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Step by Step

Microsoft Dynamics® CRM 2011

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Mike Snyder, Jim Steger, and Brendan Landers

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Microsoft Dynamics® CRM 2011

Step by Step

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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 excercises 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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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.

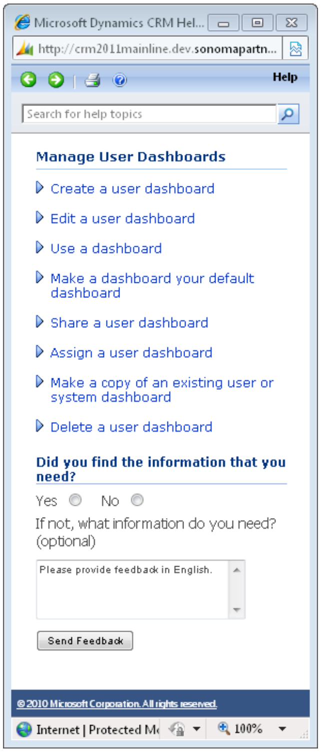
Microsoft Dynamics CRM Help is context sensitive, so the software will automatically try to access the portion of the Help content that is most relevant to the page you're currently viewing. For example, if you're viewing a lead record and you click the Help button located in the upper-right corner of 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.



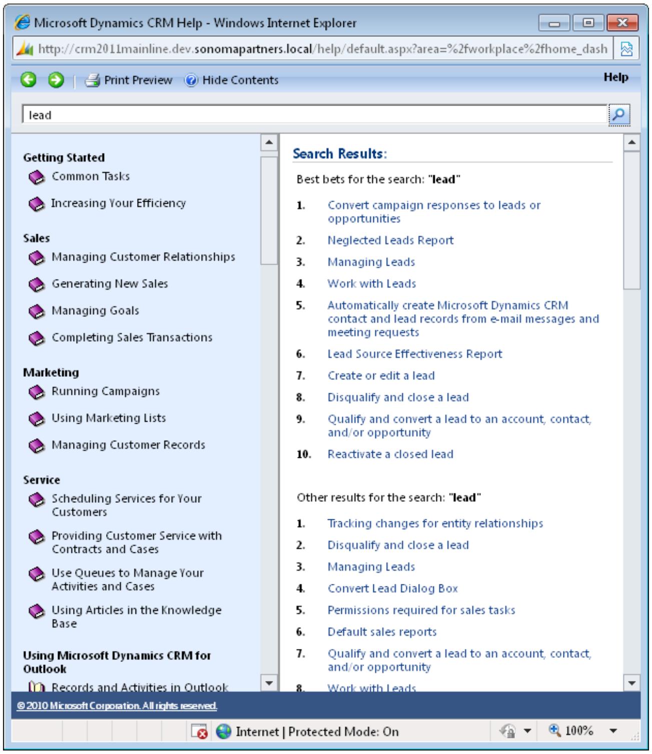
You can click any topic to display the corresponding information.

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

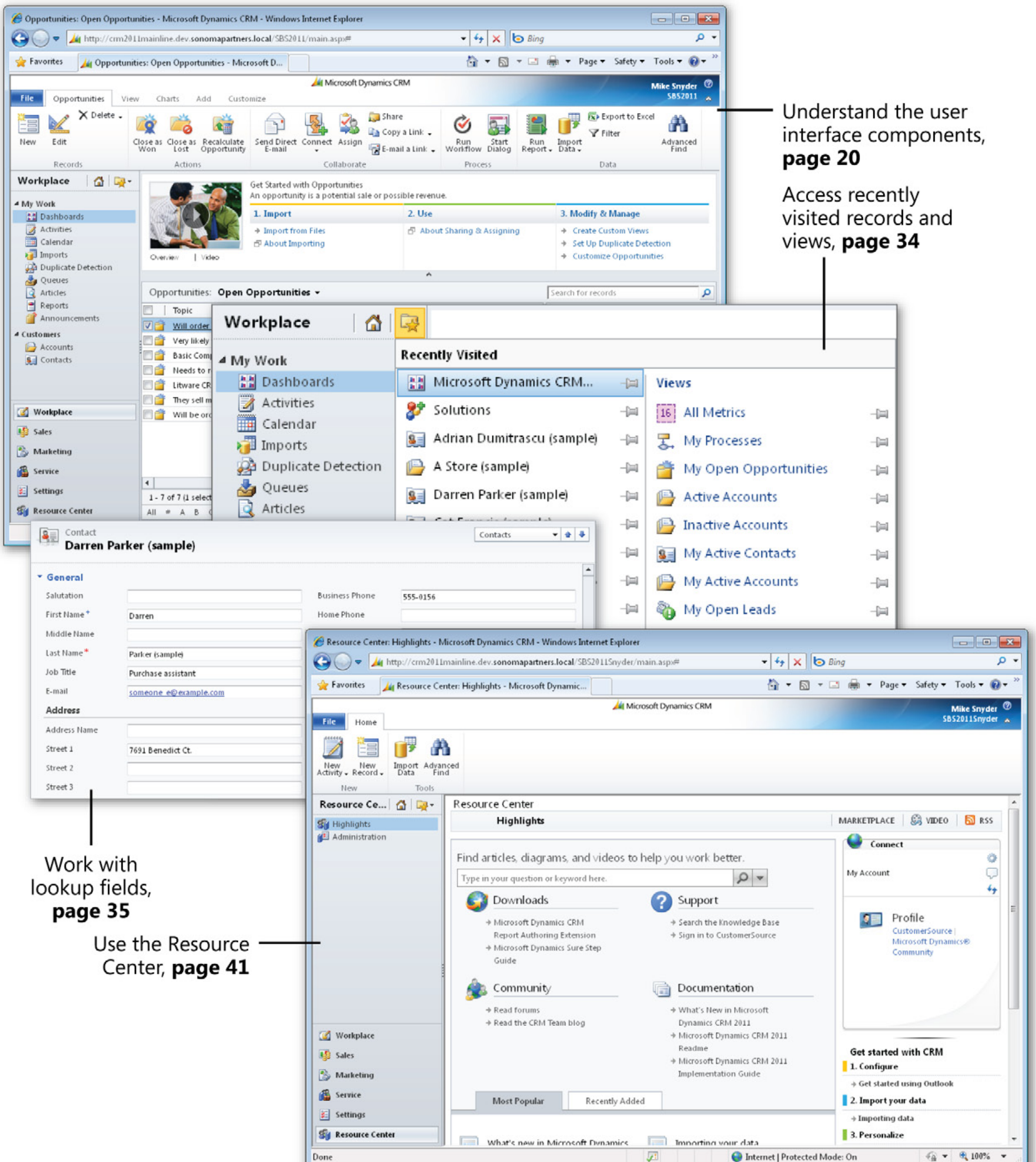
In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

