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Step by Step

Microsoft Dynamics® CRM 2011

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Mike Snyder, Jim Steger, and Brendan Landers

Microsoft Dynamics® CRM 2011

Step by Step

Mike Snyder
Jim Steger
Brendan Landers

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Introduction

Welcome to *Microsoft Dynamics CRM 2011 Step by Step*! Most likely, your organization has implemented—or is considering implementing—a Microsoft Dynamics CRM system, and you're ready to learn more about what the software can do.

Whether you're a sales associate following up with your top accounts, a marketing professional reaching out to prospects and customers, a customer service representative resolving customer requests and issues, or an executive manager seeking to analyze and understand all of your organization's customer interactions, Microsoft Dynamics CRM can help you do business better.

The intent of this book is to show you how to use key features in the software to understand your customers better, increase sales and productivity, and improve customer satisfaction. It's important to note that Microsoft Dynamics CRM allows administrators to easily customize the forms, fields, and other options in the software, so some of the names used in this book might not match your environment.

A Word About Sandbox Environments

If possible, ask your system administrator about setting up a second Microsoft Dynamics CRM environment—often referred to as a “sandbox environment”—that you can use to step through the exercises in this book. A sandbox environment allows you to modify records without affecting the data in your live system. Your organization might already have a staging or test environment you can use.

About the Examples in This Book

The descriptions and procedures in this book are based on the default forms and views in Microsoft Dynamics CRM. As you'll learn in the chapters that follow, the software also offers several access options: CRM data can be accessed from a Windows Internet Explorer web browser, from Microsoft Outlook by using the Microsoft Dynamics CRM for Outlook feature, or from a mobile device such as a cell phone. Most of the screen shots and examples in this book show the web browser option.

Just like some of the forms, fields, and data described in this book, the security roles referenced throughout this book also might have been modified in or even removed from your system. If you do not have the access needed to view or assign security roles, talk to your system administrator about setting up a few roles for testing. For the purposes of this book, we assume that the default roles included with Microsoft Dynamics CRM have not been modified.

Looking Forward




Microsoft Dynamics CRM is a fluid system that can adapt as your business grows and changes. By using the step-by-step processes laid out in these pages, you can explore whatever options you need to match the software with your requirements. We hope you find this book useful and informative as your organization moves into the future!

Features and Conventions of This Book

This book has been designed to lead you step by step through all the tasks you are most likely to want to perform in Microsoft Dynamics CRM 2011. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to create and work with all of the common views and functionality of Microsoft Dynamics CRM 2011. However, each topic is self contained. If you have worked with a previous version of Microsoft Dynamics CRM, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

- **Detailed table of contents** Search the listing of the topics and sidebars within each chapter.
- **Chapter thumb tabs** Easily locate the beginning of the chapter you want.
- **Topic-specific running heads** Within a chapter, quickly locate the topic you want by looking at the running head of odd-numbered pages.
- **Glossary** Look up the meaning of a word or definition of a concept.
- **Detailed index** Look up specific tasks and features and general concepts in the index, which has been carefully crafted with the reader in mind.

You can save time when you use this book by understanding how the *Step by Step* series shows special instructions, keys to press, buttons to click, and other information. These elements are shown in the following table.

Convention	Meaning
 SET UP	This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise. It also indicates any requirements you should attend to or actions you should take before beginning.
 CLEAN UP	This paragraph following a step-by-step exercise provides instructions for saving and closing open files or programs before moving on to another topic. It also suggests ways to reverse any changes you made to your computer while working through the exercise.
1 2	Numbered steps guide you through hands-on exercises in each topic.
See Also	These paragraphs direct you to more information about a topic in this book or elsewhere.
Troubleshooting	This paragraph explains how to fix a common problem that might prevent you from continuing with an exercise.
Tip	This paragraph provides a helpful hint or shortcut that makes working through a task easier, or information about other available options.
Important	This paragraph points out information that you need to know to complete a procedure.
	The first time you are told to click a button in an exercise, a picture of the button appears in the left margin.
Ctrl+Home	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "press Ctrl+Home" means "hold down the Ctrl key while you press the Home key."
Program interface elements	In exercises, the names of program elements, such as buttons, commands, and dialog boxes, as well as files, folders, or text that you interact with in the steps, are shown in bold characters.
User input	In exercises, anything you are supposed to type appears in bold italic characters.

Using the Practice Files

Before you can complete the exercises in this book, you need to copy the book's practice files to your computer. These practice files, and other information, can be downloaded from the book's detail page, located at

<http://aka.ms/648906/files>

Important This website only includes practice files to help you learn Microsoft Dynamics CRM 2011; it does not include the Microsoft Dynamics CRM 2011 software. If you don't already have access to the software, you need to purchase it. Alternatively, you could also access a free 30-day trial of the software at <http://crm.dynamics.com>.

The following table lists the practice files for this book.

Chapter	File
Chapter 3: Working with Accounts and Contacts	Orders1.xlsx
Chapter 18: Bulk Data Importing	ContactImport1.csv

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Errata

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Getting Help with Microsoft Dynamics CRM 2011

If your question is about Microsoft Dynamics CRM, and not about the content of this Microsoft Press book, your first recourse is the Microsoft Dynamics CRM Help system. You can find general or specific Help information in a couple of ways:

- In the Microsoft Dynamics CRM window, you can click the Help button (labeled with a question mark) located in the upper-right corner of the web browser window to display the Microsoft Dynamics CRM Help window.
- On the ribbon, you can click the File tab to access the Help button.

Microsoft Dynamics CRM Help is context sensitive, so the software will automatically try to access the portion of the Help content that is most relevant to the page you're currently viewing. For example, if you're viewing a lead record and you click the Help button located in the upper-right corner of the window, Microsoft Dynamics CRM automatically directs you to the Help topic titled *Work With Leads*. If you want to access the full Help documentation, you can click the File tab on the ribbon to access the Help button on that screen. After you click the Help button, click Contents on the submenu that appears.

If you want to practice getting help, you can work through the following exercise, which demonstrates two ways of locating information.

