007:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Enter a search term into the Quick Find corner field above the list of leads on the right and press Enter.
4. Microsoft Dynamics CRM will search for your search term in all lead fields.
5. The list of matching leads will appear on the screen. To remove the search filter, click the X button to the right of the Search field.

If you don't find the leads you're looking for, try using the alphabet bar at the bottom of the view or running an Advanced Find. In Outlook 2003/2007, Advanced Find is on the toolbar. In Outlook 2010, Advanced Find is on the Leads tab of the ribbon in the Data group.

You can create personal or shared views. Click the Advanced Find button at the top of the screen. Configure the details of your query, determine which columns to display, and click the Save As button to save the view.

Task B Switching between different lead views

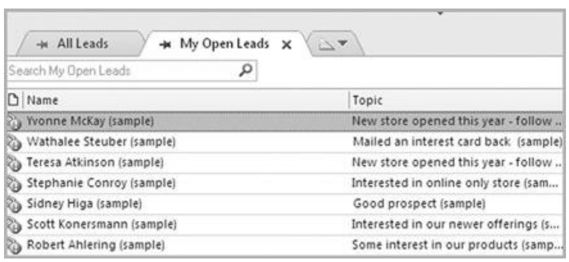
By default, the Leads view will show you all of your open leads. The view that appears by default is called My Open Leads. If you want to look at a different list of leads, you can just switch to a different Lead view. For example, instead of showing all of your open leads, you might want to see all of the leads that are older than six months. Just switch views, and you'll see a whole different set of records on the screen.

Internet Explorer/Outlook 2003:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Choose a view from the View drop-down at the top of the leads list.
4. All leads matching the query for your view will appear.

Outlook 2007/2010:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. At the top of the leads list, you will see tabs representing the views that have been pinned. Click the furthest tab to the right to add a new tab/view to your list of existing tabs.



Qualifying leads

Leads are temporary, and all leads will be either qualified or disqualified at some point. If someone purchases from your company, you'll probably convert the lead to an account or contact. If you lose the sale, you'll disqualify the lead, which will remove it from the list of active leads but still retain all communication history.

Task A Converting leads to accounts, contacts, or opportunities

A lead is an unqualified prospect. It's probable that you haven't yet spoken with the lead. Maybe it came in from a list you bought, or perhaps you got the information from a trade show. Once you have determined that there is a potential to sell something, you'll want to qualify the lead. After converting a lead to another record type, the original lead will be deactivated and set to read-only and all relevant information will transfer to the new record.

Outlook 2010/Internet Explorer:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Highlight the lead you'd like to convert.
4. On the Leads tab of the ribbon, in the Actions group, click the Qualify button.
5. Place a checkmark next to the Account, Contact, and/or Opportunity fields. If you choose all three, Microsoft Dynamics CRM will create an account, a related contact, and a related opportunity based on this lead record.
6. Click OK.
7. The new entities will be created, and the original lead record will be deactivated.

Outlook 2003/2007:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Highlight the lead you'd like to convert.
4. On the Leads menu, click the Qualify button.
5. Choose Qualify and convert into the following records option.
6. Place a checkmark next to the Account, Contact, and/or Opportunity fields. If you choose all three, Microsoft Dynamics CRM will create an account, a related contact, and a related opportunity based on this lead record.
7. Click OK.
8. The new entities will be created, and the original lead record will be deactivated.

When converting the lead to an opportunity, sometimes you'll find that someone has already created an account or contact record for the lead. To avoid duplicates in this situation, just convert the lead to an opportunity. When you do this, you'll be able to specify the potential customer for the opportunity.

All activities captured while qualifying the lead will be maintained within the lead record. These activities can be viewed from within the corresponding account, contact, or lead by selecting Activities from the Navigation Pane and viewing "Related Regarding Records."

Reactivating a disqualified lead is covered on the next page.

Task B Disqualifying a lead

There's no sense in chasing a dead lead, so Microsoft Dynamics CRM lets you disqualify a lead. Disqualified leads will be removed from your active lead views, but all lead information and activity history is retained in the system. This way, if the customer ever calls again, you'll know that you tried to do business with him or her before.

Outlook 2010/Internet Explorer:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Highlight the lead you'd like to convert.
4. On the Leads tab of the ribbon, in the Actions group, click the Qualify button.
5. Choose the Disqualify option.
6. From the Status drop-down, choose a reason for disqualifying the lead.
7. Click OK.

Outlook 2010/2007:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. Highlight the lead you'd like to convert.
4. On the Leads menu, click the Qualify button.
5. Choose the Disqualify option.
6. From the Status drop-down, choose a reason for disqualifying the lead.
7. Click OK.

Task C Reactivating a closed lead

If you disqualify a lead, you can always reactive the lead. For example, perhaps you determined the prospect did not have budget allocated for the project. A few weeks later, they call back and inform you that they have received executive sponsorship for the project. In this case, you'd reactivate the lead.

Outlook 2010/Internet Explorer:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. From the View drop-down, choose a view that will display the lead you'd like to reactivate. (For example, you could choose the Closed Leads view.)
4. Highlight the lead.
5. On the Leads tab of the ribbon, in the Records group, click the Activate button.
6. You will now be able to work with the lead, and it will show up in your list of active leads.

Outlook 2003/2007:

1. On the Navigation Pane, click Sales and then Leads.
2. Your current leads list should appear.
3. From the View drop-down, choose a view that will display the lead you'd like to reactivate. (For example, you could choose the Closed Leads view.)
4. Highlight the lead.
5. On the Leads menu, click the Activate button.
6. You will now be able to work with the lead, and it will show up in your list of active leads.

After reactivating a lead, check to make sure all of your information is up to date. If you were working on this lead last year, the company may have a new address or other contact information.

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Chapter 2

Working with Records

- Creating and deleting records
- Viewing records
- Sharing records
- Creating connections between records

If you want to share your new record with others, click on the record in your list. On the ribbon in the Collaborate group, click the Share button.

Creating and deleting records

Accounts are companies. In the hierarchy of customer records, accounts are usually at the top. Within an account, you may have multiple associated contacts. Microsoft is an account. Bill Gates is a contact.

Task A Creating a new record

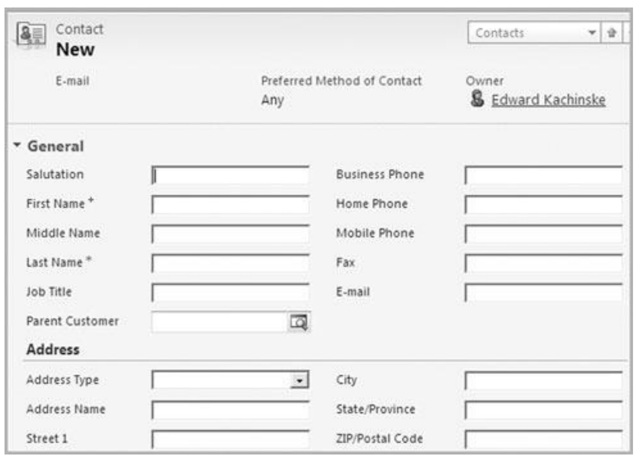
Creating most new records in Microsoft Dynamics CRM follows the same general process. In Outlook 2010/Internet Explorer, you'll see a New button on the ribbon in the Records group. In Outlook 2003/2007, the New button is on the Record menu. You can follow the process below to create a new record in Internet Explorer or Outlook 2003/2007.

Internet Explorer:

1. On the File tab, click New Record, then select a record type.
2. Enter field data for your account.
3. On the ribbon in the Save group, click the Save & Close button.

Outlook 2003/2007:

1. On the toolbar, click the New Record drop-down and select a record type.
2. Enter field data for your account.
3. Click the Save & Close button.

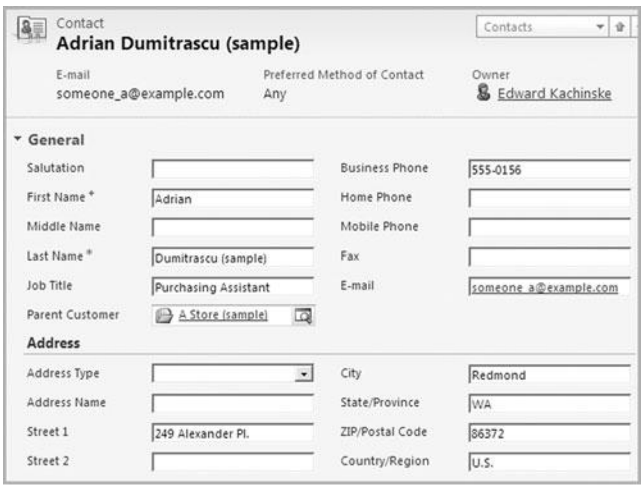


Task B Editing an existing record

Anytime you see a list of records in Microsoft Dynamics CRM, you can double-click the record. This brings up an edit window, where you can edit the record. While you're editing a record, notice the options on the left. You can add additional addresses, activities, connections, and more.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. If necessary, use the Search field, alphabet bar, or the View drop-down to locate the record you'd like to edit.
4. After finding the record you'd like to edit, double-click it in the list.



To go to a specific record, you could:

- Run an Advanced Find.
- Enter a term into the Quick Search.
- Click a letter at the bottom of the record list to jump to records that begin with that letter.

You can only edit a record if your user role allows editing of a particular type of record. Your administrator also may restrict your ability to edit records that you do not own.

To view inactive records, go to the record list and choose the Inactive view from the View drop-down.

Deactivating a record is usually a better idea than deleting it. When a record is deleted, it is removed from the database completely. You can always reactivate a record that has been deactivated.

Task C Deleting or deactivating a record

When a record is no longer needed, you have two basic options: You can delete the record, or you can deactivate it. Deactivating a record removes it from your list of active records, and removes it from most search results. Deactivating a record does not, however, permanently remove the record from your database.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Highlight the record you'd like to deactivate.
4. On the ribbon in the Records group, click the Delete or Deactivate button.
5. Click OK to confirm the deactivation or deletion.

Outlook 2003/2007:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Highlight the record you'd like to deactivate.
4. On Record menu, click the Deactivate button.
5. Click OK to confirm the deactivation.

Task D Bulk deleting records

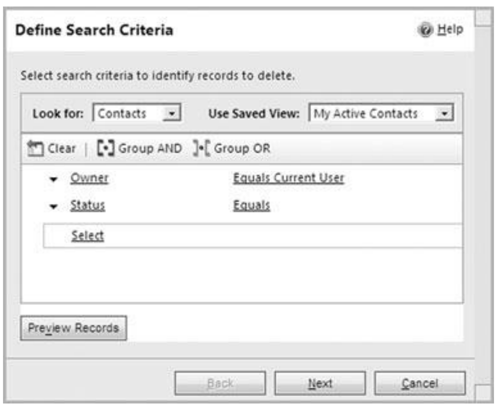
In addition to deleting records from the list views, you can also perform a bulk deletion based on query. This will allow you to delete a group of records based on particular criteria. System administrators should be extremely cautious when granting users this privilege. It's really easy to delete your entire data set with this feature. And whoops! There's no undo, and CRM Online users likely won't have a backup.

Outlook 2010/Internet Explorer:

1. On the ribbon in the Records group, click the Delete drop-down, then Bulk Delete.
2. Configure your search criteria.
3. Follow the wizard's instructions to complete the bulk deletion job.

Outlook 2003/2007:

1. On the Record menu, highlight Delete, then click Bulk Delete.
2. Configure your search criteria.
3. Follow the wizard's instructions to complete the bulk deletion job.



Users should be extremely cautious when bulk deleting records. The process of bulk deleting records can be dangerous.

The system administrator should consider disabling this function for most users.

You can add as many notes for a record as you like. These instructions for adding notes will work with most other record types.

Task E Adding notes for a record

Most of your record data will be entered into fields, but sometimes you may have important bits of information that don't logically fit in a field. For these situations, you can enter notes for a record.

Outlook 2003/2007/2010/Internet Explorer:

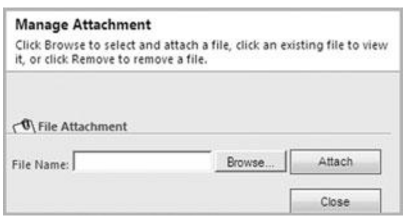
1. In the Navigation Pane, click a record type.
2. Your current record list should appear.
3. Locate the record and double-click it in the list.
4. Click the Notes form section.
5. Click the option to add a new note and type the note.

Task F Adding attachments for a record

You have an important proposal. That proposal needs to be shared with the other Microsoft Dynamics CRM users that have access to an account. You'd like that proposal to be available every time you access the account record. Add the proposal as an attachment to the account, and you'll have all of this.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Accounts.
2. Your current accounts list should appear.
3. Locate the account and double-click it in the list.
4. On the Create Related tab of the ribbon in the Include group, click the Attach File button.
5. Browse and select the file.
6. Click the Attach button.
7. Click Close.



Attachments appear in the Notes form section.

Be careful about adding large attachments. They count toward your total database size, and adding lots of large attachments is a quick way to outgrow your server or hosting plan.

It's easy to send a colleague a web link to a record. Open any record. On the ribbon, in the Collaborate group, click either the Copy a Link or E-mail a Link button. The shortcut link that is copied or sent can be clicked by any Microsoft Dynamics CRM user to go directly to a specific account record.

If you don't find the records you're looking for, try running an Advanced Find.

Viewing records

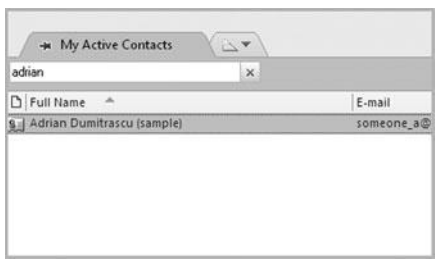
Once you've entered records into Microsoft Dynamics CRM, it will be helpful to know how to find and display information for these records.

Task A Finding a record

Most of your searches will follow this quick lookup procedure. You need to call someone at XYZ Company, and you need to bring up the account record to get a main phone number. For this type of situation, use this procedure to find a record.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click on a record type. (For example, you could click on Contacts.)
2. Your current record list should appear.
3. Enter a search term into the Quick Search field and press Enter.
4. Microsoft Dynamics CRM will search for your search term in all record fields.
5. The list of matching records will appear on the screen. To remove the search filter, click the X button to the right of the Search field.



Task B Switching views

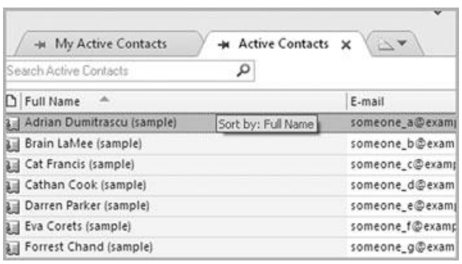
When you go to the record list, the records that appear are defined by the current view. By default, you will see your active accounts, but you can switch views to see deactivated accounts, all active accounts, accounts that have not ordered anything in the last six months, and so on.

Internet Explorer/Outlook 2003:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. In the upper-left corner of the record list, choose a view from the View drop-down.
4. All matching accounts that match the view's query will appear.

Outlook 2007/2010:

1. Go to a list of records. For example, you might go to your list of Accounts.
2. The tabs at the top of the list show the views that have been pinned. To add a new view/tab to the list of tabs, click the furthest tab to the right and select a view from the list that appears.



You can create your own views in the Advanced Find area. Run an Advanced Find, create a query, and save the query as a view.

When you create your own views, you can also define the columns that appear when the view is invoked.

Click the Export Activities button on the ribbon in the Data group to export all of the activities data on the screen to an Excel spreadsheet.

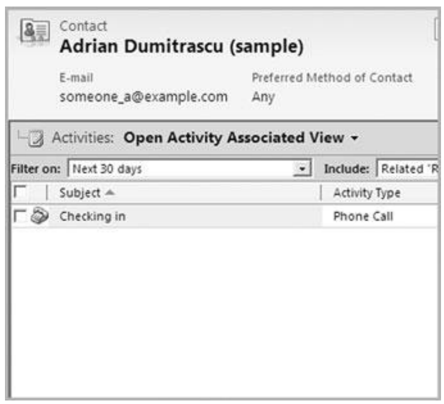
At the top of the activities list, make sure your filter is set properly. By default, you will only see history entries for the last 30 days.

Task C Viewing pending and closed activities for a record

When you complete activities with a record, Microsoft Dynamics CRM creates a history of the activity having been completed. For example, if you write a letter, send an e-mail, or complete an appointment, an activity history is created. If you're looking for a chronological list of everything that has happened with a record, check the Closed Activities area.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click on a record type. For example, you might click on Leads.
2. A record list should appear.
3. Locate the record and double-click it in the list.
4. On the left, click the Activities option to see pending activities. Click the Closed Activities option to see a list of completed activities.



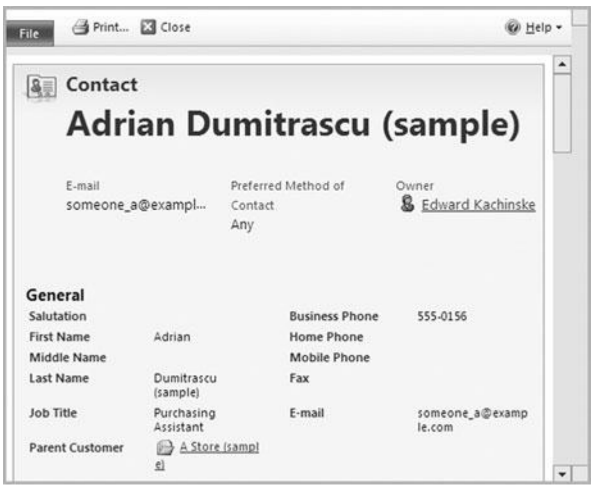
Task D Printing information about a record

Having information about a record in Microsoft Dynamics CRM is useful, but you may sometimes want the ability to print that information and take it to an appointment. For most records, you can click the Print Preview button on the File tab to print a quick report of relevant information for that record.

If you need a specific format for your account information, consider running a report or exporting the data to Excel.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click on a record type. For example, you might click on Cases.
2. A record list should appear.
3. Double-click a record.
4. On the File tab, click the Print Preview button. This will generate a printable list of all account data, including notes.



To create a new contact under this account, click the Add New Contact button on the ribbon in the Records group.

To associate another existing contact with this account, click the Add Existing Contact button on the ribbon in the Records group.

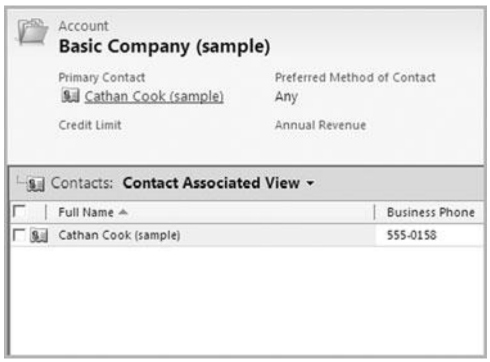
If you have created custom entities, you may be able to associate those entities with an account as well.

Task E Viewing contacts associated with an account

You can associate contacts with an account. After bringing up an account for editing, the buttons on the left of the account screen will show all of the associated records.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Accounts.
2. Your current accounts list should appear.
3. Double-click an account.
4. On the left, click the Contacts option to see associated contacts.
5. A list of all related contacts will appear.



Task F Setting conditional formatting on a view

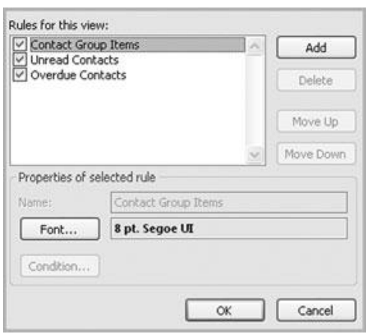
The conditional formatting feature allows you to set the font type, size, and color for a record based on a query that you configure. So, in your list of opportunities, you might want high-priority opportunities to show in red. This conditional format makes it easier to spot the opportunities that require your first attention. This feature is only available to CRM users in Outlook 2010.

This feature is only available to users with Outlook 2010, so if you're on an old version of Outlook, now might be a good time to upgrade. 2003 was quite a while ago….

Conditional formatting is also available on your list of local Outlook contacts.

Outlook 2010:

1. In the Navigation Pane in Outlook 2010, click on a record type. For example, you might click on Contacts.
2. On the View tab, in the Current View group of the ribbon, click the View Settings button.
3. Click the Conditional Formatting button.
4. Click Add to create a new rule, and click the Font button to specify the font formatting for that rule.
5. Click OK to confirm the new conditional formatting rule.



Sharing records

If you are using Microsoft Dynamics CRM in a multi-user environment, you may set up the system so that everyone sees everything. You can also configure the database to only allow specific levels of access to individual users or teams.

Task A Assigning a record to another user or team

You can also change ownership by clicking the Lookup button on the Owner field.

If you enter a record into Microsoft Dynamics CRM, you own that record by default. After double-clicking a record, you can click the Administration form section (on the left) to see the current owner for any record. You can easily transfer ownership, provided that you have sufficient rights within the system.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Highlight a record.
4. On the ribbon in the Collaborate group, click the Assign button.
5. Choose the Assign to another user or team option.
6. Click the Search button and choose a user.
7. Click OK.

Outlook 2003/2007:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Highlight a record.
4. On the Record menu click the Assign button.
5. Choose the Assign to another user or team option.
6. Click the Search button and choose a user.
7. Click OK.

Task B Sharing a record with another user or team

If your database is configured so that each user only has access to specific records, you may find the need to share a record with another user. Following this procedure will share access with another user, but you can also share access with a team of users.

If you grant access to a team, all users assigned to that team will get access to the record.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Highlight a record.
4. On the ribbon, in the Collaborate group, click the Share button.
5. Click the Add User/Team option to add new users or teams to the access list.
6. Click OK.

Outlook 2003/2007:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Highlight a record.
4. On the Record menu click the Share button.
5. Click the Add User/Team option to add new users or teams to the access list.
6. Click OK.

Available permissions are:

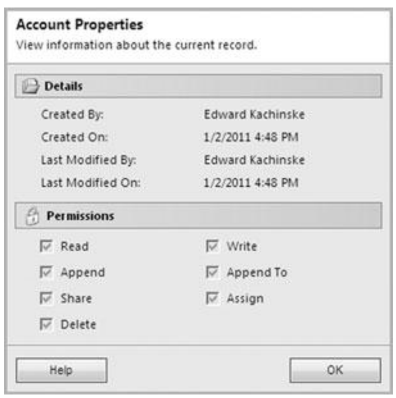
- Read
- Write
- Append
- Append To
- Share
- Assign
- Delete

Task C Checking your permissions for a record

On each record, you may have specific permissions granted. For example, even though you may have access to modify accounts, the record owner of a specific account might have restricted your ability to edit that record. At any point, you can check your permissions for a record, and then you'll know exactly what you can do with the record.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Locate the record and double-click it in the list.
4. On the File tab, click on the Properties button.
5. A list of permissions for the record will appear. A checkmark will appear next to any permission you have for the current record.



Creating connections between records

Connections allow you to track relationships between records in your database. If you are about to call a customer, you can check the connections area within CRM to see if any other people within your organization have some kind of connection to this customer. You'll also see connections that your customer has with other contacts, accounts, opportunities, or other records. Basically, the connections feature allows you to relate any record to another record within CRM.

Task A Defining a connection between two records

John Smith is a contact in your database. Jane Doe is also a contact in your database. Jane is John's ex-wife. You're about to meet with John, and you look in the connections area to see what kind of connections John has defined. In the connections area, you see that John and Jane were married, and you now know that bringing up the big project you just finished for Jane might not be your best selling strategy.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Locate the contact and double-click it.
4. On the ribbon in the Records group, click the Connect drop-down, then To Another.
5. Click the Search button next to the Name field.
6. Find your record.
7. Give the new connection a connection role.
8. On the ribbon in the Save group, click Save & Close.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Contacts.
2. Your current contacts list should appear.
3. Locate the contact and double-click it.
4. Click the Search button next to the Parent Customer field to bring up a list of accounts.
5. Highlight an account record and click OK.
6. The contact is now linked with an account.

The Connections entity in Microsoft Dynamics CRM 2011 is customizable. You can, for example, add a field or form to this entity.

Microsoft Dynamics CRM comes with a number of default connection roles. If these default roles do not work for you, then you can create a custom connection role.

Connecting users to records in your database can be useful for many organizations. This feature basically allows you to keep a record of who knows whom in your database.

Task B Connecting a record to yourself

Let's say you work for XYZ Company. You used to work for ABC Company, an important account in your current organization's database. By connecting yourself to your old organization, you can clue your current company in on your special relationship to this account.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Locate the contact and double-click it.
4. On the ribbon in the Records group, click the Connect drop-down, then To Me.
5. Select a connection role.
6. On the ribbon in the Save group, click Save & Close.

Task C Defining connection roles

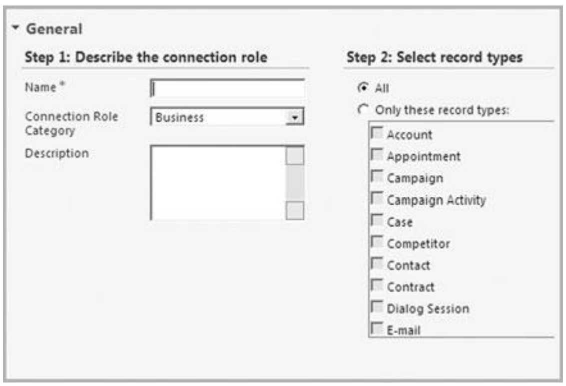
Before you establish connections between records in your database, you need to define the various connection roles that your organization wants to apply. These roles are then applied when you establish connections between different records in your database.

You can define relationship roles for most of the record types in your database, not just Accounts, Contacts, and Opportunities.

The system administrator should set up and define connection roles for the organization.

Outlook 2010/Internet Explorer:

1. On the Navigation Pane, click Settings, then Business Management.
2. Click Connection Roles.
3. Click the New button.
4. Specify a name and any other important information about your connection role.
5. Click the Save and Close button.



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Chapter 3

Searches and Views

- Finding records
- Advanced Find
- Personal views
- Searching for duplicates

Finding records

You can have a million records in your database, but it won't do you any good if you can't find them. Using the Quick Find and Advanced Find features in Microsoft Dynamics CRM, you can easily find a single record, and you can create a sub-set of your database for inclusion in a marketing list, campaign, quick campaign, export, or more.

Task A Searching with a Quick Find

When you are looking at a list of records—like a list of contacts or accounts—you can easily search for specific records within the list using the search field. The search field appears at the top of every record list.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click the type of record you'd like to find. For example, you could click Sales and then Contacts to bring up a list of contacts.
2. Once the list of records appears, you should see a search field at the top of the list. You may see the text "Search for records" in the field.
3. In this field, type a search term. For example, if you are looking for the Betty Smith contact record, you could type Smith into the field. (Use an * asterisk as a wild card in your searches.)
4. Click the magnifying glass icon to the right of the field to execute the search.

The fields that are searched in a Quick Find can be customized. For the account record, for example, the default fields that are searched are Account Name, Account Number, and E-mail. For contacts, Full Name, First, Middle, Last, E-mail, and Case Number are searched.

After running a search, your view automatically changes to display the Search Results view. Click the View drop-down to go back to looking at a different set of records.

This search procedure works for all CRM entity lists, including contacts, accounts, leads, opportunities, custom entities, etc.

Task B Changing the fields that are searched when performing a Quick Find

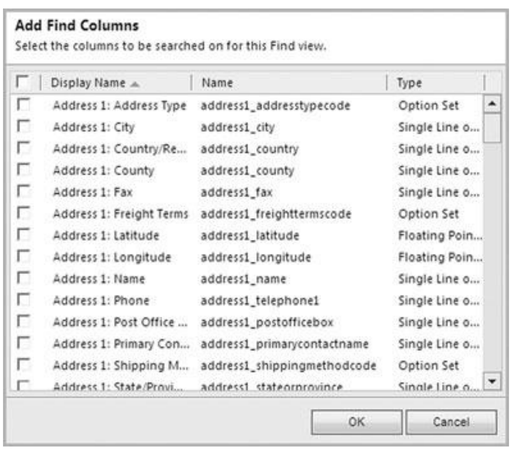
When you run a default Quick Find in CRM, only a few major fields are searched. If you want your Quick Find searches to yield more accurate results, then you can change the fields that are searched whenever you perform a Quick Find. If you have a customer number in CRM, and that customer number is a custom field that isn't searched with the Quick Find, adding it to the list of fields that is searched may make it easier to find records.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. On the Customize tab of the ribbon in the Customize group, click the System Views button.
4. Double-click the Quick Find View.
5. On the right, click the Add Find Columns button.
6. Check any fields that you want to search and click OK.
7. Click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. On the Customize menu, click the System Views button.
4. Double-click the Quick Find View.
5. On the right, click the Add Find Columns button.
6. Check any fields that you want to search and click OK.
7. Click the Save & Close button.



Always remember to publish your customizations. If you do not publish your customizations, the changes you've made will not appear in the live system.

This is likely an administrator function, so if you are not an administrator in your CRM system, you should ask your administrator to perform these steps.

You can save filters as a new view. You can also apply a filter to each column in a view. Just click the Filter button and choose the option to save as a new personal view. (Outlook 2010 only.)

Task C Filtering a view

Filters in CRM are just like filtered columns in Excel. When you turn on filters for a list view, you can reduce the number of records that appear. For example, you might want to filter a list to only show records in the United States. Each column in a view can be filtered to show certain records based on your custom filter.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. Click the Filter drop-down above the record list, then highlight Add Filter.
4. Select a column.
5. Configure your custom filter and click OK.

Outlook 2003/2007:

1. On the View menu, click the Filter button.
2. On the column header, click the Filter drop-down, then the Custom Filter button.
3. Configure your custom filter and click OK.

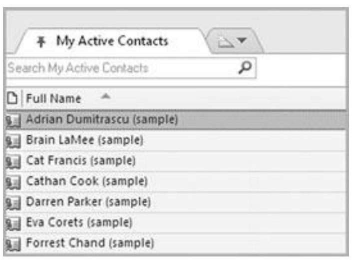
Task D Pinning a view in Outlook 2007/2010

When viewing your CRM data within Outlook 2007/2010, views of records are shown as tabs at the top of the record list. If you use a particular view frequently, you can pin the view, and it will appear at the top of the list until you remove the pin. This feature is not available for Internet Explorer or Outlook 2003 users.

Pinning a view only pins it for you. Other users will be able to pin their own views.

Outlook 2007/2010:

1. Go to a list of CRM records in Outlook. For example, you might go to your list of leads.
2. At the top of the list of records, click the tab that is furthest to the right. This will bring up a list of views.
3. Select a view, and that view will display as a tab.
4. Click the pushpin icon to the left of the view name to pin the view.