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

Chapter at a Glance



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

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

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.

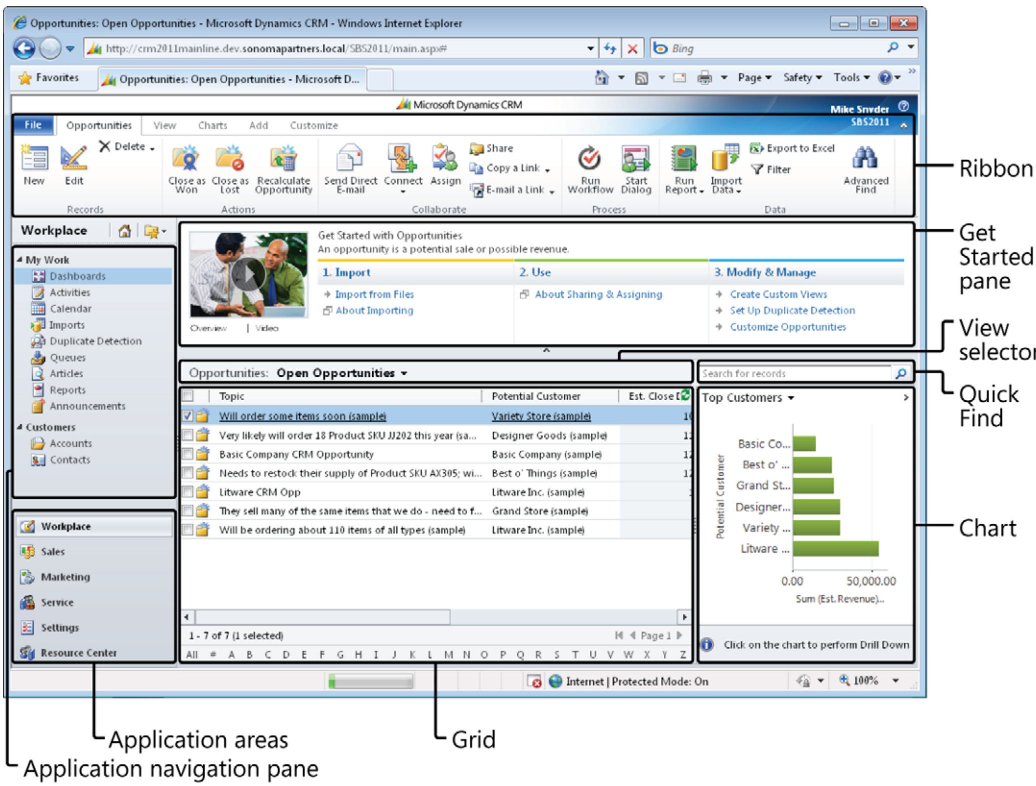
Practice Files There are no practice files for this chapter.

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 what the user is doing within the system. For example, navigating to Contacts will display different ribbon buttons and tabs than when you navigate to Opportunities. The idea behind the ribbon is to display the most common activities to a user relative to where he or she is in the system, which will save clicks.

