



Introducing Microsoft Dynamics CRM 4.0

Microsoft Dynamics CRM 4.0 business software is a complete customer relationship management (CRM) solution that provides the capabilities that organizations need to gain and retain competitive advantage in today's business world.

Microsoft relies on customers to guide product evolution. To this end, the Microsoft Dynamics CRM team spent significant time listening to customers and observing how they use CRM. The results of this research have helped us bring our customers Microsoft Dynamics CRM 4.0. Here's a quick look at the latest Microsoft Dynamics CRM features.



Why CRM 4.0?

Business moves at light speed today, requiring that every company continuously reexamine direction, strategies, suppliers, partners—literally every variable and relationship that might lead to complacency. The intensified search for competitive advantage may mean that some of your best customers pick up and leave without you ever knowing that there was a problem. How well can you react to—and even predict—ever-shifting customer needs and competitor moves?

Infuse your organization with new levels of customer intelligence using Microsoft Dynamics CRM version 4.0, an all-new customer relationship management (CRM) system that gives every customer-facing employee the information they need to truly impress customers. With Microsoft CRM, you can create a centralized repository of customer data that sits neatly alongside Microsoft Office and Microsoft Office Outlook—the applications your employees probably use every day. From Outlook, employees access Microsoft CRM sales, marketing, and customer service modules to make sales decisions, market products, solve problems, and get strategic views of the business. It's CRM that works—and works very well—because it works the way your users already do, works the way your business already does, and works the way technology should.

Works the way you do

Microsoft CRM is quite simply the fastest and easiest way to add CRM capabilities to any organization that uses Microsoft Office or Outlook. Because it was designed to partner with Outlook, Microsoft CRM delivers lower training costs, broader user adoption, less application-switching, higher productivity, and an incredibly rapid return on investment.

Microsoft CRM can give your employees direct access to customer information through Microsoft Outlook or Microsoft Outlook Web Access (OWA), enabling access to the information they need when they need it, in the office or on the road. Microsoft CRM lets you work the way you want to work with features such as:

- Tight integration with Microsoft Office and Outlook, allowing employees to easily pull information from Microsoft CRM into Office applications such as Microsoft Excel spreadsheet software and Word.

- Quick and easy access to your data through context-sensitive information for populating forms or taking next steps without changing screens.
- Customized workspaces that allow users to create, save, and reuse favorite views of customer data without the distraction of unneeded information.
- Service Calendar that allows service schedulers and dispatchers to schedule activities by resource, time, or service.
- Powerful reporting and analysis tools that make it easy to identify opportunities and problems at a glance.
- Great mobile support that allows field workers to get instant access to customer data from any personal digital assistant (PDA), laptop, or browser.

Works the way your business does

Microsoft CRM not only slips right into your employees' lives without disruption, it also adapts easily to your existing business workflow and processes. You or your information technology (IT) partner can quickly modify application forms, data fields, and relationships and add new activities and objects without writing a single line of code. This makes it easy to tailor Microsoft CRM to suit your needs and fit your business like a glove. You'll also find a number of elegant workflow innovations that speed use, including next-step suggestions and automatic task assignment. Microsoft CRM also includes capabilities such as:

- A new marketing automation module that makes it easy to build customer or lead lists, create targeted marketing campaigns, track the progress of those campaigns, and follow up on campaigns.
- Quick Campaign wizard that allows marketers and salespeople to send out e-mail blasts to targeted lists and track response.
- Service scheduling that allows you to centrally manage all aspects of a service request, from logging and dispatching to tracking and follow-up.
- Easy customization of Microsoft CRM to your business workflow by adding custom objects and activities, designing custom views for different users, and building business logic into the CRM so that Microsoft CRM automates repetitive tasks, tells users next steps, sends e-mails, and raises alerts for open items—nothing falls through the cracks, giving your customers a better experience.
- Flexible reporting that enables managers to easily see how your business is doing—CRM data can be transferred into Microsoft Excel for analysis or into Microsoft SharePoint Portal Server for updating executive dashboards or collaborating on customer-related documents.