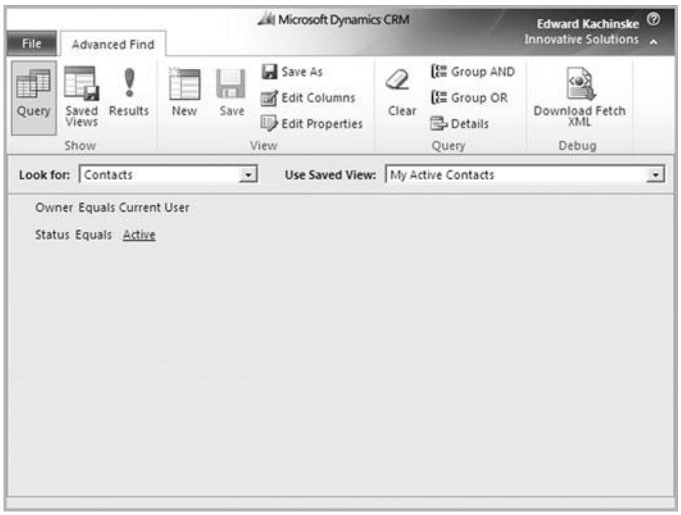
In your Opportunities list view, right-click the Priority field and choose to group by the field to see all of your high-, medium-, and low-priority opportunities grouped together.

Task E Grouping a list by a field

When you are looking at your Inbox in Outlook, you might group your incoming e-mails by date, sender, or priority. The same grouping feature available in your Inbox is also available on most CRM record lists in Outlook 2007 and Outlook 2010. Just group by a field, and all data shown in your view will be grouped by the values in the field.

Outlook 2007/2010:

1. In the Navigation Pane, click on a record type. For example, you might click on Opportunities.
2. At the top of your list view, right-click on the column that you'd like to group.
3. Choose the Group by this field option.
4. Your records will now be grouped by that field.



Advanced Find

The Advanced Find feature lets you use Boolean operators to find a very specific set of data. If you run an Advanced Find often, you can save it as a view. All of the instructions in this section apply to all entities, including contacts, accounts, leads, opportunities, and more.

Task A Using the Advanced Find feature

On the ribbon in Microsoft Dynamics CRM (or on the toolbar, if you are using Outlook 2003/2007), you'll see an Advanced Find button. When performing an Advanced Find, you can search any entity, and you can search multiple fields at once.

Outlook 2010/Internet Explorer:

1. In the Data group of the ribbon, click the Advanced Find button.
2. In the Look for drop-down, select the entity type you'd like to find. (Contacts, leads, activities, etc.)
3. Hover your mouse over the underlined <u>Select</u> word in the details area. A field drop-down will appear. Select a field from the drop-down.
4. To the right of the field you selected, an operator will appear. Choose your operator.
5. Click the Enter Value link and type the field value you'd like to find.
6. Repeat this process as many times as necessary. (Each value entered connects with an implied "and," but you can change the operator between lines to "or" before running the Advanced Find.)

Outlook 2003/2007:

1. On the toolbar, click the Advanced Find button.
2. In the Look for drop-down, select the entity type you'd like to find. (Contacts, leads, activities, etc.)
3. Hover your mouse over the underlined <u>Select</u> word in the details area. A field drop-down will appear. Select a field from the drop-down.
4. To the right of the field you selected, an operator will appear. Choose your operator.
5. Click the Enter Value link and type the field value you'd like to find.
6. Repeat this process as many times as necessary. (Each value entered connects with an implied "and," but you can change the operator between lines to "or" before running the Advanced Find.)

After clicking the Advanced Find button, click the Saved Views tab to see a list of views (Advanced Find search results) that you have previously saved.

After running an Advanced Find, click the checkmark field under the New button to highlight all records. Then:

- Click the Create Quick Campaign button to create a quick campaign for all selected records.
- Click the Mail Merge button to begin the Mail Merge Wizard for all contacts.
- Click the Add to Marketing List button to save the Advanced Find results into a marketing list.

Task B Exporting an Advanced Find view to Excel

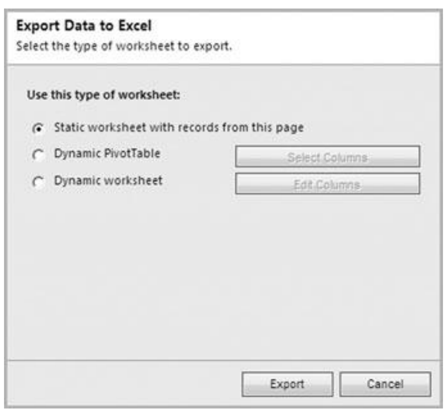
Anytime you run an Advanced Find, the results of the Advanced Find can be easily exported to an Excel spreadsheet. Let's say one of your outsourced marketing vendors needs a list of your active accounts in Texas for a mailer. Run an Advanced Find on the contact entity that searches for State = TX, and you're only one click away from the exported data.

Outlook 2010/Internet Explorer:

1. In the Data group of the ribbon, click the Advanced Find button.
2. Configure your Advanced Find query. For help with this, see Task A in this section.
3. In the Show group of the ribbon, click the Results button.
4. The results of the query will appear in the Advanced Find screen.
5. In the Date group of the ribbon, click the Export Leads button.
6. Select the type of worksheet to export.
7. Click Export.

Outlook 2003/2007:

1. On the toolbar, click the Advanced Find button.
2. Configure your Advanced Find query. For help with this, see Task A in this section.
3. In the Show group of the ribbon, click the Results button.
4. The results of the query will appear in the Advanced Find screen.
5. In the Date group of the ribbon, click the Export Leads button.
6. Select the type of worksheet to export.
7. Click Export.



Task C Changing the columns that show in Advanced Find search results

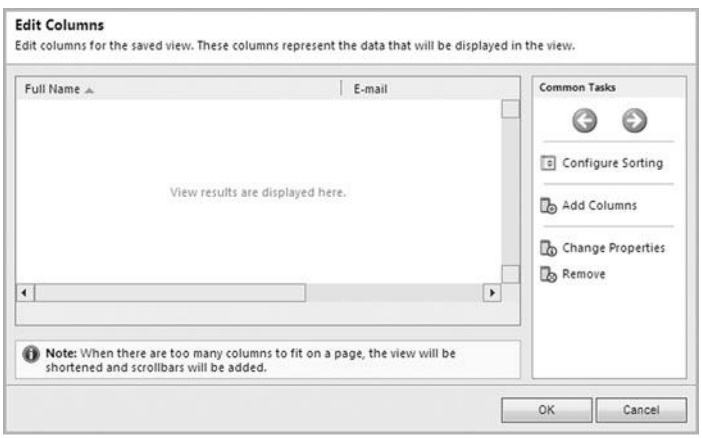
The Advanced Find view determines the default set of columns (fields) that appear when you view Advanced Find search results. With a few quick clicks, though, you can add or remove fields from your Advanced Find results. If you spend a lot of time configuring columns, you can save the Advanced Find as a personal view.

Outlook 2010/Internet Explorer:

1. Go to a list of CRM records. For example, you could go to the Accounts view.
2. In the Data group of the ribbon, click the Advanced Find button.
3. Configure your Advanced Find.
4. In the View group of the Ribbon, click the Edit Columns button.
5. Click the Add Columns button to add columns to the search results.

Outlook 2003/2007:

1. On the toolbar, click the Advanced Find button.
2. Configure your Advanced Find.
3. In the View group of the Ribbon, click the Edit Columns button.
4. Click the Add Columns button to add columns to your search results.



Personal views

The Advanced Find feature lets you use Boolean operators to find a very specific set of data. If you run an Advanced Find often, you can save it as a view. All of the instructions in this section apply to all entities, including contacts, accounts, leads, opportunities, and more.

To edit an existing view, go to that view in your records list. Then, click the Advanced Find button. Any changes made to the Advanced Find will be applied to the current view when you click the Save button on ribbon.

Task A Creating a personal view

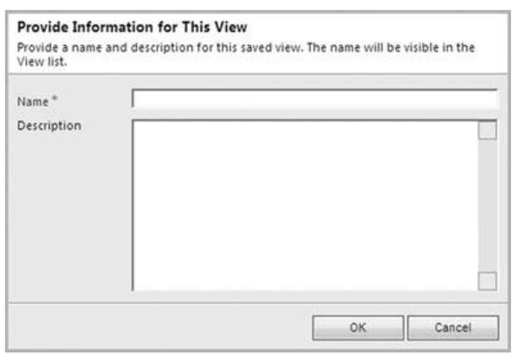
If you find yourself searching for the same set of records consistently, you will save a lot of time by saving the Advanced Find. You can save the Advanced Find query that defines which records will show in the view, and you can specify the columns of data that will appear in the view.

Outlook 2010/Internet Explorer:

1. In the Data group of the ribbon, click the Advanced Find button.
2. In the Look for drop-down, select the entity type you'd like to find. (Contacts, leads, activities, etc.)
3. Configure your query. Instructions for completing a query can be found on the previous page.
4. Click the Edit Columns button to specify the columns of data that will appear in the view.
5. In the View group of the ribbon, click the Save button.
6. Give your new view a name.

Outlook 2003/2007:

1. On the toolbar, click the Advanced Find button.
2. In the Look for drop-down, select the entity type you'd like to find. (Contacts, leads, activities, etc.)
3. Configure your query. Instructions for completing a query can be found on the previous page.
4. Click the Edit Columns button to specify the columns of data that will appear in the view.
5. In the View group of the ribbon, click the Save button.
6. Give your new view a name.



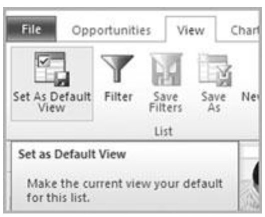
Task B Setting your default personal view

Whenever you click an entity in the Navigation Pane, CRM will automatically open the default view. If you would like a different view to open whenever you click an entity, then you can change your default personal view. In Outlook 2007 and 2010, you can pin a view to make it automatically appear. (Pinning is covered earlier in this chapter.) Outlook 2003 users cannot set a default personal view.

This method only sets your own default personal view. Resetting your own default view will not affect other users in CRM.

Internet Explorer:

1. In the Navigation Pane, click on a record type.
2. A record list should appear.
3. From the View drop-down, change your view.
4. On the View tab in the List group of the ribbon, click the Set as Default View button.



Searching for duplicates

Duplicates are an undesired part of any database. Within your list of contacts and accounts, duplicates can be especially menacing. If a customer exists in your database twice, it might mean that two different people from your organization are dealing with the customer. It might also mean that the customer is contacted twice each time you send out mass correspondence.

Task A Finding duplicates

You can create a duplicate detection job that will find similar lead, account, and contact records. Once you've identified the duplicates, you're only a couple of clicks away from merging them. Without running a duplicate detection job, you can highlight any duplicate customers in a list view. You'll see a Merge button on the ribbon in Outlook 2010/Internet Explorer and on the Actions menu in Outlook 2003/2007 that will let you manually merge the duplicates that you've identified in the view.

Outlook 2010/Internet Explorer:

1. Go to a list of records. For example, you could go to a list of contacts.
2. In the Records group of the ribbon, click the Detect Duplicates button. You will have the option to detect duplicates for either the selected records or all records on all pages.
3. Give your duplicate detection job a name, start time, and frequency.
4. Check the option to send an e-mail when the job is completed.
5. Click OK.

Outlook 2003/2007:

1. Go to a list of records. For example, you could go to a list of contacts.
2. On the Record menu, highlight Detect Duplicates. You will have the option to detect duplicates for either the selected records or all records on all pages.
3. Give your duplicate detection job a name, start time, and frequency.
4. Check the option to send an e-mail when the job is completed.
5. Click OK.

Only specify a frequency (in step 3) for the duplicate detection if you want the program to re-run this duplicate detection job on a scheduled basis.

Go to the next page for instructions on how to see the results of a duplicate record search.

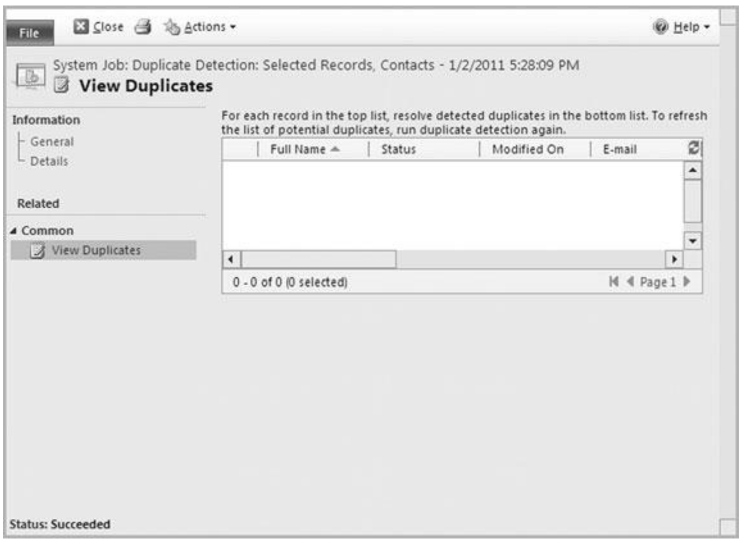
Task B Viewing duplicate records

Once the duplicate detection job has completed, the results are viewable in the My Work section of the Workplace. For small databases, it usually only takes a few minutes to complete a duplicate detection job.

Duplicate detection jobs usually finish fairly quickly, but you can always check the option to send a reminder e-mail when the job has completed. This way, you won't waste any time waiting for the job to complete.

Outlook 2003/2007/2010/Internet Explorer:

1. On the Navigation Pane, click Workplace.
2. In the My Work section, click Duplicate Detection.
3. All of your duplicate detection jobs will appear.
4. Double-click the duplicate detection job you'd like to view.
5. On the left, click the View Duplicates option.



Task C Merging duplicate records

Once duplicates have been identified, you can merge them automatically. You can also merge them with a preview. Merging with a preview gives you the ability to keep specific fields from either the master or subordinate record. Once the records are merged, the subordinate record is deactivated.

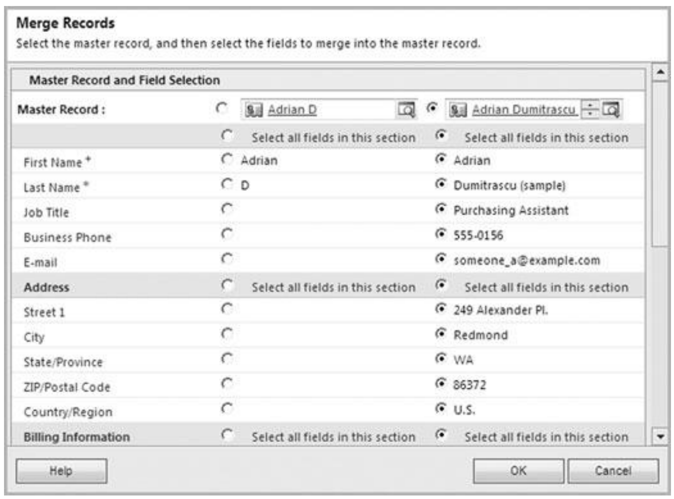
When you merge two records, the subordinate record is deactivated. If you ever need to get data back from the record, you can always re-activate it.

Outlook 2010/Internet Explorer:

1. Go to an account, contact, or lead list.
2. Click the first duplicate record, hold the Ctrl key, and click another duplicate. This highlights the two duplicate records.
3. In the Records group of the ribbon, click the Merge button.

Outlook 2003/2007:

1. Go to an account, contact, or lead list.
2. Click the first duplicate record, hold the Ctrl key, and click another duplicate. This highlights the two duplicate records.
3. On the Record menu, click the Merge button.



Chapter 4

Visual Reporting with Dashboards

- Creating a dashboard
- Using dashboards

Dashboards in CRM aren't only limited to showing charts and lists of data in your system. You can also insert web resources and iFrames if you want to display a document or a live web page.

Creating a dashboard

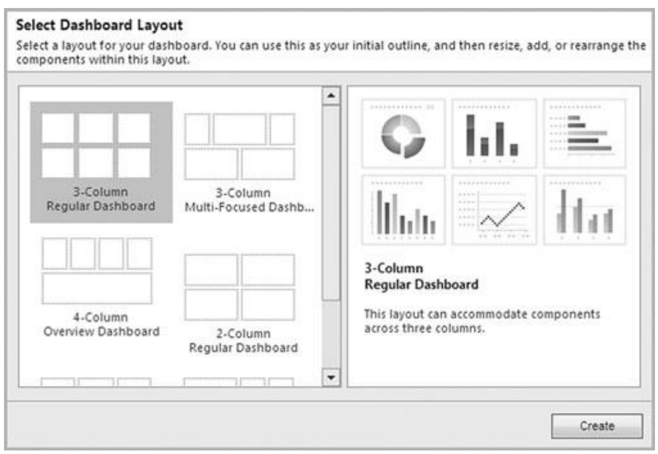
Dashboards allow you to read and analyze your CRM data quickly and visually. Dashboards can be created and customized to display a wide range of components, including graphs, sales pipelines, and iFrames.

Task A Creating a system dashboard

You can create a system dashboard in the same manner that you would create a system view. Additionally, like a system view, a system dashboard is readable to all users in the CRM system. Once you've created a system dashboard, you can open it by clicking the dashboard drop-down and selecting it from the list of options.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customize, and then Customize the System.
2. On the left, select the Dashboards option.
3. On the Actions toolbar, click the New button.
4. Configure your dashboard.
5. Click the Save and Close button when you are done.



Task B Creating a personal dashboard

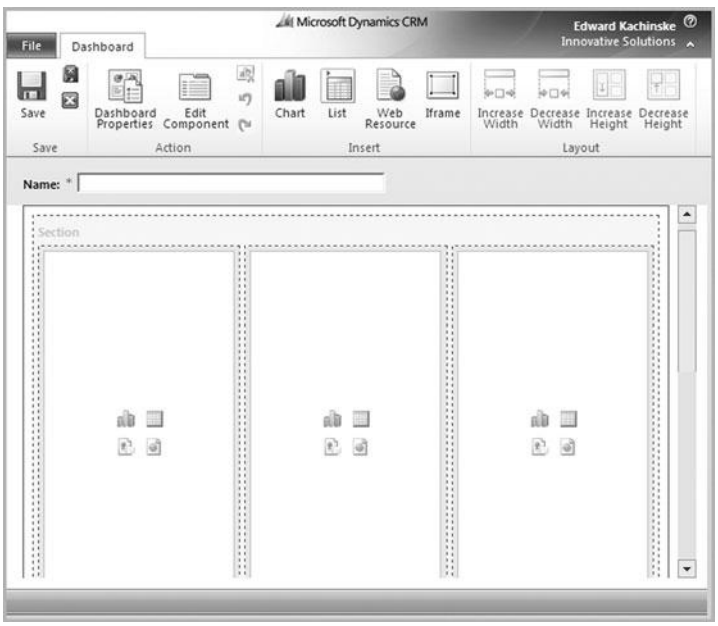
In addition to creating a system dashboard, you can also create a personal dashboard. A personal dashboard belongs to the user who created it. Other CRM users can't use your personal dashboards, but you have the option to create a personal dashboard and then share it with a user or team. Sharing dashboards is covered in Task D.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. On the Dashboards tab in the Dashboard Management group of the ribbon, click the New button.
3. Configure your dashboard.
4. Click the Save and Close button when you are done.

Outlook 2003/2007:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. On the Dashboards menu, click the New button.
3. Configure your dashboard.
4. Click the Save and Close button when you are done.



You can set a personal dashboard as your default dashboard by clicking the Set As Default button in the ribbon in Internet Explorer/Outlook 2010 and in the Dashboards menu in Outlook 2003/2007.

You can share a dashboard with other users or teams. You can also re-assign a dashboard. Sharing and re-assigning dashboards is covered later in this chapter.

Task C Editing a dashboard

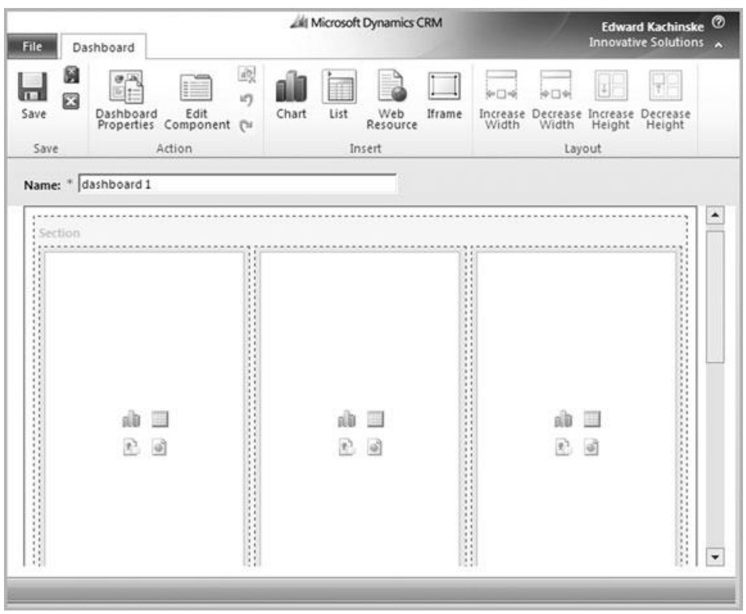
You can also edit the items that appear in a dashboard after it has been created. Items like charts and lists can be moved, replaced, and removed from the dashboard. Additionally, you can change the layout of the dashboard by resizing the dashboard sections.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. On the Dashboards tab in the Dashboard Management group of the ribbon, click the New button.
3. Select a dashboard layout and click the Edit button.
4. Reconfigure the layout of your dashboard.
5. On the ribbon in the Save group, click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. On the Dashboards menu, click the New button.
3. Select a dashboard layout and click the Edit button.
4. Reconfigure the layout of your dashboard.
5. On the ribbon in the Save group, click the Save & Close button.



To edit the individual components in your dashboard, select the component and click the Edit Component button on the ribbon. From here, you can modify the properties of this component.

Task D Sharing a personal dashboard with other users or teams

At some point, another CRM user might want to use one of your personal dashboards. You can share your personal dashboards with other users or teams, much in the same manner that you can share a personal view.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. On the Dashboards tab in the Action group of the ribbon, click the Share this Dashboard button.
3. On the left, click the Add User/Team button to add a user or team.
4. When you are finished sharing, click the OK button.

Outlook 2003/2007:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. On the Dashboards menu, click the Share this Dashboard button.
3. On the left, click the Add User/Team button to add a user or team.
4. When you are finished sharing, click the OK button.

You can also specify what other users are allowed to do with your personal dashboard. If, for example, you don't want other users to be able to edit your dashboard, then you can take away their Write privilege.

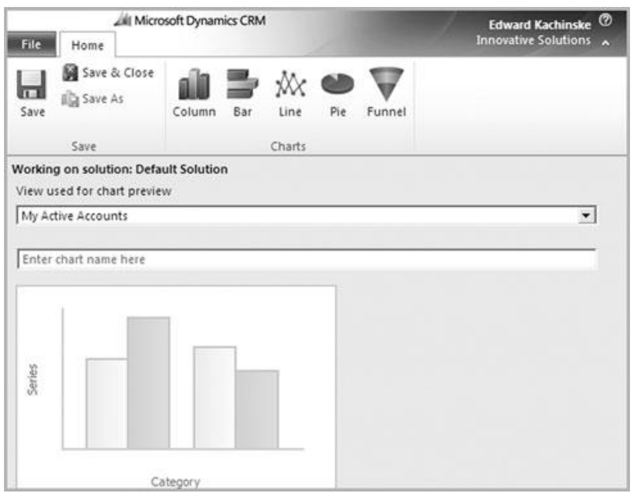
The directions in Task E outline the steps for creating a system chart. You can also create a personal chart. To create a personal chart, click on an entity in the Navigation Pane, and then click the New Chart button on the Charts tab in Internet Explorer/Outlook 2010 and on the Charts menu in Outlook 2003/2007.

Task E Creating dashboard charts and views

At some point, you might want to add a custom chart to one of your dashboards. You might, for instance, want a chart to display your accounts by category. Charts are created for specific entities, so if you want to create two similar charts for contacts and accounts, then you would need to create a chart for each entity.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Customization, and then Customize the System.
2. On the left, click the Entities option and then select an entity, such as Account.
3. On the left, click the Charts option.
4. On the Actions toolbar, click the New button.
5. Configure your chart and click the Save & Close button when you are done.



Using dashboards

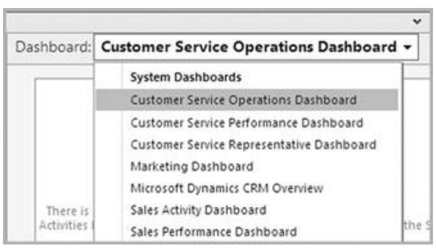
Dashboards are really useful because they allow you to visually see summaries of your data without having to go through the traditional process of creating extensive reports.

Task A Viewing, switching, and enlarging dashboards

Users aren't limited to a single dashboard. Rather, they can move between different dashboards in the same way that they can move between views. To switch to a different dashboard, follow the directions below.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. The default dashboard should appear.
3. Above the dashboard, click the Dashboard drop-down.
4. Select a dashboard from the drop-down.



You can click the Refresh Chart button in the top-right corner of a dashboard component to display the most up-to-date data.

You can also enlarge a chart by clicking the Enlarge the Chart button in the top-left corner of a dashboard component.

To go back to your original chart, click the home icon in the bottom-left corner of the dashboard component.

Task B Drilling down data

By drilling down data, you can further analyze the data within a particular data item. You might, for example, want to drill down into the estimated revenue data in a sales pipeline. Drilling down data is as simple as clicking on a data unit in a chart and specifying a new chart.

Outlook 2003/2007/2010/Internet Explorer:

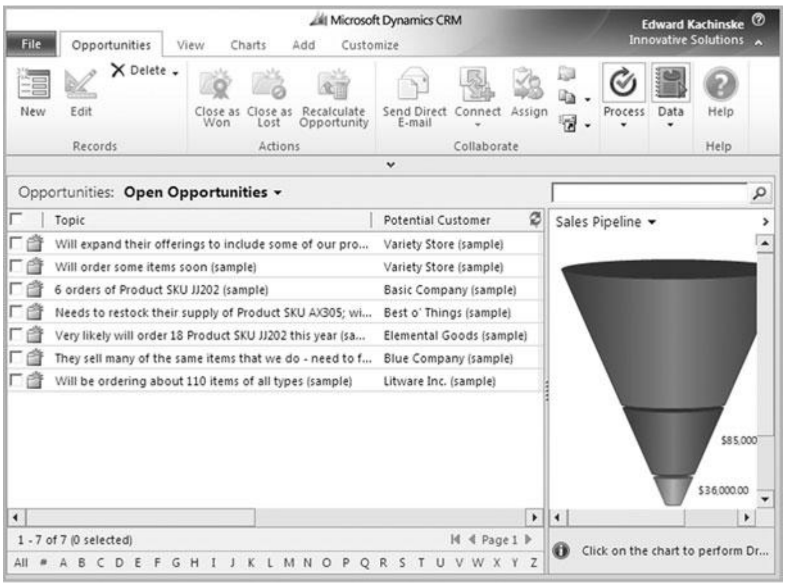
1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. The default dashboard should appear.
3. On a chart, click on a data item.
4. Configure the chart for your drilled down data.
5. Click the OK button.

Task C Viewing source records on a chart

Dashboard charts are visual representations of your CRM data. If you would rather view this data in list form, then you can view the source records on a chart. The records will then appear as they do elsewhere in CRM.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace, My Work, then Dashboards.
2. The default dashboard should appear.
3. In the top-right corner of a chart, click the View Source Records icon.
4. A list will appear showing all of the source data that make up the chart.



The chart displaying the source data appears next to the list of records. If you drill down data on this chart, the list will then refresh showing the source records for the drilled down data.

Chapter 5

Outlook Integration

- Installing the Outlook plugin
- Outlook/CRM synchronization
- Working with CRM contacts, accounts, and leads in Outlook
- Scheduling activities within Outlook
- Sending e-mails within Outlook
- Converting Outlook e-mails

You will need to install the .NET framework 3.5 service pack 1 or later to install the CRM plugin. If it's not already on your computer, the system will prompt you to install .NET.

Installing the Outlook plugin

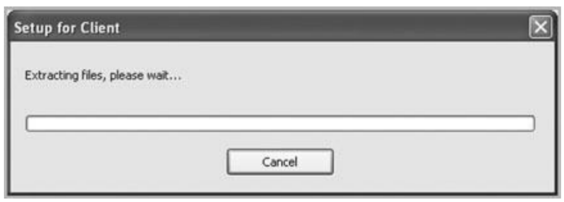
If you run CRM in Internet Explorer, then you don't need to install any files on your computer. If you want to run CRM in Outlook, however, you will need to install the Outlook plugin.

Task A Installing the plugin

Installing the CRM for Outlook plugin follows a pretty straightforward process. Simply run the install file and follow the steps. You can download the installation file in the Resource Center within CRM, or ask your administrator.

Installing the plugin:

1. Locate the CRM for Outlook plugin install file and double-click it.
2. Follow the steps to install the plugin.
3. Eventually you will be prompted to configure CRM for Outlook. This is where you will type in your server URL and authentication info.



Outlook/CRM synchronization

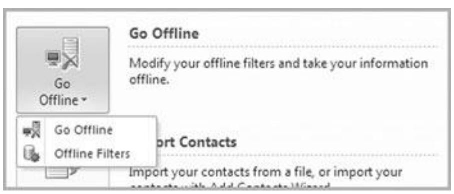
Regardless of whether you are using CRM online or on-premise, you have the option to work with CRM data within Outlook while you are offline. If you are unsure about whether this feature is configured, check with your administrator. Offline data is only available if you chose to make data available offline during the plugin installation.

Task A Going offline and online

When you are online, Microsoft Dynamics CRM displays live data from your server. In the background, though, a separate copy of the data is kept in a Microsoft SQL Express database on your local computer. When you go offline, Outlook displays data from your local copy of the database. Once you go back online, Microsoft Dynamics CRM will synchronize your local copy with the data on the server.

Outlook 2010:

1. Click the File tab, select the CRM option, and then click the Go Offline button.
2. You can tell that you are offline when the button you just clicked changes to Go Online.



Outlook 2003/2007:

1. To manually go offline, click the Go Offline button on the CRM toolbar in Outlook.
2. You can tell that you are offline when the button on the toolbar reads *Go Online*.

When you go offline, Microsoft Dynamics CRM will automatically synchronize and prepare your offline database for offline use.

Hover the mouse over the Dynamics icon in the system tray (in the bottom-right corner of the taskbar) to see if Microsoft Dynamics CRM is online.

Configuring filters is a great way to get your Microsoft Dynamics CRM data into your handheld devices. Let's say that you want to make sure you have contacts in New York (assuming you do not own all the records) available in your phone. Configure a filter to sync everyone in New York with Outlook, and (assuming your phone is set to synchronize with Outlook) all New Yorkers will automatically show up on the phone.