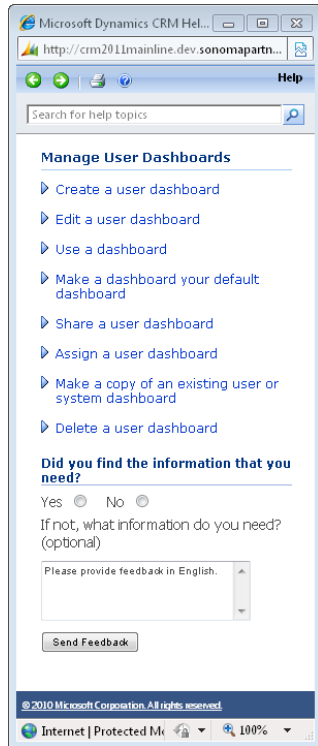


SET UP Use the Windows Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website.



1. In the upper-right corner of the Microsoft Dynamics CRM application, click the **Help** button.

The Microsoft Dynamics CRM Help menu opens. Microsoft Dynamics CRM Help displays a list of topics related to the page from which you started the Help process.



You can click any topic to display the corresponding information.



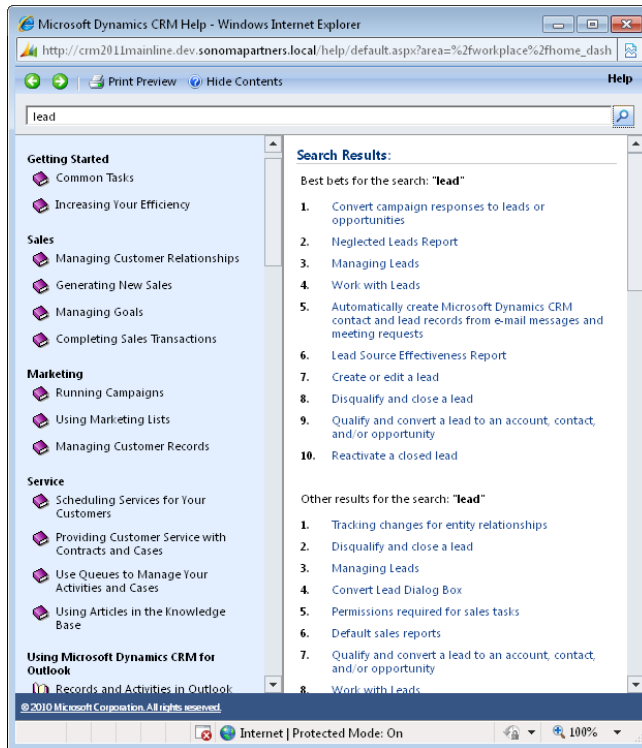
2. On the toolbar, click the **Show Contents** button. This button looks identical to the **Help** button.

The table of contents appears in the left pane, organized by category, like the table of contents in a book. Clicking any category (represented by a book icon) displays that category's help topics.



3. In the **Contents** pane, click a few categories and topics. Then click the **Back** and **Forward** buttons to move among the topics you have already viewed.
4. At the top of the **Microsoft Dynamics CRM Help** window, click the **Search for help topics** box, type **lead**, and then press the Enter key.

The Microsoft Dynamics CRM Help window displays topics related to the words you typed.



✕ CLEAN UP Close the Microsoft Dynamics CRM Help window.

More Information

If your question is about Microsoft Dynamics CRM or another Microsoft software product and you cannot find the answer in the product's Help system, please search the appropriate product solution center or the Microsoft Knowledge Base at:

<http://support.microsoft.com>

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

<http://support.microsoft.com/gp/selfoverview/>

You can also click the Resource Center link, typically found at the bottom left of the Microsoft Dynamics CRM application. Or you can access the same information via the Internet at:

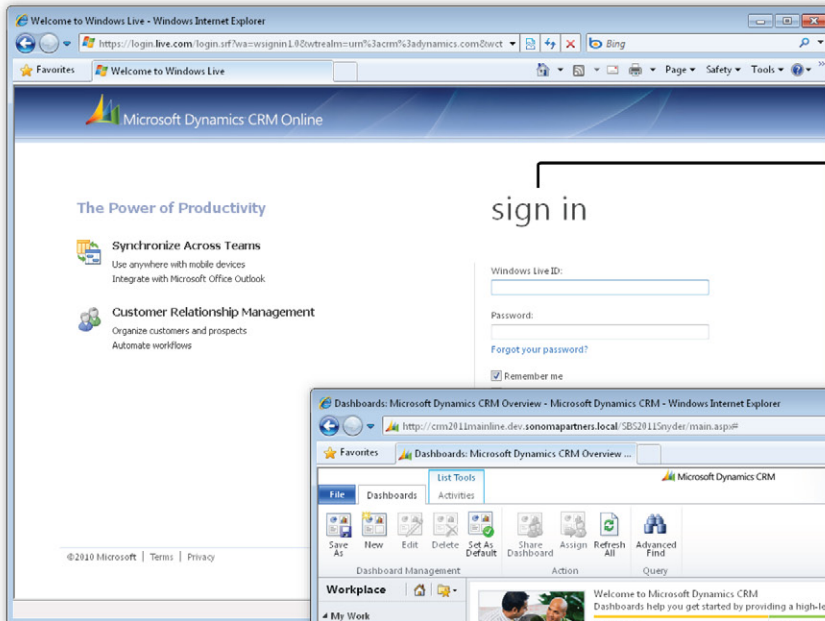
<https://rc.crm.dynamics.com/rc/2011/en-us/online/default.aspx>

