

# HOW TO GET THE MOST FROM YOUR MICROSOFT DYNAMICS CRM TRIAL

A Quick Guide Demonstrating the Basics of Microsoft  
Dynamics CRM to Optimise your Trial Experience

A Caltech CRM Publication

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## IS THIS BOOK RIGHT FOR ME?

Is this e-book right for you? CRM solutions can be confusing and we want everyone to get the most from our material. See below definitions to find out if your level matches the content you are about to read.

**Introductory** ← *This EBook!*

Introductory content is for anyone who is new to Customer Relationship Management (CRM) solutions. Also suitable for those wanting to know more about the principle of CRM solutions beyond basic contact management, and why CRM can be matched to processes and strategies.

### Intermediate

Intermediate content is for those people who may be using CRM solutions and have an understanding of how they work. This content is also suitable for those who understand many to many relationships, and how powerful CRM strategies can be when they are working in alignment with organisational goals and processes.

### Advanced

Advanced content is for those who want to do more with CRM solutions beyond contact management. You will have a strong understanding of CRM solutions and how many to many relationships can propel compelling benefits, and enable processes to be more efficient. You will understand some technical elements of the solutions and integrating them across disparate systems.

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## HOW TO GET THE MOST FROM YOUR MICROSOFT DYNAMICS CRM TRIAL

By Catherine Carlyle



Catherine helps new clients gain an understanding of CRM, and ensures they have everything they need to start using a CRM solution that delivers tangible benefits.

Catherine is the marketing manager at Caltech IT Limited (Caltech CRM) and she creates and manages content about CRM for Caltech CRM. She is also one of the first people you will speak to when looking to work with Caltech CRM.

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## Welcome to your Microsoft Dynamics CRM Trial



Here at Caltech IT Limited (Caltech CRM), we help our clients get the most from their [Microsoft Dynamics CRM](#) software.

We are passionate about making CRM effective and realising benefits for our clients. This e-book sets out to help anyone evaluating Microsoft Dynamics CRM in a trial environment, to get the optimum experience of the trial and the software capabilities.

Microsoft Dynamics CRM is a powerful CRM solution so when you first receive a trial of the software it can be confusing where to start. Your organisation has its own processes and Microsoft Dynamics CRM out of the box may not use your terminology – but don't worry. Microsoft Dynamics CRM is a very flexible system and can be used to manage anything!

Trialling CRM software can sometimes be difficult. Where do you start? What features should you use first? How do you get help? This e-book sets out the basics of Microsoft Dynamics CRM and how to get the most from your trial.

## Choosing Microsoft Dynamics CRM

Choosing the right CRM solution for your organisation can be very confusing. Choosing the wrong CRM solution for you can be expensive and time consuming. However get the right CRM solution, and your business will gain powerful strategic competitive advantage.

Customer Relationship Management (CRM) is many different things to many different people. More recently Microsoft have coined a term “XRM” – Anything Relationship Management. This is because today CRM is really about getting the right information, to the right person, at the right time – and that information can be anything.

CRM in its purest sense (out of the box) will manage leads, prospects, opportunities – sales, marketing and customer service. Refined it can manage anything. [This short video](#) is a great example of XRM.

You have your trial of Microsoft Dynamics CRM and you want to get the most from it. The first steps we recommend would be to ensure you see this CRM evaluation as a business strategy. It really is all about processes and how you do things in your organisation. Microsoft Dynamics CRM then allows these processes to be facilitated, extended and optimised – to leave you with a system that allows your organisation to do more for less.

Out of the box, Microsoft Dynamics CRM may not do what you need and the terminology may make little sense to you, the way you work and the words you use. As Microsoft Dynamics CRM is so flexible tailoring it to fit your needs is achievable.

When you evaluate Microsoft Dynamics CRM in this trial environment, we recommend that you review our [Top 10 Mistakes you don't want to make](#) in the first instance.



## Basics of Microsoft Dynamics CRM

Now you have your processes mapped out and you know where you want a CRM solution to make a difference, you are ready to start thinking about getting into your Microsoft Dynamics CRM trial.

To help get you started with Microsoft Dynamics CRM, Microsoft have added trial facilities to all trial accounts. You will see friendly welcome messages and short videos where you can find out more about each entity (areas / folders) of CRM. These are a great way to quickly learn how to complete key tasks.

Microsoft Dynamics CRM has a similar interface consistent in all Microsoft office products. This means that the software will feel familiar to engage your users across the organisation.