Task B Configuring which records sync from CRM to Outlook

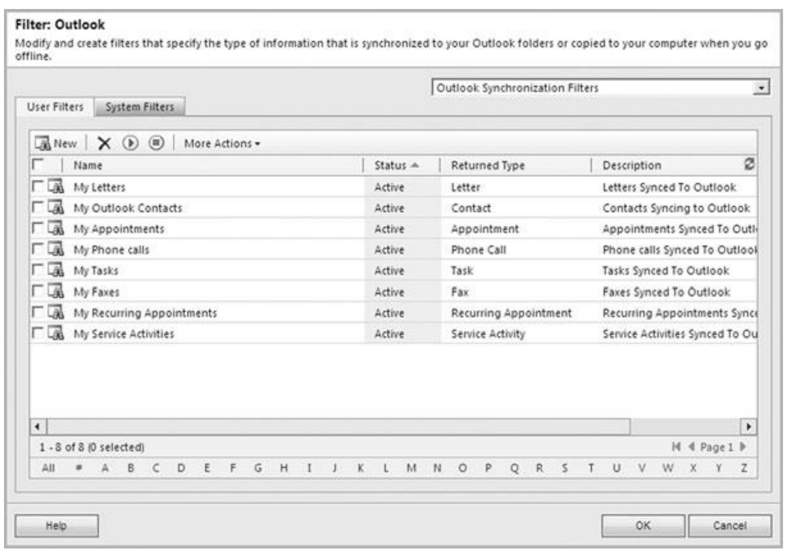
If you have a large number of records, it's unlikely that you'll want access to your entire company's database on your phone. In the synchronization options, you can configure Outlook filters. Only records that are included in your Outlook filters will sync from CRM to Outlook. So, for example, if your Outlook filter was set to bring all contacts in Texas down to Outlook, then any contact in Texas from the CRM database would show up in your local Outlook contacts list.

Outlook 2010/Internet Explorer:

1. In Outlook, on the File tab, select the CRM option, then click the Synchronization drop-down. Then select the Outlook Filters option.
2. A list of filters will appear.
3. Double-click the My Outlook Contacts filter to edit the query that sends contacts from CRM into Outlook.

Outlook 2003/2007:

1. In Outlook, Click CRM | Outlook Filters. (After installing Microsoft Dynamics CRM, you should get a CRM menu on the Outlook menu bar.)
2. A list of local data groups will appear.
3. Double-click the My Outlook Contacts filter to edit the query that sends contacts from CRM into Outlook.



Working with CRM contacts, accounts, and leads in Outlook

In the Navigation Pane, click Mail and then Microsoft Dynamics CRM. In this area, you will have access to every function available in the CRM web client. Beyond this integration, though, many of the native Outlook features—like appointments and contacts—will synchronize seamlessly with your Microsoft Dynamics CRM data.

Task A Tracking existing Outlook contacts in CRM

Especially if you are first starting out with Microsoft Dynamics CRM, chances are good that you have a few contacts in Outlook. With the Microsoft Dynamics CRM Outlook client installed, you can continue to use these contacts. With a single click, you can promote one (or many of them) to Microsoft Dynamics CRM. From that point forward, the contact in your local Outlook contacts list will appear in CRM, and changes made in either CRM or Outlook will sync.

When you're looking at the list of Outlook contacts, you'll see a CRM icon next to the contacts that are set to automatically sync with Outlook.

In the contacts list in Outlook, you can highlight single (or as many as 20 at a time) records and click the Track button to track multiple Outlook records back in Microsoft Dynamics CRM.

Outlook 2003/2007/2010:

1. Go to your list of contacts in Outlook. Note that this is not your list of contacts in Microsoft Dynamics CRM. The easiest way to get to your list of Outlook contacts is to click Contacts on the Navigation Pane on the left.
2. Double-click an Outlook contact to edit it.
3. At the top of the Contact form, click the Track button.
4. Click the Set Parent button to specify the parent account (company) in CRM for this contact.
5. Click the Save and Close button. This contact will now be bi-directionally synchronized between Outlook and Microsoft Dynamics CRM.
6. To see only your CRM contacts within Outlook, choose the CRM option on the menu. Select Go To | Sales | Contacts. This will bring up a list of only the CRM contacts and Outlook contacts that are tracked in CRM. Regular Outlook contacts not tracked in CRM will not show in this list.

From the New Record drop-down, you can create any type of CRM record, including custom entities. Need to create a new support case? From the New Record drop-down, choose the Case option.

Task B Working with CRM accounts within Outlook

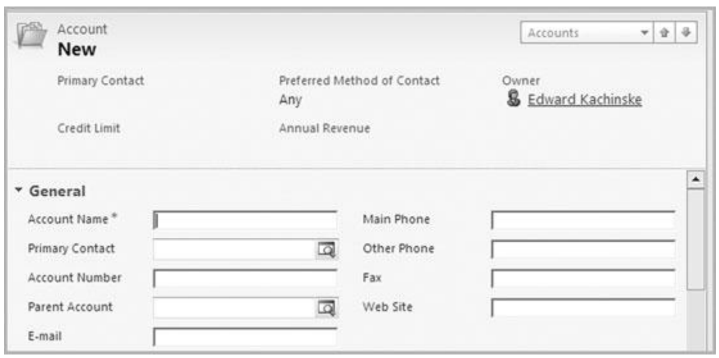
Without Microsoft Dynamics CRM installed, Outlook doesn't have a feature to store account data. Because all of your Microsoft Dynamics CRM data is available in Outlook, though, you can easily create CRM accounts from within the Outlook interface.

Outlook 2010:

1. From the CRM Record drop-down on the CRM tab of the ribbon, choose the Account option.
2. The New Account dialog box will appear. Enter field information for your new account.
3. Click the Save and Close button.

Outlook 2003/2007:

1. From the New Record drop-down on the CRM toolbar, choose the Account option.
2. The New Account dialog box will appear. Enter field information for your new account.
3. Click the Save and Close button.



Task C Working with CRM leads in Outlook

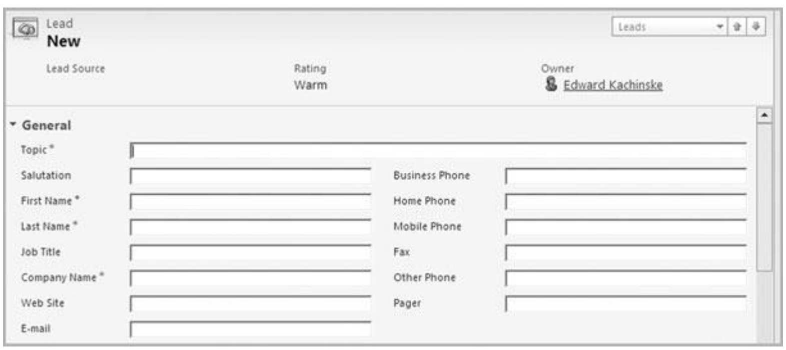
In Chapter 1, we covered the process of adding new leads to Microsoft Dynamics CRM. We included this task to illustrate how you can perform the same actions from within the Outlook interface. After completing this task, take a moment to read through Chapter 1. All of the tasks in that chapter can be done within Outlook as well. Outlook e-mails can be tracked in CRM and then converted to leads from the CRM e-mail activity.

Outlook 2010/Internet Explorer:

1. From the CRM Record drop-down on the CRM tab, choose the Lead option.
2. The New Lead dialog box will appear. Enter field information for your new lead.
3. Click the Save and Close button.
4. To see your leads within Outlook, choose the CRM option on the menu. Select Go To | Sales | Leads.

Outlook 2003/2007:

1. From the New Record drop-down on the CRM toolbar, choose the Lead option.
2. The New Lead dialog box will appear. Enter field information for your new lead.
3. Click the Save and Close button.
4. To see your leads within Outlook, choose the CRM option on the menu. Select Go To | Sales | Leads.



Before you can add the new lead to a marketing list or campaign, you'll need to save it. Just click the Save button at the top of the New Lead screen to enable the Marketing List or Campaign options on the left.

Tracked Outlook tasks will be viewable by another Microsoft Dynamics CRM user who has access to the regarding record. (The regarding record is the record associated with the task.)

Scheduling activities within Outlook

The Microsoft Dynamics CRM calendar synchronizes with Outlook's calendar. When you schedule activities in Outlook, you can track those activities in Microsoft Dynamics CRM. Then, when you are looking at a record in CRM, you'll see all of the activities relevant to that record.

Task A Tracking Outlook tasks in CRM

Anytime you are editing a task in Outlook, you should see a Track button on the toolbar or ribbon. Clicking this button will automatically track the Outlook task in your corporate Microsoft Dynamics CRM system.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane on the left, click the Tasks option.
2. Your Outlook To-Do List will appear.
3. Locate the Type a new task field. In this field, type the subject of your task and press Enter to add the task to your To-Do List for today.
4. Double-click the task to edit its properties.
5. In the CRM area of the ribbon, click the Track button.
6. Click the Set Regarding button and choose a record for this task. In Microsoft Dynamics CRM, the task will now be associated with the regarding record.
7. Click the Save & Close button.

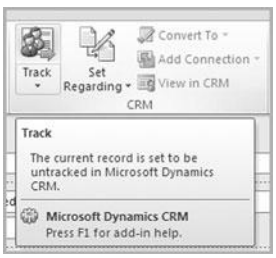
Task B Tracking Outlook appointments in CRM

You have an appointment scheduled with Jane Doe. Jane is a contact in Microsoft Dynamics CRM. When you send the meeting invitation to Jane, click the Set Regarding button to track this appointment on Jane's contact record in CRM. When you do this, the appointment will be available in the Activities section of Jane's contact record.

Once an activity is tracked with a record in Outlook, you'll see the following text appear at the top of the appointment: [CRM] Regarding: <RecordName>

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane on the left, click the Calendar option.
2. Your Outlook calendar will appear.
3. Create a new activity on the calendar. There are many ways to do this, but the easiest is to click on a timeslot or day and just start typing.
4. Double-click the activity to bring up its properties.
5. Click the Track button, or click the Set Regarding button and choose a record for this activity. In Microsoft Dynamics CRM, the activity will now be associated with the regarding record.
6. Click the Save & Close button.



Sending e-mails within Outlook

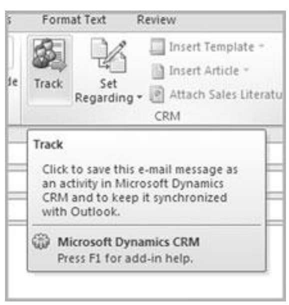
If you use Outlook to send e-mail, you can track relevant e-mails in Microsoft Dynamics CRM. Then, when you are looking at a record in CRM, a copy of the e-mails will display in the History section of the record.

Task A Tracking a new Outlook e-mail in CRM

When you are creating a new message in Outlook, you can click the Set Regarding button on the ribbon or toolbar to associate the e-mail with a record in CRM. There's also a Track button on the ribbon or toolbar. If the e-mail address for the e-mail matches with a customer in CRM, you may also be able to click the Track button to attach the e-mail back to a record in CRM.

Outlook 2003/2007/2010:

1. Click the New button on the Outlook toolbar and create a new e-mail message.
2. Enter the e-mail address for your recipient. Add a subject and message body as well, just as you would do with any normal e-mail.
3. Click the Track button.
4. If you want to associate the e-mail with a specific record, you can click the Set Regarding button and manually associate the e-mail with someone other than the email recipient or any CRM entity.
5. In Microsoft Dynamics CRM, go to your contact record for the recipient of the e-mail. Double-click the contact to bring up details for the record.
6. On the left, click the History option. You should see a record of the e-mail. Double-click it to bring up a saved copy of the e-mail.



When looking at e-mail history for a record, check your filter. By default, you'll only see e-mails sent in the last 30 days, but that filter is easy to change. Just click the Filter drop-down at the top of the contact history screen.

E-mails stored in Microsoft Dynamics CRM are separate from e-mails stored in your Exchange server. If space limitations require you to remove messages from your Sent Items folder in Outlook, the e-mail will still appear in Microsoft Dynamics CRM.

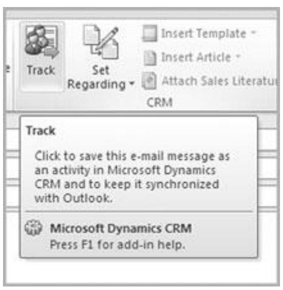
Task B Tracking an incoming Outlook e-mail in Microsoft Dynamics CRM

If you highlight a message in your Outlook Inbox, clicking the Track button in the ribbon or toolbar will copy the message to the History section of the sending contact's record in Microsoft Dynamics CRM. This is a great way to share important e-mails with your colleagues without actually giving them full access to your inbox.

You can highlight multiple e-mails in Outlook and click the Track button to track all highlighted e-mails at once.

Outlook 2003/2007/2010/Internet Explorer:

1. In your Inbox or other mail folder, go to a message that you'd like to track in Microsoft Dynamics CRM.
2. Click the Track button. The message will be promoted to Microsoft Dynamics CRM, and you will now see a copy of the message in the Completed Activities section of the contact that sent the e-mail.
3. If you want to associate the e-mail with another contact or other type of record, click the Set Regarding button and choose a different record.



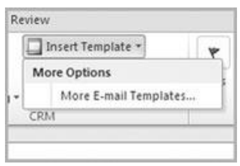
If the Insert Template button is grayed out, you may need to click the Track button.

Task C Sending template-based e-mails in Outlook

If you want to use a CRM template but are sending the e-mail from within Outlook, then you can insert a CRM direct e-mail template into the message. Before you insert a template into an e-mail message, make sure you've tracked it back to a CRM record first.

Outlook 2010/Internet Explorer:

1. Create a new e-mail message in Outlook.
2. Enter your recipient's e-mail address into the To field, and select a regarding record (by clicking Track or Set Regarding on the CRM tab of the ribbon) for the e-mail.
3. Click the Insert Template drop-down and select the More E-mail Templates option.
4. Select an e-mail template and click OK.



Task D Attaching Sales Literature to an outgoing e-mail

A marketing team might want to send out a sales literature document to promote a new product. In CRM, you can attach sales literature to an e-mail just like any other attachment.

Remember to track the e-mail in CRM before you attach a sales literature document.

This feature is only available for Outlook 2010 users.

Outlook 2010:

1. Create a new e-mail message in Outlook.
2. Click the Attach Sales Literature button.
3. Select a sales literature document and click OK.

Converting Outlook e-mails

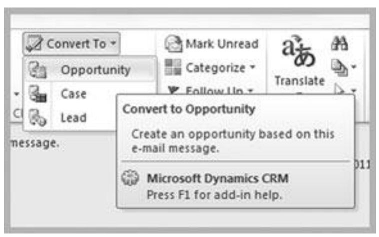
A new customer sends you an e-mail message. This customer isn't in CRM yet. With just a couple of clicks, you can convert that e-mail message into an opportunity, contact, and more within CRM.

Task A Converting an e-mail to an Opportunity

Many opportunities will come to you through e-mail. An existing customer might send you a message with a request for more work. A new prospect might first contact you by e-mail. It's pretty common for an e-mail message to be the first place where you learn about an opportunity, and when that happens, you should convert the e-mail to an opportunity in CRM.

Outlook 2010:

1. In your Inbox (or other folder), highlight an e-mail message.
2. In the CRM group of the ribbon, click the Convert To drop-down.
3. Choose Opportunity.



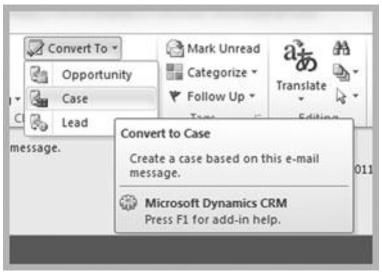
Task B Converting an e-mail to a case

A customer might send you an e-mail message about a problem he or she is having with something that your company sells. You want the customer service department to deal with the issue, so you convert the e-mail message to a case.

Once the e-mail has been converted to a case, the originating e-mail will automatically be attached to the case. So, the customer service rep who handles the case will be able to see the message that your customer originally sent.

Outlook 2010:

1. In your Inbox (or other folder), highlight an e-mail message.
2. In the CRM group of the ribbon, click the Convert To drop-down.
3. Choose Opportunity.



Chapter 6

Managing Sales

- Managing goals
- Creating and editing opportunities
- Tracking competitors
- Using sales literature
- Opportunity reporting

Managing goals

Every organization has goals. A salesperson might need to generate $30,000 of revenue in a quarter. A service technician might be required to close 15 service cases every week. In CRM, you can create and track goals for employees in your organization.

Task A Creating "amount" goal metrics (Step 1)

For a monetary goal, you would use an "amount" goal metric. You might, for example, want a salesperson to generate a certain amount of revenue in closed opportunities within a specified period. Before you can create a goal for this salesperson, you would need to create a revenue goal metric.

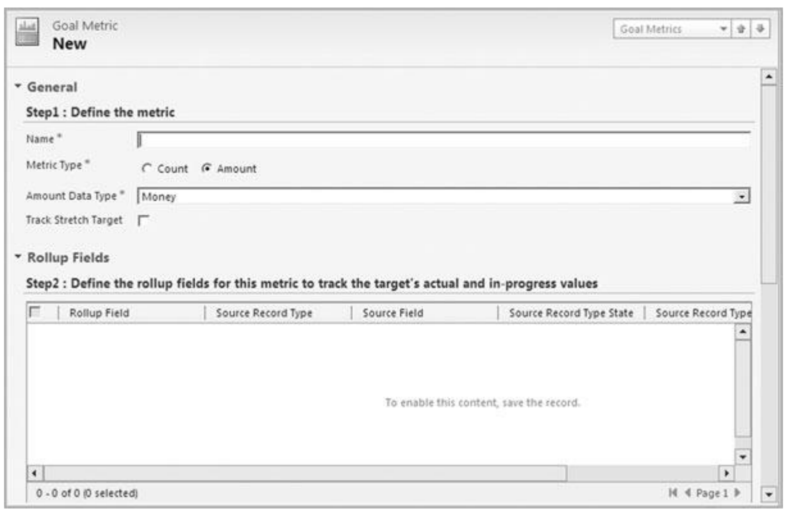
Now that you've created your goal metric, you'll need to add rollup queries to your goal. The rollup queries define your targets for this goal and they are covered in Task C.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Goal Metrics.
2. On the Goal Metrics tab, in the Records group of the ribbon, click the New button.
3. Give your metric a name, and then, in the Metric Type field, select the Amount option.
4. Click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Goal Metrics.
2. On the Goal Metrics menu click the New button.
3. Give your metric a name, and then, in the Metric Type field, select the Amount option.
4. Click the Save & Close button.



Task B Creating "count" goal metrics (Step 2)

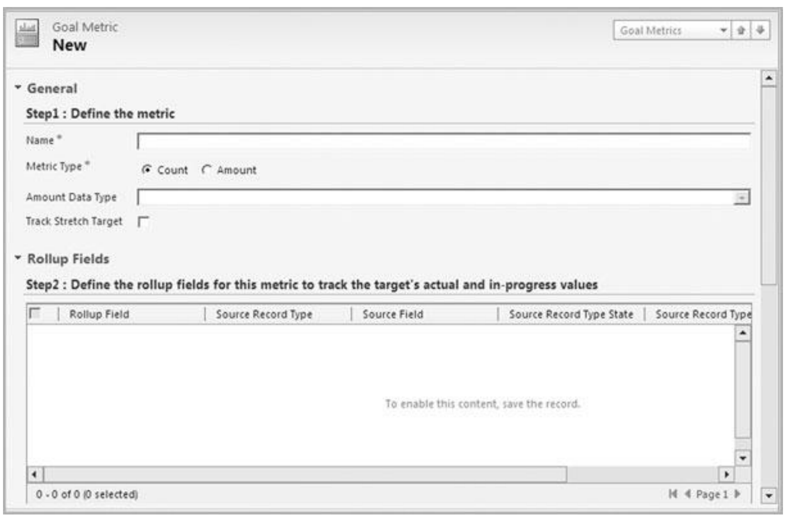
With "count" goal metrics, you can track progress by a record count. A service technician, for example, might need to close a certain number of service cases in a week. Before you create a goal like this for a service technician, you would need to create a goal metric that tracks by count.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Goal Metrics.
2. On the Goal Metrics tab, in the Records group of the ribbon, click the New button.
3. Give your metric a name, and then, in the Metric Type field, select the Count option.
4. Click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Goal Metrics.
2. On the Goal Metrics menu, click the New button.
3. Give your metric a name, and then, in the Metric Type field, select the Count option.
4. Click the Save & Close button.



Consider using "count" goal metrics to track user adoption. Set specific goals for the number of new activities, the number of new opportunities, the number of new records, etc. In your dashboards, you can then display user progress toward these goals.

Click the View Records button at the bottom of the query to see if your search yields any results.

Task C Creating rollup queries (Step 3)

The rollup query defines the subset of records that will be used for counting progress toward your goals. For example, you might create a rollup query that defines just high-priority opportunities. Once you have that query in place, then you can create a goal for closing x number of high-priority opportunities.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Rollup Queries.
2. On the Rollup Queries tab, in the Records group, click the New button.
3. Give your rollup query a name and entity type.
4. Once you select an entity type, a query edit window will appear, where you can configure your query logic.
5. Click the Save & Close button when you are done.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Rollup Queries.
2. On the Rollup Queries menu, click the New button.
3. Give your rollup query a name and entity type.
4. Once you select an entity type, a query edit window will appear, where you can configure your query logic.
5. Click the Save & Close button when you are done.

Task D Creating individual goals (Step 4)

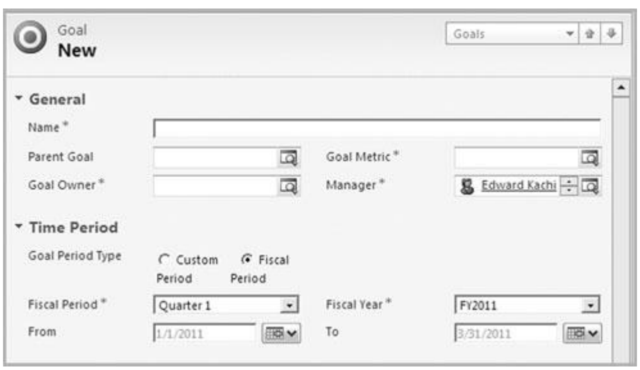
Once you have defined your goal metrics and your rollup queries, you're now ready to put actual goals into the system. As a manager, you can create goals for your employees or you can create personal goals for yourself.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Goals.
2. On the Goals tab, in the Records group of the ribbon, click the New button.
3. Give your goal a name, goal metric, and owner.
4. Define the time period for this goal.
5. Define your target, which will be either an integer or monetary amount, depending on your goal metric.
6. Define your criteria for the goal, including your rollup query.
7. Click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Goals.
2. On the Goals menu, click the New button.
3. Give your goal a name, goal metric, and owner.
4. Define the time period for this goal.
5. Define your target, which will be either an integer or monetary amount, depending on your goal metric.
6. Define your criteria for the goal, including your rollup query.
7. Click the Save & Close button.



If you are creating goals for a large number of users, consider using the workflow feature to speed up the process of creating individual user goals.

Use the Parent Goal field to define multiple sub-goals that roll up into one bigger master goal.

From anywhere in Microsoft Dynamics CRM, you can choose the Opportunity option from the New Record drop-down to create a new opportunity.

While you are editing an opportunity, you can print information for the opportunity by clicking the Print Preview button on the File tab. If you don't see it, you might have to first save the opportunity. Click the blue floppy disk icon to save.

Creating and editing opportunities

Opportunities are potential sales. Whether you are selling widgets, services, buildings, pizzas, or just about anything else, you can customize the opportunity feature in Microsoft Dynamics CRM to track the sales opportunities for your company.

Task A Creating a new opportunity

Adding a new opportunity to Microsoft Dynamics CRM is the first step in managing your prospective sales. You can create a new opportunity from the New Record drop-down on the File tab of the ribbon in Internet Explorer, or you can follow the procedure below.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click on Sales and then Opportunities.
2. On the Opportunities tab in the Records group of the ribbon, click the New button.
3. Enter information about your opportunity.
4. Click the Save & Close button.

Outlook 2003/2007:

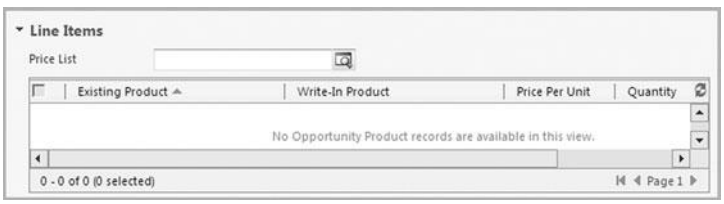
1. In the Navigation Pane, click on Sales and then Opportunities.
2. On the Opportunities menu, click the New button.
3. Enter information about your opportunity.
4. Click the Save & Close button.

Task B Adding products to an opportunity

Microsoft Dynamics CRM stores a central list of products. When you enter an opportunity, it's a good idea to link products to the opportunity. Doing so makes it easy to calculate the estimated revenue and create quotes, orders, and invoices for the opportunity. It also makes it easy to create product-based reports.

Outlook 2003/2007/2010/Internet Explorer:

1. Create a new opportunity or open an existing opportunity.
2. If you are creating a new opportunity, click the Save button after entering the required fields.
3. On the left, click on the Line Items form Section.
4. Specify a price list.
5. Choose a product and unit, and quantity. (The amount will be automatically calculated when you save.)
6. Click the Save & Close button.
7. The product will be added to the opportunity. Note that this also changes the estimated revenue field for the opportunity.
8. Click the Save & Close button.



The estimated revenue for an opportunity will be automatically calculated if you add products to the opportunity. So, if you add two products valued at $15 each to the opportunity, the overall estimated revenue for the opportunity will show as $30.

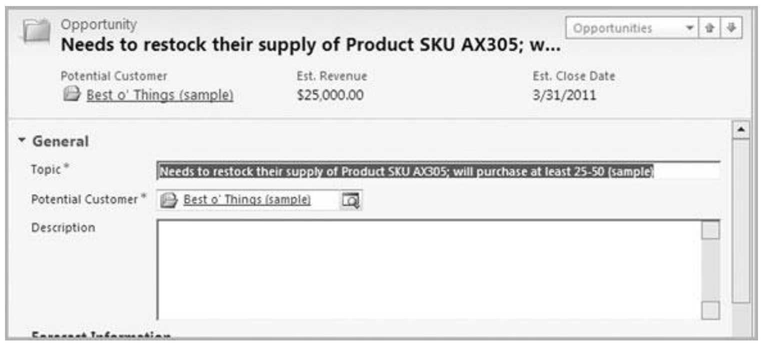
To easily find a specific opportunity, use your views. When looking at the list of opportunities, you'll see the View drop-down at the top. Choose a view, and only opportunities matching the view will appear.

Task C Editing an existing opportunity

From the Opportunity list view, you can double-click any opportunity to edit the properties of the opportunity. Of course, you'll need to have sufficient permissions to edit the opportunity.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Opportunities.
2. This will bring up your default list of your opportunities.
3. Locate the opportunity you'd like to edit. Use the Search for Records field at the top of the Opportunities list to find a specific opportunity.
4. Double-click the opportunity you'd like to edit.

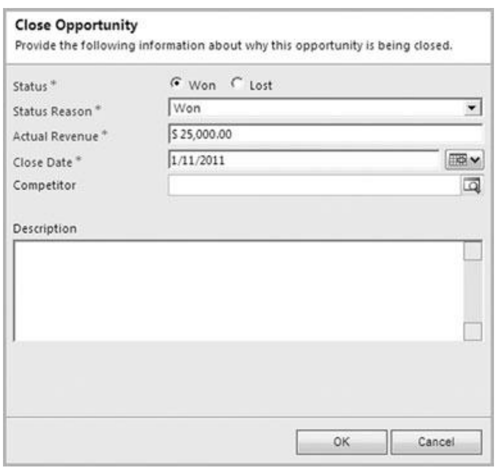


Task D Closing an opportunity

Once an opportunity has been won or lost, you can close the opportunity in Microsoft Dynamics CRM. It's a good idea to close your opportunities when they're no longer active because this removes them from your active list of opportunities in the Opportunity list view.

Outlook 2003/2007/2010/Internet Explorer:

1. Go to your Opportunities list.
2. Double-click an opportunity to open it for editing.
3. In the Actions group of the ribbon, click the Close as Won or Close as Lost button.
4. Choose a status for the opportunity to show whether the opportunity was won or lost.
5. Select a reason for the end of the opportunity.
6. Add an actual revenue, close date, competitor, and description.
7. Click OK.



Once you have closed an opportunity, it will be automatically removed from the My Open Opportunities view. If you want to view your closed opportunities, choose the Closed Opportunities view from the view drop-down at the top of the Opportunities list.

Workflow can be used to automate activity creation and opportunity record updates to support a sales process before/after closing the opportunity.

Tracking competitors

Gaining an understanding of your competition is critical to understanding whether your sales and marketing efforts are working. By creating a central list of competitors in Microsoft Dynamics CRM, you can track your win/loss rate with specific opportunities and products.

Task A Managing the list of competitors

You'll probably want to add products to your competitors. Understanding which products are sold by your competitors is important—especially if you are in a highly competitive sales environment.

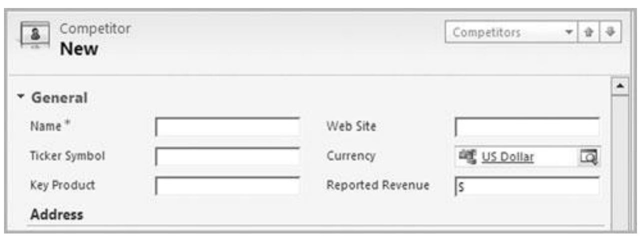
The first step in tracking your competitors in Microsoft Dynamics CRM is to create a list of competitors. Once your list of competitors has been defined, you can link those competitors to opportunities or products.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Competitors.
2. On the ribbon in the Records group, click the New button.
3. Type the name of your competitor in the Name field.
4. Enter any other information about your competitor into the other fields on the screen.
5. Click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Competitors.
2. On the Competitors menu, click the New button.
3. Type the name of your competitor in the Name field.
4. Enter any other information about your competitor into the other fields on the screen.
5. Click the Save & Close button.

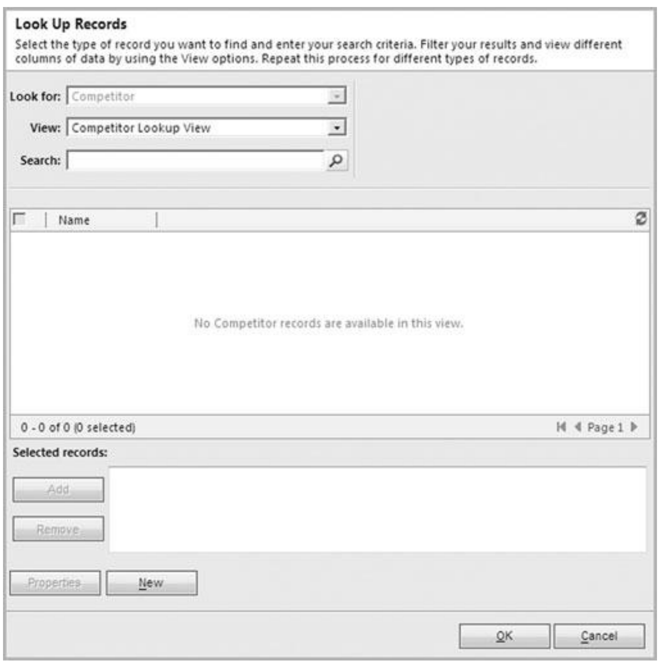


Task B Creating a relationship between a competitor and an opportunity

After adding an opportunity to Microsoft Dynamics CRM, you may find out that you're competing against a specific competitor. When you learn this, associate the opportunity with the competitor.