Part 1

Overview

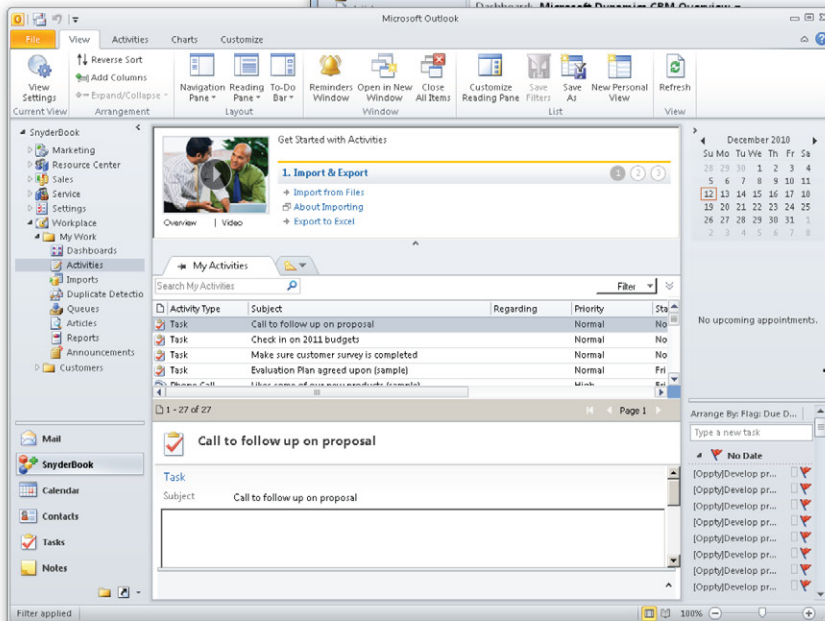
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3	Working with Accounts and Contacts	45
4	Working with Activities and Notes.	67
5	Using Microsoft Dynamics CRM for Outlook	95

Chapter at a Glance



Log on to Microsoft Dynamics CRM Online, **page 9**

Get started in Microsoft Dynamics CRM Online, **page 9**



Access Microsoft Dynamics CRM within Outlook, **page 13**

1 Introduction to Microsoft Dynamics CRM

In this chapter, you will learn how to:

- ✓ Understand key concepts in Microsoft Dynamics CRM.
 - ✓ Understand the three deployment models for Microsoft Dynamics CRM.
 - ✓ Understand how other Microsoft software products integrate with Microsoft Dynamics CRM.
 - ✓ Log on to Microsoft Dynamics CRM Online.
 - ✓ Log on to Microsoft Dynamics CRM.
 - ✓ Access Microsoft Dynamics CRM by using Microsoft Dynamics CRM for Outlook.
 - ✓ Log on to Microsoft Dynamics CRM via Mobile Express.
-

Every successful organization relies on its customer base to sell products or services. Businesses that want to track and manage all of the various interactions with their customers frequently deploy a Customer Relationship Management (CRM) software system. With a CRM system, businesses can:

- Achieve a 360-degree view of the customer relationship.
- Automate common business processes to reduce manual tasks and common workflows.
- Deliver a more consistent customer experience by streamlining customer interactions.
- Enable executives to measure and report on key metrics related to their business so they can make better business and strategy decisions.

CRM software systems have been in existence for many years, but most of them earned a reputation for being difficult to use. Microsoft Dynamics CRM addresses the problems of previous CRM systems by providing an easy-to-use software application while still providing the flexibility and the technical platform that most businesses require. Microsoft Dynamics CRM works with most of the software products that businesses use today, such as Microsoft Outlook, Microsoft Word, and Microsoft Excel. Users do not need to learn a new software application to capture and work with Microsoft Dynamics CRM data; they can continue using the productivity tools they are comfortable using for other day-to-day business functions. The latest version of Microsoft Dynamics CRM includes new features such as visualizations and a revamped user interface designed to make the end-user experience as friendly as possible.

In this chapter, you will learn the core concepts of Microsoft Dynamics CRM. You'll also learn the different ways you can access Microsoft Dynamics CRM and other Microsoft products that integrate with Microsoft Dynamics CRM.

Tip Many of the examples in this book use the sample data utility that Microsoft Dynamics CRM includes. You do not need to use this sample data, but you might find it useful for your training or testing purposes. Contact your system administrator to install the sample data.

Practice Files There are no practice files for this chapter.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows 7 user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, refer to the “Information for Readers Running Windows XP” section at the beginning of this book.

Important The images used in this book reflect the default form and field names in Microsoft Dynamics CRM. Because the software offers extensive customization capabilities, it's possible that some of the record types or fields have been relabeled in your Microsoft Dynamics CRM environment. If you cannot find the forms or fields referred to in this book, contact your system administrator for assistance.

Important You must know the location of your Microsoft Dynamics CRM website to work the exercises in this book. Check with your system administrator to verify the web address if you don't know it.

What Is Microsoft Dynamics CRM?

Microsoft Dynamics CRM is a business software application that allows companies of all sizes to track, manage, and report on customer interactions. Microsoft Dynamics CRM is part of the Microsoft Dynamics brand, which offers multiple software products to help businesses automate and streamline various operations, such as financial analysis, customer relationships, supply chain management, manufacturing, inventory, human resources, and so on.

Microsoft Dynamics CRM includes the following three main modules:

- Sales
- Marketing
- Service

Within each module, Microsoft Dynamics CRM lets you track various types of customer information, as outlined in the following table.

Sales	Marketing	Service
Accounts	Accounts	Accounts
Contacts	Contacts	Contacts
Leads	Leads	Service Calendar
Opportunities	Marketing Lists	Cases
Marketing Lists	Campaigns	Knowledge Base
Competitors	Products	Contracts
Products	Sales Literature	Products
Sales Literature	Quick Campaigns	Services
Quotes		Goals
Orders		Rollup Queries
Invoices		Goal Metrics
Quick Campaigns		
Goals		
Goal Metrics		
Rollup Queries		

Your company might want to track only some of this data about your customers, and some of these might not apply to your business. Even though Microsoft Dynamics CRM includes only these three modules, many companies extend the software to track other types of related data such as projects, status reports, events, facilities, and so on. The flexibility of the Microsoft Dynamics CRM platform allows businesses to capture almost any type of data related to their customers. In addition to managing customer data, you can use Microsoft Dynamics CRM to capture information about your prospects, partners, vendors, suppliers, and other related parties.

Tip When businesses use Microsoft Dynamics CRM to track non-traditional sales, marketing, and service information, you might hear people refer to the term xRM. This term refers to using the flexible and extensible application framework of Microsoft Dynamics CRM to create line-of-business applications. xRM is not a separate product but rather a description of how businesses might use the Microsoft Dynamics CRM system to track non-traditional CRM data.

