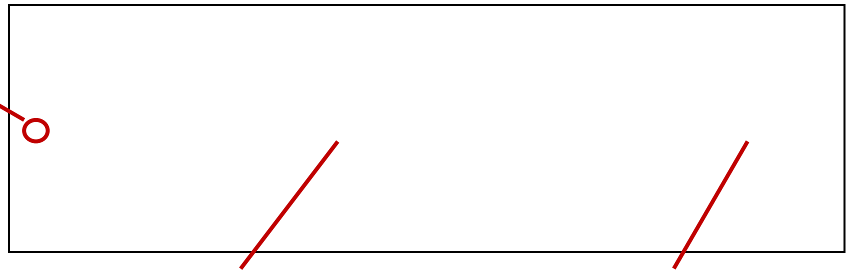
WHAT IS CRM?	Customer Relationship Management (CRM) is an application that manages customer interactions in Sales, Marketing, and Customer Service.
LOGGING IN	Access CRM Web client at http://... /. Access CRM via Microsoft Outlook via the CRM tab, File menu, or Ribbon. See *CRM Via Outlook Navigation*.
WORKING WITH DASHBOARDS The Dashboard serves as the Home page with quick access to common tasks and information. You can create your own dashboard and set a default dashboard.	**Creating a Dashboard** 1. Click **Microsoft Dynamics CRM**, **Service**. 2. Click the **Service** drop-down menu, **Dashboards**. 3. Click NEW . 4. Click a **layout**, **Create**. 5. Type a **name**. 6. Click ••• to rearrange the width or height of a component. 7. Click CHART to insert a chart. 8. Click LIST to insert a list. 9. Click **Save**. **Setting the Default Dashboard** 1. Click **Microsoft Dynamics CRM**, **Service**. 2. Click **Service**, **Dashboards**. 3. Click **Dashboards** drop-down list, choose **dashboard**. 4. Click SET AS DEFAULT. **Note**: Don't see *Set As Default*? Click **Settings** (upper-right), **Options**. Choose **Default based on user role** from the *Default Pane* drop-down list, click **OK**.

CRM WEB CLIENT NAVIGATION

Views

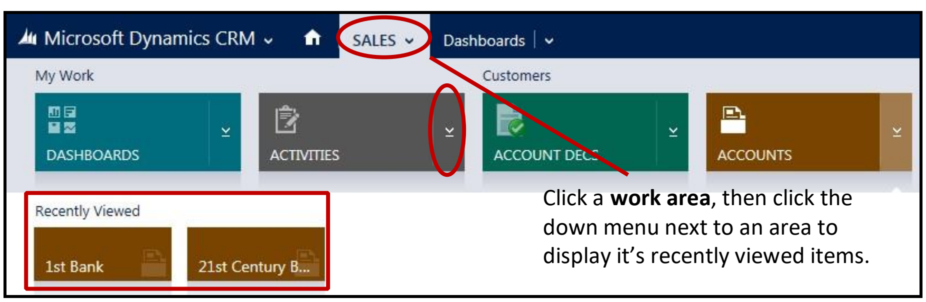
Click to pin your favorite view.



Change views by clicking the **Active Accounts** drop-down menu and choosing your view.

Instantly search for records by typing your search here

Recently Viewed



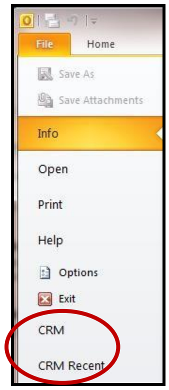
CRM VIA OUTLOOK NAVIGATION

CRM Tab

Click **CRM Activity** to create a task, phone call, email, appointment, or Call Report.

Click **CRM Record** to access accounts, contacts, cases, Sales Worksheets, Opportunities and more.

File Menu

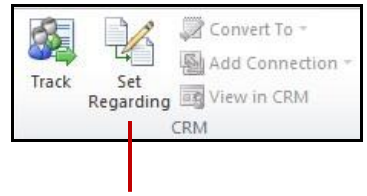


Choose **CRM** to set your Personal Options, synchronize records, go offline, import contacts, manage records, and sign out of CRM.

Choose **CRM Recent** to choose from a list of recently used records.

Ribbon Toolbar

If



you have an email you want to attach to a CRM record (e.g., Account), highlight the email, then click **Set Regarding**.

WORKING WITH ACCOUNTS

Create accounts to keep track of the companies and vendors you work with.

Accessing Accounts

1. Click **Microsoft Dynamics CRM**, **work area**, e.g., Sales.
2. Click **work area's** drop-down menu, **Account DECs**.
3. To find a specific account, type the account name in the *Search for records* text box, then click the **magnifying glass**.