Outlook 2003/2007/2010/Internet Explorer:

1. Create a new opportunity or open an existing opportunity.
2. If you are creating a new opportunity, click the Save button after entering the required fields.
3. On the left, click the Competitors option.
4. On the ribbon in the Records group, click the Add Existing Competitor button.
5. In the look up dialog, add any existing competitors to the opportunity.
6. Click OK.
7. Click the Save & Close button.



One of the reports included in Microsoft Dynamics CRM is the Competitor Win Loss report. In the Navigation Pane, click Sales and then Competitors. In the Data group of the ribbon, click the Reports drop-down and choose the Competitor Win Loss option.

Using sales literature

Sales slicks, pricing spreadsheets, product descriptions, technical documents, news bulletins, manuals, marketing collateral, and any other sales literature can all be added to the sales literature library in Microsoft Dynamics CRM.

Task A Adding sales literature

Click the Documents option instead of the Sales Attachments if your document is in a SharePoint folder.

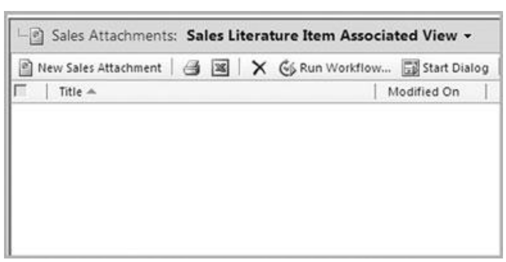
After adding sales literature to the library in Microsoft Dynamics CRM, you can associate the literature with products or competitors. Then, the next time you are up against a specific competitor, you'll have literature specific to the competitor at your fingertips. If you're selling a product, the price lists, news, or marketing collateral is linked to the product and is easily accessible.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Sales Literature.
2. On the Sales Literature tab, in the Records group of the ribbon, click the New button.
3. Give your sales literature item a title and subject. Fill in any other fields.
4. Click the Save button.
5. On the left, click the Sales Attachments option.
6. On the Actions toolbar, click the New Sales Attachment button.
7. Add a title, author, keywords, and abstract (description). Click the Browse button to attach a file.
8. Click the Save & Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Sales Literature.
2. On the Sales Literature menu, click the New button.
3. Give your sales literature item a title and subject. Fill in any other fields.
4. Click the Save button.
5. On the left, click the Sales Attachments option.
6. On the Actions toolbar, click the New Sales Attachment button.
7. Add a title, author, keywords, and abstract (description). Click the Browse button to attach a file.
8. Click the Save & Close button.

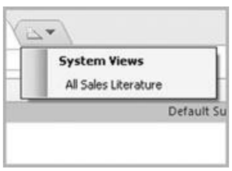


Task B Viewing sales literature

Sales literature that is linked with products or competitors can be viewed in the Sales Literature section for the product or opportunity. If you'd like to view all sales literature, check out the Sales Literature view.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Sales Literature. That will bring up the master list of all sales literature.
2. When viewing the details for a product, click the Sales Literature option on the left to bring up sales literature associated with the product.
3. At the top of the Sales Literature list, click the View drop-down to select a category of literature to display.



In the master list of sales literature, you can switch views to show specific types of sales literature. In the top-right corner of the Sales Literature view, click the View drop-down to see your views. (You can create views by clicking the Advanced Find button.)

When viewing the details for a competitor, click the Sales Literature option on the left to bring up sales literature linked with that competitor.

Use the Search for Records field at the top of the Sales Literature list to find a specific document.

Opportunity reporting

At the end of the day, opportunity reports will really drive your sales system. Reports will show your most important competitors, your best-selling products, and your most productive salespeople.

Task A Exporting opportunities to Excel

When exporting to Excel, you have three export options:

- Static worksheet with records from this page: Exports the data that you see on the screen.
- Dynamic PivotTable: Automatically creates a PivotTable from the data that is exported to Excel. In Excel, you'll see a Refresh from CRM button that will bring new data from Microsoft Dynamics CRM using the live data in your database.
- Dynamic Worksheet: With this option, you get the same dynamic worksheet that you get with the PivotTable option above, but without the PivotTable

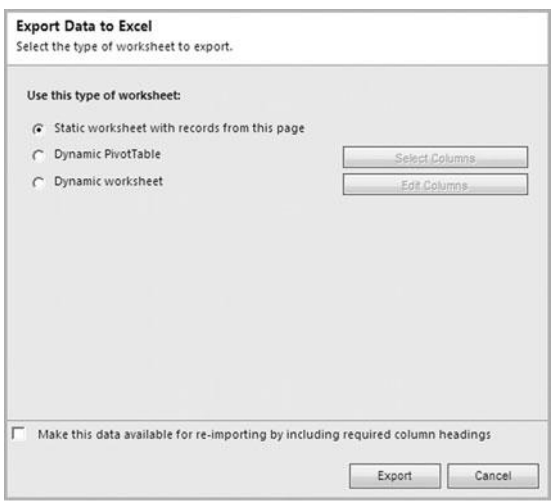
Many people overlook Excel as a reporting tool. It can, however, be a really powerful tool. If you don't know anything about pivot charts and pivot tables in Excel, run a Windows Live Search or reference your favorite Excel book. Using pivot tables, you can easily create breakdowns of your sales data. Want to know how many sales you have broken down by state and then salesperson? That report takes about ten seconds to produce as a pivot table.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Opportunities.
2. Choose a view from the View drop-down.
3. In the Data group of the ribbon, click the Export to Excel button.
4. Select the type of export to perform. You can export a static worksheet, or you can create a dynamic pivot table or worksheet.
5. Click the Export button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Opportunities.
2. Choose a view from the View drop-down.
3. On the Opportunities menu, click the Export to Excel button.
4. Select the type of export to perform. You can export a static worksheet, or you can create a dynamic pivot table or worksheet.
5. Click the Export button.



Task B Running opportunity reports

Without any customization, you can create activity, competitor, lead source effectiveness, and pipeline reports in Microsoft Dynamics CRM. Using the Report Wizard, you can create new reports that show data specific to your business process.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Opportunities.
2. Select the opportunities that should be included in your report. (This step is optional.)
3. On the Opportunities tab, in the Data group of the ribbon, click the Run Report drop-down.
4. Select the report you'd like to run.
5. Choose the range of records that should be included in the report. Your options are: All applicable records, The selected records, and All records on all pages in the current view.
6. Click the Run Report button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Opportunities.
2. Select the opportunities that should be included in your report. (This step is optional.)
3. On the toolbar, click the Run Report drop-down.
4. Select the report you'd like to run.
5. Choose the range of records that should be included in the report. Your options are: All applicable records, The selected records, and All records on all pages in the current view.
6. Click the Run Report button.

To select all opportunities, click the checkmark field right under the New button.

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Chapter 7

Scheduling Activities within the CRM Web Client

- Working with activities in Microsoft Dynamics CRM
- Converting activities

Working with activities in Microsoft Dynamics CRM

In this chapter, you'll learn how to manage activities within the web-based Microsoft Dynamics CRM application. Most users use Outlook to manage their calendars on a day-to-day basis, so be sure to read Chapter 5, which covers basic activity functions within Outlook.

Task A Viewing the calendar in Microsoft Dynamics CRM

Not all of your Outlook activities will appear in the Microsoft Dynamics CRM activities list. Only Outlook activities that have been selected to be tracked in CRM will appear.

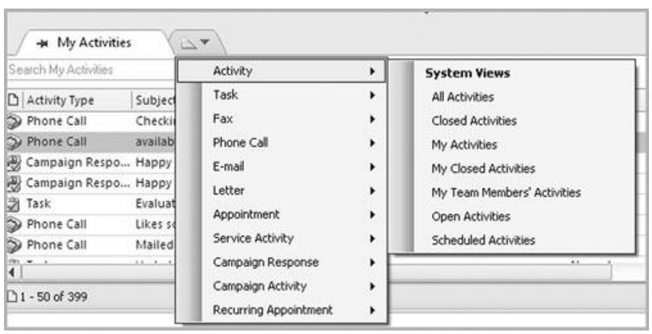
Activities added to Microsoft Dynamics CRM will also show up in your Outlook calendar if you have the Outlook client installed.

In the Navigation Pane, click Workplace and then Calendar. This will show you a calendar of your CRM activities.

The Activities list view shows a listing of activities (appointments, tasks, service activities, e-mails, etc.) in a spreadsheet-like format. You can filter this list to show just specific activities, and you can use the View drop-down to configure pre-defined sets of activities based on a query. Both activities created in the web client and Outlook (if tracked in CRM) will appear in this list.

To view activities in Microsoft Dynamics CRM:

1. In the Navigation Pane, click Workplace and then Activities.
2. Your CRM activities list will appear.
3. Double-click any activity to open it for editing.
4. Use the drop-downs at the top of the Activity list to filter the activities that appear in the list.

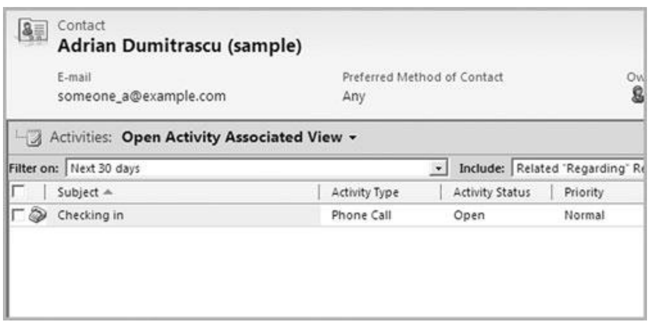


Task B Viewing activities linked with a record in Microsoft Dynamics CRM

Activities in Microsoft Dynamics CRM are usually linked with records. You might schedule an appointment with a contact, send an e-mail to an account, or set a task for an opportunity. When you are looking at any record, you'll see an activities option in the left panel. In this area, you'll see all activities linked to the record.

To view activities linked with a record:

1. In the Navigation Pane, click Sales and then Contacts.
2. Double-click a contact to open it for editing.
3. On the left, click the Activities option.
4. A list of activities that have been associated with the record will appear.
5. Use the filter at the top of the screen to set the date range for activities in the list.



Activities are associated with a record when that record is specified as the "Regarding" record. This can be done when scheduling activities in Microsoft Dynamics CRM or Outlook.

You can also initiate this process from the customer record so that contact details are pre-populated.

Types of activities that can be initiated from the Activities list:

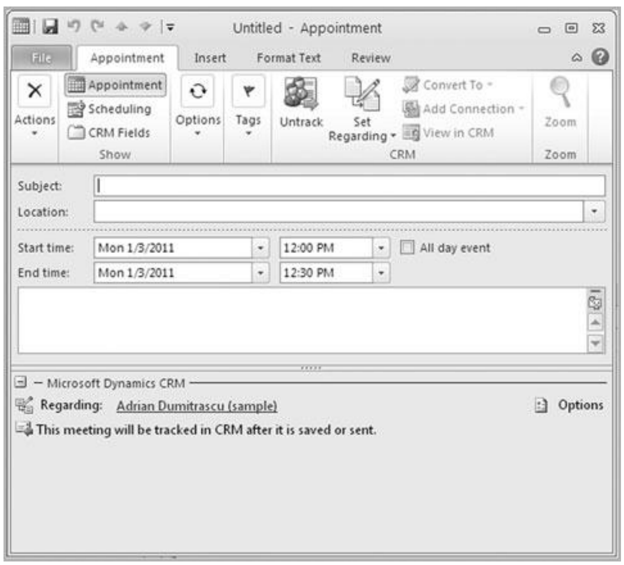
- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity
- Campaign Response

Task C Creating a new appointment

You can create an appointment in Outlook, and that appointment will sync to Microsoft Dynamics CRM if you click the Track in CRM or Set Regarding buttons in the ribbon or toolbar. Alternatively, you can follow this process to create an appointment in the web client for Microsoft Dynamics CRM.

To create a new appointment:

1. In the Navigation Pane, click Workplace and then Activities.
2. On the Activities tab in the New group of the ribbon, click the New button.
3. Select the type of activity you'd like to create. For this example, you will create an appointment.
4. Click OK.
5. Enter the details for your appointment.
6. Click the Save and Close button.

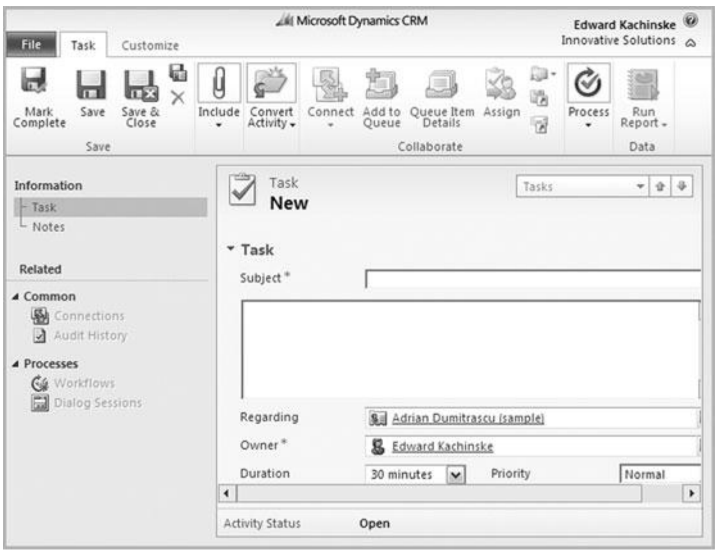


Task D Creating a new task

Any new tasks created in Outlook will automatically sync to Microsoft Dynamics CRM if you click the Track in CRM or Set Regarding buttons on the toolbar or ribbon in Outlook. If you are in the web client for Microsoft Dynamics CRM, you can use this process to create a new task.

To create a new task:

1. From the New Activity drop-down on the File tab, choose the Task option.
2. Give your task a subject, and type any details.
3. In the Regarding field, select the record for association with this task.
4. Click the Save & Close button.



To view your task list: In the Navigation Pane, click Workplace and then Activities. From the Type drop-down at the top of the screen, choose the Tasks option.

When you are viewing any record in Microsoft Dynamics CRM, click the Activities button on the left to bring up a list of activities associated with the record. Click the New button to create a new task associated with the record.

Recurring activities will also show up in your Outlook calendar as recurring activities if you configure your CRM appointments to sync down to Outlook.

Task E Scheduling a recurring appointment

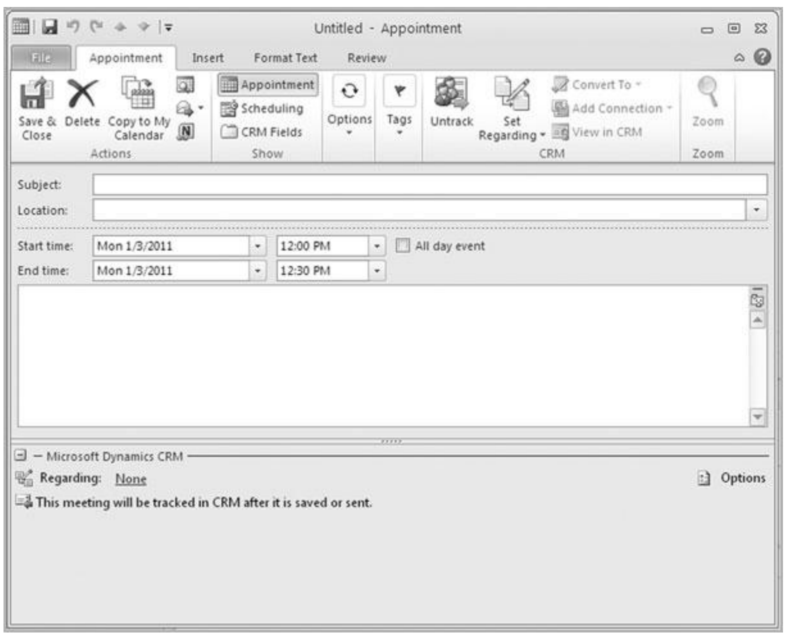
If you have an appointment that recurs on a specific date and time, then you can create a recurring appointment. Once you create a recurring appointment, pending appointments will be subsequently created. If you delete a recurring appointment, you will be prompted to delete either the occurrence or series of appointments.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace and then Activities.
2. On the Activities tab, in the New group, click the Appointment drop-down, and then select the Recurring Appointment option.
3. Configure your recurring appointment.
4. Click the Save & Close button when you are done.

Outlook 2003/2007:

1. In the Navigation Pane, click Workplace and then Activities.
2. On the Activities menu, highlight Appointment, and then select the Recurring Appointment option.
3. Configure your recurring appointment.
4. Click the Save & Close button when you are done.



Converting activities

Converting an activity in CRM is similar to converting other kinds of records in your system. Activities can be closed or converted into another CRM record type, such as an opportunity. This will allow you to track sales processes with activities in CRM.

Task A Closing an activity

Once an activity has been completed, you can clear it to show that the activity is done. Doing so takes the activity off your list of active activities. Completed activities will appear in the Closed Activities area for a record, while active activities show in the Activities area.

To close an activity:

1. In the Navigation Pane, click Workspace and then Activities.
2. Double-click an activity (like an appointment) to open it for editing.
3. In the Actions group of the ribbon, click the Close Appointment button.
4. Select a status for the appointment. For example, you could choose Completed or Cancelled.
5. Click OK.

You could create a workflow to automatically close activities after a certain period of time.

Closed activities show in the Closed Activities area for a record.

In the Activity list view, one of your views (in the drop-down in the upper-right corner) will show a list of your completed activities.

A quick way to complete an activity is to save it as completed. After double-clicking any activity, click the Mark Complete button in the Save group of the ribbon.

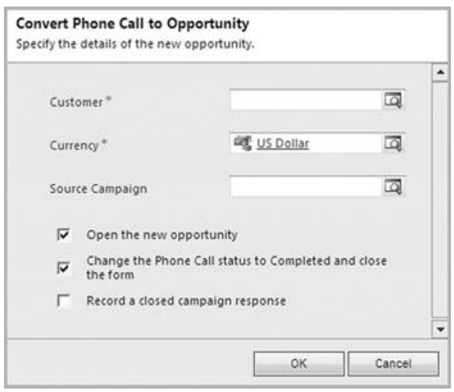
You can also convert an appointment to a case. Do this in situations where follow-up support is required.

Task B Converting an appointment to an opportunity

You complete a cold call, and the potential customer is excited about the opportunity to work with your company. Converting an appointment to an opportunity will automatically create a new opportunity, and it will change the appointment status to complete. Most types of activities (e-mails, phone calls, faxes, letters, appointments, and campaign responses) can be converted. Service activities and tasks cannot be converted.

To convert an appointment to an opportunity:

1. In the Navigation Pane, click Workspace and then Activities.
2. Double-click an activity to open it for editing.
3. In the Convert Activity group of the ribbon, click the To Opportunity button.
4. Click the To Opportunity option.
5. Select a customer and source campaign.



Chapter 8

Managing Campaigns

- Creating a campaign
- Adding items to a campaign
- Quick campaigns
- Campaign responses

In the Campaign list view, click the Excel to Excel button to export a list of all marketing lists currently showing.

Creating a campaign

The campaign feature in Microsoft Dynamics CRM lets you create a group of marketing activities in an organized format from which you can easily run reports.

Task A Creating a new campaign

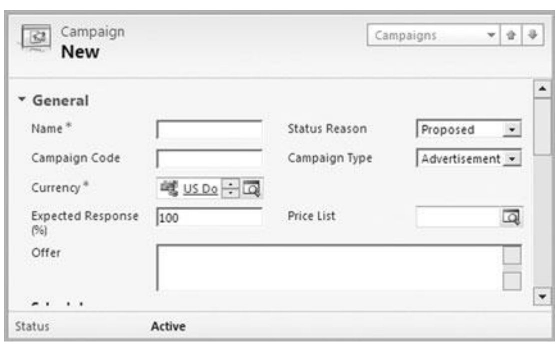
If you are about to introduce a new product offering, you might create a new campaign to advertise the offering. The campaign might consist of a number of planning tasks, mass letters, mass e-mails, postcards, phone calls, and more. By creating a campaign for this marketing effort, you can create a structure that allows for tracking the progress of the campaign.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. On the Campaigns tab in the Records group of the ribbon, click the New button.
3. Give your campaign a name and click the Save button.
4. Enter information into the other fields for the campaign.
5. On the left, you can set up planning tasks, campaign activities, and campaign responses. All of these are covered later in the chapter.
6. Click the Save and Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. On the Campaigns menu, click the New button.
3. Give your campaign a name and click the Save button.
4. Enter information into the other fields for the campaign.
5. On the left, you can set up planning tasks, campaign activities, and campaign responses. All of these are covered later in the chapter.
6. Click the Save and Close button.



Task B Creating a campaign template

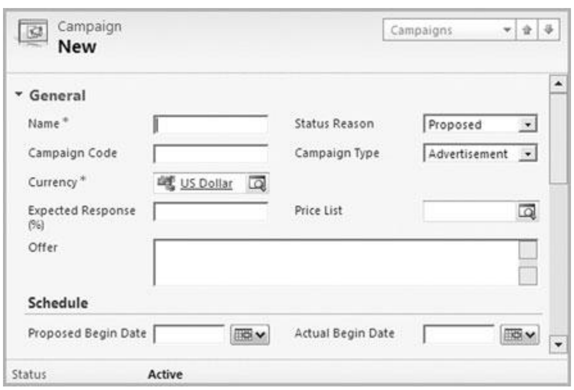
There's not much difference between a campaign and a campaign template. Functionally, they're the same. A campaign is a collection of tasks and activities related to a marketing effort. So is a campaign template. You'd create a template, however, as an example marketing campaign to be used as the basis for other campaigns. In other words, in the future, you can create a new campaign from a campaign template, and the structure of the template is copied to the new campaign.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. On the Campaigns tab in the Records group of the ribbon, click the New Template button.
3. Give your campaign template a name and click the Save button.
4. Enter information into the other fields for the campaign.
5. On the left, you can set up planning tasks, campaign activities, and Target Marketing Lists. All of these are covered later in the chapter.
6. Click the Save and Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. On the Campaigns menu, click the New Template button.
3. Give your campaign template a name and click the Save button.
4. Enter information into the other fields for the campaign.
5. On the left, you can set up planning tasks, campaign activities, and Target Marketing Lists. All of these are covered later in the chapter.
6. Click the Save and Close button.



To view just the campaign templates, choose the Campaign Templates view from the View drop-down in the upper-right corner of the Campaign list view.

To create a new campaign from a template, open the template. Then, in the Actions group of the ribbon, click the Copy as Campaign button.

Adding items to a campaign

After creating a campaign, you'll want to add planning tasks and campaign activities to the campaign. If you have a template already created, the easiest way to do this is to add the existing template to your campaign.

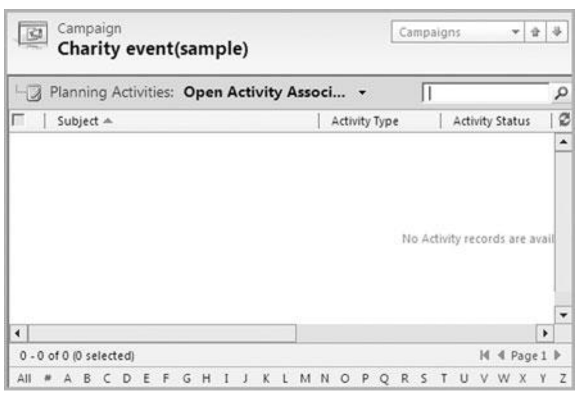
Task A Adding a planning activity to a campaign

Planning activities are often the key to a successful campaign. Planning activities are the activities that you need to perform before your first communication with the customer takes place. Examples of planning tasks might be:

- Finalize the target marketing lists.
- Get bids from the printer for your sales slicks.
- Get approval for the marketing materials to be sent.
- Have the design department create special landing pages on your website.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a marketing campaign to open it.
3. Click the Planning Activities option on the left.
4. In the Records group of the ribbon, click the Add New Activity drop-down, then select an activity type.
5. Repeat steps 3 and 4 until all of your planning tasks have been added.



Task B Adding a campaign activity to a campaign

Campaign activities are the customer interactions that are all tied to the campaign. Campaign activities can include letters, e-mails, trade shows, advertisements, phone calls, and just about any other type of sales activity.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a marketing campaign to open it.
3. Click the Campaign Activity option on the left.
4. In the Records group of the ribbon, click the Add New Campaign Activity button.
5. Enter details for the activity.
6. Click the Save and Close button.

If you are adding a mail merge campaign activity, all records in your marketing list must be the same entity. So, they'd all have to be contacts, or they'd all have to be accounts. They could not be a mix of contacts and accounts.

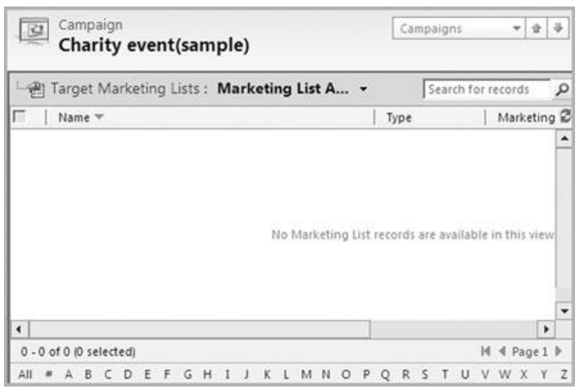
When you are adding a marketing list in the Target Marketing Lists area, click the New button to create a new list.

Task C Adding a marketing list or product to a campaign

You probably won't target your entire database for every part of every campaign. Because of this, you can target specific campaign activities to just contacts that are in specific marketing lists.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a marketing campaign to open it.
3. Click the Target Marketing Lists option on the left.
4. In the Records group of the ribbon, click the Add Existing Marketing List button and click OK.
5. Check the box to add the marketing lists to open undistributed campaign activities. Click OK.



Quick campaigns

Quick campaigns are like mini campaigns that you run without significant planning. Where campaigns might be made up of many planning tasks and campaign activities, quick campaigns only contain one activity. If you want to send a mass e-mail to everyone in a marketing list, for example, you can run a quick campaign for those contacts to send the e-mails.

Task A Creating a quick campaign

You can create a quick campaign from just about any list view of customer data. In the accounts, leads, and contacts views, you'll see a Create Quick Campaign button on the Actions toolbar. After completing an Advanced Find, you also have an option to run a quick campaign for the results of the search.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Contacts. (You can create quick campaigns on other record types as well.)
2. Highlight the contacts that should be included in the quick campaign. (You might switch to a different view or run an Advanced Find to make it easier to narrow down your list of contacts.)
3. On the Add tab in the Marketing group of the ribbon, click the Create Quick Campaign drop-down and select a range of contacts. (Selected records, All records on the current page, or All records on all pages.)
4. Click Next.
5. Give your campaign a name and click Next.
6. Choose the type of activity, assign ownership to a user in the system, and click Next.
7. Add details for your activity and click Next.
8. Click the Create button.

Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Contacts. (You can create quick campaigns on other record types as well.)
2. Highlight the contacts that should be included in the quick campaign. (You might switch to a different view or run an Advanced Find to make it easier to narrow down your list of contacts.)
3. On the Record menu, highlight Create Quick Campaign drop-down and select a range of contacts. (Selected records, All records on the current page, or All records on all pages.)
4. Click Next.
5. Give your campaign a name and click Next.
6. Choose the type of activity, assign ownership to a user in the system, and click Next.
7. Add details for your activity and click Next.
8. Click the Create button.

You can assign quick campaign activities to:

- The currently logged-in user
- The owners of each record in the quick campaign
- A specific user or queue

Campaign responses

Campaign responses track the effectiveness of a campaign. A campaign response is the record in Microsoft Dynamics CRM that tracks the type of response a customer has to a campaign. Reports are included that track campaign responses, so it's easy to make sure your team knows how a customer has responded to your campaign.

Task A Creating a campaign response

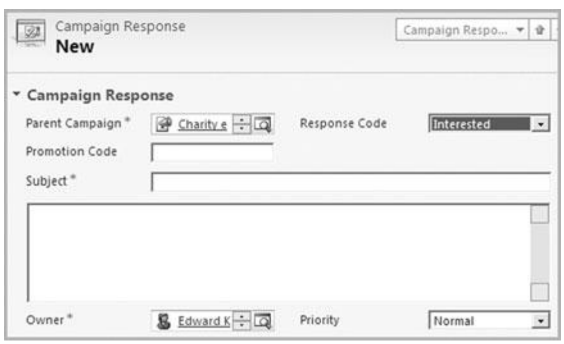
This task shows you how to manually record a campaign response. In many circumstances, however, the response will be automatically generated. Here's how:

- You can convert an existing activity to a campaign response.
- You can import campaign activities from a spreadsheet.
- You can automatically generate campaign responses with scripting or workflow.

You can create a campaign response manually from within the Campaign edit screen. It's important to understand that the campaign response that gets created through this process only notes within Microsoft Dynamics CRM that a customer has responded to your campaign. Unless a workflow has been created, campaign responses do not send any sort of communication to the customer.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a campaign to open it for editing.
3. On the left, click the Campaign Responses option.
4. In the Records group of the ribbon, click the Add New Campaign Response button.
5. Enter the details of your campaign response.
6. Click Save and Close.



Task B Duplicating a campaign response

If you get the same response from a dozen contacts at the same company that were included in a campaign, you can duplicate their response.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a campaign to open it for editing.
3. Click the Campaign Responses option on the left.
4. Double-click the campaign response you'd like to copy.
5. In the Action group of the ribbon, click the Copy Campaign Response button.
6. A copy of the campaign response will appear. Make any changes.
7. Click Save and Close.

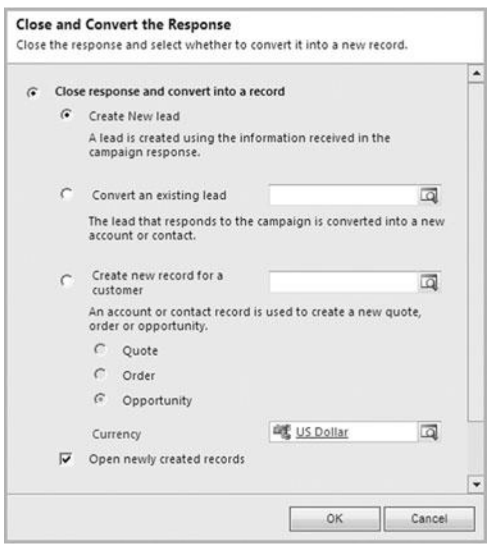
If you convert the campaign response to a new record for an existing customer, a new quote, order, or opportunity is automatically created and associated with the customer you choose.

Task C Converting campaign responses to leads or opportunities

If someone responds to your marketing campaign, and if they are interested in buying one of your products or services, it's a good idea to convert that campaign response to a lead or opportunity. Once the marketing group within your company has gotten the campaign response, they can convert the response to a lead, and then the sales department takes over.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a campaign to open it for editing.
3. Click the Campaign Responses option on the left.
4. Double-click the campaign response you'd like to convert.
5. In the Actions group of the ribbon, click the Convert Campaign Response button.
6. Choose to convert to a new lead, an existing lead, or a new record for a customer.
7. Click OK.