When you first log into your Microsoft Dynamics CRM trial you will see lots of features, graphs, dashboards, pipelines and a button “get Microsoft CRM for Outlook”... Do remember this is out of the box and may be a starting point for your organisation, it won’t be the refined solution that you may need.

Look at the funnel sales pipeline for example. It has coloured sections that resemble stages within a sales process. However this is using the sample data and to ensure that CRM is working effectively for you, you may need to mould Microsoft Dynamics CRM to your specific needs – but don’t worry its truly flexible!

## Leads

The first thing we would recommend for most organisations is to start in the leads entity.

The terminology “Leads” in Microsoft Dynamics CRM are those people who you have knowledge of. They may have asked about your products or services, you may be marketing to them. They are people who have shown an interest.

Phil Callaghan MD of Caltech CRM has produced a [step by step guide](#) to using Leads in Microsoft Dynamics CRM.

## Opportunities / Accounts and Contacts

Following creating the Leads you will want to “qualify” that Lead to progress them down your sales process. To do this you will qualify the Lead. Again [see this step by step](#) video.

### Accounts

Accounts are companies or organisations. You can get to the account records through the following entities; Marketing, Service and Sales. The general tab holds information about the account such as company name, telephone number etc. The administration tab stores financial, marketing and other information. The Owner field is automatically filled in with the name of the person who entered the information, but you can reassign the record to another user to own that record. Learn how to assign and share data [here](#).

- To find accounts you can enter the first few letters of that account within the search field. This function isn't case sensitive.
- Enter part of the account name preceded or followed by an asterisk \*.
- Click a letter of the alphabet at the bottom of the grid and you can then go through the companies that begin with that letter.

### Contacts

Your contacts hold lots of information about each person this can be linked to a Parent Organisation. The contacts entity can be interrogated in the same way as the accounts entity.



## Advanced Finds

Advanced find will help you to locate one account quickly, or several accounts based on specific search criteria. For example you can find records by name, city, etc. Advanced Finds allow you to query your data and have specific views to help you work more effectively.

## Workplace

The workplace tab will show you the tasks that you have to achieve, with reminders and notes.

## Involve your Colleagues

CRM will encompass the whole of your organisation. Lots of different teams will be using the solution for lots of different purposes. Your trial system can allow multiple users. Caltech CRM recommends you choose a champion from each team who is able to trial the system for their own role and to ensure the functionality will address their needs and goals.

## Personalise Microsoft Dynamics CRM

Microsoft Dynamics CRM is extremely flexible. Caltech CRM works with its clients to ensure an optimised implementation and therefore a system that works. Caltech CRM specialises in customising CRM. However, there are times when you will need to personalise your solution yourself.

[This video](#) allows you to personalise your experience to suit individual roles and work styles.

## Reporting in Microsoft Dynamics CRM

Dashboards are a very important feature and will empower your users or managers to find out if they are achieving their goals, and the goals of the organisation. [See this video](#) that Microsoft have produced around the reporting function.

## Get Microsoft Dynamics CRM for Outlook

When you first log into your trial you will see a button “Get Microsoft CRM for Outlook.” Microsoft Dynamics CRM can be used directly from Microsoft Outlook and we would recommend you do trial this feature as it’s very popular with users.

By clicking the button an automated installation will start. Once this install is completed you will be able to see all your Microsoft CRM information from Outlook. This will appear as folders on the left hand side of the screen. If you alter records here they will also be altered in the web client of your Microsoft CRM trial. Any record that is synchronised in Outlook is also available on web enabled mobile devices such as BlackBerry, iPhone and Windows phones.

## How to get Help?!

At any time during your trial you can get help using one of the three options:

Review the videos  
embedded in your  
Microsoft CRM Trial

Contact Caltech CRM  
for guidance or help  
[george@caltech.co.uk](mailto:george@caltech.co.uk)  
01924 507 280

Refer to this guide or  
use a book such as  
Microsoft Dynamics  
CRM for Dummies

Microsoft Dynamics CRM is a great solution with lots of features. It is constantly being improved and more functionality added. With over 3,000,000 users and 33,000 Microsoft CRM sites, it’s a popular and affordable choice. But don’t take our word for it – [see what the analysts say!](#)

Thank you for reading our e-book. If you want to know more about Microsoft Dynamics CRM, how it can optimise your processes and ensure you are getting value from your software, email us at [george@caltech.co.uk](mailto:george@caltech.co.uk), we would love to talk through your requirements.



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