Works the way technology should

Microsoft CRM works the way your IT staff wants it to because it's based on proven, industry-standard Microsoft technology that's easy to learn and work with. You'll enjoy a rapid, low-cost deployment; low support costs; and easy scalability as your business grows. IT-friendly features include:

- Easy to modify forms, data fields, and information relationships so that users can get the customized information they need.

- Streamlined installation diagnostic tools that reduce setup time and help ensure a successful deployment of Microsoft CRM.
- Fast data searches across large volumes of customer data that help users find the information they need.
- Easy to use step-by-step Microsoft Exchange Connector Deployment Wizard that simplifies Microsoft CRM integration with Microsoft Exchange and Outlook.
- Simple and fast connectivity to external data sources that gives users access to relevant information.
- Advanced management and notification tools that are centralized and give the IT staff the right information to manage a CRM system.

Greater support for global business

Many companies require the ability to work in multiple languages and currencies whether globally or within their own geographical area. The Microsoft Dynamics CRM 4.0 client provides improved support for multiple languages and currencies, making multinational deployments for Microsoft Dynamics CRM much easier.

Flexible hosting scenarios with multi-tenant installations

Many CRM scenarios require an organization to support multiple groups of CRM software users while keeping their data distinct. For example, a hosting company may have multiple customers using Microsoft Dynamics CRM, or a company with an affiliate model might require each affiliate to keep their data separate from the others. Because Microsoft Dynamics CRM 4.0 supports multiple instances of the product installed on the same physical hardware, multiple customers or business organizations can have their own distinct Microsoft Dynamics CRM implementation. This not only makes it easier to manage those customers, it makes better use of server hardware and improves overall operations costs. With Microsoft Dynamics CRM 4.0, which is built on a multi-tenant architecture, organizations can run multiple distinct instances of Microsoft Dynamics CRM on a single server.

Improved availability, performance, and scalability

Businesses want their CRM data accessible 24 hours a day, 7 days a week. Microsoft Dynamics CRM 4.0 includes significant enhancements to availability, performance, and scalability to ensure that your CRM data is available when it's needed, without interruption.

Microsoft Dynamics CRM 4.0 supports clustering for solution components including Microsoft Exchange Server, CRM Web Services, and load balancing. The e-mail router has received several performance and scalability enhancements, including parallel processing of inboxes and better support for enterprise deployment scenarios. Microsoft Dynamics CRM 4.0 also has better performance in Wide Area Network (WAN) environments, transferring only the data that needs to be transferred over slow connections. With support for SQL Server mirroring, an additional copy of the Microsoft Dynamics CRM database is maintained, so that in case of database failure, the Microsoft Dynamics CRM system can switch databases automatically and with minimal disruption.

Microsoft Dynamics CRM 4.0 has brilliant new features and functionality:

Outlook Client Enhancements:	New Reporting and Configuration Features:	New Workflow Features:
<ul style="list-style-type: none"> • Tracking token in the subject line...gone! And still tracks emails. • Configuration Wizard • Office UI enhancements • Outlook Diagnostics Tool • Mail Merge enhancements • Sync Performance enhancements • Outlook sync: phone calls, letters, faxes • Bulk Tracking of e-mails and contacts • Users of Microsoft Office OneNote can now take notes created in OneNote and assign them to Microsoft Dynamics CRM users with a single click. 	<ul style="list-style-type: none"> • New Integration Architecture • New Security Options for Reports • All 3.0 reports upgrade to new security model • End user reporting wizard • Multiple Entity fields available on views and Advanced Find • Support for many to many relationships and one to one relationships • Expanded support for configuration against system entities 	<ul style="list-style-type: none"> • Workflow toolset part of web based application User Interface (UI). • Personal Workflows (i.e. end users can create workflows). • Richer Workflows - more events, entities, relationships, flow control, records, dynamic expressions and processes • Contextual visibility. Drill down from entities to the actual workflow. • Workflow data available for reporting, advanced find, and export to excel • Leveraging Windows Workflow Foundation Services

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