Task D Closing a campaign response

If a customer included in your campaign makes it clear that he or she is not interested in your product or service, you can close the campaign response. Closing the campaign response does not convert it to a lead, opportunity, or any other sort of record. It simply disqualifies the response.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Campaigns.
2. Double-click a campaign to open it for editing.
3. Click the Campaign Responses option on the left.
4. Open a campaign response you'd like to close.
5. In the Actions group of the ribbon, click the Close Campaign Response button.
6. Choose a status (either Closed or Cancelled) and click OK.

At any point, you can reactivate a campaign response. Just highlight the campaign response. In the Records group of the ribbon, click the Activate button.

Closed campaign responses are read-only and cannot be edited unless they are reactivated.

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Chapter 9

Marketing Lists

- Creating marketing lists
- Managing list membership

Creating marketing lists

Marketing lists are groups of otherwise unrelated records. You could use marketing lists to collect a list of customers that should be included in a campaign. You might have a marketing list of your top prospects. You might even keep everyone on your Board of Directors in a marketing list.

Task A Creating a static marketing list

You can create a marketing list that includes accounts, contacts, or leads. Create a marketing list of records if you ever want to include the records in a campaign or quick campaign.

It's easy to export marketing list members to Excel. Look for the Excel button in the Data group of the ribbon.

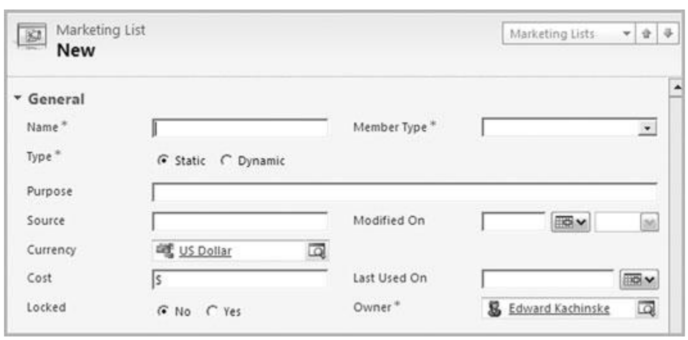
You can change the columns that display for your marketing list by creating a new marketing list view. This is done in the Advanced Find interface. See Chapter 4 for information on creating a new view.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. On the Marketing Lists tab in the Records group of the ribbon, click the New button.
3. Give your marketing list a name.
4. Choose an entity from the Member Type drop-down. (You can create a marketing list for contacts, accounts, or leads.)
5. Add any other field information to your marketing list.
6. Click the Save and Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. On the Marketing Lists menu, click the New button.
3. Give your marketing list a name.
4. Choose an entity from the Member Type drop-down. (You can create a marketing list for contacts, accounts, or leads.)
5. Add any other field information to your marketing list.
6. Click the Save and Close button.



Task B Creating a dynamic marketing list

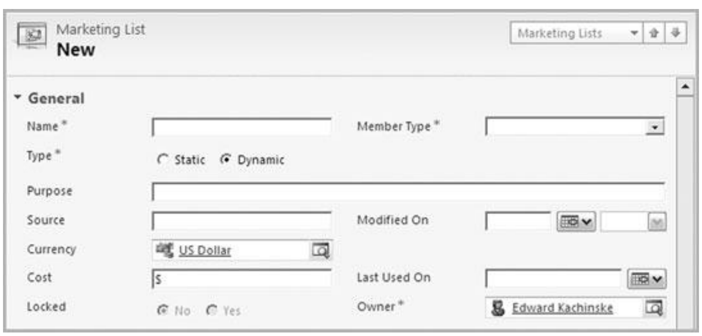
Unlike a static marketing list, a dynamic marketing list is based on Advanced Find criteria. This means that once you create a dynamic marketing list, you won't need to personally manage membership of the list.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and the Marketing Lists.
2. On the Marketing Lists tab, in the Records group, click the New button.
3. In the General form section, select Dynamic as the marketing list type.
4. Give your marketing list a name and member type and click the Save button.
5. On the left, click the Marketing List Members Option, then click the Manage Members button in the Actions group of the ribbon.
6. Configure your query and click the Use Query button.

Outlook 2003/2007:

1. In the Navigation Pane, click Marketing and the Marketing Lists.
2. On the Marketing Lists menu, click the New button.
3. In the General form section, select Dynamic as the marketing list type.
4. Give your marketing list a name, a member type, and then click the Save button.
5. On the left, click the Marketing List Members Option, then click the Manage Members button in the Actions group of the ribbon.
6. Configure your query and click the Use Query button.



If the Marketing List Members option on the left is grayed out, then you may need to save your marketing list.

In the top corner of the Marketing Lists view, check out the View drop-down. By default, you'll probably see My Active Marketing Lists. If a marketing list is not active, it will not appear in this list. To see your inactive marketing lists, use this View drop-down to select a view that includes inactive lists.

Task C Activating/deactivating a marketing list

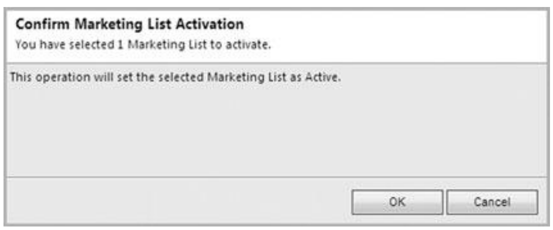
New marketing lists entered into Microsoft Dynamics CRM are not active until you activate them. Only active marketing lists can be used in quick campaigns or campaigns, and you'll need to activate a marketing list before you can add members.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. Highlight the marketing list you'd like to activate or deactivate.
3. On the Marketing Lists tab in the Records group of the ribbon, choose either the Activate or Deactivate option.

Outlook 2003/2007:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. Highlight the marketing list you'd like to activate or deactivate.
3. On the Marketing Lists menu, choose either the Activate or Deactivate option.



Managing list membership

Once you have the marketing list created, your first step will probably be to add members to the list. You can add leads, accounts, or contacts to a marketing list.

Task A Adding records to a marketing list

There are three basic ways to add records to a marketing list. You can import records directly into a marketing list. Using the Advanced Find feature, you can specify that any resulting records be added to the marketing list. You can also use the lookup feature to add marketing list members individually.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. Double-click the marketing list whose membership should be changed.
3. On the left, click the Marketing List Members option.
4. In the Actions group of the ribbon, click the Manage Members button.
5. Select a method for finding your members. You can use a simple lookup or Advanced Find. Click OK.
6. Find your records and add them to the marketing list.

Marketing lists can have accounts, leads, or contacts as members.

If your campaign needs to send an e-mail to a marketing list that contains both contacts and leads, you'll have to create two separate marketing lists. One for the relevant contacts, and the other for the relevant leads.

Task B Copying membership for another marketing list

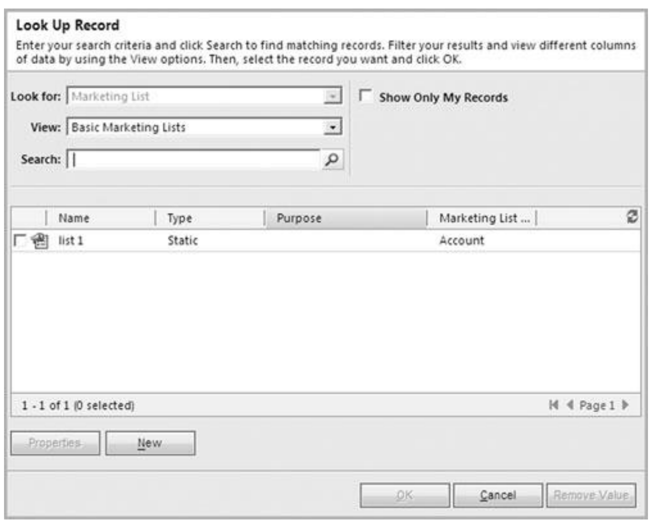
Last year, you created a marketing list for contacts that received a holiday card. This year, you want to create another holiday card marketing list, but it might save some time to just copy last year's list. This way, you can start with a larger list and just add the new relevant contacts that have been added in the last 12 months.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. Highlight a marketing list.
3. On the Marketing Lists tab in the Actions group of the ribbon, click the Copy to Marketing List button.
4. Click the New button to create a new marketing list, if necessary.
5. Highlight a marketing list and click OK.
6. Click OK to confirm that you would like all marketing list members to be copied to the new list that you highlighted in step 5.

Outlook 2003/2007:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. Highlight a marketing list.
3. On the Marketing Lists menu, click the Copy to Marketing List button.
4. Click the New button to create a new marketing list, if necessary.
5. Highlight a marketing list and click OK.
6. Click OK to confirm that you would like all marketing list members to be copied to the new list that you highlighted in step 5.



Task C Removing records from a marketing list

If you've added a contact to a marketing list, and you find out that working with that contact will not be possible, you can remove him or her from the marketing list. Doing so will pull the contact out of any campaigns or quick campaigns that use the marketing list.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Marketing and then Marketing Lists.
2. Double-click the marketing list whose membership should be changed.
3. On the left, click the Marketing List Members option.
4. In the Actions group of the ribbon, click the Manage Members button.
5. Choose the Use Advanced Find to remove the member's option and click OK.
6. Configure your Advanced Find, and click the Find button to see the results.
7. Highlight any contacts you'd like to remove and click the Remove from Marketing List button.

After clicking the Marketing List Members option, choose the Remove from Marketing List option in the Actions group of the ribbon to quickly remove the selected members.

For more information about using the Advanced Find feature, see Chapter 4.

Removing records from a marketing list does not remove the records from the database. It simply disassociates the record from the list. Rest assured you won't lose any data.

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Chapter 10

Letters, Envelopes, and Labels

- Running a mail merge
- Creating mail merge templates in Microsoft Word

Running a mail merge

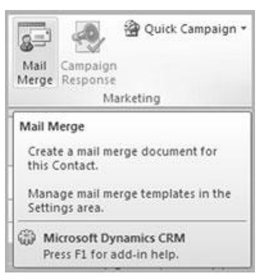
With the mail merge features in Microsoft Dynamics CRM, you can easily create multiple letters, envelopes, or labels for customers in your database. If you've used the mail merge features in Microsoft Word, you'll find this interface is very similar. To utilize Microsoft Dynamics CRM's integration with Microsoft Word, you'll need to have the CRM Outlook client installed on your local computer.

Task A Selecting recipients for a mail merge

There are a number of ways to select recipients for a mail merge, but most of them involve either selecting a view that contains the relevant records or performing an Advanced Find. As long as you can bring up your recipients on a page, running a mail merge for them should only require a couple of clicks.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Sales and then Contacts. (You could also mail merge to other entities, but for this example, we'll use contacts.)
2. From the View drop-down in the upper-left corner of the contact list, choose the view that contains the contacts that should be included in the mail merge.
3. Once the view is displayed, highlight the contacts that should be included in the mail merge.
4. On the Create Related tab in the Marketing group of the ribbon, click the Mail Merge button.



Outlook 2003/2007:

1. In the Navigation Pane, click Sales and then Contacts. (You could also mail merge to other entities, but for this example, we'll use contacts.)
2. From the View drop-down in the upper-left corner of the contact list, choose the view that contains the contacts that should be included in the mail merge.
3. Once the view is displayed, highlight the contacts that should be included in the mail merge.
4. On the Add menu, click the Mail Merge button.

Task B Executing a mail merge

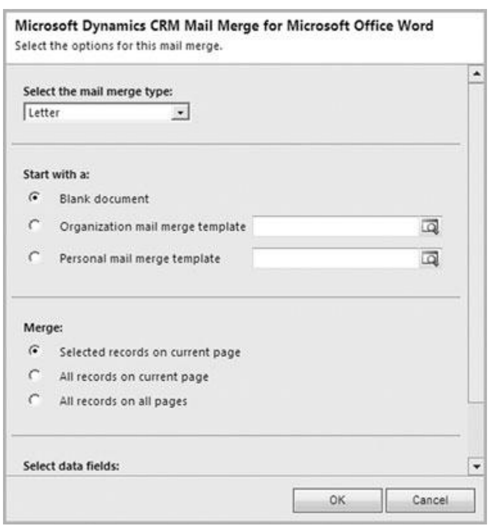
When you execute a mail merge in Microsoft Dynamics CRM, data from CRM is sent directly to Microsoft Word. Once you're in Word, the mail merge process is the same as you'd follow for creating any mail merge in Word.

Outlook 2010/Internet Explorer:

1. Highlight the records that should be included in your merge. (See the previous task.)
2. On the Create Related tab in the Marketing group of the ribbon, click the Mail Merge button.
3. From the drop-down at the top, choose the Letter option.
4. Select a template.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. In Word, click the CRM button on the toolbar or ribbon.
8. Your mail merge will begin in Word.

Outlook 2003/2007:

1. Highlight the records that should be included in your merge. (See the previous task.)
2. On the Add menu, click the Mail Merge button.
3. From the drop-down at the top, choose the Letter option.
4. Select a template.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. In Word, click the CRM button on the toolbar or ribbon.
8. Your mail merge will begin in Word.



After clicking the Word icon to launch the merge, click the Data Fields button to select the fields that will be available.

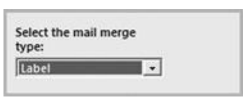
You will need to enable macros to run a mail merge using Word.

Task C Printing labels for customers

You can print on just about any type of label in Microsoft Word. If a standard Avery (or other) template doesn't exist for the sheet of labels you're using, you can create a custom label.

Outlook 2010/Internet Explorer:

1. Highlight the records that should be included in your label merge.
2. On the Create Related tab in the Marketing group of the ribbon, click the Mail Merge button.
3. From the drop-down at the top, choose the Labels option.
4. Select an existing label template, or start with a blank document.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. [If prompted…] In Word, click the CRM button on the toolbar or ribbon.
8. Follow the Mail Merge Wizard instructions in Word to complete your label merge.



Outlook 2003/2007:

1. Highlight the records that should be included in your label merge.
2. On the Add menu, click the Mail Merge button.
3. From the drop-down at the top, choose the Labels option.
4. Select an existing label template, or start with a blank document.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. [If prompted…] In Word, click the CRM button on the toolbar or ribbon.
8. Follow the Mail Merge Wizard instructions in Word to complete your label merge.

If you print on a specific label often, it's probably a good idea to create a template specifically for that label.

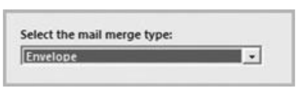
Label mail merge templates can include pictures, so you could include your specific formatting, return address, or other relevant information within the template.

Task D Printing envelopes for customers

Using the mail merge feature in Microsoft Dynamics CRM, you can merge envelopes. Doing this saves you the time of sticking labels on an envelope, since the customer information in your database is printed directly on the envelope.

Outlook 2010/Internet Explorer:

1. Highlight the records that should be included in your merge. (See the previous task.)
2. On the Create Related tab in the Marketing group of the ribbon, click the Mail Merge button.
3. From the drop-down at the top, choose the Envelope option.
4. Select a template, or choose to start with a blank document.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. [If prompted…] In Word, click the CRM button on the toolbar or ribbon.
8. Follow the Mail Merge Wizard instructions in Word to complete your envelope merge.



Outlook 2003/2007:

1. Highlight the records that should be included in your merge. (See the previous task.)
2. On the Add menu, click the Mail Merge button.
3. From the drop-down at the top, choose the Envelope option.
4. Select a template, or choose to start with a blank document.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. [If prompted…] In Word, click the CRM button on the toolbar or ribbon.
8. Follow the Mail Merge Wizard instructions in Word to complete your envelope merge.

For more information about completing your mail merge once it opens in Word, see the help section in Word or refer to your favorite Microsoft Word book.

Creating mail merge templates in Microsoft Word

Mail merge templates are created in Microsoft Word, but they can be uploaded to Microsoft Dynamics CRM so that they are available anytime you need to merge customer information. There are two basic types of templates: personal templates and organization templates.

Task A Creating personal templates

Personal templates are Microsoft Word mail merge templates that are only available when you are logged into Microsoft Dynamics CRM. Other users will not be able to see your personal templates.

Only XML files can be uploaded and used as mail merge templates with Microsoft Dynamics CRM. If your template is saved as a DOC, DOCX, or other format, open it in Word and save it as an XML file.

Outlook 2003/2007/2010/Internet Explorer:

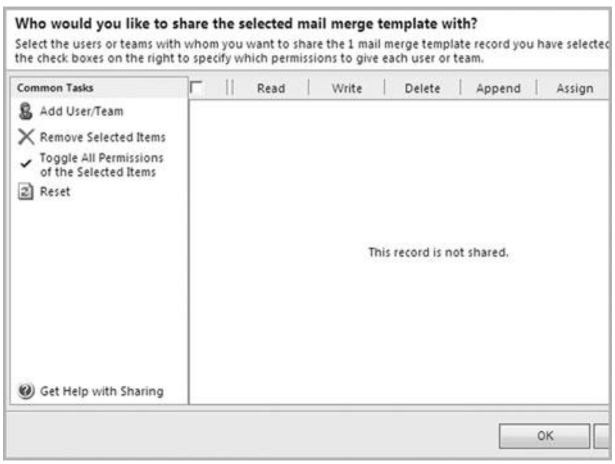
1. Highlight the records that should be included in your merge. (See the previous task.)
2. On the Create Related tab in the Marketing group of the ribbon, click the Mail Merge button.
3. From the drop-down at the top, choose the Envelope option.
4. Select a template, or choose to start with a blank document.
5. Select a merge range of records. (Selected records, All records on current page, or All records on all pages.)
6. Click OK. If prompted, click Open to open the Word document.
7. Follow the steps to create your mail merge.
8. In the final step, click the Upload Template to CRM option.
9. Give your template a name and click the Save button.

Task B Making templates available to the entire organization

Organization templates are shared with all Microsoft Dynamics CRM users, so you should only share templates that will be relevant to everyone in your company. To create an organization template, you'll follow the same process discussed in the previous task. In the list of mail merge templates, you'll choose to make the template available to others.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Templates, and then Mail Merge Templates.
2. Highlight the template you'd like to make available to the organization. (You may need to switch views to see the template.)
3. On the toolbar, choose the Make Available to Organization option from the More Actions drop-down.



On the toolbar, choose the Make Personal option from the More Actions drop-down to revert an organization template to be just viewable by yourself.

If you make a template available to the organization, you can restrict access to users or teams. Highlight the template from your list of mail merge templates. On the toolbar, choose the Sharing option from the More Actions toolbar.

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Chapter 11

Sending E-mail

- Sending e-mail
- Sending e-mails to multiple recipients
- Workflow e-mails

Sending e-mail

E-mail is the most commonly used method of business communication today, and Microsoft Dynamics CRM makes it easy to send e-mail through Outlook or via the web-based Microsoft Dynamics CRM client. However you send e-mails, it's easy to attach them back to records—giving you a valuable history of communication on the record level.

Task A Sending a template-based direct e-mail

After clicking the Send Direct E-mail button, you'll have the option to send the template-based e-mail to:

- The selected records on the current page
- All records on the current page
- All records on all pages

If you are using the web client for Microsoft Dynamics CRM, you can send e-mails to your customers right from within Internet Explorer. E-mails sent from Microsoft Dynamics CRM will come from your e-mail address, and a history of the e-mail having been sent will be created on the customer record. Best of all, they're sent using templates, so you'll save time writing the body of the e-mail.

Outlook 2010/Internet Explorer:

1. On the Navigation Pane, click Sales and then Contacts. (You could also click Leads or Accounts, if you wanted to send an e-mail to a lead or account.)
2. From your contact list, highlight the contact (or contacts) that should receive the direct e-mail.
3. In the Collaborate group of the ribbon, click the Send Direct E-mail button.
4. In the template list, choose a template.
5. Select a range of recipients. You can send to Selected records, All records on the page, or All records.
6. Choose a sender for your e-mail. The e-mail will appear to have been written by the sender or queue that you select.
7. Click Send.

Outlook 2003/2007:

1. On the Navigation Pane, click Sales and then Contacts. (You could also click Leads or Accounts, if you wanted to send an e-mail to a lead or account.)
2. From your contact list, highlight the contact (or contacts) that should receive the direct e-mail.
3. On the Contacts menu, click the Send Direct E-mail button.
4. In the template list, choose a template.
5. Select a range of recipients. You can send to Selected records, All records on the page, or All records.
6. Choose a sender for your e-mail. The e-mail will appear to have been written by the sender or queue that you select.
7. Click Send.

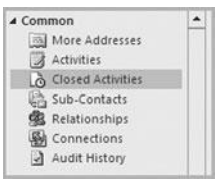
Task B Viewing a history of e-mail sent or tracked through CRM

In the History area of a record, you'll see a list of all completed activities for the record—including histories of e-mails sent. If you need to refer back to an e-mail conversation you had with a client, it'll be faster to refer back to the client's record. Once you start using this feature, you'll never spend hours pouring through your Sent Items folder to find a relevant message.

E-mails tracked in Microsoft Dynamics CRM will show a tracking token next to the subject in the closed activities area of the customer record. You can turn off the tracking token feature, in which case CRM uses smart matching technology to figure out where to store the message.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, go to the record whose history you'd like to view. For example, you could click Sales in the Navigation Pane and then Customers.
2. Double-click a record from your list.
3. On the left, click the Closed Activities option.
4. A list of all e-mails sent should appear. Double-click any e-mail to see the full contents of the e-mail, including attachments.



Sending e-mails to multiple recipients

Using the mass e-mail features in Microsoft Dynamics CRM, you can send template-based e-mails to multiple contacts in one step. The e-mails can contain field placeholders that will pull data from the customer record, so your customers will never know that they are receiving a mass e-mail.

Task A Selecting multiple e-mail recipients

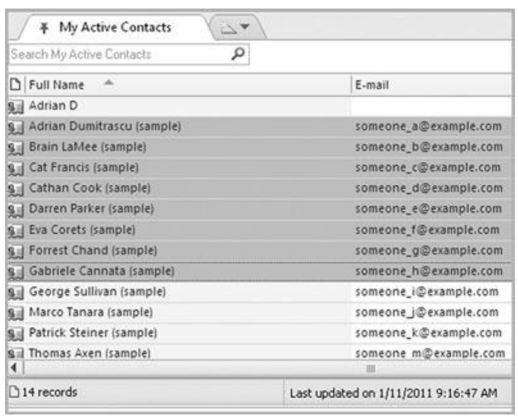
To select mass e-mail recipients, you can either highlight contacts in a view, or you can use the Advanced Find feature to isolate specific contacts. You could also send a mass e-mail to members of a marketing list.

Outlook 2003/2007/2010/Internet Explorer:

1. Go to a list of customer records. Using the View drop-down, select the view that contains the customers who should be in your distribution list.
2. Perform the mass e-mail using the instructions on the next page.

~or~

1. Go to a list of customer records. Hold down the Ctrl key and highlight records that should be included in the distribution list.
2. Perform the mass e-mail using the instructions on the next page.



If you send a lot of mass e-mails, check out CoreMotives. CoreMotives is an e-mail marketing service that makes it a lot easier to send and track the progress of your e-mail campaigns (www.coremotives.com).

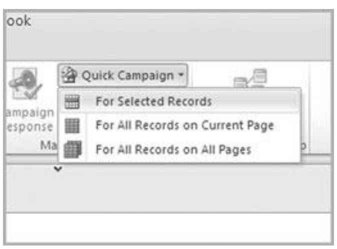
Before you start mass e-mailing customers, run a Bing Search (or other internet search) on “avoiding blacklisting” to get updated information about blacklist sites. If you continually send SPAM-like e-mail, you may get blacklisted, and then many of your customers will stop receiving your e-mails altogether.

Task B Sending an e-mail to multiple recipients

Mass e-mails are a type of campaign, and the easiest way to send a mass e-mail on-the-fly is to use the quick campaign feature. Quick campaigns are covered in more depth in Chapter 8.

Outlook 2010/Internet Explorer:

1. Highlight all of the records that should be included in your mass e-mail. (See the previous page for options.)
2. On the Add tab, in the Marketing group of the ribbon, click the Mail Merge button.
3. Choose E-mail as your mail merge type.
4. Choose a template or a blank document to start with.
5. Click OK.
6. In Word, follow the Mail Merge Wizard. In the last step, you will have the option to send the message via e-mail.



Outlook 2003/ 2007:

1. Highlight all of the records that should be included in your mass e-mail. (See the previous page for options.)
2. On the Add menu, click the Mail Merge option.
3. Choose E-mail as your mail merge type.
4. Choose a template or a blank document to start with
5. Click OK.
6. In Word, follow the Mail Merge Wizard. In the last step, you will have the option to send the message via e-mail.

When sending mass e-mails, make sure that you are compliant with the CAN-SPAM law. It may be worth consulting with your attorney for SPAM regulations within your state. In some states, you can lose your business license if enough people complain about your unsolicited e-mails.

Workflow e-mails

Automated workflow in Microsoft Dynamics CRM allows you to monitor for events and condition changes within the database and then perform specific actions in reaction. Before attempting this task, make sure you read Chapter 18, where we talk about workflow in more detail.

Task A Configuring workflow to automatically send e-mails

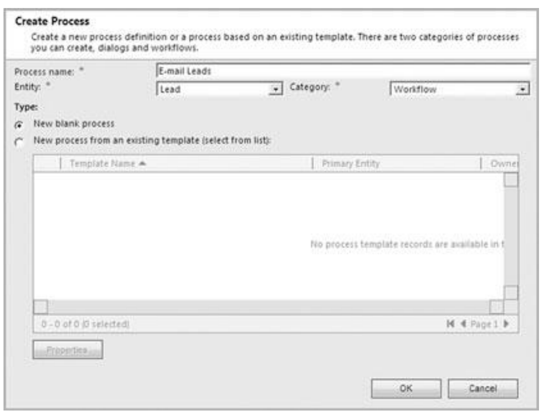
Workflows are not active until they are activated. Open the workflow and click the Activate button on the toolbar to make it active.

When adding a recipient to your workflow e-mail, use the Form Assistant to add dynamic values. So, in the To: field, you could send the e-mail to the Lead's owner. The resulting text will look like this: {Owner(Lead)}.

As soon as a new lead is entered into the system, you want to set Microsoft Dynamics CRM to automatically send an e-mail to the relevant sales rep to let him or her know that a lead is ready in the system. Using the workflow feature, it's easy to set this up.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Processes.
2. On the Actions toolbar, click the New button.
3. Give your Process a name, choose Lead as your entity, and select Workflow as your Category type.
4. Click OK.
5. With the default settings, the workflow will be configured to run each time a new lead is created.
6. On the Actions toolbar, click the Add Step drop-down and choose the Send E-mail option.
7. Type the description of your step, and click the Properties button to configure the e-mail. This is where you'll add the From and To contacts, subject, and body of the e-mail message.
8. Click Save and Close to exit the e-mail properties.
9. Click Save and Close to exit the workflow screen.



Chapter 12

Managing Contracts

- Creating contracts
- Working with contracts

Creating contracts

If you use Microsoft Dynamics CRM to manage your customer support, you can create contracts in the system. Those contracts are tied to a specific company record, and the contract is a collection of contract lines. Each contract line defines a specific service or offering that the customer is entitled to under the contract. Support cases can be tied to contracts in situations where an organization doesn't want to extend any support to customers with expired or insufficient support entitlements.

Task A Creating a new contract template

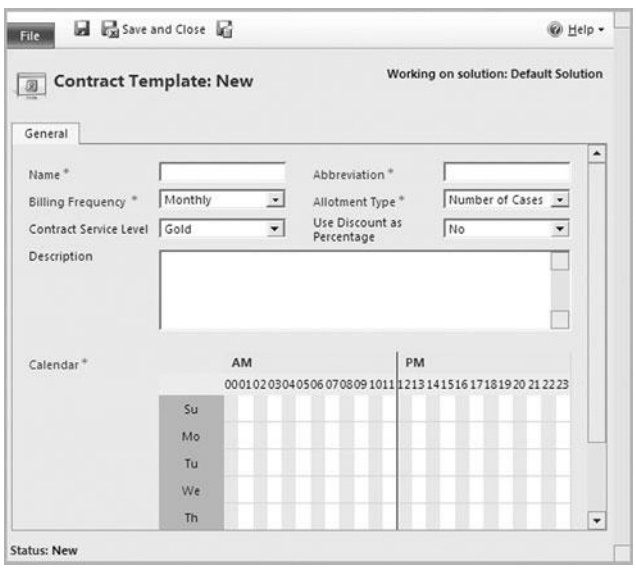
All new contracts are based off a contract template. If you offer a dozen base support agreements, you can create contract templates for each of your offerings. Then, when one of your users creates a new contract in the system, the billing frequency, allotment type, and service hours will be pre-filled for the user.

After they have been created, contract templates cannot be edited. If you need to make changes to a contract template, create a new template and delete the old template.

If you need to delete multiple contract templates, choose the Bulk Delete option from the More Actions drop-down.

Outlook 2003/2007/2010/ Internet Explorer:

1. In the Navigation Pane, click Settings and then Templates.
2. Click the Contract Templates option.
3. On the Actions toolbar, click the New button.
4. Give your contract template a name, billing frequency, abbreviation, allotment type, and calendar service hours.
5. Click the Save and Close button.

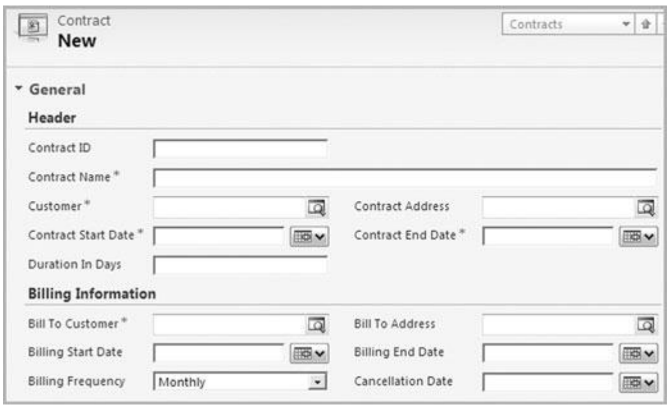


Task B Creating a new contract

A contract is an agreement between you and your end customer to provide a specific service (or services) within the valid dates for the contract. If you offer a customer a technical support plan, use the contract feature to record the specifics of that contract.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Contracts.
2. On the Actions toolbar, click the New button.
3. Choose a template and click OK.
4. Give your contract a name, start date, end date, and currency. Add the linked customer and bill-to customer.
5. Add any other information.
6. Click the Save and Close button.



A good best practice is to start this process from the customer record so that customer information (in step 4) is pre-populated.

Only draft contracts can be edited. Once you activate a contract, it is no longer editable. The same applies for contracts where the customer has been invoiced.

When adding a contract to the system, make sure you record the billing address for the customer. You'll need that billing address to create invoices for the contract.

Once you have created a contract, you'll need to add contract lines. (See Task C.)

Contracts without any contract lines cannot be invoiced.