Microsoft Dynamics CRM is a web-based application that is built on the Microsoft .NET Framework technology platform. Because of its native web architecture, Microsoft Dynamics CRM can be accessed through the Windows Internet Explorer web browser. In addition to the web user experience (also known as the *web client*), another possible access point for Microsoft Dynamics CRM is through Outlook, if your administrator installed the Microsoft Dynamics CRM for Outlook software on your computer.

Troubleshooting Because Microsoft Dynamics CRM for Outlook is optional software, you might not be able to access Microsoft Dynamics CRM through Outlook. If you are not able to use Microsoft Dynamics CRM for Outlook, contact your system administrator about getting it installed on your computer.

The Microsoft Dynamics CRM for Outlook software comes in two different versions:

- **Microsoft Dynamics CRM for Outlook** This version is designed for use with desktop or notebook computers that will remain connected to the Microsoft Dynamics CRM server at all times.

- **Microsoft Dynamics CRM for Outlook with Offline Access** This version is designed for users of laptop computers who must disconnect from the Microsoft Dynamics CRM server but who still need to work with Microsoft Dynamics CRM data when they are offline, just as they use Outlook for email management, contact management, tasks, and appointment management while working with no access to the Internet. The terms used by Microsoft Dynamics CRM to refer to the processes of connecting and disconnecting from the server are *going online* and *going offline*. The offline-enabled version of Microsoft Dynamics CRM for Outlook lets you work with Microsoft Dynamics CRM data offline; the software will synchronize your changes with the main database when you connect to the server again.

Tip When we refer to Microsoft Dynamics CRM for Outlook in this book, we are referring to both the standard and offline versions. The two clients offer nearly identical functionality except that the version with offline access allows users to work while disconnected from the Microsoft Dynamics CRM server.

You can access almost all of the Microsoft Dynamics CRM system functionality from either the web client or from Microsoft Dynamics CRM for Outlook. Therefore, you can decide which user interface method you prefer to use to access Microsoft Dynamics CRM. Microsoft Dynamics CRM for Outlook also allows you to synchronize your email, tasks, contacts, and appointments from Outlook into your Microsoft Dynamics CRM system.

Beyond the computer, you can also access Microsoft Dynamics CRM from a web-enabled mobile device such as a cell phone, by using the Mobile Express module. Mobile Express allows you to access the same data that you can access from the web and Microsoft Dynamics CRM for Outlook clients, but Mobile Express delivers streamlined and simple web pages that are specially formatted for handheld devices. This mobile access to Microsoft Dynamics CRM can prove very handy if you need to perform common tasks such as looking up a phone number or street address of a contact while you are away from your computer.

Important In order to access Microsoft Dynamics CRM via Mobile Express, your mobile device must have Internet access and Mobile Express must be enabled for your system.

Microsoft Dynamics CRM Deployment Options

Microsoft Dynamics CRM is unique in the world of customer relationship management because it is one of the only applications that offers businesses several choices for installing and deploying the software. The three deployment options for Microsoft Dynamics CRM are:

- **Microsoft Dynamics CRM Online** In this deployment, a business uses the Microsoft Dynamics CRM software over the Internet on servers hosted by Microsoft.
- **On-premise** With this option, a business purchases the Microsoft Dynamics CRM software and installs it on its local network. Depending on the configuration, employees might also be able to access the Microsoft Dynamics CRM system over the Internet.
- **Partner-hosted** For this option, a business deploys the software at a third-party hosting environment.

In early 2011, Microsoft released new versions of Microsoft Dynamics CRM across all three deployment models. This latest release is called Microsoft Dynamics CRM 2011 for on-premise and partner-hosted deployments, but it is simply named Microsoft Dynamics CRM Online for the Microsoft-hosted version. The system functionality across all three deployment options is nearly identical, but differences do exist. The examples in this book apply to all three deployment options. If necessary, we will highlight any areas of the software in which the book examples vary by deployment type.

Integrating with Other Microsoft Products

In addition to the integration with Microsoft Outlook discussed earlier in this chapter, Microsoft Dynamics CRM integrates with several other Microsoft software applications:

- **Excel** You can export your Microsoft Dynamics CRM data into Excel with the click of one button and create Excel files that dynamically update when data in the Microsoft Dynamics CRM system changes. After you export the data into Excel, you can also update the information within Excel and then re-import it back into Microsoft Dynamics CRM. Editing large data sets within Excel frequently provides a better user experience, because many users are very comfortable working with data in Excel.

- **Word** You can use Word to create mailings (such as letters and envelopes) to your customers by performing a mail merge in Microsoft Dynamics CRM. This integration also allows you to save copies of the mail merge documents.
- **Microsoft Lync (formerly known as Office Communications Server)** You can access features of Lync (such as instant messaging and presence information) directly within Microsoft Dynamics CRM to improve team collaboration.
- **Microsoft SharePoint Server** If your company uses SharePoint Server, you can connect it to Microsoft Dynamics CRM to take advantage of the document library functionality that SharePoint offers. This integration provides a streamlined user experience in which the user can perform common tasks such as checking documents in and out via the Microsoft Dynamics CRM interface (without needing to browse to a separate SharePoint website in a separate window).

Logging On to Microsoft Dynamics CRM Online

Before you can start using Microsoft Dynamics CRM, you will need to log on to the software. How you access Microsoft Dynamics CRM will depend on how your company chose to deploy the software. If you are unsure how to access your Microsoft Dynamics CRM system, contact your system administrator. In this exercise, you will practice logging on to Microsoft Dynamics CRM Online. In the next section, you will log on to the on-premise deployment of Microsoft Dynamics CRM through the web client. Select the exercise that matches your deployment model.