- **Grid** The grid displays a list of records. Each record set is known as a data view in Microsoft Dynamics CRM. The grid consists of rows and columns of data. At the bottom of the grid, you can find information about the number of records in the view. The grid also includes an index bar that allows you to quickly filter records in the grid based on the starting letter. Microsoft Dynamics CRM applies the ribbon actions against the records selected in the grid. For example, if you select three records in a grid and click a button on the ribbon, Microsoft Dynamics CRM will apply that button's action to the three records you selected.
- **Application navigation pane** This portion of the user interface provides access to the various types of Microsoft Dynamics CRM data. Simply click a hyperlink in the application navigation pane to view that set of records.
- **Application areas** Each application area provides a logical grouping of Microsoft Dynamics CRM records. The default application areas are Workplace, Sales, Marketing, Service, Settings, and Resource Center. If you click one of these buttons, Microsoft Dynamics CRM will update the application navigation pane to display the records grouped within that section.
- **Get Started pane** The Get Started pane displays help information about how to work with Microsoft Dynamics CRM. The help information consists of different types of content such as videos, hyperlinks to help pages, or links that launch system actions. The Get Started pane content dynamically updates with different help information depending on the type of records you are viewing.

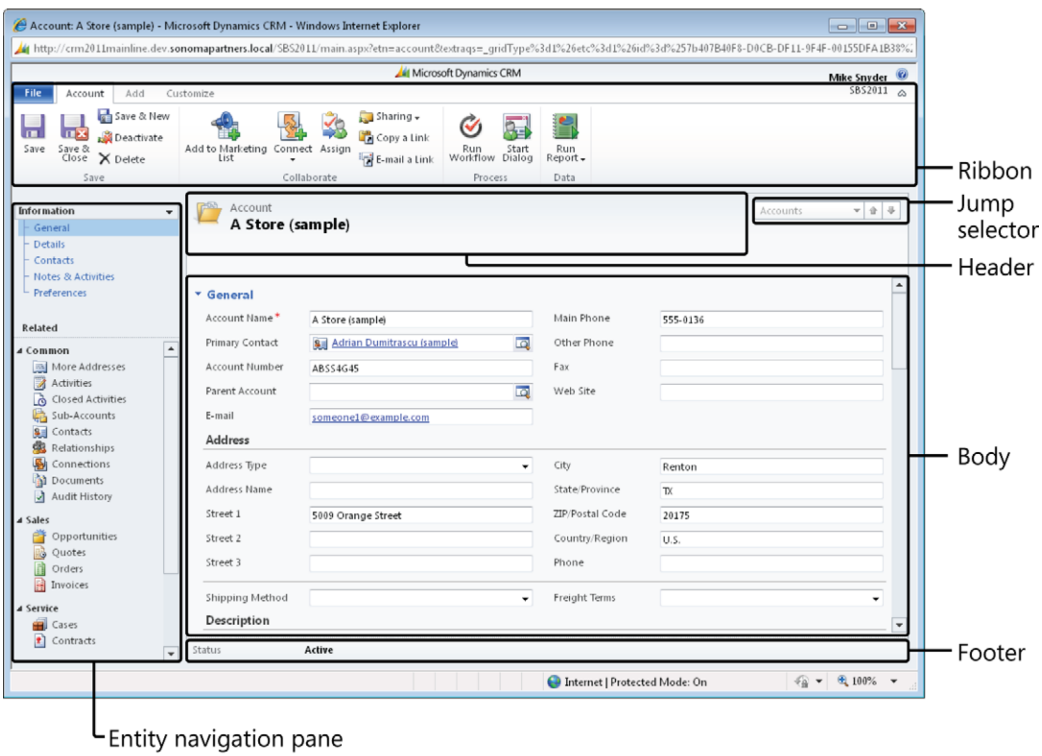
> **Tip** You can collapse and expand the Get Started pane by clicking the arrow located directly beneath the pane. You can also turn off the Get Started pane for all records by updating your personal options. For more information, see "Setting Personal Options" later in this chapter.

- **View selector** The view selector allows you to select different views of data.
- **Quick Find** The Quick Find functionality allows you to enter text to quickly search for specific records.

- **Chart** This area of the user interface displays charts and graphs. The data that appears in the chart is specific to the currently selected view. For example, viewing a top-customers chart with the Open Opportunities view selected will show the chart with all of the open opportunities. Viewing a top-customers chart with the My Open Opportunities view selected will show the chart only with the opportunities that you own. The actual appearance of the chart might vary, depending on your data.

> **Tip** As with the Get Started pane, the chart can be collapsed and expanded by clicking the arrow located in the upper-right corner of the Chart area.

When you open a record in Microsoft Dynamics CRM, you'll see additional parts of the user interface.



- **Ribbon** Just like the ribbon in the main user interface, the ribbon on each individual record includes buttons and tabs related to that record type.
- **Entity navigation pane** Similar to the application navigation pane, the entity navigation pane displays different types of Microsoft Dynamics CRM records. However, the entity navigation pane displays only those records that are linked to the open record. For example, clicking the Contacts link in the entity navigation pane of an account record will display only those contacts that have the open account record listed as their parent customer. In addition to showing related records, you can click the text links located under Information in the navigation pane to jump to specific sections of the form.
- **Body** The body displays the data related to the open record. The fields on the entity form are sometimes referred to as attributes.
- **Header** The record header includes data about the record, and it always remains visible when the record is open even if you click one of the related entities in the navigation pane.
- **Footer** Just like the header, the footer remains visible at all times when you have the record open. You might want to include certain data fields in the footer so that you can view them at any time when working with a record.
- **Jump selector** If you open a record from a view of data, the jump selector allows you to quickly jump to other records in the view. By clicking the picklist, you can see a list of contacts from the originating view and select one. In addition, you can click the Up or Down arrow to open the previous or next record from the view.