Use the Search field at the top of the contracts list to find a specific contract.

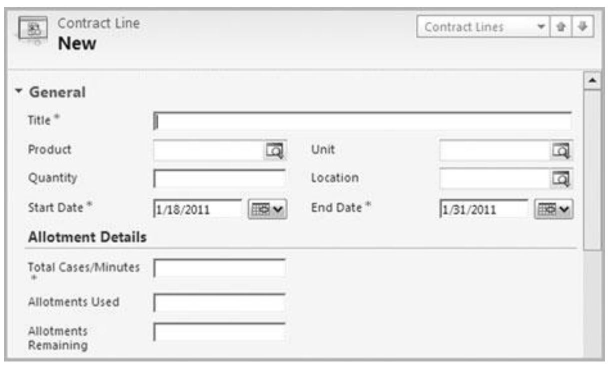
Active contract lines cannot be deleted. If you would like to remove an active line from a contract, you should cancel the line.

Task C Creating a new contract line

Contract lines are the specific items that show what your company is offering to provide the end customer under the contract. If you are using contracts to manage your technical support agreements, you might add contract lines for 100 hours of telephone support, 25 hours of on-site support, and 1,000 e-mail support responses. All three of these lines comprise your support agreement.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Contracts.
2. Double-click the contract you'd like to edit.
3. On the left, click the Contract Lines option.
4. In the Records group of the ribbon, click the New Contract Line button.
5. Give your contract line a title, start/end date, number of cases/minutes, and total price.
6. Add any other information to the contract line and click the Save and Close button.



Working with contracts

Once the base structure of your contract is created, you can activate the contracts, send invoices to your customers, and modify or renew contracts as needed.

Task A Activating and invoicing a contract

When the customer has agreed to purchase your support contract, you should send an invoice for the contract. Sending an invoice automatically changes the status to active. The invoice that gets created will show up in your list of invoices. Microsoft Dynamics CRM does not actually produce invoices for clients, but it can track whether an invoice is paid. This is a manual process, unless your CRM system is linked with an ERP system. Many customers use an integration broker like Pervasive or Scribe to integrate CRM with their accounting or ERP systems.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Contracts.
2. Double-click the contract you'd like to invoice/activate.
3. In the Actions group of the ribbon, click the Invoice Contract button.
4. Click the Close button.
5. To see the invoice, click Sales in the Navigation Pane and then Invoices.

Outlook 2003/2007:

1. On the toolbar, click the New Record drop-down and select a record type.
2. Enter field data for your account.
3. Click the Save & Close button.

A service case can deduct from the number of hours on a contract when the case is resolved.

Invoiced contracts cannot be deleted. They can be canceled, which is covered on the next page.

Consider integrating workflow into your contract process. For example, you could configure workflow to watch for activated contracts. As soon as a contract is activated, workflow could automatically send an e-mail to the customer explaining support hours, telephone numbers, and other important information.

If the contract is still in draft status, you can delete it. Until the point where you invoice a contract, it can be deleted, but after the contract has been invoiced, you would cancel it.

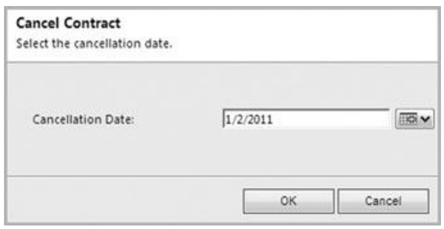
You can also put a hold on a contract. Open the contract for editing, and then choose the Hold Contract option in the Actions group of the ribbon.

Task B Canceling a contract

If an active contract is no longer needed, you can cancel the contract. A customer may have moved to a different service, or perhaps the customer has invoked your money-back guarantee on services. Either way, cancelling the contract removes it from the active contracts list.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Contracts.
2. Double-click the contract you'd like to invoice/activate.
3. In the Actions group of the ribbon, click the Cancel Contract button.
4. Enter a cancellation date. The contract will no longer be active as of this date.
5. Click OK.



Task C Renewing a contract

The support you offered was so great last year that the customer wants to renew his or her support contract. They're essentially looking for the same service, so you'll save data entry time by renewing the existing contract, rather than creating a new contract from scratch.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Contracts.
2. Double-click the contract you'd like to renew. (Only active/invoiced contracts can be renewed.)
3. In the Actions group of the ribbon, click the Renew Contract button.
4. Select whether to include cancelled contract lines, if there are any, and click OK.
5. Update information for the contract—like the start date and end date.
6. To activate the contract, choose the Invoice Contract option from the Actions drop-down on the toolbar.
7. Click Save and Close.

If you want to renew a contract, the contract end date must have passed. Only expired contracts can be renewed. If you try to renew a contract that has not yet expired, it will show in draft (non-active) mode until the original contract end date.

If you renew a contract, the Contract ID is retained from the original contract.

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Chapter 13

Managing Cases

- Creating cases
- Working with cases

Creating cases

Using the case management features in Microsoft CRM, you can manage your customer service department. Cases can be linked to customer records, and they also interact with other parts of the application—like contracts, knowledge-base articles, services, and activities.

It's a good idea to link new cases to contract lines. If the contract line allows for five support incidents, then this case would count as one of them.

To assign a case to another user or queue, open the case. In the Collaborate group of the ribbon, click the Assign button.

Task A Creating a new case

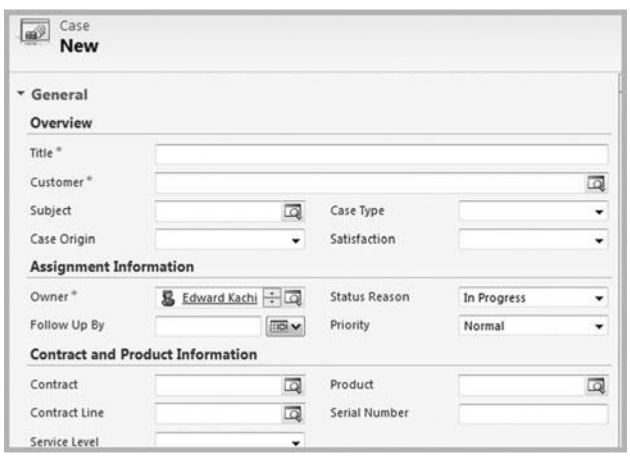
If a customer calls with a problem or concern, you can create a new case for the situation. The system will automatically assign a case number, and you can write in information about the case—like the subject, owner, title, and level of customer satisfaction. Cases remain open in the system until they are closed by one of your support technicians, and it is easy to run reports that show outstanding cases.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. On the Cases tab in the Records group of the ribbon, click the New button.
3. Give your case a title, customer, subject, and owner.
4. You can also link the case with a contract and/or contract line.
5. Click Save and Close.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Cases.
2. On the Cases menu, click the New button.
3. Give your case a title, customer, subject, and owner.
4. You can also link the case with a contract and/or contract line.
5. Click Save and Close.



Task B Entering notes for a case

Many cases have unique circumstances, and to house that special information, you can enter notes for any case. An unlimited number of notes can be added to each case, and if you are taking over a case, it's always a good idea to review the notes before talking with the customer.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. Double-click a case from the list of cases.
3. Click the Notes and Article form section.
4. In the Notes area, click where it says Click here to enter a new note….
5. Type your note.
6. Click Save and Close.

Use the Quick Find field at the top of the list of cases to find a specific case.

When you print the details for a case, you see all field information for the case, along with the notes and relevant knowledge-base articles. Just click the Print Preview button on the File tab.

Working with cases

Once cases are created, you can assign ownership for the case, resolve the case when the client has been satisfied, and track relevant information as the case progresses through your support process.

Task A Assigning cases to other CRM users or queues

After entering a new case in the system, you can assign the case to another CRM user or queue. Let's say you are a level 1 technician. You take all of the information about the customer's problem over the phone, but you cannot resolve the issue. To escalate the case to a level 2 technician, you could assign the case to the level 2 queue.

Depending on your security settings, you may lose the ability to perform certain actions once you change ownership for a case. For example, if your security settings prohibit editing other users' cases, you wouldn't be able to edit the case after transferring ownership.

To create a queue, click Settings in the Navigation Pane and then Business Management. Then, click the Queues option to create new queues or modify existing ones.

Outlook 2003/2007/2010/Internet Explorer:

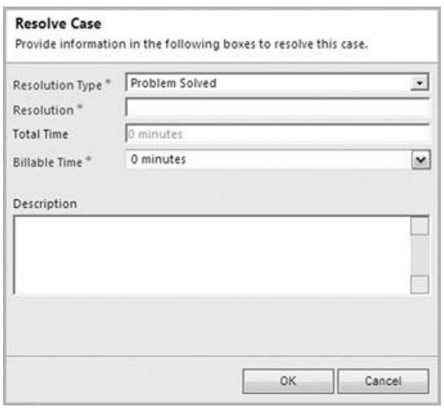
1. In the Navigation Pane, click Service and then Cases.
2. Double-click a case from the list of cases.
3. In the Collaborate group of the ribbon, click the Assign button.
4. Choose the Assign to another user or team option.
5. Click the Lookup button to explore your list of users and teams.
6. Highlight a user or team and click OK.
7. Click OK, and then Save and Close.

Task B Resolving cases

After the customer has been satisfied, you can mark the case as resolved in the system. You'll want to make sure to resolve cases as soon as they are closed to avoid having the case mistakenly show up in the Neglected Cases report.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. Double-click a case from the list of cases.
3. In the Actions group of the ribbon, click the Resolve Case button.
4. Specify the Resolution Type, Resolution, Total Time, and Total Billable Time for the case.
5. Add a description, if necessary.
6. Click OK.



You can also delete or cancel cases. After opening the case for editing, you'll see options to either delete the case or cancel it in the Save group of the ribbon.

You cannot resolve a case until all activities associated with the case have been marked complete.

Resolved cases are read-only and cannot be edited unless they are reactivated.

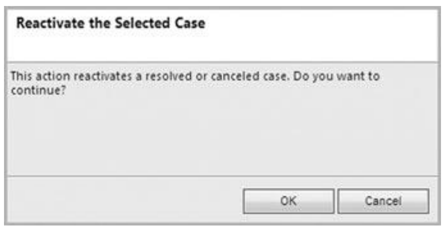
To see all active cases associated with a record, open the record. To do this with a contact record, click Sales on the Navigation Pane and then Contacts. Double-click a contact record. On the left, click the Cases option, and you'll see a list of cases that are associated with the contact.

Task C Reactivating cases

You're on the phone with a customer, and he is satisfied with the solution you've offered him, so you mark the case as resolved. However, an hour later, the customer calls back and is having the same issue again. In this case, you would reactivate the existing case.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. From the View drop-down, choose a view that will include your resolved cases. For example, you could choose the My Resolved Cases view.
3. Double-click the resolved case you'd like to reactivate.
4. In the Actions group of the ribbon, click the Reactivate button.
5. Click OK.



Task D Assigning a knowledge base article to a case

A customer calls with a specific issue, but it's an issue that has previously been documented in your knowledge base. By assigning the knowledge base article to the case, you can easily see the contents of the article within the case screen, and any other technicians that view the case will have the article for reference.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. Double-click a case from the list of cases.
3. Click the Notes and Article form section.
4. In the Knowledge Base Article section, click the Lookup button to browse for a specific knowledge-base article.
5. From the drop-down in the upper-right corner, select a search method. Enter your search terms, and click the Search button to find relevant articles.
6. Highlight the article that is relevant to the case, and click OK.

After clicking the Show article checkbox, a toolbar will appear. Click the E-mail KB Article button on that toolbar, and you can easily e-mail the document to a colleague or customer.

At the top of the report, you can specify the minimum days neglected. If you set this number to 7, for example, the report will assume that cases that have been open for 7 or fewer days are not neglected, and they will be omitted from the report.

Task E Running a neglected cases report

In any business, some customer service issues slip through the cracks. The neglected cases report is designed to keep that from happening. The report will show cases that have not been contacted recently. The report will show a list of cases that have not had changes to the case or related activities/notes within the time range you specify.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. If you want to run the report on a sub-set of your cases, switch to a view that just contains the cases for your report. Alternatively, you could Ctrl+ click to highlight certain records, or you could run an Advanced Find.
3. On the Cases tab in the Data group of the ribbon, click the Run Reports button.
4. Choose the Neglected Cases report.
5. Select to run the report on all records, the selected records, or all records in the current view.
6. Click the Run Report button.
7. The graph that appears shows the number of cases grouped by the number of days neglected. Click the Show All link at the bottom of the graph to see the raw data.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Cases.
2. If you want to run the report on a sub-set of your cases, switch to a view that just contains the cases for your report. Alternatively, you could Ctrl+ click to highlight certain records, or you could run an Advanced Find.
3. On the Cases menu, click the Run Reports button.
4. Choose the Neglected Cases report.
5. Select to run the report on all records, the selected records, or all records in the current view.
6. Click the Run Report button.
7. The graph that appears shows the number of cases grouped by the number of days neglected. Click the Show All link at the bottom of the graph to see the raw data.

Chapter 14

Using the Articles Library

- Creating articles
- Searching and printing the articles library

Creating articles

An articles library is a collection of technical documents, how-to's, procedures, bug fixes, and other documents. These documents are all meant to make it easier to resolve customer service issues.

Task A Creating articles

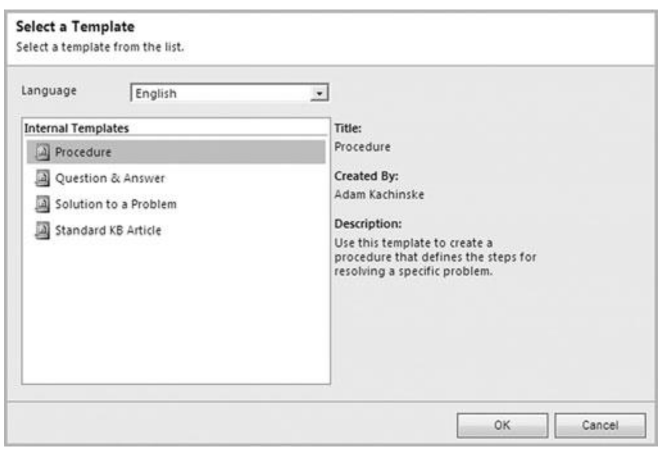
Once you have solved a customer service or technical support issue, it's a good idea to document your solution process in the articles library. This way, the next time a technician runs into the same issue with a customer, it will be easier for him or her to efficiently resolve the issue.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Articles.
2. On the Articles tab in the Records group of the ribbon, click the New button.
3. Select a language, and then choose from one of your existing templates.
4. Click OK.
5. Add a title, subject, and keywords for the article.
6. In the editing area, type the content for this article.
7. Click Save and Close.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Articles.
2. On the Articles menu, click the New button.
3. Select a language, and then choose from one of your existing templates.
4. Click OK.
5. Add a title, subject, and keywords for the article.
6. In the editing area, type the content for this article.
7. Click Save and Close.



Consider using a customer portal to extend your CRM articles library to non-CRM web users. The CRM Portal Accelerator is free and available on Codeplex.com. (Search for CRM.)

If you need a more advanced portal, check out ADX Studio (www.adxstudio.com).

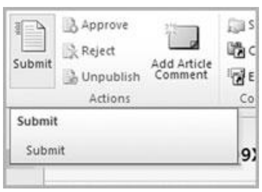
You can create article templates. This will help provide uniformity in your articles. In the Navigation Pane, click Settings and then Templates. Then click Article Templates.

Task B Submitting an article for approval

Once you have written an article, it automatically is categorized in the Draft queue. This allows you to make changes to it while you are investigating the topic. When you are confident that the article is ready for publication, you can submit it for approval.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Articles.
2. On the left, click the Drafts queue.
3. Highlight the article you'd like to submit for approval.
4. On the Articles tab in the Actions group of the ribbon, click the Submit button.



Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Articles.
2. On the left, click the Drafts queue.
3. Highlight the article you'd like to submit for approval.
4. On the Articles menu, click the Submit button.

Based on your security role, you may also be able to publish the article. See the next page for instructions.

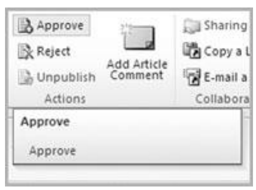
Published articles are moved from the Unapproved Articles view into the Published Articles view.

Task C Publishing a knowledge-base article

After a knowledge-base article has been submitted for approval, it is moved into the Unapproved Articles view. From here, it can be either deleted or approved. Until the article is approved, it will not become a part of the searchable knowledge base.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Articles.
2. Click the view drop-down and select the Unapproved Articles option.
3. Highlight the article you'd like to publish.
4. On the Articles tab in the Actions group of the ribbon, click the Approve button.



Outlook 2003/2007:

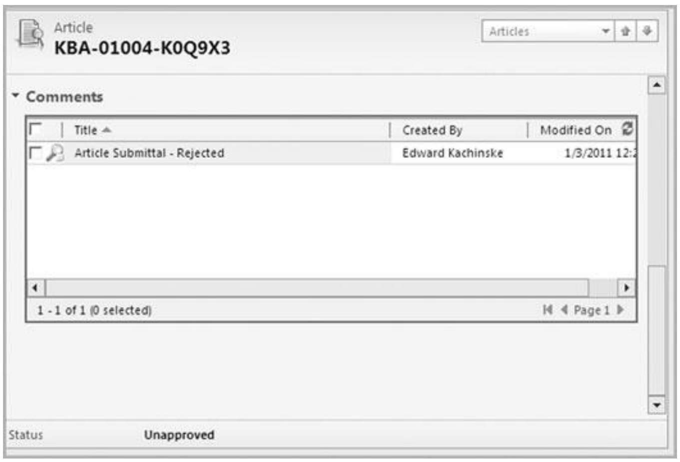
1. In the Navigation Pane, click Service and then Articles.
2. Click the view drop-down and select the Unapproved Articles option.
3. Highlight the article you'd like to publish.
4. On the Articles menu, click the Approve button.

Task D Commenting on an article

If you use a knowledge-base article to resolve a customer's issue, but you find that the document is slightly out of date, you can add a comment to the article. Comments appear in the Comments form section of the knowledge-base article.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Articles.
2. Double-click a knowledge-base article to open it.
3. In the Actions group of the ribbon, click the Add Article Comment button.
4. Add your comment, and click OK.



If you choose to e-mail the article, comments will not be visible in the version that is e-mailed.

Searching and printing the articles library

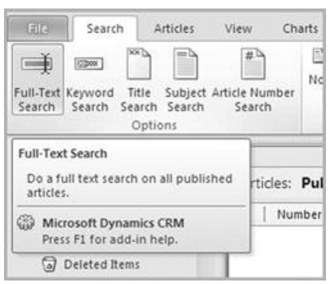
A knowledge base is a collection of technical documents, how-to's, procedures, bug fixes, and other documents. These documents are all meant to make it easier to resolve customer service issues.

Task A Searching the articles library

If a customer calls with an issue, one of your first actions should be to search the knowledge base to see if anyone else in your company has resolved the issue and documented it. You can perform a keyword search, full text search, title search, or article search.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Articles.
2. A list of articles should appear.
3. Click on the Search tab of the ribbon. In the Options group, you can configure your search.
4. In the Quick Find field, enter your search terms and click the search icon.
5. A list of matching articles should appear.



Outlook 2003/2007:

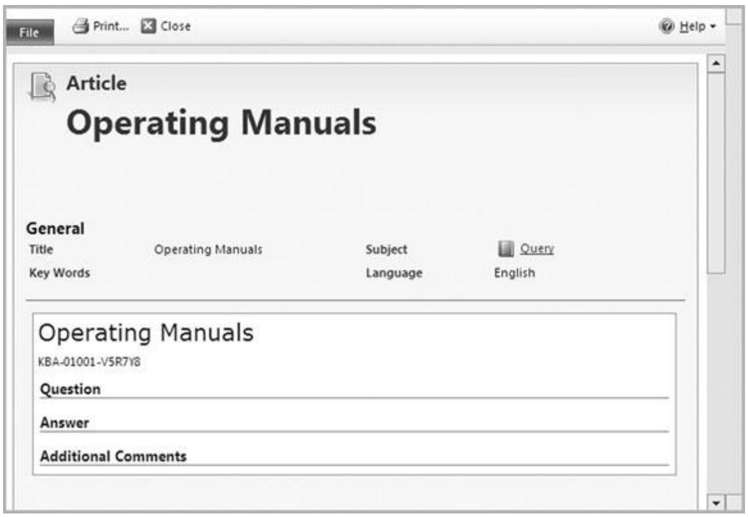
1. In the Navigation Pane, click Service and then Articles.
2. A list of articles should appear.
3. Click on the Search menu. Here you can configure your search.
4. In the Quick Find field, enter your search terms and click the search icon.
5. A list of matching articles should appear.

Task B Printing articles

You may find it useful to print an article. Just like with most screens in Microsoft Dynamics CRM, you'll find a Print Preview button on the file tab.

Outlook 2003/2007/2010/Internet Explorer:

1. Double-click a relevant knowledge-base article to open it.
2. On the File tab, click the Print Preview button.
3. A print preview appears. Click the Print button.



If you have a PDF printer driver installed, printing to PDF will let you easily send the article to people outside your company.

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Chapter 15

Service Scheduling

- Viewing the service calendar
- Scheduling service activities and appointments
- Setting up services, resources, and work hours

Viewing the service calendar

The service calendar is a central area that you can use to schedule service-related activities for any user in your organization. You can use the service calendar to track appointments, service activities, conflicts, resources, and other service-related items.

Task A Viewing the service calendar

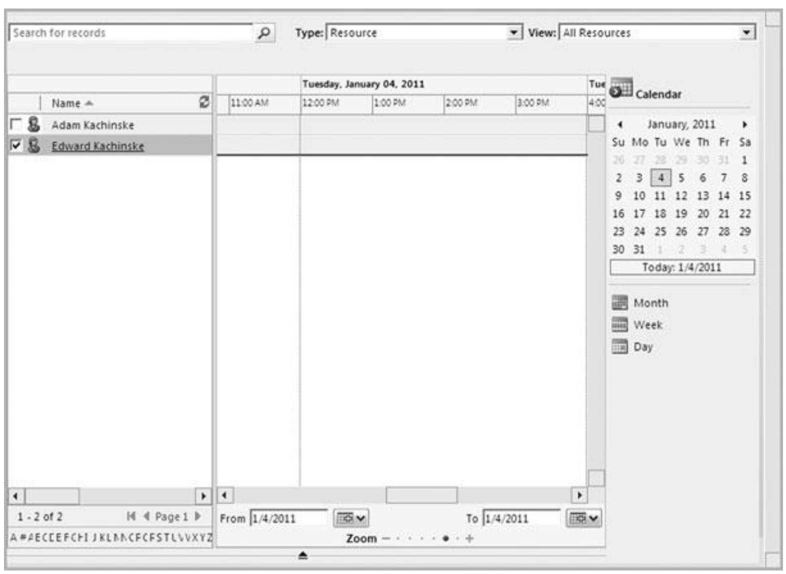
Before using the service calendar, your organization will need to have services, resources, facilities/equipment, and users configured.

At the bottom of the middle column (where you see the activities blocked out), you can zoom and set a begin/end date for activities that are shown on the service calendar.

Use the service calendar to quickly see available timeslots for scheduling service-related activities or appointments. The service calendar keeps track of when users are free, and it also tracks times when required resources, facilities, and equipment are available for a service call.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. On the left, you'll see a list of resources.
4. In the middle, you'll see a calendar view that shows service activities scheduled.
5. On the right, you'll see a mini-calendar that you can use to switch the middle panel to a different day.

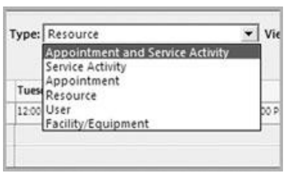


Task B Filtering the service calendar

On the left panel of the service calendar, you see a list of items. These items might be facilities, equipment, users, etc. In the middle column, you see all of the service activities (using the items on the left) in their scheduled timeslot. You can filter the service calendar to alter the items that are shown in the left panel.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. In the Type drop-down at the top of the service calendar, choose the type of resources you'd like to see listed in the left panel of the service calendar.
4. In the View drop-down, you can further refine your filter. For example, if you are showing the service calendar by Facility/Equipment, you can use the View drop-down to show All Facilities/Equipment, Local Facilities/Equipment, or Subsidiary Facilities/Equipment.



You can filter to show these types of resources in the service calendar:

- Appointment and Service Activity
- Service Activity
- Appointment
- Resource
- User
- Facility/Equipment

When performing a search, you click the magnifying glass icon to run the search. After the search completes, that icon changes to an X. Click the X icon to clear your search results.

Task C Searching the service calendar

If you are looking for a specific resource, facility, or user, you can search within the service calendar. At the top of the service calendar, you'll see a Search button, which performs a search to narrow the list of users and resources in the left panel of the service calendar.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. At the top of the screen, locate the Quick Find field.
4. Type your search term into this field and click the magnifying glass icon. For example, you could type someone's last name to see his or her availability on the service calendar.

Scheduling service activities and appointments

You can use the service calendar to schedule a service-related activity or appointment for anyone in your business unit or organization.

Task A Scheduling a new service activity

Service activities are different from other activities and appointments scheduled in Microsoft Dynamics CRM. Service activities are tied to resources, and because you schedule these activities on the service calendar, you'll easily be able to see where all of your service technicians are.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. In the New group of the ribbon, click the Service Activity button.
4. In the Customers field, associate the service activity with at least one customer.
5. In the Service field, specify the service to be performed.
6. In the Resources field, any resources dependent on the service selected will appear. You could add additional resources, if necessary.
7. Click the Find Available Times button to see when the resources are available.
8. Highlight a timeslot in the list of available times, and click the Schedule button.
9. Enter a subject for the activity, and click the Save and Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. On the Service Calendar menu, click the Service Activity button.
4. In the Customers field, associate the service activity with at least one customer.
5. In the Service field, specify the service to be performed.
6. In the Resources field, any resources dependent on the service selected will appear. You could add additional resources, if necessary.
7. Click the Find Available Times button to see when the resources are available.
8. Highlight a timeslot in the list of available times, and click the Schedule button.
9. Enter a subject for the activity, and click the Save and Close button.

Service activities that you own will sync to your Outlook calendar, if you have the Microsoft Dynamics CRM Client for Outlook installed.

If you try to schedule two service activities that require the same resources at the same time, a dialog box will appear warning you about the conflict. You can override the warning, or you can go back and schedule at a time when all required resources are available.

Task B Rescheduling service activities

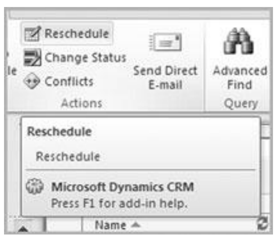
A client calls to say that they won't be in the office when your service technician is scheduled to visit their office, so you need to reschedule the activity. Just highlight the activity in the service calendar and click the Reschedule button to move the activity to a different date or time.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. Click the activity you'd like to reschedule.
4. In the Actions group, click the Reschedule button.
5. Click the Find Available Times button and choose a new time.
6. Click the Schedule button.
7. Click the Save and Close button.

Outlook 2003/2007:

1. In the Navigation Pane, click Service and then Service Calendar.
2. The service calendar will appear.
3. Click the activity you'd like to reschedule.
4. On the Service Calendar menu, click the Reschedule button.
5. Click the Find Available Times button and choose a new time.
6. Click the Schedule button.
7. Click the Save and Close button.



Task C Creating a service activity for a case

If you've just entered a case for a customer service issue, you may want to create a service activity so that someone within your organization can follow up to resolve the case. You can easily schedule a service activity from within any case.

By associating the service activity with the case, you'll be able to see the activity each time you open the case. It'll show in the Activities section on the left.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Service and then Cases.
2. Double-click the case for which you'd like to add a service activity.
3. On the left, click the Activities option.
4. In the records group of the ribbon, click the New Activity button.
5. Choose the Service Activity option and click OK.
6. Schedule the service activity. (See the previous two tasks for information on scheduling service activities.)

Setting up services, resources, and work hours

Before you can schedule service activities, you have to create a central list of services. Also tied to your list of services will be dependent resources. So, for example, if you have an onsite visit as a service, you may need to also have one of your fleet of trucks available to perform that service.

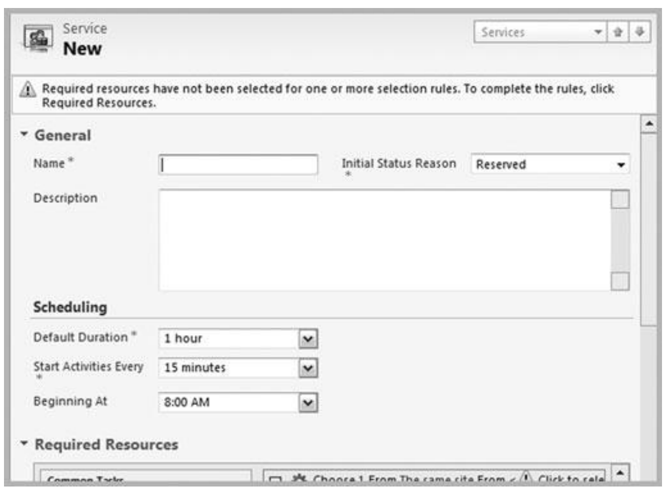
Service activities will sync to your Outlook calendar if you are using Microsoft Dynamics CRM with Outlook.

Task A Creating services

Services are the general categories of activities that you perform for customers as part of your support of those customers.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click on Service, and then Services.
2. A record list should appear.
3. On the ribbon in the Records group, click the New button.
4. Configure your service.
5. On the ribbon in the Save group, click the Save & Close button.

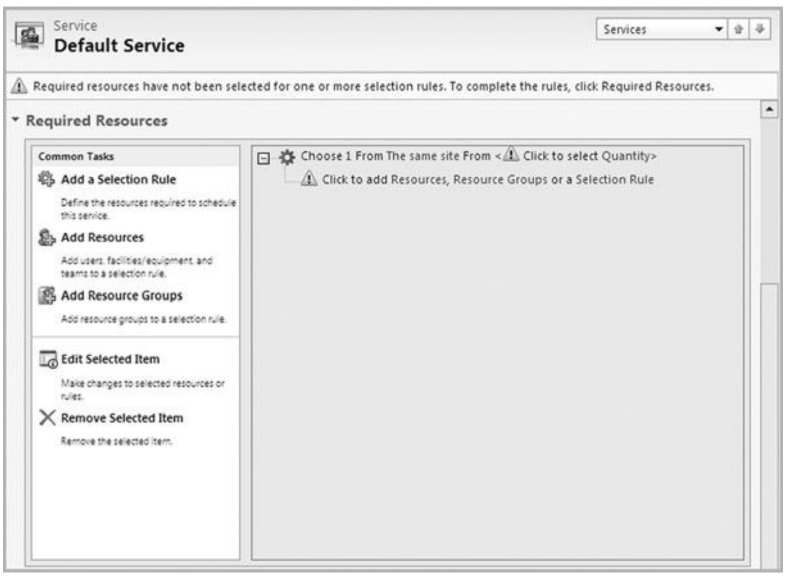


Task B Assigning resources to services

You can assign resources to services. When doing so, you'll create selection rules and then assign resources for those selection rules. If you support three products and only one of your support techs is qualified to answer questions on product #1, you can create a simple selection rule that will require the tech to be available when scheduling this service.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Business Management.
2. Click the Services option.
3. Double-click the service from the list of services.
4. Click the Required Resources tab.
5. Create a selection rule, and assign resources to that rule.
6. Click the Save and Close button.