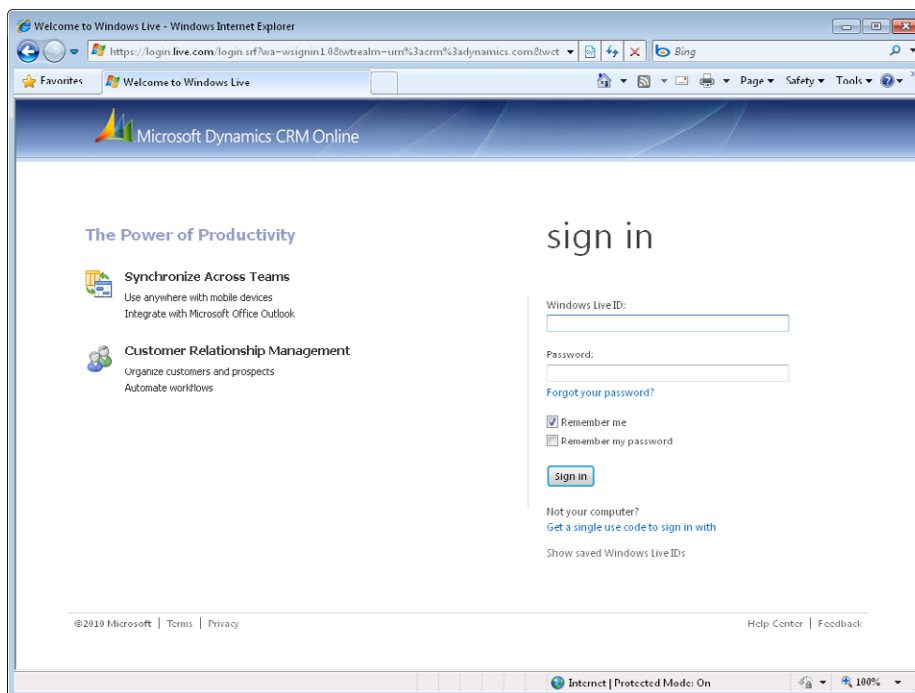
Tip The steps for accessing the partner-hosted deployment model of Microsoft Dynamics CRM are similar to those for accessing an on-premise deployment. If your organization has deployed the partner-hosted model, follow the steps in the on-premise exercise to log on to Microsoft Dynamics CRM.

If your company uses the Microsoft-hosted version of the software through Microsoft Dynamics CRM Online, you will need to use your Windows Live ID to log on to the system. Many users find that Windows Live ID is a convenient authentication method, because they can use a single logon and password for a wide variety of websites on the Internet. In this exercise, you'll log on to Microsoft Dynamics CRM Online.



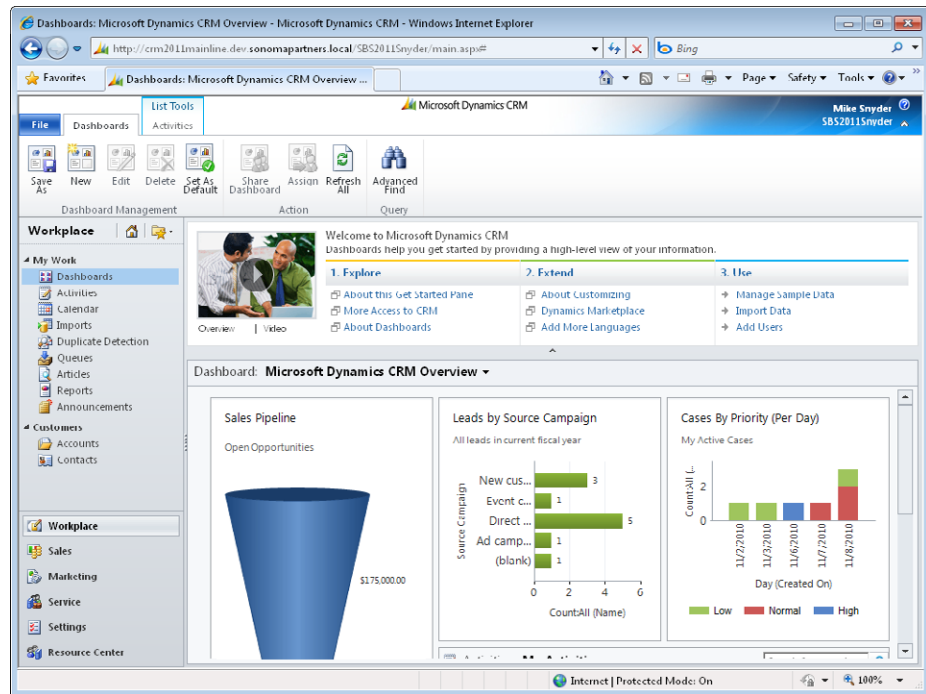
SET UP Open the Internet Explorer web browser.

1. In the Address bar, type the following web address (also known as the URL): ***http://crm.dynamics.com***.
2. Click the red **CRM Online Login** button.
3. Enter the email address and password of your Windows Live ID.



4. Click **Sign in**.

The Dashboards page of Microsoft Dynamics CRM Online appears.



Logging On to Microsoft Dynamics CRM

If your company is not using Microsoft Dynamics CRM Online, you will use different steps to log on to Microsoft Dynamics CRM. The exact steps you follow will depend on how your system administrator set up the configuration, but the two most common logon methods are:

- Logging on from your corporate network
- Logging on at an external Internet-facing address (such as a .com or .net website address)

After you have contacted your system administrator and retrieved the website address of your Microsoft Dynamics CRM system, you can log on by following the steps in this exercise.

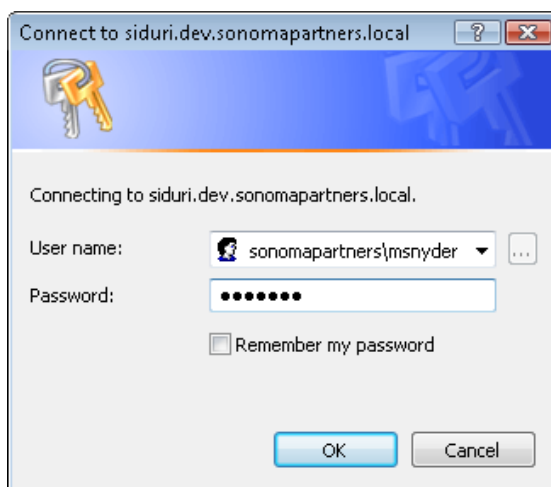


SET UP Open the Internet Explorer web browser.

1. In the Internet Explorer Address bar, type the web address (also known as the URL) of your Microsoft Dynamics CRM site: ***http://<yourcrmserver/organization>***.