Tip **You can use the Ctrl+> (right angle bracket) keyboard shortcut to advance to the next record or Ctrl+< (left angle bracket) to move back to the previous record.**

Using Views to Work with Data Records

Now that you understand the main components of the Microsoft Dynamics CRM user interface, you're ready to start working with data records. Microsoft Dynamics CRM uses a view to display a list of data records in a grid. You will spend a lot of time working with views, so it's important to understand the utilities that Microsoft Dynamics CRM offers to work with views of data.

Each view can contain an unlimited number of data records. Microsoft Dynamics CRM splits the view data into multiple pages of records, so you might need to click the page arrows located in the lower-right corner of the grid to access the additional records contained in your view. If the page arrows are disabled, your view does not contain multiple pages of records.

> **Tip** Even though Microsoft Dynamics CRM splits the view into multiple pages, you can view the total count of records in the view by looking in the lower-left corner of the grid. If your view contains more than 5,000 records, Microsoft Dynamics CRM will simply state that the record count is 5000+.

In this exercise, you will change the data records that appear in the grid by selecting a different view of the data. You might want to change views for various purposes, such as exporting the records from the view into Microsoft Excel for a report or editing multiple records at one time.

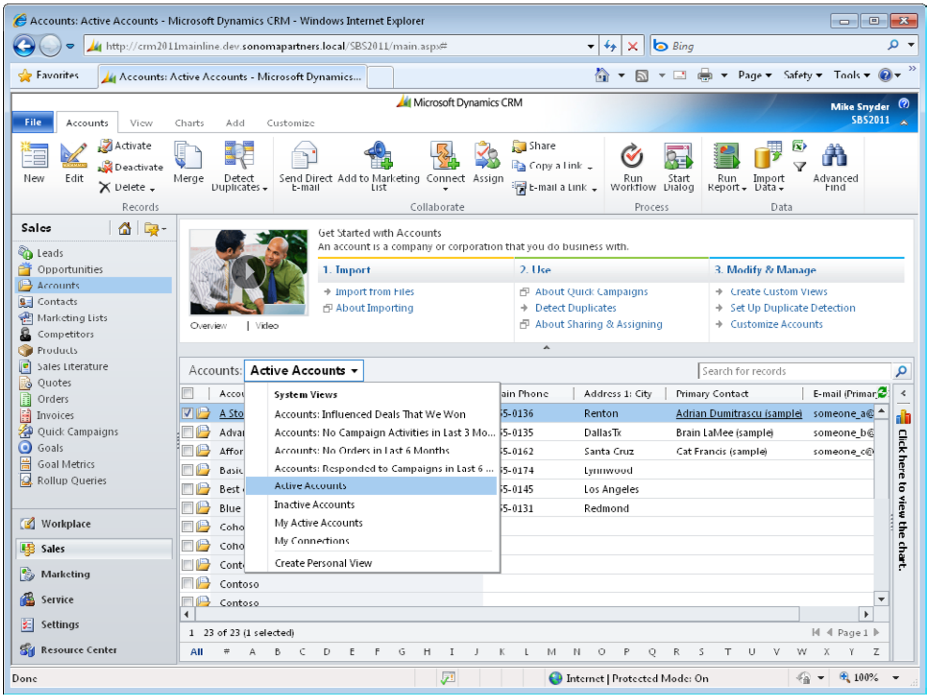
> **Tip** You can change the width of a view column by clicking the column divider and dragging it to the left or right. Resizing the column allows you to see more or less of the record's data.

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

1. In the application areas, click the **Sales** button.
2. In the application navigation pane, click the **Accounts** link.

   By default, you will see a view of all of the active account records that you own in your system.
3. Click the arrow in the view selector.

   Microsoft Dynamics CRM displays a list of the views available for the account entity.

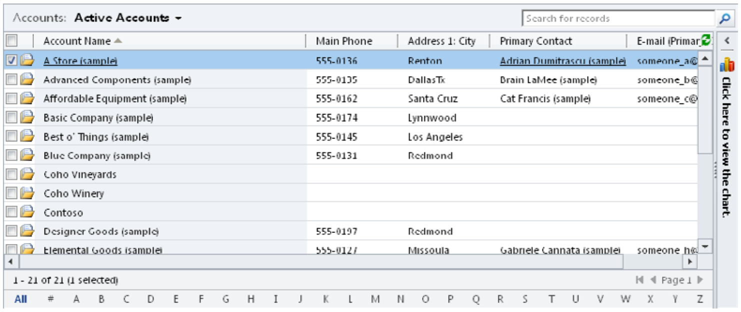


4. Select **Active Accounts**.

   Microsoft Dynamics CRM changes the records displayed in the grid to show all of the active accounts in the database.

Sorting Records in a View

Within each view, you can sort the records to see them in a particular order. Each view contains a default sort order, but you can change the record order in any grid. When you're looking at a view, Microsoft Dynamics CRM includes visual indicators to show how it has sorted the records. In the column header, next to one of the column names, you will see a small triangle pointing up or down. This triangle indicates that this column's data is used to sort the view records. An upward-pointing triangle means that the records are displayed in ascending order (low to high or A to Z); a downward-pointing triangle means that the records are displayed in descending order (high to low or Z to A). In addition to the triangle in the column heading, Microsoft Dynamics CRM shades the column a light blue color in the background to visually indicate that the view is sorting on this column.



