

Special Edition Using Microsoft CRM

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Misprint	Correction
<p>Page 60, second sentence under Figure 4.5</p> <p>The rule of thumb is that nearly any operation you can carry out with Microsoft's user interfaces can be carried out by another interface or application when properly configured to do so.</p>	<p>The rule of thumb is that nearly any operation you can carry out with Microsoft's user interfaces can be carried out by another interface or application when properly customized to do so.</p>
<p>Page 63, add sentence to beginning of first paragraph</p> <p>Contacts are records of individuals.</p>	
<p>Page 76, second paragraph, first sentence</p> <p>Microsoft CRM marketing talked about how it requires little setup time and has a low need for consulting.</p>	<p>Microsoft CRM marketing talked about how Microsoft CRM requires little setup time and has a low need for consulting.</p>
<p>Page 77, Note, delete second sentence and add:</p> <p>Microsoft CRM version 1.2 will be released in 9 languages to more than 20 countries in December 2003. Version 1.2 languages are U.S. English, International English, German, French, Dutch, Danish, Halian, Spanish, and Brazilian Portuguese.</p>	
<p>Page 81, add following Tip after first paragraph:</p> <p>Once a user record has been disabled, you can use the Reassign Records option on the record's Actions menu to reassign any records for which the disabled user is the record owner.</p>	
<p>Page 85, Table 5.1, new definition for Append:</p> <p>The ability to attach (append) this object to other objects. For example, a user with a role that has the Activity Append privilege will be able to attach Activities to Accounts if the user's role has the Append To privilege for Accounts. In this example, the user can attach the Activity to the</p>	

<p>Account because he/she has the right to attach (append) Activities as well as the right to attach to (append to) Accounts. It is important to look at both sides of the Append/Append To equation. If you want users to be able to add Activities to Accounts, the users will need the Append privilege on Activities as well as the Append To privilege on Accounts.</p>	
<p>Page 85, Table 5.1, new definition for Append To: The ability to attach (append) other objects to this object. See the previous definition of Append.</p>	
<p>Page 92, add following Tip at bottom of page: If your organization has multiple Microsoft Exchange servers, the Microsoft CRM Exchange Queue Service (the connector) should be installed on all Exchange servers.</p>	
<p>Page 94, last sentence on page These are shown in Figure 5.17.</p>	<p>The Subject Manager is shown in Figure 5.17.</p>
<p>Page 103, first full paragraph, add following Tip after fifth sentence (that ends with "...Selecting Options.") Users with the proper privileges can share a personal email template with the entire organization by opening the template and selecting the Make Template Available to Organization option.</p>	
<p>Page 111, Figure 6.3 caption, first sentence Creating a new Contact from the home page.</p>	<p>Creating a new Contact from the Create a Record area of the home page.</p>
<p>Page 179, delete Tip and add following Tip: If you use the Web interface to create a Contact, Task or Appointment record, that record will not be added to your Exchange mailbox immediately. You need to initiate a synchronization (by going offline) for those records to</p>	

become available in your Exchange Mailbox. This means that any files or devices (for example, you Offline Folders, Pal Pilot, PocketPc or Blackberry) that synch up with the Mailbox will not receive a copy of this record until you initiate a synchronization by clicking on the "Go Offline" button.

Page 179, under Tip, delete everything through Tip on top of page 180 and add:

Where you make a change to a CRM Contact, the corresponding Outlook Contact is automatically updated as well. The opposite is also true. If you edit an Outlook contact, the corresponding CRM Contact will automatically stay in synch. Keep in mind that the changes you (or any other CRM user) make either online or offline will be propagated only when you initiate a synchronization. This illustrates the importance of synchronizing your offline database on a regular basis. Another point to note is that when a record is deleted, the corresponding record is not deleted. (CRM Contacts will have a CRM Contact icon, which is shown in Figure 8.8.)

Page 254, replace entire Note with following Note:

After you have installed the Crystal Reports Enhanced Edition for Microsoft CRM, you can use Crystal Reports to edit the reports displayed on your Microsoft CRM system. After you make changes, you can save your reports back to your CRM system. You can also create new reports and save them to the CRM system. Microsoft CRM TechKnowledge document 28047 provides detailed steps for both modifying reports as well as saving new ones to be displayed in the reports listings. This article can be viewed at <http://www.greatplains.com/techknowledg/techknowledge.asp?id=28047>

<p>Page 275, first paragraph after Note, second sentence through second bullet should be:</p> <p>Specifically, when you export the customization XML from one Microsoft CRM installation to another, you are exporting:</p> <ul style="list-style-type: none"> • Attributes (schema fields you have added) • The import process will create these new fields in the target implementation • Mappings 	
<p>Page 290, last paragraph on page</p> <p>In this code example, the second parameter (1 in this case) passed into the <code>SetFieldReqLevel</code> function tells the function whether to make the value required or not. In this case, a value of 2 would make the field not required.</p>	<p>In this code example, the second parameter (True in this case) passed into the <code>SetFieldReqLevel</code> function tells the function whether to make the value required or not. In this case, a value of False would make the field not required.</p>

This errata sheet is intended to provide updated technical information. Spelling and grammar misprints are updated during the reprint process, but are not listed on this errata sheet.