You can create very complex rules governing which resources are required for specific services. The example given on this page shows a very simple case, but this feature is designed to grow into large sophisticated support environments.

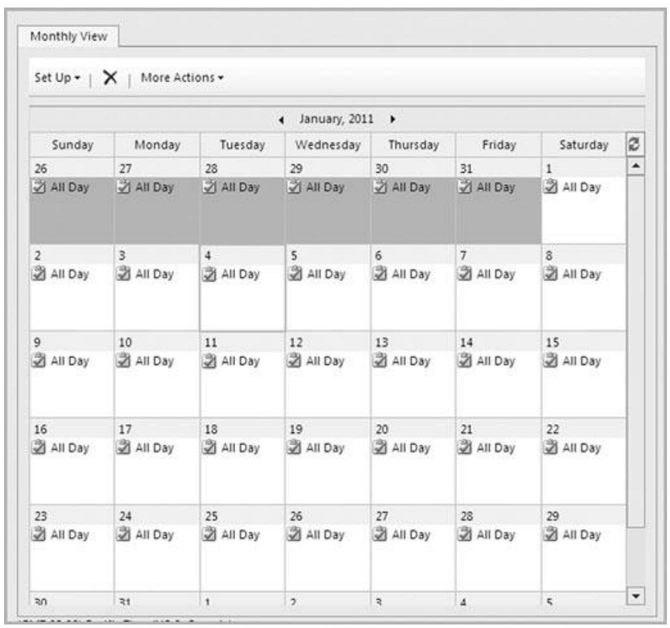
You can also set the work hours for users in the database. In the Navigation Pane, click Settings and then Administration. Click the Users option. Double-click the user whose work hours you'd like to edit. On the left, click the Work Hours option.

Task C Managing service resource work hours

Your employees are only available during certain hours. Facilities may only be open during specific hours. Some equipment may not operate in off-hours timeslots. By setting your service resource work hours, you'll ensure that you never schedule one of your service technicians when he or she is out of the office.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Business Management.
2. Click the Facilities/Equipment option.
3. Double-click a resource from the list that appears.
4. On the left, click the Work Hours option.
5. From the Set Up drop-down, you can configure a new weekly schedule, a specific work schedule for one day, or a schedule of time off.
6. Double-click any day to modify the work schedule for that day.
7. Click OK and then Save and Close.



Chapter 16

Import and Export

- Using the Import Data Wizard
- Exporting data
- Using Excel exports for reporting

Using the Import Data Wizard

You can perform most simple imports using the Import Data Wizard. This tool, which is accessible both from within Outlook and in the Microsoft Dynamics CRM web client, will import data into any entity from a CSV file.

Task A Importing a text file

Using the Import Data Wizard, you can import any CSV text file. Before running an import job, it's probably a good idea to open your data file in Excel and check the actual data to make sure it is consistent with the existing data and field structure in Microsoft Dynamics CRM.

If your data is in an Excel spreadsheet, you can save it as a CSV file. In Excel, click File | Save As. In the File type drop-down, choose CSV (Comma delimited).

CSV stands for Comma Separated Values.

If you have a CSV file with columns but empty data in the field, you will get an error that columns / data do not match.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace and then Imports.
2. In the Records group of the ribbon, click the Import Data button.
3. Click the Browse button and select your data file. Also, verify the data and field delimiters. If you are importing a CSV file, the defaults should be fine. Click Next.
4. In the Record type field, choose the type of records you are importing. In the Data map field, choose a data map and click OK. Click Next.
5. Choose a record owner and select whether or not to import duplicate records. Click Next.
6. Specify a name for the import job, and click the Import button.

Outlook 2003/2007:

1. In the Navigation Pane, click Workplace and then Imports.
2. On the Imports menu, click the Import Data button.
3. Click the Browse button and select your data file. Also, verify the data and field delimiters. If you are importing a CSV file, the defaults should be fine. Click Next.
4. In the Record type field, choose the type of records you are importing. In the Data map field, choose a data map and click OK. (Creating a data map is covered on the next page.) Click Next.
5. Choose a record owner and select whether or not to import duplicate records. Click Next.
6. Specify a name for the import job, and click the Import button.

Task B Importing multiple files

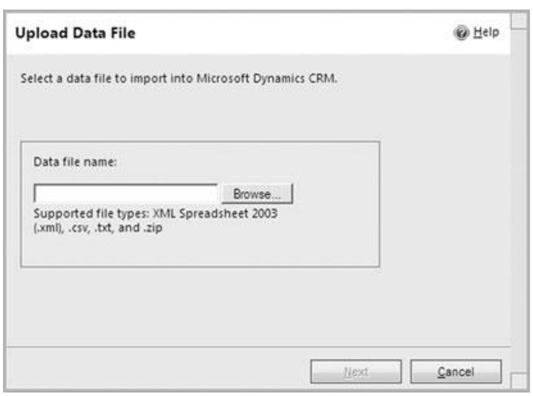
In addition to importing a single file in, you can also import multiple files into your CRM database. This is especially useful if you are importing a list of contacts and accounts. If you import these lists at the same time, any contacts and accounts that are linked to each other will be linked once they are imported into your CRM database.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Workplace and then Imports.
2. In the Records group of the ribbon, click the Import Data button.
3. Click the Browse button and select your data file. This should be a ZIP file that contains your multiple files.
4. In the Record type field, choose the type of records you are importing. In the Data map field, choose a data map and click OK. (Creating a data map is covered on the next page.) Click Next.
5. Choose a record owner and select whether or not to import duplicate records. Click Next.
6. Specify a name for the import job, and click the Import button.

Outlook 2003/2007:

1. In the Navigation Pane, click Workplace and then Imports.
2. On the Imports menu, click the Import Data button.
3. Click the Browse button and select your data file. This should be a ZIP file that contains your multiple files.
4. In the Record type field, choose the type of records you are importing. In the Data map field, choose a data map and click OK. (Creating a data map is covered on the next page.) Click Next.
5. Choose a record owner and select whether or not to import duplicate records. Click Next.
6. Specify a name for the import job, and click the Import button.



If you don't import multiple files at the same time, then linked records won't import properly. For example, if you import a list of contacts that are linked to an account that isn't in your system yet, then they won't link to any account.

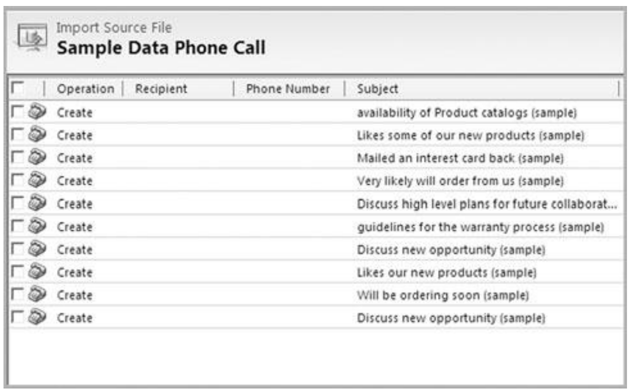
When looking at the list of records created, you can highlight all of them and then click the Add to Marketing List option to add all imported contacts to a marketing list.

Task C Analyzing your import job

After your import job has finished, it's a good idea to verify the records that were imported. Just double-click the import job, and you'll see a lists of records that were successfully imported, as well as lists of items that were not imported.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Workplace and then Imports.
2. Double-click the import job you'd like to review.
3. On the left, click the <Records> Created option. If you imported contacts, this will say Contacts Created. If you imported leads, it will say Leads Created.
4. In this area, you'll see a list of all records created as a result of the import.
5. On the left, click the Failures option. This will show a list of records that were not imported for some reason. (Dealing with failures is covered later in this chapter.)



Task D Dealing with failed import records

Sometimes during an import, certain records will not import properly. Maybe they are missing data in a required field? If you are importing into a picklist field, records might not import if the field value that you are importing does not exist in the picklist. If you have chosen to not import duplicate records, the import of a record might fail because the record already exists in Microsoft Dynamics CRM.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Workplace and then Imports.
2. Double-click the import job you'd like to review.
3. On the left, click the Failures option.
4. A list of failed records will appear.
5. On the Actions toolbar, click the Export Error Rows button to export all of the records that were not imported to a CSV file for analysis in Microsoft Excel.

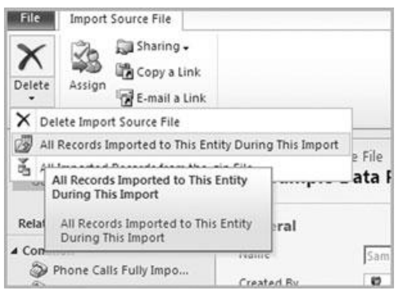
Click the Print Preview button on the File tab to create a print preview of the records that were not properly imported.

Task E Deleting all records created by an import

After running an import, you might realize that the import produced an undesirable result. Maybe you forgot to import zip codes for contacts, or perhaps some fields were mapped incorrectly? Whatever the issue, you can easily delete all records associated with an import.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Workplace and then Imports.
2. Double-click the import job you'd like to review.
3. On the left, click the <Records> Created option. If you imported contacts, this will say Contacts Created. If you imported leads, it will say Leads Created.
4. In this area, you'll see a list of all records created as a result of the import.
5. Highlight all records.
6. On the ribbon, click the Delete button.
7. Choose to either deactivate or delete the records.



To highlight all records in a list, click the checkmark field in the upper-left corner of the list.

You'll have to delete the records 250 at a time if you delete using this process. For large record sets, consider using the bulk delete feature.

Exporting data

There are many reasons for exporting your data from Microsoft Dynamics CRM. You may need an offsite copy of the data, or you may need to export the data for reporting purposes. You may need to export contact data to send to a mailing house. It's easy to export any part of your Microsoft Dynamics CRM database.

Task A Exporting data to Excel

The easiest way to export a single entity is with the direct export to Microsoft Excel. Whether you're looking at contacts, leads, accounts, opportunities, cases, or any other entity, you can click the Export to Excel button to export.

Outlook 2010/Internet Explorer:

1. Go to any list of records in Microsoft Dynamics CRM. For example, you could:
   - Click Sales in the Navigation Pane and then Contacts to bring up a list of contacts.
   - Click Sales in the Navigation Pane and then Leads to bring up a list of leads.
   - Click Service in the Navigation Pane and then Cases to bring up a list of support cases.
2. Once you have a list of records on the screen, click the Excel button in the Data group of the ribbon.
3. You will have the option to export static or dynamic worksheets. You can also export a dynamic pivot table.
4. Click the Export button.

Outlook 2003/2007:

1. Go to any list of records in Microsoft Dynamics CRM.
2. Once you have a list of records on the screen, click the Export to Excel button on the Records menu.
3. You will have the option to export static or dynamic worksheets. You can also export a dynamic pivot table.
4. Click the Export button.

If you are using Microsoft Excel 2003, spreadsheets are limited to 65,535 rows and 255 columns.

Task B Exporting data to Excel for cleanup and re-import

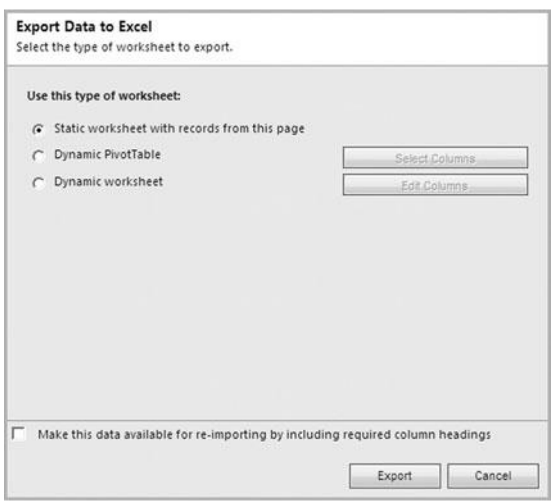
You should use Excel whenever you are editing a large list of records. You can edit multiple records in CRM, but editing in Excel is very quick and easy for data cleanup. Once you have finished cleaning up your data in an Excel spreadsheet, then you can simply save and re-import the file.

Outlook 2010/Internet Explorer:

1. Go to any list of records in Microsoft Dynamics CRM.
2. Once you have a list of records on the screen, click the Excel button in the Data group of the ribbon.
3. Select the static worksheet option and check the option to make the data available for re-importing at the bottom of the window.
4. Clean up your data in the Excel spreadsheet.
5. Save your Excel spreadsheet as a CSV file, then re-import the file into CRM. Follow the importing records steps that are covered earlier in this chapter.

Outlook 2003/2007:

1. Go to any list of records in Microsoft Dynamics CRM.
2. Once you have a list of records on the screen, click the Export to Excel button on the Records menu.
3. Select the static worksheet option and check the option to make the data available for re-importing at the bottom of the window.
4. Clean up your data in the Excel spreadsheet.
5. Save your Excel spreadsheet as a CSV file, then re-import the file into CRM. Follow the importing records steps that are covered earlier in this chapter.



Using Excel exports for reporting

Don't discount the reporting power in Microsoft Excel. Especially if you are running Microsoft Excel 2010, some of your most versatile and comprehensive reports can come from Excel spreadsheets. Because just about every entity will perform a one-click export to Excel, this is an option for reporting on most of your CRM data.

Task A Exporting a dynamic Excel PivotTable

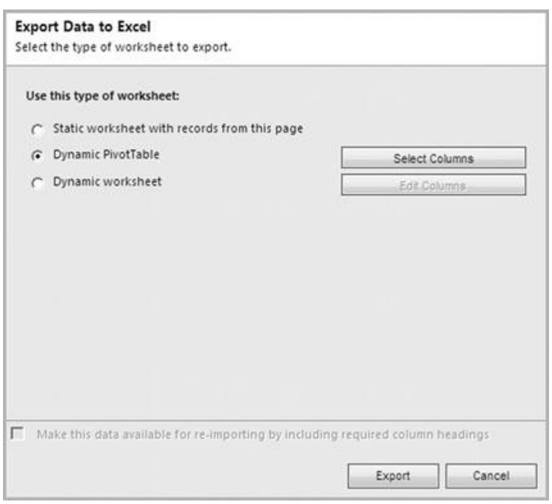
A PivotTable is an object that can be added to an Excel spreadsheet that will summarize your data independent of the original spreadsheet data. So, for example, let's say that your original data has three columns: Company, Name, and State. The PivotTable could give a summary list of the number of companies in each state, broken down by state.

Outlook 2010/Internet Explorer:

1. Go to any list of records in Microsoft Dynamics CRM.
2. Once you have a list of records on the screen, click the Export to Excel button in the Data group of the ribbon.
3. You will have the option to export a dynamic PivotTable.
4. Click the Export button.

Outlook 2003/2007:

1. Go to any list of records in Microsoft Dynamics CRM. For example, you could open a list of contacts.
2. Once you have a list of records on the screen, click the Export to Excel button on the Records menu.
3. You will have the option to export a dynamic PivotTable.
4. Click the Export button.



You must have Microsoft Excel 2003, 2007, or 2010 installed on the local computer to perform these tasks.

You must also have the Microsoft Dynamics CRM Client for Outlook installed to export a dynamic PivotTable.

Click the Refresh from CRM button on the toolbar to automatically update the data in your PivotTable with live data.

You must have Microsoft Excel 2003, 2007, or 2010 installed on the local computer to perform these tasks.

The Microsoft Outlook client for Microsoft Dynamics CRM must be installed to refresh data.

This feature is only available for CRM On-premise or CRM Online users that have a local copy of the database synchronizing to the server.

Task B Exporting a dynamic Excel spreadsheet

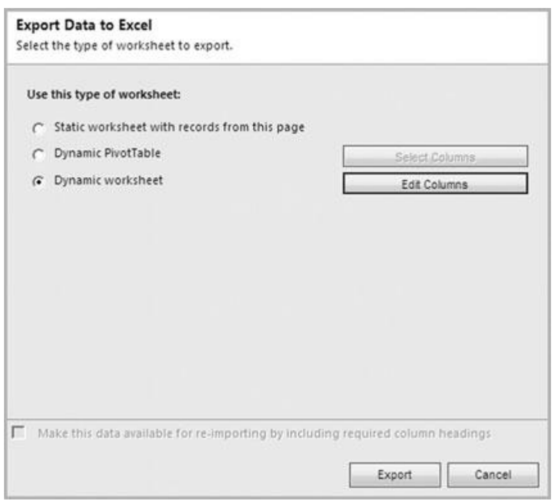
In the first task in this section, you exported a static Excel spreadsheet. In that case, after the export had been performed, there was no live link between the spreadsheet and Microsoft Excel. By exporting a dynamic spreadsheet, you get the same spreadsheet, but it comes with a Refresh from CRM button on the toolbar. Click that button, and live data from the CRM database is refreshed into the spreadsheet.

Outlook 2010/Internet Explorer:

1. Go to any list of records in Microsoft Dynamics CRM.
2. Once you have a list of records on the screen, click the Export to Excel button in the Data group of the ribbon.
3. You will have the option to export a dynamic spreadsheet.
4. Click the Export button.

Outlook 2003/2007:

1. Go to any list of records in Microsoft Dynamics CRM. For example, you could open a list of contacts.
2. Once you have a list of records on the screen, click the Export to Excel button on the Records menu.
3. You will have the option to export a dynamic spreadsheet.
4. Click the Export button.



Chapter 17

Automated Processes

- Creating workflows and dialogs

Creating workflows and dialogs

Automated workflow is one of the most useful features in Microsoft Dynamics CRM. Workflow is like a macro that sits in the background, watches for changes or conditions within the database, and then creates records, modifies things, or performs actions based on a pre-defined set of workflow steps.

For example, whenever a new lead is entered into the database for one of your salespeople, workflow can be configured to automatically generate a reminder e-mail to the salesperson and to create activities that aid in implementing your business process. Workflows can be created by a system administrator and applied to an entire organization, or they can be created by individuals to automate a personal business process.

Task A Workflow example: Forcing a new follow-up activity when opportunities are created

The workflow will not run until it has been activated. Highlight a workflow and click the Activate button on the Actions toolbar to activate it.

In this chapter, we cover only a very small percentage of the functionality available with workflow. Some pretty ingenious applications of the workflow feature are discussed in CRM blogs. Do an internet search for Microsoft Dynamics CRM Workflow Blog (or something related), and you'll get a treasure trove of information about the workflow feature.

Workflow can change fields, create new records, send e-mails, and perform many routine database tasks on an automated basis. In this example, you'll see how to create a workflow that will—every time a new opportunity is entered into the database—create a follow-up activity phone call with the prospect.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Processes.
2. On the Actions toolbar, click the New button.
3. Give your workflow a name, choose Opportunity as your entity, and select Workflow as your category. Click OK.
4. Select the Scope for the Workflow.
5. In the Start When section, select the trigger for the workflow. The trigger is the action (or inaction) that should cause the workflow to start.
6. Select the Scope for the Workflow.
7. In the Start When section, select the trigger for the Workflow, what action (or inaction) should cause it to start.
8. On the Actions toolbar, click the Add Step drop-down and choose the Create Record option.
9. Type a description for the workflow step. (It might be something like Create Follow-up Call.)
10. In the Create drop-down, choose the Phone Call option.
11. Click the Set Properties button to configure the details of the call that will be scheduled.
12. Click Save and Close.

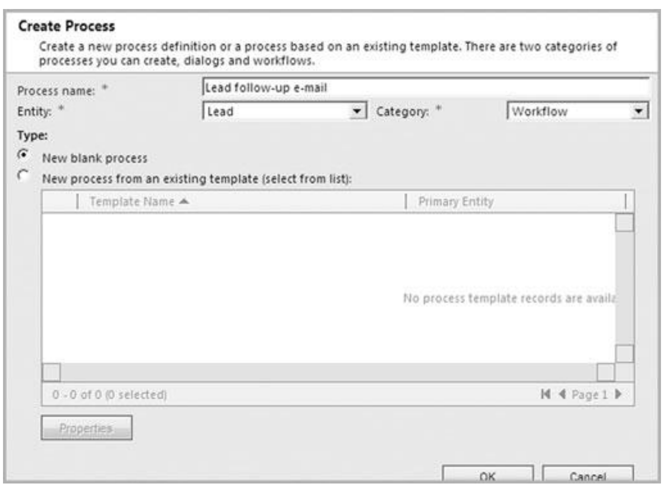
Task B Workflow example: Creating an e-mail when leads are created

In this book, you learn two very basic examples of workflows that can be configured in Microsoft Dynamics CRM. Keep in mind, though, that you can add multiple steps, wait conditions, child workflows, stages, and a lot more. You could literally spend an entire week creating a complex workflow. In this example, we'll create a reminder e-mail that gets automatically sent to the owner of a lead when the lead is created.

Remember, the workflow will not be active until you activate it. Click the Activate button to activate a workflow.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Processes.
2. On the Actions toolbar, click the New button.
3. Give your workflow a name, choose Lead as your entity, and select Workflow as your category type. Click OK.
4. On the Actions toolbar, click the Add Step drop-down and choose the Send E-mail option.
5. Click the Set Properties button to configure the e-mail that will be sent.
6. In the From field, enter the sender contact.
7. Click your mouse in the To field. In the Form assistant on the right, make sure Lead is selected in the Look for drop-down. In the drop-down below that, choose the Owner option. Then click Add, and then OK. This will add a field placeholder to show that the e-mail should be sent to the lead owner, whoever that is.
8. Give the e-mail a subject and body, and click Save and Close.
9. Click Save and Close to save the workflow.



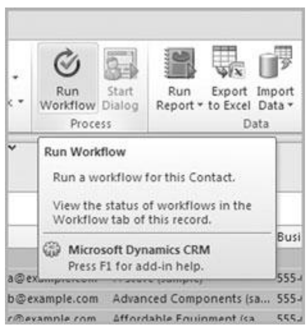
When defining a workflow, make sure the On Demand option is checked under the Available to Run header. Then, the workflow will be available to run on-demand.

Task C Running an on-demand workflow

The workflows that we've created so far run automatically when a record is changed, a status changes, a record is assigned, a record is deleted, or a record attribute changes. However, you might have some workflows that you want to run on-demand. In these cases, you can highlight a record and force the workflow to perform its steps on the record at that moment.

Outlook 2010/Internet Explorer:

1. Go to a list of records. For example, you could click Sales in the Navigation Pane and then click Contacts to go to a list of contact records.
2. In the Process group of the ribbon, click the Run Workflow button.
3. Select a workflow to run, and click OK.
4. Click OK to confirm.



Outlook 2003/2007:

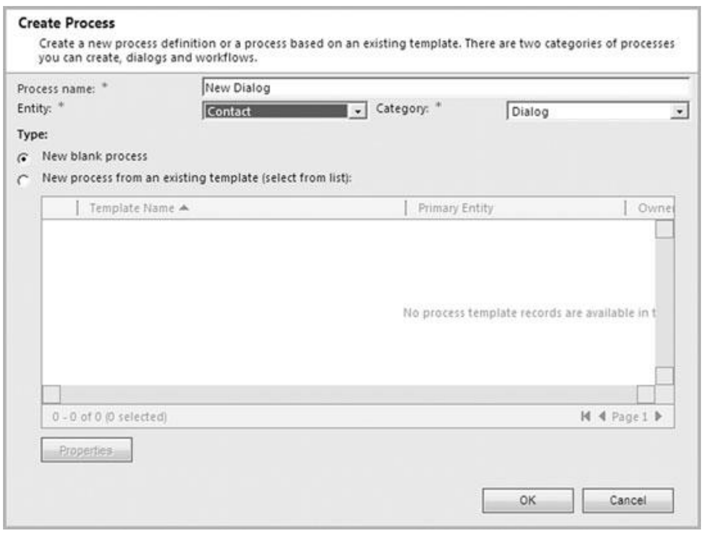
1. Go to a list of records. For example, you could click Sales in the Navigation Pane and then click Contacts to go to a list of contact records.
2. On the Contacts menu, click the Run Workflow button.
3. Select a workflow to run, and click OK.
4. Click OK to confirm.

Task D Creating a dialog

Think of a dialog as a wizard—the kind that you often see in Windows products. With a dialog, you can prompt the user to enter information about a record and then the system will automatically fill in that information wherever it belongs in CRM.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Processes.
2. On the Actions toolbar, click the New button.
3. Give your dialog a name, choose an entity, and select Dialog as your category type. Click OK.
4. Add your input arguments, variables, and steps to the dialog.
5. Click the Save & Close button and Activate when you are finished.



Dialogs are a very powerful feature that can accommodate incredibly complex scenarios. If this is a feature that you are going to use, do an internet search for Dynamics CRM dialogs to find many blog postings and articles about the dialog feature. We could easily write a book on just this topic.

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Chapter 18

Customizing Your Solution

- Creating entities
- Customizing fields
- Customizing forms and views

Once the new entity is created, you will want to add fields and relationships for the entity. You will also want to customize the forms and views used to enter information for the forms. All of this is covered in this chapter.

Creating entities

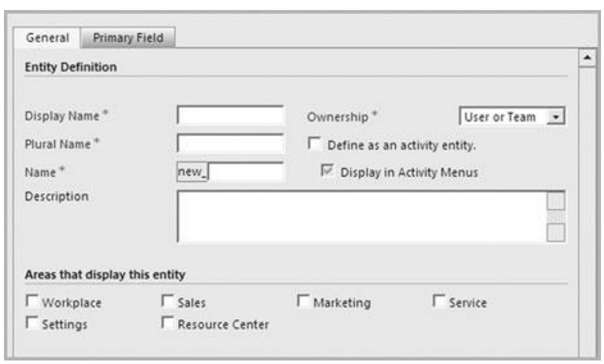
Entities are types of records in Microsoft Dynamics CRM. Contacts, activities, cases, opportunities, campaigns, products, sales literature, and leads are all examples of entities in Microsoft Dynamics CRM. By creating your own custom entities, you can really extend the functionality of your database. Once the entities are created, you can create relationships between existing entities and your new custom entities. Almost everything covered in this chapter requires elevated security permissions in CRM.

Task A Creating a new entity

Let's say you run a computer training business. You hold classes on a regular basis. You want to be able to track student attendance for these classes in CRM, but there is no obvious way to do this out of the box. By creating a new custom entity for training classes, you can track information about each class, and you can then link individual contacts to the classes they attend.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. On the Actions toolbar, click the New button.
4. Give your entity a display name, plural name, ownership level, and table name.
5. Configure any other settings for the entity, like the areas (Workplace, Sales, Marketing, etc.) that will display the entity. If you want to append notes and activities to this entity, you may enable this capability at this point and this point only.
6. Click Save and Close.



Task B Publishing customizations

After adding an entity to the system, your database remains unchanged. You need to publish the customizations, at which point all of your changes will appear in the live database.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Highlight the entity whose recent changes should be published to the live database.
4. On the toolbar, click the Publish button.

Before publishing customizations, it might be a good idea to make a backup of your existing customizations. In the Navigation Pane, click Settings, Customization, and Customize your Solution. Then click the Export Customizations option.

On the toolbar, choose the Publish All Customizations option to publish every non-published customization.

Customizing fields

You can create new fields in either a custom entity or one of the default entities—like contacts or leads. If you wanted to add a Customer Type drop-down on the contact record, you'd add a new picklist field on the contact entity.

When adding a new field, check out the Requirement Level field. You have three options:

- No Constraint—The field is not required.
- Business Required—Users cannot save the entity until a value has been added to the field.
- Business Recommended—The field is not required, but it will show with a blue + to remind users that they should enter information into the field.

Task A Creating a new field for an entity

You can add a virtually unlimited number of fields for any entity. Need to track additional information for your opportunities? Add new fields to track that information. You can add the following types of fields:

- **Single Line of Text** field can contain text, numbers, and symbols.
- **Option Set** fields offer a drop-down menu of choices.
- **Two Options** fields can have two possible choices, such as True/False or Yes/No. Two Options fields can also be configured in your form customization as check boxes or radio buttons.
- **Whole Number** fields can only contain integers (numbers without a decimal point).
- **Floating Point Number** fields contain numbers with a decimal point.
- **Decimal Number** fields have a fixed number of digits after the decimal point.
- **Currency** fields contain currency values.
- **Multiple Lines of Text** fields are memo fields that can hold up to 100,000 characters.
- **Date and Time** fields contain a date, time, or both.
- **Lookup** fields point to another entity in the system and create a 1:N relationship.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Double-click the entity where you would like to create a new field.
4. On the left, click the Fields option.
5. From the Actions toolbar, click the New button.
6. Configure your new field.
7. Click Save and Close.

Task B Creating a security-enabled field

You can put field level security levels on fields within the database. You can then configure your system so that users can see certain fields based on a security level. Credit card and social security numbers are obvious examples of fields you would want to make security enabled.

On any field, you can grant read, update, or create rights to a user or team.

Outlook 2003/2007/2010/Internet Explorer:

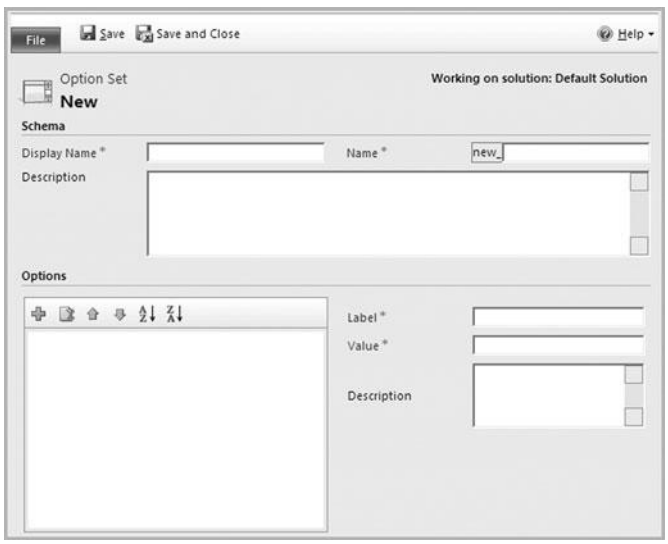
1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Double-click the entity where you would like to create a new field.
4. On the left, click the Fields option.
5. Double-click a field.
6. In the Field Security area, choose the Enabled Option.
7. Now, go back to the Customize your Solution area and choose Field Security profiles.
8. Click the New button to create a role where you can define permissions for this field (and others).

Task C Creating a global option set

Option sets are drop-down fields. You might have a drop-down field that appears multiple times in the database, and when this happens, you can create a global option set so that changes made to one drop-down will show up in all of the fields that share that drop-down.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click Option Sets on the left.
3. Click the new button on the Actions toolbar to create a new options set.
4. When you are adding a new field (see the previous lesson) you can now use this global options set to populate the values of your drop-down.
5. Click the Save and Close button.