Changing the sort order of a column is very straightforward; all you need to do is click the column heading. Clicking the column heading toggles the sort order between ascending and descending.

You can also sort records by more than one column at a time. In this exercise, you will sort a view by using multiple columns.

> **Important** Even though you can display columns from related records in a view, you can sort only on columns that are attributes of the primary entity in the view. For example, if you have a contact view that contains columns from the related account records, you can sort the contact view only by clicking the columns that contain contact data; clicking the related account columns will not sort the records. You will not receive an error message when you click the related columns; instead, Microsoft Dynamics CRM will not react at all.

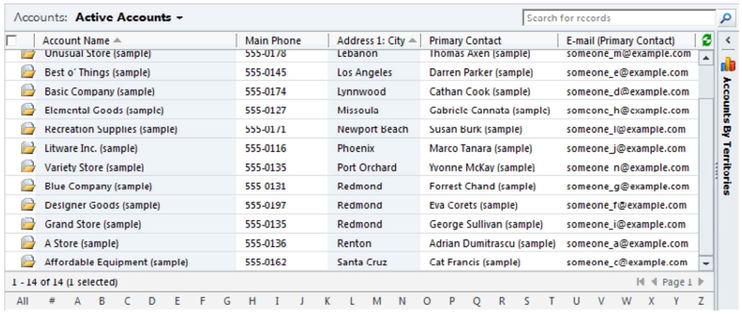
SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise. Open a webpage that contains multiple records in a view.

1. Click the heading of the column by which you want to sort the records.

   Microsoft Dynamics CRM adds the upward-pointing sort arrow and sorts the records in the view in ascending order.

2. Hold down the Shift key and click the second column heading by which you want to sort the records.

   Microsoft Dynamics CRM adds another upward-pointing sort arrow to this column and sorts in ascending sort order, while preserving the first sort column.



3. While keeping the Shift key down, click the second column heading again.

Microsoft Dynamics CRM toggles the sort order to display the records in descending order.

Selecting and Refreshing Records in a View

As you learned earlier in this chapter, you can use the buttons on the ribbon to perform actions on selected records in a view. Microsoft Dynamics CRM offers a few different ways to select records within a view. If you want to select one record, simply click the record row. Alternatively, you can also point to the row you want to select and then select the check box that appears on the far left. Taking either of these actions will cause Microsoft Dynamics CRM to highlight the record with a blue background to indicate which record you selected. If you want to select all of the records, select the check box that appears in the upper-left corner of the view. Microsoft Dynamics CRM will highlight all of the records that appear on the page. Deselecting the check box will deselect all of the records.

Important When you select the check box to select all of the records, you are only selecting all of the records on the page. You are not selecting all of the records in the view. For example, if your view contains 500 records and your page contains 25 records, selecting the check box will select only the 25 records displayed on the page. Some of the features in the ribbon, such as Export To Excel and Send Direct E-Mail, allow you to select all of the records from the view, but many of the features in the ribbon (such as assigning records and editing records in bulk) apply only to a single page of records. Unfortunately, in these scenarios, you will need to repeat the action on each page of records if your view contains multiple pages of records. Later in this chapter, we will explain how to display up to 250 records per page in a view (instead of the default of 25 records per page). Displaying more records per page decreases the number of times you need to repeat an action on a set of records.

If you want to select more than one record in a view (but not all of them), you can do so by pressing the Ctrl and Shift keys. This technique should be familiar to users of Office, because other applications such as Excel and Outlook also allow users to select multiple items by holding down the Ctrl or Shift key while clicking the desired records.

As you work with the records in a view, you might find that the view does not refresh the data set as you expect. This might happen when you're working with different sets of records in multiple Internet Explorer windows or if a different user is editing the records in your view.

> **Tip** **As a best practice, refresh the data in a view before performing any actions on the data set.**

In this exercise, you will manually refresh the data that appears in a view, and then select multiple records in the view.

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise. Open a webpage that contains multiple records in a view.

1. In the upper-right corner of the view, click the **Refresh** button. Microsoft Dynamics CRM refreshes the data in the view.
2. Click a record in the view. Microsoft Dynamics CRM highlights the row, indicating that the record is selected.
3. To add one record to your selection, hold down the Ctrl key and select another record.

   Microsoft Dynamics CRM highlights this new record as well, indicating that you've selected it.
4. To include multiple records in a selection, click one record, and then hold down the Shift key and select another record.

   Microsoft Dynamics CRM selects and highlights the two records you clicked and all of the records in between.

   With the appropriate records selected, you can apply the desired action to the records.