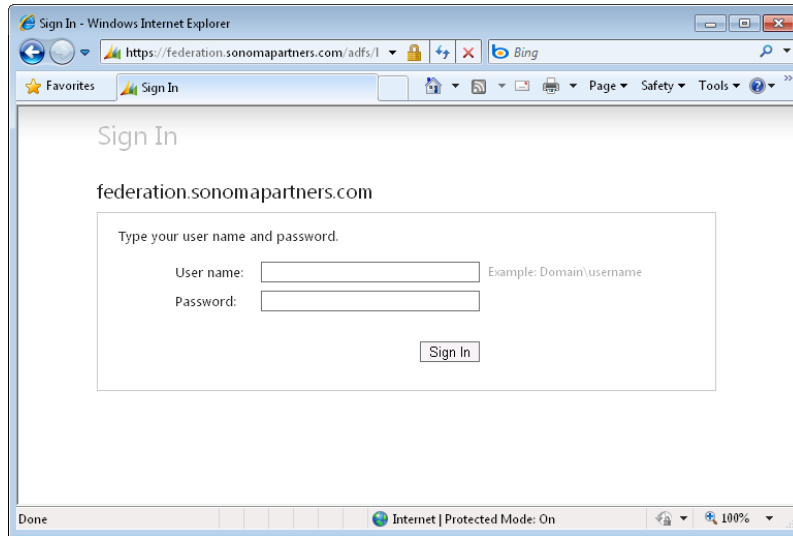
The *<yourcrmserver/organization>* portion of the URL is the name and organization name of the Microsoft Dynamics CRM site you will be using for the exercises in this book. Depending on how your Microsoft Dynamics CRM server is configured, you might need to include the organization portion in the address bar.

2. If you are logging on from your corporate network, Microsoft Dynamics CRM should automatically log you on. However if you are prompted, simply enter your user name and password.



3. If you are logging on from an external Internet-facing address, enter your user name and password on this screen.

It is possible that your login screen appears different than the following graphic, depending on your system configuration. If so, please contact your system administrator for login instructions specific to your organization.



4. Click OK.

The start page of your Microsoft Dynamics CRM system appears. By default, the Dashboards page is the start page.

Accessing Microsoft Dynamics CRM by Using Microsoft Dynamics CRM for Outlook

In addition to the web client, Outlook can be used to access Microsoft Dynamics CRM. Many users find accessing Microsoft Dynamics CRM within Outlook particularly convenient because they already spend a lot of time working within Outlook. The Microsoft Dynamics CRM integration with Outlook provides a single application to manage all of your customer sales, marketing, and service information. Many competing CRM software applications require users to open a second application to access their customer data. The Outlook integration of Microsoft Dynamics CRM is a unique benefit of the software that enables users to work more efficiently in a familiar software application.

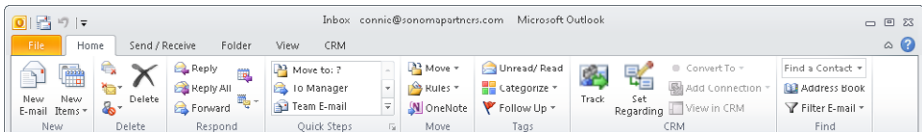
In this exercise, you will access Microsoft Dynamics CRM within Outlook.

See Also For more information on the integration between Microsoft Dynamics CRM and Outlook, see Chapter 5, "Using Microsoft Dynamics CRM for Outlook."

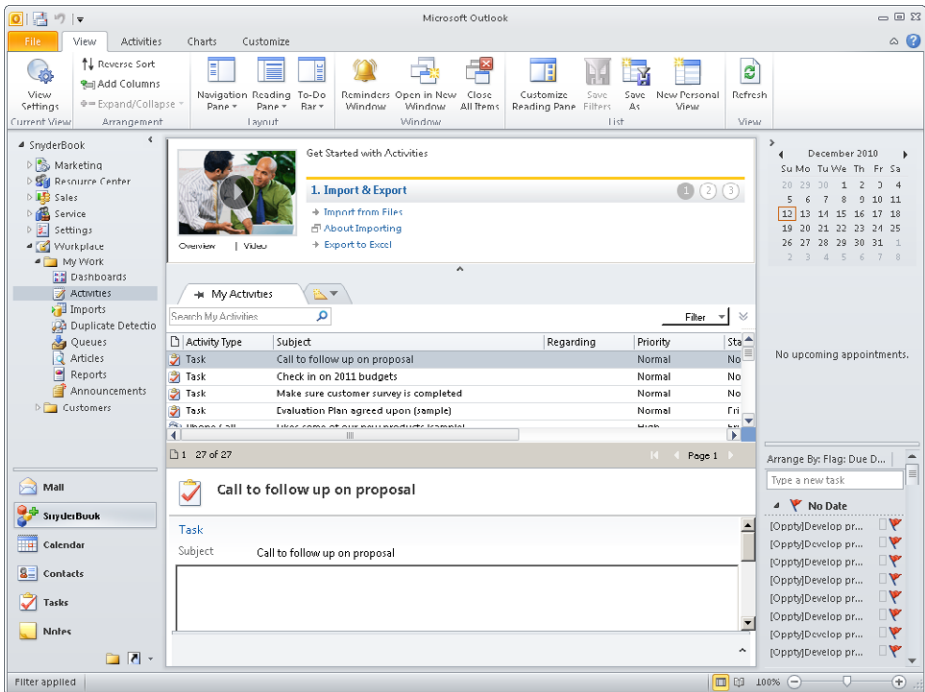


SET UP Confirm that your system administrator has installed the Microsoft Dynamics CRM for Outlook software on your computer before beginning this exercise.

1. Launch Outlook. You will see that Microsoft Dynamics CRM added a **CRM** tab to the ribbon. In addition, you will see a **CRM** group with buttons such as **Track** and **Set Regarding** on the **Home** tab of the ribbon for the **Mail**, **Contacts**, **Calendar**, and **Tasks** modules.



2. In the Outlook navigation pane, you will see a button with the name of your Microsoft Dynamics CRM organization listed next to the **Mail**, **Calendar**, and **Contacts** buttons. Click the button with your organization's name on it.
3. In the folder list, expand the **Workplace** folder.
4. Expand the **My Work** folder, and then click the **Activities** folder. You will see a list of the Microsoft Dynamics CRM activities. These are the same activities that you see when you log on to Microsoft Dynamics CRM through the web client.



