



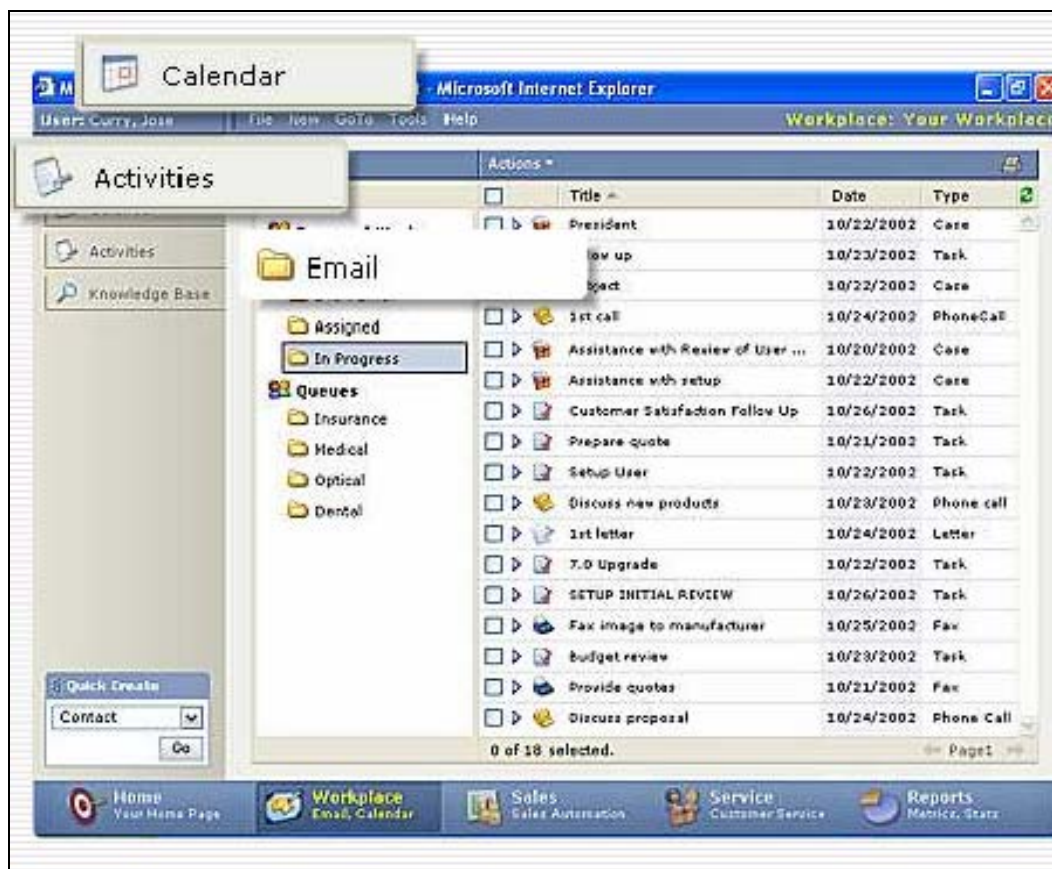
# MICROSOFT CRM

## Chapter 10

## MICROSOFT CRM

---

The point of a CRM tool is to allow employees to share information that would help them better serve their customers. For example, a sales representative can better serve his/her customer if they know the status of the pending repairs, the status of pending credit approvals, the status of shipments in progress, thresholds for achieving additional discounts etc. Historically, sales representatives did not have access to the accounting system data, and therefore did not have easy access to this type of information. With a CRM tool, sales representatives have this type of information at their fingertips, which makes them better able to serve the customer. Microsoft CRM is one such tool targeted at mid-market companies. Microsoft Business Solutions CRM can help businesses build customer relationships without abandoning existing systems. Integrated Sales and Customer Service modules allow employees to share information to improve sales and customer service.



In Microsoft CRM, sales and customer service features include:

- Complete view of customer history
- Automated incident management
- Leads and opportunity management
- Searchable knowledgebase