Editing Multiple Records in a View

As you work with various records in a view, you might want to update the data in multiple records at one time. Microsoft Dynamics CRM allows you to select multiple records in a view and edit them with one form so that you don't have to modify each record individually. This feature can provide a significant time savings if you need to modify a large number of records. Although the edit multiple records feature is very convenient, it does contain a few notable restrictions:

- If a particular field contains programming script behind the scenes (as configured by your system administrator), you cannot edit the data in that field while editing multiple records.
- You cannot use the edit multiple records feature to remove values from a field. You can only modify or add data to a field.
- You cannot use the edit multiple records feature to edit certain fields in Microsoft Dynamics CRM, such as the Parent Account field of the account record or the Parent Customer field of a contact record.
- The edit multiple records feature updates only the selected records on the page; you cannot use it to update **all** of the records in the view if the records span multiple pages.
- If a data field is read-only on the form, you cannot edit it with the multiple record edit tool.

> **Tip** **Even though you cannot edit the owner of a record by using the edit multiple records feature, you can easily change the owner of multiple records at one time by using the Assign feature located on the ribbon.**

In this exercise, you will update the State/Province field for multiple contacts.

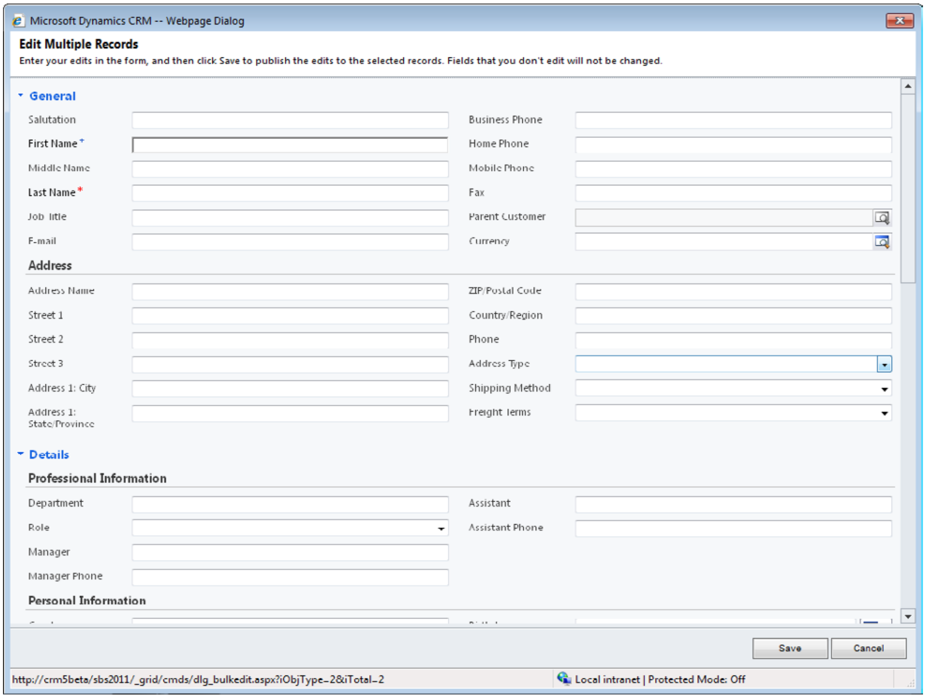
SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise. Open a view of Contacts that contains more than one record.

1. While holding down the Ctrl key, click two or more of the contact records.

   Microsoft Dynamics CRM highlights the records you click to indicate that they are selected.

2. On the ribbon, click **Edit**.

The Edit Multiple Records dialog box appears. This dialog box is very similar to the contact form, with the same layout and fields.



3. Locate the **State/Province** field, and type ***Illinois*** in the field.
4. Click the **Save** button.

   Microsoft Dynamics CRM updates the State/Province field of the selected records and closes the Edit Multiple Records dialog box.

Using Quick Find to Search for Records in a View

Even with the sorting features in views, sometimes it can be time consuming to manually look for a particular record, especially if the view contains a large number of records. To help address this concern, Microsoft Dynamics CRM includes a Quick Find feature that allows you to search for records by using keywords or wildcard characters. You can find the Quick Find search box above the grid and to the right of the view selector. To use it, enter a search phrase and press Enter on the keyboard or click the button with the magnifying glass to start the search. Even though Quick Find is simple to use, there are a few tips and tricks that will help you find records more efficiently.

- Your system administrator can configure Microsoft Dynamics CRM to search for matching records across multiple columns. For example, you could search for particular contacts by name, phone number, or email address. You can even include custom data fields as part of the search criteria.
- When you enter search text, Microsoft Dynamics CRM will search for the value as it is entered. By default, it will not search for partial records. For example, if you search for a phone number by entering 555-1212 and the contact's phone number is (312) 555-1212, Microsoft Dynamics CRM will not consider that a match. It will return only those records that have 555-1212 as the start of their phone number.
- Of course, there will be times when you don't know the exact value you're searching for. In these cases, you can enter an asterisk (*) as a wildcard character in your Quick Find search. In the previous example, if you did not know the exact phone number, you could search for *555-1212 and Microsoft Dynamics CRM would find the (312) 555-1212 matching record, plus any other records that ended with 555-1212.

> **Tip** **You can enter the wildcard character anywhere in your search criteria: at the beginning, in the middle, or at the end. If you can't find the record you're looking for, be sure to try different combinations with the asterisk wildcard. Note that the Quick Find feature is not case sensitive in its searches.**

- If you start a Quick Find search when you're working with a specific view, such as My Active Contacts, you might expect that Microsoft Dynamics CRM would search for matching records only within the My Active Contacts view. However, Quick Find always searches for matching records across all active records for that entity. Quick Find ignores inactive records.

