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# Microsoft Dynamics™ CRM 4 FOR DUMMIES®

**A Reference  
for the  
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Joel Scott  
David Lee  
Scott Weiss

Generate leads,  
manage campaigns,  
and track your  
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# ***Microsoft Dynamics<sup>TM</sup> CRM 4 For Dummies®***

**by Joel Scott, David  
Lee, and Scott Weiss**



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# About the Authors

**Joel Scott** is the president of the Computer Control Corporation, which began focusing on CRM software in 1989. Since the early 1990s, Computer Control has been an elite dealer of GoldMine software, winning many sales and business process awards. Mr. Scott has also written the entire series of *GoldMine For Dummies* books.

With the release of Microsoft CRM 1, Computer Control Corporation made the decision to expand its product line and expertise to Microsoft CRM as well. Mr. Scott has been the lead author for the *Microsoft CRM For Dummies* series. This is now the third book in the series.

In 2007, the Computer Control Corporation merged with a friendly competitor, Core Solutions, Inc. Mr. Scott now handles GoldMine and Microsoft CRM sales and design work for Core Solutions, as well as focusing on client retention consulting, writing, and speaking engagements. Mr. Scott can be reached at [joels@ccc24k.com](mailto:joels@ccc24k.com).

**David Lee** is the Chairman of the Board of Trustees for the University of Northern Virginia, Vice Chair of the Board of Trustees of Myers University, on the Board of Advisors to ECPI, and was also adjunct faculty for George Mason University.

He founded Vertical Marketing, Inc., as a home-based business in 1985 and has grown it to a force in the CRM industry, with offices in four cities worldwide. It has won

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Dr. Lee is a recognized speaker and thought leader in the customer relationship management (CRM) industry. He is a regular contributor to several CRM publications and writes a CRM column for *MSDynamicsWorld*. He is certified in many of the primary mid-market CRM systems.

Before founding Vertical Marketing, Dr. Lee served as Marketing & Support Manager, Vice President of Marketing, Vice President of Sales, and President in such organizations as Rand Teleprocessing, Barrister Microsystems, and Market Wise Inc., and as an officer in the U.S. Army. He is also a karate black belt and a competition-level dancer.

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Mr. Weiss founded Core Solutions in 2000. With offices in Newton, Massachusetts, and Rocky Hill, Connecticut, Core Solutions has provided CRM solutions to hundreds of clients. Mr. Weiss hosted a weekly radio show "Winning Business" from 2005-2006. He has guest lectured to graduate business students on entrepreneurship.



Prior to founding Core Solutions, Mr. Weiss spent several years in sales and marketing management in the medical diagnostics industry. He lectured on international marketing for the Massachusetts Port Authority.

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# Authors' Acknowledgments

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We're proud of this book; please send us your comments through our online registration form located at [www.dummies.com/register/](http://www.dummies.com/register/).



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# Introduction

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This book is about Microsoft Dynamics CRM version 4, which we refer to as simply Microsoft CRM or just CRM. We assume that Microsoft CRM just showed up on your desktop computer or notebook. Chances are, you already have some experience with one or more of the popular predecessors to CRM — ACT, GoldMine, SalesLogix, or an earlier release of Microsoft CRM. Maybe you thought your Outlook was actually a CRM system. (It isn't.) Or maybe you've never had any kind of CRM system — and never wanted one either. In any event, now you have to get yourself up and running with this new software. If you relate to any of this, *Microsoft CRM 4 For Dummies* is for you.

If you're a technical type looking for help with installation, integration, or serious customization, you'll need more than just this book. You'll need some technical references, an experienced dealer, and some time.

If nothing else, Microsoft CRM is an organizational tool. Whether you're in sales, marketing, customer service, or management, this software will provide a significant return on your investment — whether that investment is money or time. Beyond that, if you've fallen in love with Microsoft Outlook and refuse to relinquish it, relax. Not only can you still use Outlook, it's one of the primary means by which you'll communicate with Microsoft CRM.