Logging On to Microsoft Dynamics CRM via Mobile Express

If you need to access your Microsoft Dynamics CRM system while you are out of the office and away from a computer, you can use the Mobile Express module to access the system with an Internet-enabled device such as a cell phone. Mobile Express displays webpages in a streamlined format specifically designed to work on small screens and with a wide variety of mobile web browsers so that you can access the system from most Internet-enabled cell phones (even devices that do not use Microsoft software).



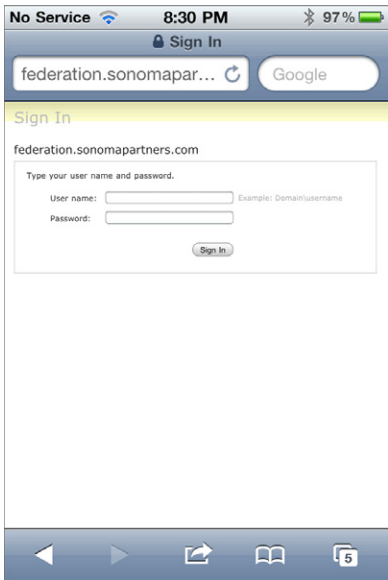
SET UP Confirm that your system administrator has enabled Mobile Express for your Microsoft Dynamics CRM system before beginning this exercise.

1. On your mobile device, open the web browser.
2. In your mobile web browser, type the web address of your Microsoft Dynamics CRM site and add an **/m** after the address. For example, if your Microsoft Dynamics CRM URL address is *http://sonoma3.crm.dynamics.com*, then you should type ***http://sonoma3.crm.dynamics.com/m*** in the address bar.
3. If you are using Microsoft Dynamics CRM Online, you will need to enter your Windows Live ID user name and password. Then click **Sign In**.

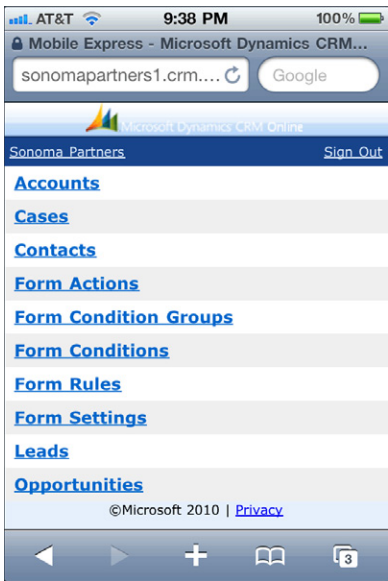


4. In an on-premise or partner-hosted deployment of Microsoft Dynamics CRM, you will see a logon screen on which you must enter your user name and password. Then click **Sign In**.

It is possible that your login screen appears different than the following graphic, depending on your system configuration. If so, please contact your system administrator for login instructions specific to your organization.



After you log on, you will see the Mobile Express interface of Microsoft Dynamics CRM.

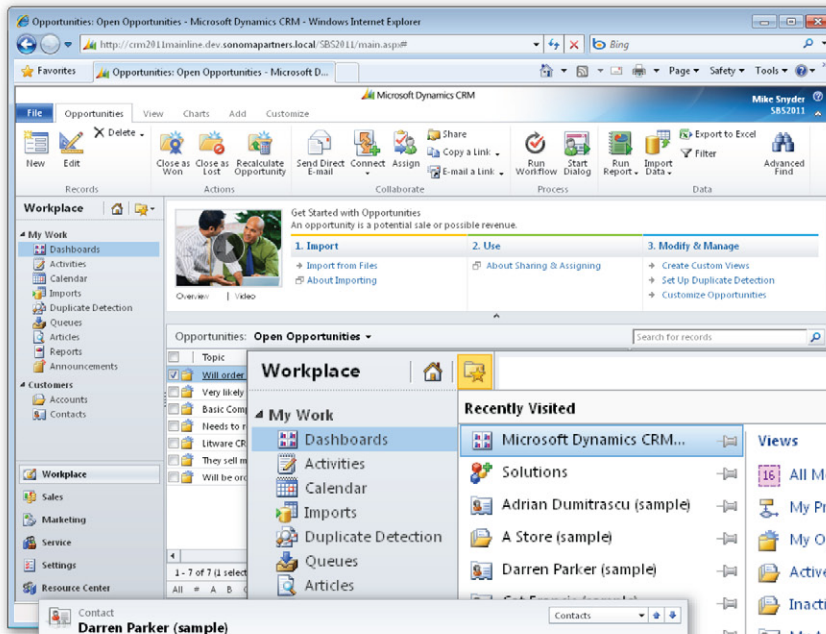


Tip The list of records you see in Mobile Express will vary depending on how your system administrator configured your system; therefore, what you see will differ from what is shown in these images.

Key Points

- Microsoft Dynamics CRM is a web-based application that lets businesses easily track and manage their customer data.
- The three modules of Microsoft Dynamics CRM are Sales, Marketing, and Service.
- You can access Microsoft Dynamics CRM data through Internet Explorer, Microsoft Dynamics CRM for Outlook, or Mobile Express on a handheld device such as a cell phone.
- Microsoft Dynamics CRM integrates with other Microsoft products such as Word, Excel, Microsoft Lync, and SharePoint Server.