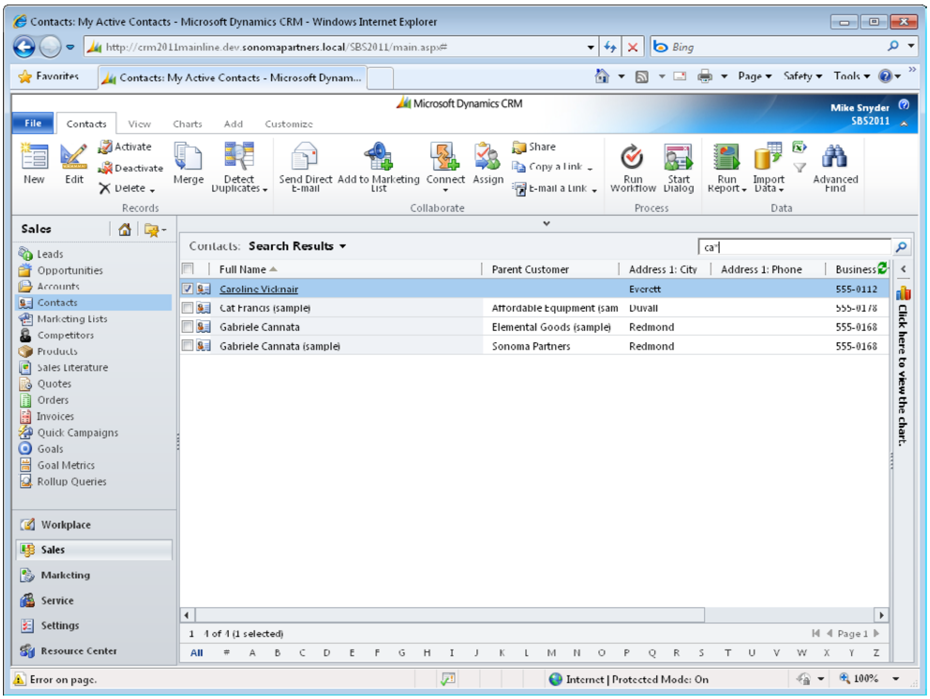
> **Tip** **To filter records within a specific view, you can click the letters that appear at the bottom of the view (also referred to as the index bar). Clicking a letter will update the view to show only those records whose entry in the current sort column starts with the selected letter. For example, if you're looking at the My Active Contacts view with the records sorted by City and you click B in the index bar, Microsoft Dynamics CRM will show you only those records in which the city starts with the letter *B*. If you then click the Full Name column to sort by that field and click the letter *C* in the index bar, Microsoft Dynamics CRM will update the My Active Contacts view to show only those records in which the Full Name entry starts with the letter *C*.**

In this exercise, you will use the Quick Find feature to search for records in Microsoft Dynamics CRM.

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise. Open a view of Contacts that contains more than one record.

1. In the **Quick Find** box, type ***ca**** and press Enter.

   Microsoft Dynamics CRM will search for and return all active contacts with matching records.



2. To cancel the search, click the X button to the right of the **Quick Find** box, or simply select a new view in the view selector.

Setting a Default Personal View

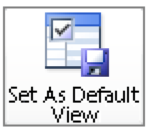
For each type of record, your system administrator can specify the default view that you see when you navigate to a list of those records. However, Microsoft Dynamics CRM also allows each user to specify his or her own personal default view independent of the system administrator's settings. You might find that using this feature saves you dozens of mouse clicks per day.

> **Important** The default view loads first for each web browsing session; however, Microsoft Dynamics CRM also keeps track of your most recently visited view within a web session and displays that first for convenience.

In this exercise, you will set a new default personal view.

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise.

1. Navigate to the **Accounts** view. The default view for **Accounts** is **My Active Accounts**, so you will see that first. Let's assume that you want to change the default view (just for you) to **Active Accounts**.
2. Click the view selector and select **Active Accounts**.
3. On the ribbon, click the **View** tab.



4. Click the **Set as Default View** button.

   You have now set this view as your personal default for Accounts. The next time you log on to Microsoft Dynamics CRM and navigate to Accounts, you will see the Active Accounts first.
5. Let's see how the default view works within a single web browsing session. Click the view selector and select **Inactive Accounts**.
6. In the application navigation pane, click **Contacts**. Now let's navigate back to **Accounts** to see which view appears first.
7. In the application navigation pane, click **Accounts**.

   You will see the Inactive Accounts view first, even though the Active Accounts view is your personal default. This is because Microsoft Dynamics CRM displays the last view you accessed within the web browsing session by default.
8. Now close the Internet Explorer window, open a new window, and access Microsoft Dynamics CRM again.
9. Navigate to the **Accounts** views, and you will see the **Active Accounts** view first (your default personal view).

Accessing Recently Visited Records and Views

As you spend the day working in Microsoft Dynamics CRM, you will probably find that you frequently use the same records or views again and again. Fortunately, Microsoft Dynamics CRM includes a recently visited feature that allows you to quickly access records and views. This will save you time and clicks.