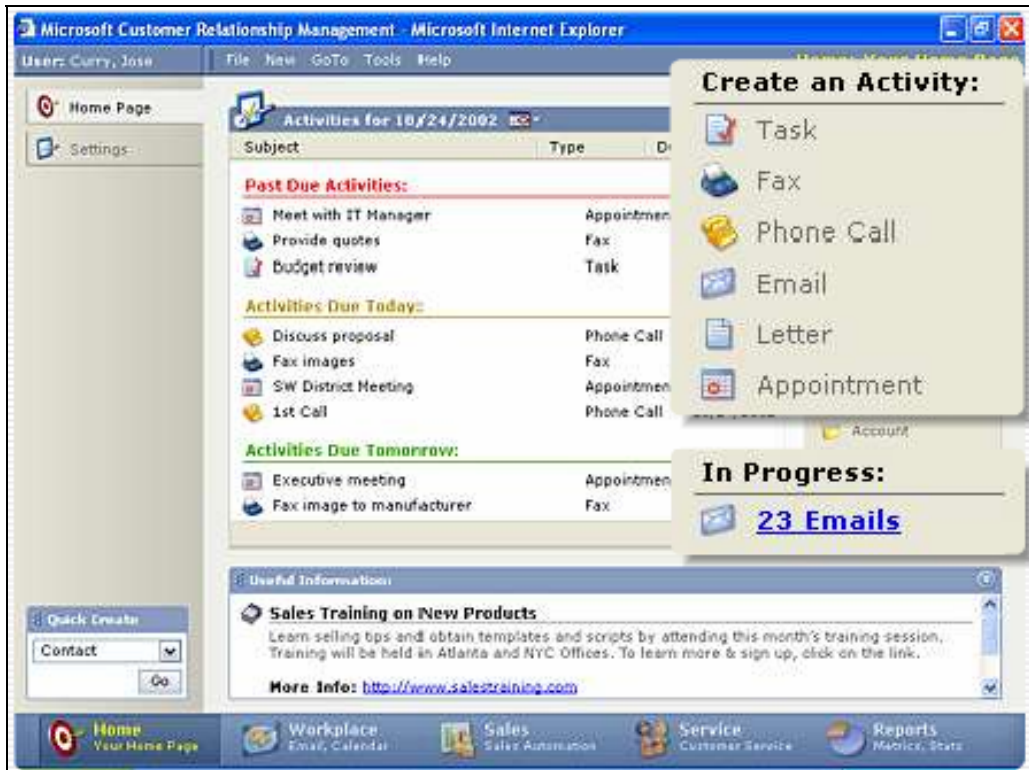
According to Microsoft, the key benefits of Microsoft CRM are as follows:

1. Works with Outlook;
2. Accessible via the Web;
3. Works with many accounting systems including Great Plains, Solomon, Navision, and Axapta;
4. Designed to handle millions of transactions, therefore Microsoft CRM can scale up to meet the needs of larger companies;
5. Microsoft CRM also includes reporting tools for forecasting and measurement of business activity and employee performance;



6. Configure workflow rules to free employees from administrative tasks;
7. Tailor forms to capture the data you need;
8. Customization - Enhance existing functionality, build custom vertical solutions, integrate to third-party applications, and extend the solution to Web services platforms.
9. Browser-based interface allows customizations to be published to the entire system in a single upload, with no need to reconfigure individual desktops or laptops.
10. Microsoft CRM customizations carry forward with future upgrades.

**Forms & Views** – Users can add new fields to the Microsoft CRM database to fit the data needs of a specific industry or business. Users can also customize any form within Microsoft CRM—accounts, contacts, opportunities, cases, orders, etc. Users can modify information views so that they see the desired critical information at a glance and sort data across records according to specific business needs. Users can create custom templates for mail merge, e-mail, knowledge base articles, and quotes, to achieve consistent customer communication.



With Microsoft CRM, it is possible to automate business processes. For example, users can set up and modify rules that automate leads routing and notifications, opportunity and pipeline management, case management, and data transfer to other applications. Users can also employ workflow rules or build sales methods to automate stages in the selling process. It is possible to create customized e-mails and set up rules for automatic order fulfillment notification, leads and opportunity follow-ups, service requests follow-ups, etc.

Microsoft CRM's advanced customizations allow users to build customized integrations with third-party business solutions, using BizTalk Server technologies. Users can also extend the solution to Web services—for example; automatically perform credit checks whenever new opportunities are created in Microsoft CRM. A summary listing of all Microsoft CRM Sales Features found in the Professional Edition are presented below:

Lead management	Opportunity management	Correspondence/mail merge
Lead routing	Calendar	Work flow
Notes and attachments	Sales process management	Activity and task management
Product catalog	Customization tools and utilities	Quotes, orders, invoices
Direct e-mail	Quotas	Territory management
Sales literature	User and business management	Competitor tracking
Account and contact management	Integration to MBS Financial	Reports
	Solutions	

Presented below is a quick reference to the Microsoft CRM features as found on the sales screen.

**Using Microsoft CRM in Outlook**

### The Outlook Bar

Annotations for Outlook Bar:

- Access the CRM modules (points to CRM (Homepage))
- View or create sales leads (points to Leads)
- View or create accounts (points to Accounts)
- View or create competitors (points to Competitors)
- Scroll down for Sales Literature, Activities, Quotes, Orders Invoices or Online Services (points to bottom of bar)

### The Folder List

Clicking on Microsoft CRM in the folder list displays the CRM Home Page.

### Contents

<b>Using Microsoft CRM in Outlook</b>	<b>1</b>
The Outlook Bar	
The Folder List	
Outlook CRM Toolbar	
<b>The CRM Process</b>	<b>2</b>
<b>Working with Leads</b>	<b>2</b>
The Leads Page	
Advanced Find Information Cards	
<b>Tracking Opportunities</b>	<b>4</b>
Converting Leads	
Calculating Value	
<b>Working with Quotes</b>	<b>5</b>
Producing a Quote	
Activating a Quote	
Sending a Quote	
<b>Closing the Sale</b>	<b>6</b>
Creating an Order	
Closing a Quote	
Closing an Opportunity	

A quick self-running demonstration of Microsoft CRM (shown below) is available here:  
[http://www.microsoft.com/BusinessSolutions/content/demos/MSCRMdemos/full\\_demo.htm](http://www.microsoft.com/BusinessSolutions/content/demos/MSCRMdemos/full_demo.htm)