Creating Accounts

1. Complete steps 1-2 under *Accessing Accounts*.
2. Click **+ New**.
3. Click  in the blank fields to enter the contact information. * = required.
4. Click **Save** (lower-right corner or upper-left corner).

Creating a Location DEC

1. Click **Microsoft Dynamics CRM**, **Sales**.
2. Click the **Sales** drop-down menu, scroll to and click **Location DECs**.
3. Click **+New**.
4. Enter the known and required information. * = required
5. Click **Save**.

WORKING WITH CONTACTS Create contacts to track the people you work with. **Accessing Contacts** 1. Click **Microsoft Dynamics CRM**, **work area**, e.g., Sales. 2. Click **work area's** drop-down menu, **Contact DECs**.	**Creating Contacts** 1. Complete steps 1-2 under *Accessing Contacts*. 2. Click **+ New**. 3. If you are adding the new contact to a new account, leave *Adding to a New Account*. If you are adding the new contact to an existing account, click **Adding to a New Account** to change it to *Adding to an Existing Account*. 4. Click in the blank fields to enter the contact information. * = required 5. Click **Save** (lower-right corner or upper-left corner). **Updating Contacts** 1. Complete steps 1-2 under *Accessing Contacts*. 2. Double-click a **contact** to open it. 3. Click **New** in the *New or Update* field to change to *Update*. 4. Make changes to contact. 5. Click **Save** (lower-right corner or upper-left corner).
WORKING WITH ACTIVITIES (i.e., tasks, phone calls, emails, appointments, or Call Reports) **Accessing Activities** 1. Click **Microsoft Dynamics CRM**, **work area**, e.g., Sales. 2. Click **work area's** drop-down menu, **Activities**. 3. Double-click **activity**.	**Creating an Activity** To create a task, phone call, email, appointment, or Call Report: 1. Click **+ Create** at the top of any view, desired **activity**. 2. Enter/specify information in displayed dialog box. 3. Click **Save & Close**. **Closing an Activity** 1. Complete steps 1-2 under *Accessing Activities*. 2. Select the activity to close and click ••• . 3. Choose **Mark Complete**.
WORKING WITH CASES Create cases to track customer issues and requests. **Accessing Cases** 1. Click **Microsoft Dynamics CRM**, **work area**, e.g., Service. 2. Click **work area's** drop-down menu, **Cases**.	**Creating a Case** 1. Click **+ Create** at the top any screen, **Case.** 2. Enter/choose the known case details. • Choose a customer to which you want to assign the case by clicking in the *Customer* field. • The case will automatically be assigned to you. To assign to others, click in the *Assign to Others* field, then click **Look Up More Records**. Select the additional user and click **Add.** 3. Click **Save**. **Resolving a Case** **Note**: All activities must be closed. 1. Access cases: double-click the **case** you want to resolve. 2. Click **Resolve Case**. 3. Choose **Resolution Type**. 4. Type **Resolution** description. 5. Choose **Billable Time**. 6. Type **notes** in *Remarks* text box. 7. Click **Resolve**.

WORKING WITH OPPORTUNITIES
(i.e., lead ready to buy)

Accessing Opportunities

1. Click **Microsoft Dynamics CRM**, **Sales**.
2. Click **Sales** drop-down menu, **Opportunities**.

Creating an Opportunity

1. Complete steps 1-2 under *Working with Opportunities*.
2. Click **+New**.
3. Enter/specify known and required information.
4. Click **Save**.

Closing an Opportunity as Won or Lost

1. Complete steps 1-2 under *Working with Opportunities*.
2. Double-click the **opportunity** you want to close.
3. Click **Close as Won** or **Close as Lost.**
4. Choose a **Status Reason** from the drop-down list.
5. Type the **Actual Revenue** amount in the text box.
6. Enter a **Close Date** for the opportunity in the text box or click the **calendar** icon to choose a date.
7. Optionally, click the **magnifying glass** in the *Competitor* field to choose a competitor.
8. Click **OK**.

RUNNING REPORTS

Reports vary depending on the customer. If a record has reports associated with it, the Run Report option will be available.

Click **Run Report** within a record to display report options, then click the desired **report**.

EXPORTING DATA TO EXCEL

Export to Excel is available in View mode (i.e., a record is not selected).

Exporting Data to Static Worksheet

1. Click **Export to Excel.**
2. Select **Static worksheet with records from this page**. Select the **Make this data available for re-importing…** check box if you are exporting the data to make changes and import it back into CRM.
3. Click **Export**.
4. To view the static worksheet, click **Open**.
5. Save the exported data to a file.