Customizing forms and views

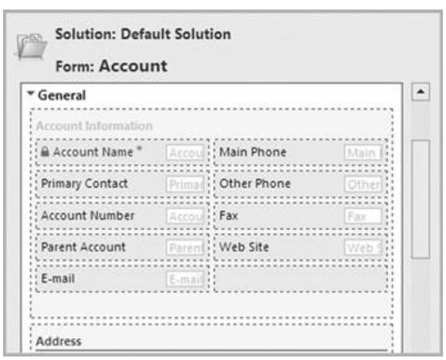
After you have added a new field for an entity, you'll want to make sure it displays as a field on the forms and views. When you double-click a contact, a screen appears that lets you enter information about the contact. That screen is called a form. In the Navigation Pane, when you click Sales and then Contacts, the resulting spreadsheet-like list of contacts is called a view.

Task A Editing the form for an entity

The form is the screen that appears when you are editing information for an entity. Double-click a contact, and the form for that contact appears. If you add a new field for an entity, it doesn't appear on the form until you add it manually.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Double-click the entity where you would like to add a field to the form.
4. On the left, click the Forms option.
5. Double-click the form you'd like to edit. For example, if you are adding fields to the contact entity, you could double-click the form called Form, which is the default application form.
6. Click the Add Fields button.
7. Check each of the fields you'd like to add to the form.
8. New fields appear at the bottom of the form. Highlight a field and click the arrow buttons to move the field to a new spot on the form.
9. Click Save and Close.



Add new tabs to any form by clicking the Add a Tab button.

You can use the IFRAME feature to embed external content into a form.

You can create different forms for different security roles.

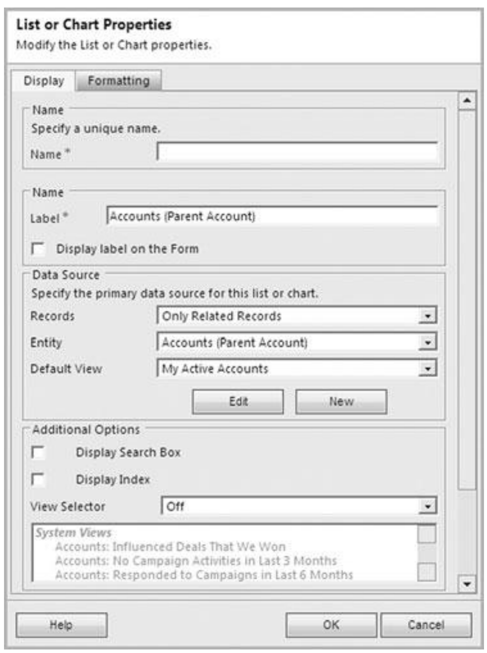
Changes won't appear until you publish the entity.

Task B Adding sub-grids to a form

The sub-grid shows a list of records associated with the record you are viewing. So within a contact record, you might show a list of opportunities or activities. Displaying them in a sub-grid puts them on the main page and prevents the user from having to click on Activities or Opportunities on the left Navigation Pane.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Double-click the entity where you would like to add a sub-grid to the form.
4. On the left, click the Forms option.
5. Double-click the form you'd like to edit. For example, if you are adding fields to the contact entity, you could double-click the form called Form, which is the default application form.
6. On the Insert tab, in the Control group of the ribbon, click the Sub-Grid button.
7. Give your sub-grid a name, configure your options, and select the type of record that should be shown.
8. Click the Save & Close button.



Task C Customizing the left navigation pane for a form

The left Navigation Pane shows related activities, opportunities, quotes, orders, invoices, etc. You may have some items on your Navigation Pane that aren't in use. For example, if you are not using the system for invoices, you might want to remove invoices from the Navigation Pane.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Double-click the entity where you would like to customize the left navigation pane.
4. On the left, click the Forms option.
5. Double-click the form you'd like to edit. For example, if you are adding fields to the contact entity, you could double-click the form called Form, which is the default application form.
6. Double-click on the left Navigation Pane area.
7. Highlight an item (like Invoices) and then click the Remove button in the Edit group of the ribbon.
8. Click the Save & Close button.

Remember to publish your customizations.

Task D Creating a system view

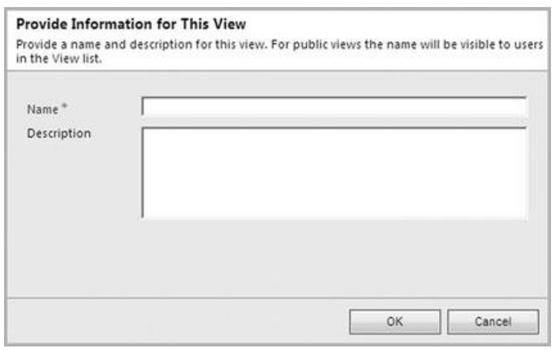
System view will appear for all users, so if you are creating a view that should only be viewable by specific users or a team, create a personal view and share it instead.

You can save a copy of an existing view to save time.

In a previous chapter you learned how to create a personal view. In this section you'll learn how to create a system view. A system view is like a personal view, only it is available to all users once it is created.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Customization, and then Customize your solution.
2. Click the Entities option on the left.
3. Double-click the entity where you would like to create a system view.
4. On the left, click the Views option.
5. Click the New button on the Actions toolbar.
6. Give your view a name and click OK.
7. Click Edit Filter Criteria to define a query that will determine which records are shown in the view. Click Add Columns to add additional fields for display in the view.
8. Click the Save & Close button.



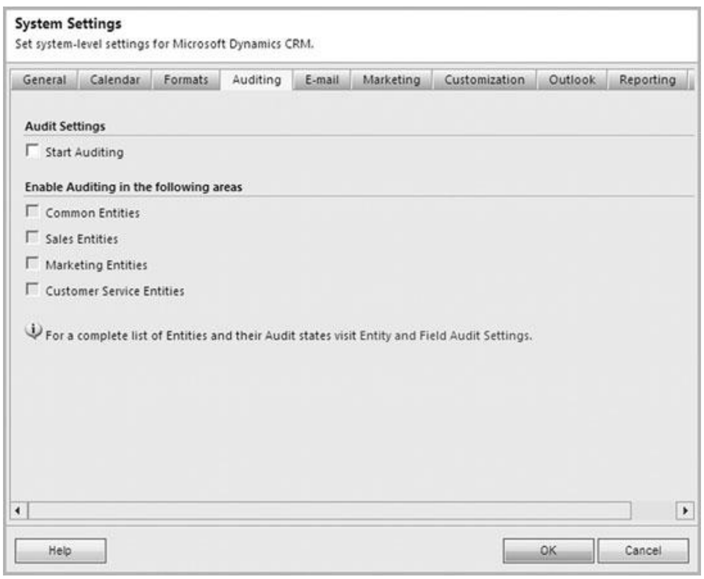
Task E Enabling auditing

Auditing keeps track of changes made to fields within your CRM database. By default, it's turned off. You can choose to audit an entire entity or a specific field within an entity.

Use this field judiciously as it can balloon the size of your database pretty quickly.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, System, and then Auditing.
2. Click the Global Audit Settings option to turn on auditing.
3. Click Entity and Field Audit Settings to enable audit tracking on entities or fields.
4. Click Audit Log Management to manage the amount of space taken up by your audit logs.



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Chapter 19

Managing Users and Security Roles

- Creating users
- Security roles
- CRM Online users

Creating users

Creating a user in an on-premise deployment follows a slightly different process than the one outlined in this chapter. In an on-premise deployment, Microsoft Dynamics CRM uses active directory users for authentication to the database. In Microsoft Dynamics CRM Online, new users are authenticated with the Windows Live ID. The instructions in this chapter are valid for Microsoft Dynamics CRM Online.

Task A Adding a new user

Before you can add a new user, make sure that you have licensing to do so. If you have a 10 user license to Microsoft Dynamics CRM, adding the 11th user won't work. Disabling a user, which is covered later in the chapter, will free up a license.

Microsoft Dynamics CRM Online: Your users will need to get a Windows Live ID before they will be able to log into the database.

Microsoft Dynamics CRM On-Premise: Your users will need to be active users in the domain to log in.

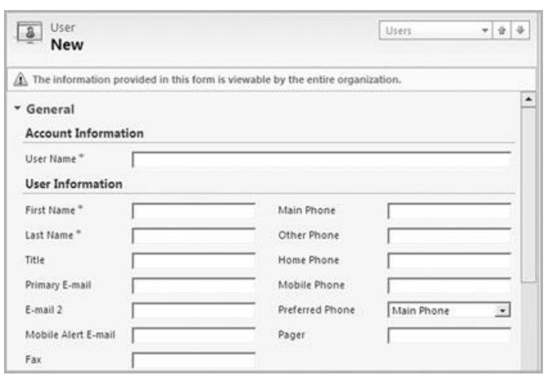
Microsoft Dynamics CRM Partner-Hosted: Your hosting provider will assign usernames and passwords for the database.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Users option.
3. In the Records group of the ribbon, click the New button.
4. Choose a business unit and click Next.
5. Select a security role and click Next.
6. Enter the first name, last name, and e-mail address for the user. Click the Add button, followed by the Next button.
7. Click the Create New Users button.

Outlook 2003/2007:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Users option.
3. In the Records group of the ribbon, click the New button.
4. Choose a business unit and click Next.
5. Select a security role and click Next.
6. Enter the first name, last name, and e-mail address for the user. Click the Add button, followed by the Next button.
7. Click the Create New Users button.



Task B Disabling a user record

If a user leaves the company, you can disable the user record. Disabling the user will remove him or her from the list of active users, and it will free the license for another active user. Once you disable a user, he or she will no longer be able to access the system.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Users option.
3. Highlight the user that you'd like to disable.
4. In the Records group of the ribbon, click the Disable button.
5. Click OK to confirm.

Outlook 2003/2007:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Users option.
3. Highlight the user that you'd like to disable.
4. On the Users menu, click the Disable button.
5. Click OK to confirm.

After disabling a user record, any workflows or system jobs (like imports or duplicate checking jobs) owned by this user will cease.

Users cannot be deleted. This preserves the association with historical activities.

Task C Reassigning user information

There is no easy way to undo this action, so be careful!

If a salesperson leaves the company, you may want to reassign all of the former employee's information to the incoming user. In bulk, you can reassign all record ownership from one user to another using this process.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Users option.
3. Double-click the user whose records should be reassigned.
4. In the Actions group of the ribbon, choose the Reassign Records option.
5. Choose the Assign to another user option and choose the target user.
6. Click OK.

Security roles

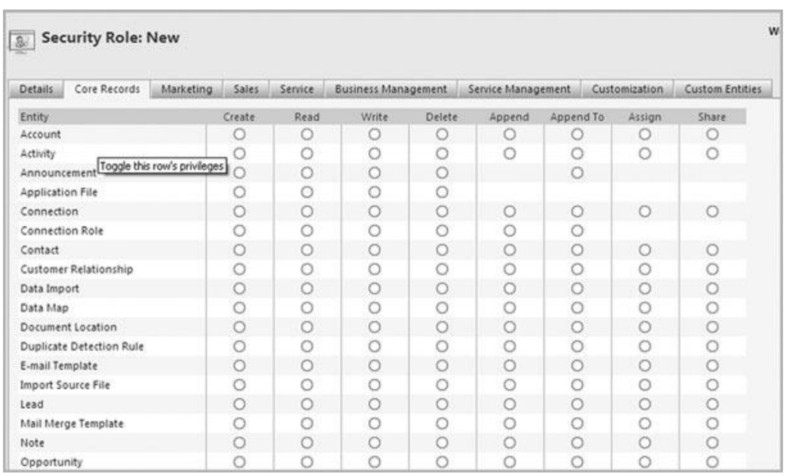
Security roles define a level of access to specific entities and actions within the database. A security role, for example, may allow users to delete contacts. It may disallow deletion of contacts. The role might restrict deletion of contacts to just contacts in the user's business unit.

Task A Creating a security role

By creating custom security roles for each type of user in your database, you can very specifically restrict access to certain parts of the database. A customer service agent, for example, might have a greater level of access to cases, knowledge-base documents, and contracts. A salesperson might not be able to even see knowledge-base documents.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Security Roles option.
3. On the Actions toolbar, click the New button to create a new security role.
4. In the Details tab, give your security role a name, and assign it to a business unit.
5. In each of the other tabs, specify the level of access that users assigned to this security role should have.
6. For example, in the Core Records tab, click the Create option for Account entities to allow creation of accounts.
7. Click Save and Close.



When assigning rights:

- Click once to assign rights for records owned by the user.
- Click again to assign rights for records owned by the business unit.
- Click again (three times) to assign rights for records owned by the business units and also child business units.
- Click again (four times) to assign rights for records owned by the entire organization.

Since multiple security roles can be added to any user, the least limiting security role permissions will override. So, let's say a user is assigned to two security roles. One security role does not allow deletion of contacts, but the other does. The user will be able to delete contacts.

Task B Assigning a security role to a user

The security role defines what a user can and cannot do in the database. Users assigned a specific security role will be restricted by the limits of the security role. So, if a security role does not allow deletion of notes, any users assigned to the security role will not be able to delete notes.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Users button.
3. Double-click a user.
4. On the left, click the Security Roles option.
5. In the Actions group of the ribbon, click the Manage Roles button.
6. Place a checkmark next to each role that should be assigned to this user.
7. Click OK, and then Save and Close.

CRM Online users

Windows Live ID is the authentication system for CRM Online users. Instead of purchasing fixed-cost licenses, you will buy a number of users at a monthly fee. For more information, go to crm.dynamics.com.

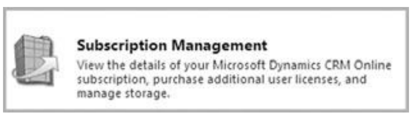
Task A Managing licensing and purchased storage

Adding additional available licenses and additional gigabytes of storage to your CRM Online account is done within a central license area within CRM Online. You will likely need to be the billing administrator on your account to do any of this. If you run into problems, call 877-CRM-CHOICE, option 2.

For billing related questions, call 877-CRM-CHOICE, option 2.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings, Administration, and then Subscription Management.
2. Here you'll have the option to add licenses or additional storage.



If you have a Hotmail account, you can use this as your Windows Live ID.

Task B Creating a Windows Live ID

CRM Online uses a Windows Live ID for user authentication. Windows Live ID is the cross Microsoft authentication mechanism. You should have a Windows Live ID before you sign up for CRM online.

Internet Explorer:

1. Go to https://signup.live.com.
2. Follow the on-screen instructions to create a Windows Live ID.

Chapter 20

Creating Business Units and Teams

- Working with business units
- Working with teams

Working with business units

In Microsoft Dynamics CRM, your organization is made up of business units. Within each business unit, you can define teams of users. Your permissions may be limited to records owned within your business unit. For example, you may have security permissions to delete contacts across the entire organization. You might be restricted to deleting contacts owned by users within your business unit, or you might only be able to delete contacts that you own.

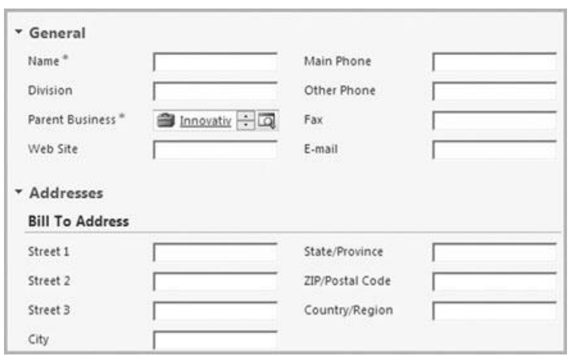
Task A Creating a business unit

A business unit is a group of users within your company that work on a common objective. General Motors is a large company, and business units within that company might be Pontiac, GMC Trucks, Cadillac, etc.

Once a business unit has been created, it cannot be modified or deleted. If you create a business unit, be sure to spell it properly, and make sure the capitalization is consistent. If you make a mistake, you can disable the business unit and start again.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Business Units option.
3. On the Actions toolbar, click the New button.
4. In the Name field, enter the name of your business unit.
5. If this is a sub-unit of an existing business unit, specify the parent business unit in the Parent Business field.
6. Click Save and Close.



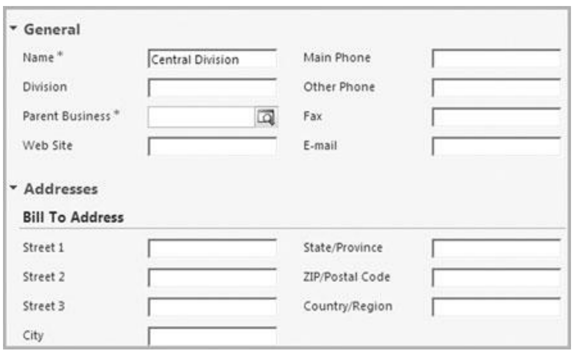
Task B Changing settings for an existing business unit

You can change just about any business unit setting, except for the name. You can change users, teams, facilities/equipment, and resource groups assigned to any business unit. You can also change field information—like the address—for an existing business unit.

To change the parent business unit for a business unit, click the Change Parent Business option from the Actions drop-down.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Business Units option.
3. Double-click the business unit you would like to edit.
4. Change any field information for the group.
5. On the left, click the Users, Business Units, Teams, Facilities/Equipment, or Resource Groups buttons to change entities that are associated with the business unit.
6. Click Save and Close to exit.



Any sub-business unit under a business unit that you disable will also be disabled.

To enable a disabled business unit, choose the Enable option from the Actions drop-down.

Task C Disabling a business unit

You cannot delete a business unit, but you can disable it. Disabling a business unit will prevent any users assigned to that business unit from logging into your database. If you work in a large organization, and you sell a business unit to a competitor, you'd disable the business unit within Microsoft Dynamics CRM.

Outlook 2003/2007/2010/Internet Explorer:

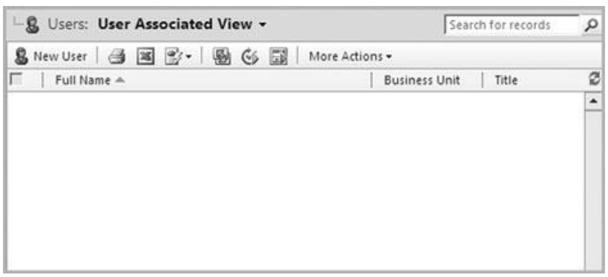
1. In the Navigation Pane, click Settings and then Administration.
2. Click the Business Units option.
3. Double-click the business unit you would like to disable.
4. From the Actions drop-down, choose the Disable option.
5. Click OK.

Task D Changing the business unit for a user

If a user transfers from one business unit to another, you can switch the associated business unit for the user. Changing a user's business unit may change the data that the user can access.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Business Units option.
3. Double-click the business unit for the user.
4. On the left, click the Users option.
5. Highlight the user (or users) whose business unit should be changed.
6. From the More Actions drop-down, choose the Change Business Unit option.
7. Select a new business unit and click OK.



This procedure can also be used to reassign facilities or equipment to a new business unit. In step 4, click the Facilities/Equipment option instead of the Users option to reassign facilities and equipment.

Working with teams

Teams are groups of users. They are most commonly used when sharing records. Whenever you share a record, you have the option of sharing that record with a user or a team.

It's a good idea to add a description for your teams, especially if you are working in a database with a large number of users. This way, other administrators of your database will know the purpose for adding the team.

Task A Creating a new team

Teams are assigned to a specific business unit. A team can contain as many users as you have in the database, and removing a user from a team will remove that user's access to any records shared only with the team.

Outlook 2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. On the Teams tab, in the Records group of the ribbon, click the New button.
3. Give your team a name and business unit.
4. Click the Save button. (This is necessary to add users.)
5. Go to the next page for instructions on how to add users to a team.

Outlook 2003/2007:

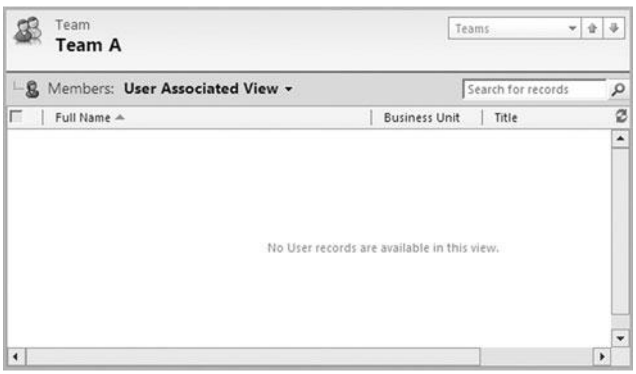
1. In the Navigation Pane, click Settings and then Administration.
2. On the Teams menu, click the New button.
3. Give your team a name and business unit.
4. Click the Save button. (This is necessary to add users.)
5. Go to the next page for instructions on how to add users to a team.

Task B Changing team membership

As employees come and go, and as they transfer to different positions within your company, you will likely need to update team membership. If you remove a user from a team and add the user to another team, any access privileges the user had from the first team will be removed, and new access levels will be added for records shared with the second team.

Outlook 2003/2007/2010/Internet Explorer:

1. In the Navigation Pane, click Settings and then Administration.
2. Click the Teams option.
3. Double-click the team whose team membership should be changed.
4. On the left, click the Members option.
5. To remove a user from the team, highlight the user. Then, in the Records group of the ribbon, click the Delete button.
6. To add a new member to the team, click the Add Members option in the Records group of the ribbon.



On the left, click the Workflow option to see any workflows related to the team.

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Chapter 21

Sharing and Assigning Records

- Sharing records with others
- Assigning records to others

Sharing records with others

When you share records with other users, teams, or business units, you grant them specific levels of access to the record. The following permissions can be granted on most records:

- Read
- Write
- Append
- Append To
- Share
- Assign
- Delete

Task A Sharing a record with another CRM user, team, or business unit

To share a record with others, you must be:

- The owner of the record or
- You must have been granted Share access by the owner of the record

When you grant access to a record, the user, team, or business unit that has been granted access will have the specified level of access to that record. The user, team, or business unit may also be granted access to associated records.

Outlook 2010/Internet Explorer:

1. Go to a list of records. For example, you could click Sales and then Contacts on the Navigation Pane to get to the list of contacts.
2. Highlight a record.
3. On the Contacts tab, in the Collaborate group of the ribbon, click the Sharing button.
4. On the left, click the Add User/Team option.
5. In the Look for drop-down, select to look for either a user or team. In the Search field, type the name of the user or team you'd like to find.
6. Click the Search button to show available records.
7. Double-click the user or team from the list of available records.
8. Click OK.
9. Set the permissions for the user you added to the access list. Options are: Read, Write, Delete, Append, Assign, Share, and more—depending on the type of record you are sharing.
10. Click OK.

Outlook 2003/2007:

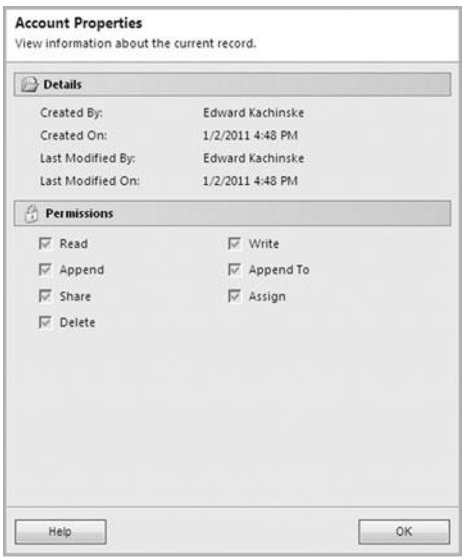
1. Go to a list of records. For example, you could click Sales and then Contacts on the Navigation Pane to get to the list of contacts.
2. Highlight a record.
3. On the Contacts menu, click the Sharing button.
4. On the left, click the Add User/Team option.
5. In the Look for drop-down, select to look for either a user or team. In the Search field, type the name of the user or team you'd like to find.
6. Click the Search button to show available records.
7. Double-click the user or team from the list of available records.
8. Click OK.
9. Set the permissions for the user you added to the access list. Options are: Read, Write, Delete, Append, Assign, Share, and more—depending on the type of record you are sharing.
10. Click OK.

Task B Checking your access for a record

If you are on a record, you can check your level of access for that record. This procedure works on most records—like contacts, opportunities, accounts, cases, etc.

Outlook 2003/2007/2010/Internet Explorer:

1. Go to a list of records. For example, you could click Sales and then Contacts on the Navigation Pane to get to the list of contacts.
2. Double-click a record to open it for editing.
3. Click the File tab.
4. Choose the Properties option.
5. Your permission level will appear for the record.



If you want to have a greater level of access to the field, you will need to contact the owner of the record. When editing a record, go to the Administration form section to see the owner of the record.

When editing a record, you can also reassign ownership by changing the Owner field. In the Contact record, for example, that field is on the Administration form section.

Assigning records to others

Assigning records is different than sharing records in that, after assigning a record, the record ownership changes to the reassigned user. Once you no longer own the record, you may have limited rights to the record, even though you were the original owner.

Task A Assigning a record to another CRM user, team, or business unit

To reassign a record to another user or team, you must either be the owner of the record or you must have the Assign permission for the record.

Outlook 2003/2007/2010/Internet Explorer:

1. Go to a list of records. For example, you could click Sales and then Contacts on the Navigation Pane to get to the list of contacts.
2. Double-click the record you'd like to assign.
3. In the Collaborate group of the ribbon, click the Assign button.
4. Click the Lookup button to find a user.
5. Select the user for reassignment and click OK.
6. Click OK.

Task B Sharing or assigning multiple records

If you want to share or assign multiple records, you can do so from most lists of records. Sharing multiple records will grant the user(s) access to all records, and assigning multiple records will change the owner field for all selected records.

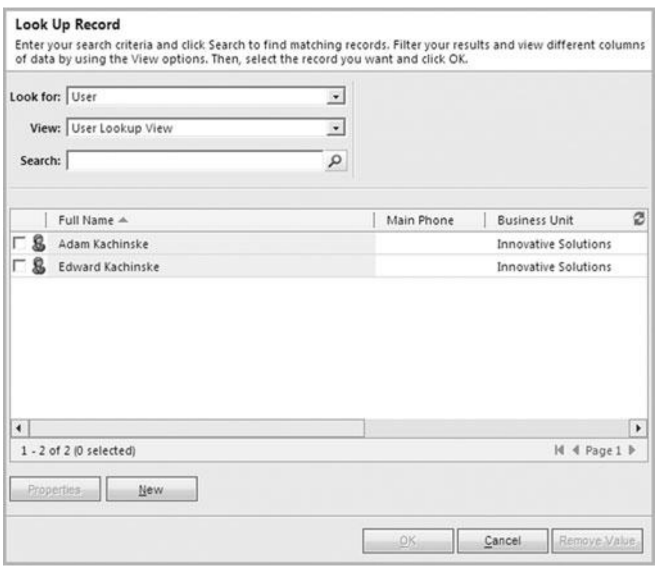
You can only assign or share multiple records if you have sufficient permissions to assign or share all highlighted records.

Outlook 2010/Internet Explorer:

1. Go to a list of records. For example, you could click Sales and then Contacts on the Navigation Pane to get to the list of contacts.
2. Highlight the records you'd like to share or assign.
3. In the Collaborate group of the ribbon, click the Share button.
4. To re-assign multiple records, click the Assign button.

Outlook 2003/2007:

1. Go to a list of records. For example, you could click Sales and then Contacts on the Navigation Pane to get to the list of contacts.
2. Highlight the records you'd like to share or assign.
3. In the Record menu, click the Share button.
4. To re-assign multiple records, click the Assign button.



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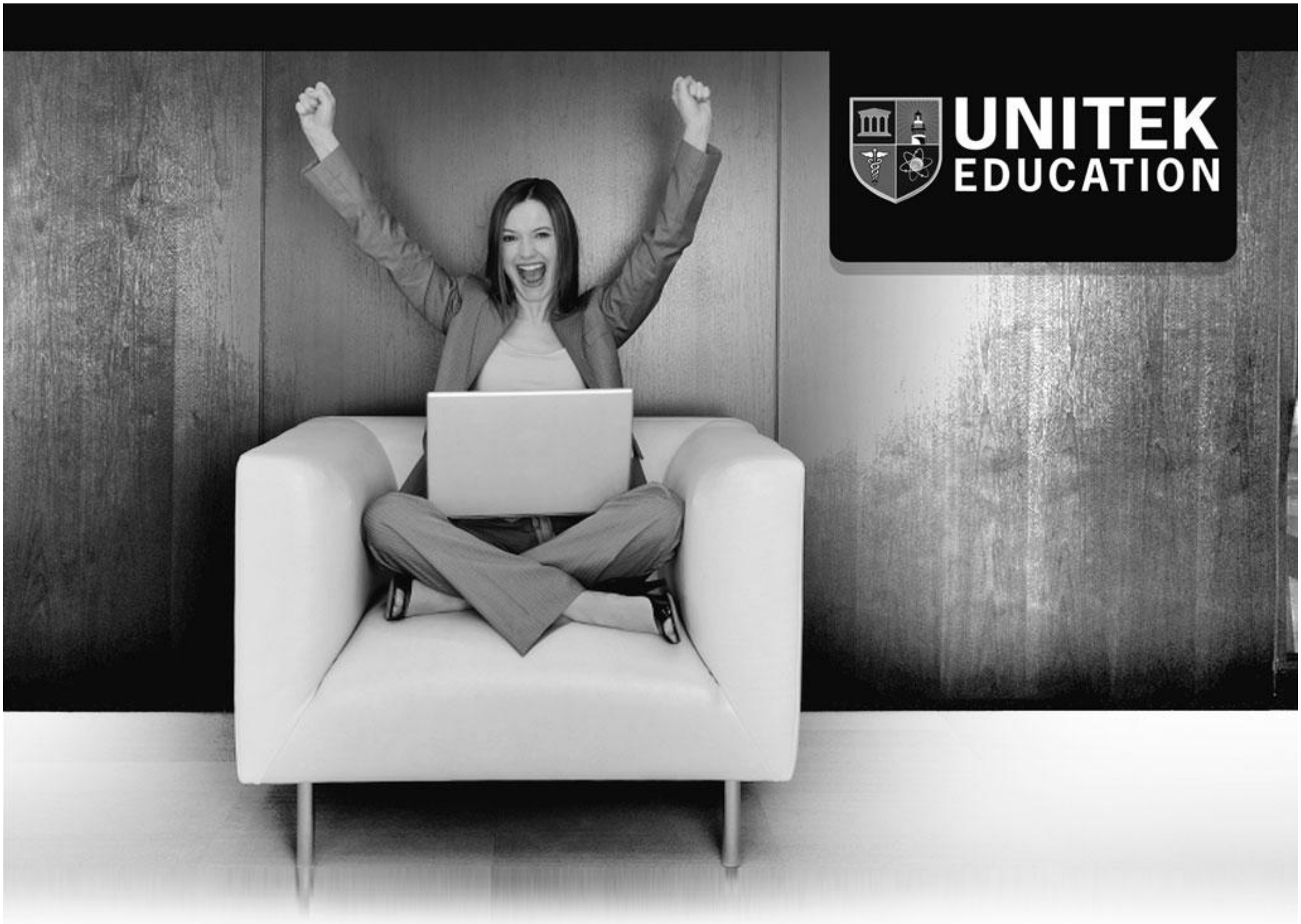

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