# How CRM Fits in the Market

Microsoft came to the CRM market seemingly a little late but with a system built on a platform called .NET. With CRM, you work in networked mode or in offline mode. Networked mode doesn't require a direct connection to your office file server. In fact, with .NET technology, *networked* actually means connected to the server through the Internet. *Offline* mode also takes great advantage of the Internet but enables you to work while disconnected by using a tool that Outlook users will find familiar.

And, now, Microsoft has an answer for all those users clamoring for a hosted version of its software. With the release of version 4, Microsoft is also offering CRM Live — a hosted version of essentially the same software you can purchase and install on your own servers.

If you have an IT department that's comfortable with the care and feeding of servers and have Internet connectivity with good firewalls and security, you should consider installing and using CRM. Otherwise, you can have CRM hosted. The third-party hosting company or Microsoft maintains the equipment and software in return for a monthly check.

# How to Use This Book

Microsoft CRM is divided into six major sections: Workplace, Sales, Marketing, Service, Settings, and the new Resource Center. This book loosely follows these themes. We describe navigating the workplace and CRM in general in Chapter 3. In Part II, you find out all about setting up the system. Then we jump into sales topics, a little marketing, and some customer service.

You should be able to comfortably read the book from start to finish, but for those of you so caffeinated you can't sit still that long (don't laugh; you know who you are), each chapter can stand on its own as reference material. Either way, you have a comprehensive guide to Microsoft CRM.

You'll get the most benefit from this book by sitting in front of your computer with CRM on the screen. It's easy to convince yourself that you've got it by just reading, but there's no substitute for trying the steps yourself. Experimenting with sample data is sometimes just the ticket to an epiphany.

## Foolish Assumptions

We assume you have some basic computer and Windows skills. If you aren't comfortable with Windows, you need to get yourself up to speed in this area. Find a local class

or seminar, or get one of the *For Dummies* books on Windows. Regarding CRM, however, we assume you just returned from a long mission to Mars and need to start using CRM tomorrow.

We also assume you have a basic understanding of database concepts. If you're comfortable with fields, records, files, folders, and how they relate to each other, you'll be fine. If you're familiar with attributes, entities, instances, and objects, even better. If this is already sounding bad, you can seek help at most community colleges or local computer training facilities.

If you're going to be your own CRM administrator (backing up files and assigning usernames, passwords, and access rights), you need to understand records, files, folders, security, operating systems, and networks. If you just want to be a good day-to-day user of CRM, make sure that you understand what a file is and how to locate one using Explorer.

# How This Book Is Organized

Some people just have a knack for organization. Our office manager is highly organized, although her desk looks like a tornado swept through it. However, she assures us that she knows exactly where everything *should* be. (And we take no responsibility for her actions if you touch anything.) Anyway, we digress. Organization — without it, this book would be a jumbled mess. To cure that, we've organized the book into six parts, each with at least three chapters. Again, you can read the book from cover to cover (who has that kind of time?), or you can refer to it section by section. Each part (and chapter) can definitely stand on its own, but we recommend that you at least skim through the basics and the table of contents before getting started.

# **Part I: Microsoft CRM Basics**

Just the facts! Part I gives you an overview of what Microsoft CRM is all about and provides a tour of the main windows. We also show you how to use Microsoft CRM offline.

## **Part II: Setting Things Up**

In Part II, we begin with a discussion of how to personalize your workplace and the software. The workplace is command central in Microsoft CRM. From the workplace, you can access the day-to-day stuff, such as your calendar, assigned activities, and service scheduling. You can also set up business units, security, sales processes, and business rules. Setting up workflow and reports are the topics of Chapters 9 and 10 respectively.

# **Part III: Managing Sales**

In Part III, we explain how to create accounts and contacts in your database and how to locate existing records. We also show you how to create and manage activities as well as leads, opportunities, and territories. You find how-to information on notes and attachments. Then we get into the nitty-gritty and discuss some of the more complex functions of Microsoft CRM, such as quotes, orders, and invoices (some of which benefit from integration with an accounting system). In addition, we talk about sales literature and how to track competitors.