Chapter at a Glance



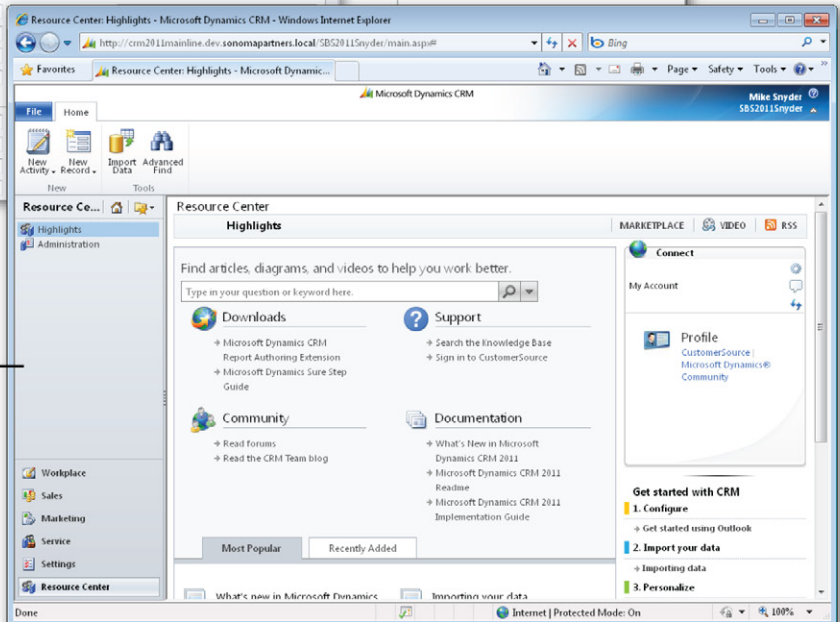
Understand the user interface components, **page 20**

Access recently visited records and views, **page 34**

A screenshot of the Microsoft Dynamics CRM 'Contact' lookup form for 'Darren Parker (sample)'. The form is divided into sections: 'General' (Salutation, First Name, Middle Name, Last Name, Job Title, E-mail), 'Address' (Address Name, Street 1, Street 2, Street 3), and 'Business Phone' (Business Phone, Home Phone). The 'General' section is expanded, showing the contact's details. The 'Address' section shows the contact's address. The 'Business Phone' section shows the contact's business and home phone numbers.

Work with lookup fields, **page 35**

Use the Resource Center, **page 41**



2 Getting Around in Microsoft Dynamics CRM

In this chapter, you will learn how to

- ✓ Understand and work with the components of the user interface.
 - ✓ Use Microsoft Dynamics CRM views to work with records.
 - ✓ Use Quick Find to search for records in a view.
 - ✓ Work with lookup fields and use the automatic resolution feature.
 - ✓ Modify your personal options to suit your preferences.
 - ✓ Use the Resource Center to learn more about Microsoft Dynamics CRM.
 - ✓ Access software help within the system.
-

Before showing you how to track and manage customer data in Microsoft Dynamics CRM, we want to explain where to find the areas referenced in this book and show you how to navigate through the software. You'll also learn about the resources available for more information on how to work with the software.

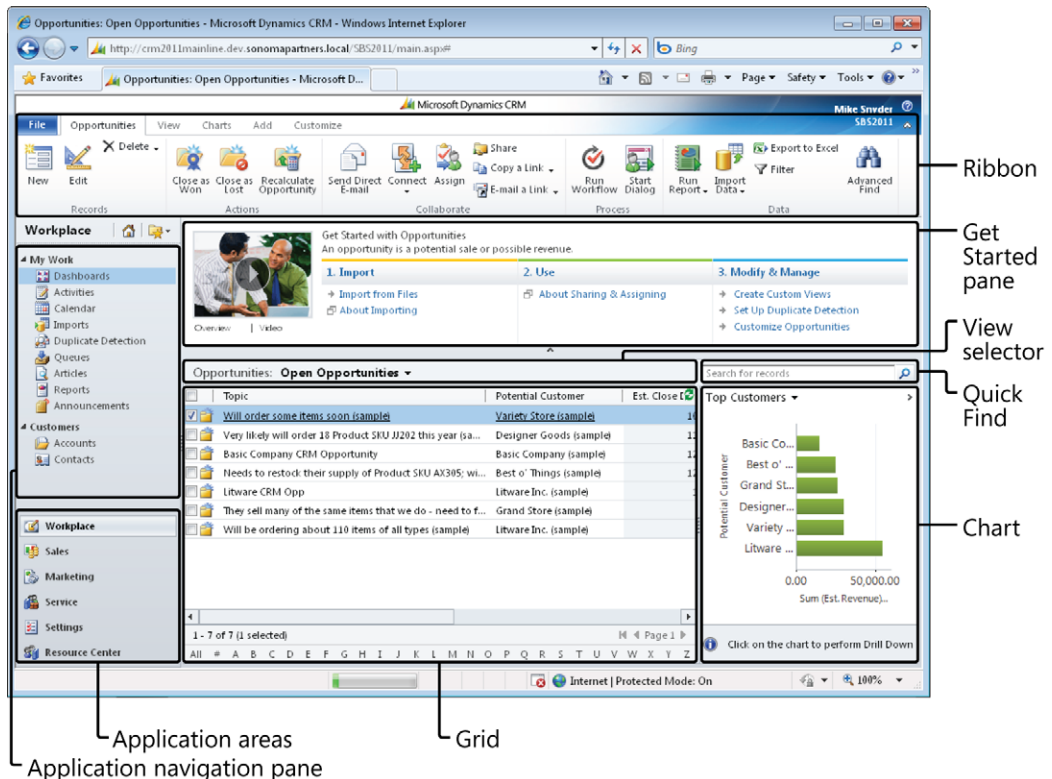
Practice Files There are no practice files for this chapter.

Important The images used in this book reflect the default form and field names in Microsoft Dynamics CRM. Because the software offers extensive customization capabilities, it's possible that some of the record types or fields have been relabeled in your Microsoft Dynamics CRM environment. If you cannot find the forms or fields referred to in this book, contact your system administrator for assistance.

Important You must know the location of your Microsoft Dynamics CRM website to work the exercises in this book. Check with your system administrator to verify the web address if you don't know it.

Understanding the Microsoft Dynamics CRM User Interface

Most of the time, you will access Microsoft Dynamics CRM through one of its two primary user interfaces: the web client or Microsoft Dynamics CRM for Outlook. The exercises and examples in this chapter use the web client, unless otherwise specified. Chapter 5, "Using Microsoft Dynamics CRM for Outlook," explains the system navigation specific to the Microsoft Outlook interface. To help you better understand how to navigate the software, the various components of the web interface are described here.



The following list describes the sections of the user interface:

- Ribbon** The ribbon includes buttons and tabs that let you quickly access system actions. If you have used the 2007 Microsoft Office system or Office 2010, you will recognize the ribbon because it appears in most of the Office applications as well. The ribbon is unique because the buttons and tabs dynamically update based on