As you would expect, the recently visited section keeps track of the various records and views you have worked with recently. In addition, as with the other Office applications that include this type of recently used functionality, you can pin specific views or records so that they always remain in your recently visited list.

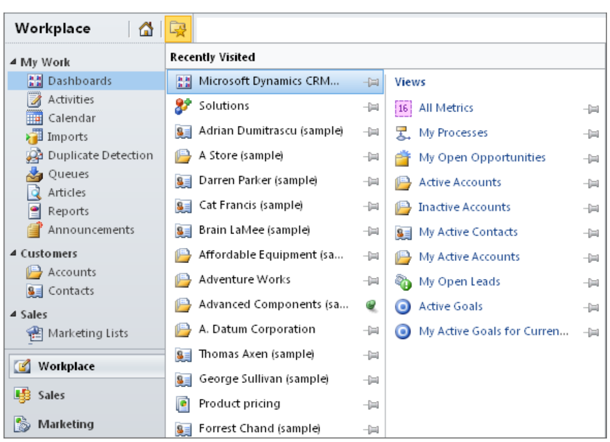
In this exercise, you will access the recently visited list and pin a view for future quick access.

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise.

1. Click the recently visited button, which always appears in the upper-left corner of the application window, directly under the ribbon.

   A new menu appears, and you will see two lists of records and views. The left column lists your recently visited records, and the right column lists your recently visited views. Both columns also include an icon of the record or view type so that you can visually determine which type of entity the record or view corresponds to.

2. Click one of the gray pin icons to permanently pin that record or view. After you click the pin, the pin icon will update by turning green and changing to look like it is standing upright. That pinned record or view will always remain in your recently visited list.

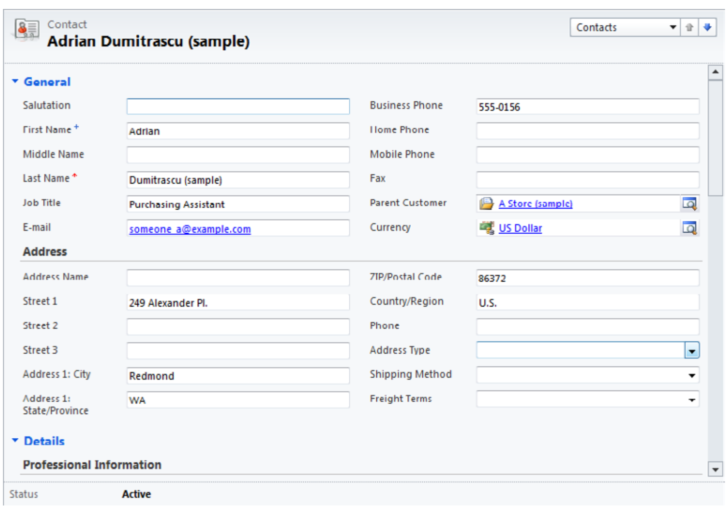


3. To load the record or view from the recently visited list, simply click its name. To unpin a record or view, follow the same steps and click the green pin icon to unpin the record or view from your recently visited list.

> **Tip** You can click the Home button located to the left of the recently visited button at any time to return to your default home page.

Using Lookups and Automatic Resolution

One of the main benefits of any customer relationship management system is that the software allows you to create relationships between records in your database. These relationships allow you to understand the different types of data about your customers, vendors, and partners, and how they interact with one another. The Microsoft Dynamics CRM user interface displays the link between two records by using a lookup. The default contact form includes two lookups: one for the Parent Customer and one for the default currency.



You can visually determine that a field is a lookup because:

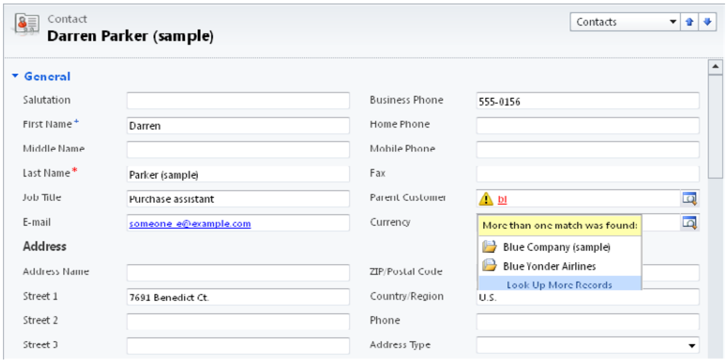
- The text in the field is hyperlinked (blue and underlined).
- There is an icon to the left of the text that indicates the entity of the linked record.
-  The field includes an icon with a window and a magnifying glass.

Clicking the hyperlinked text in the field will launch a new window displaying the linked record. Unlike the other fields on the form, in which you simply enter data into the field, lookup fields require you to select a record to link to. You can link records in the lookup field by using one of three techniques:

- **Use the Look Up Records dialog box** To use this technique, click the lookup icon. Microsoft Dynamics CRM will then launch the Look Up Records dialog box, which you can use to search for and select a specific record.
- **Use automatic resolution** To use this technique, simply start typing the name of the linked record in the lookup field. After you enter all (or a portion) of the linked record's name, click a different form field or press the Tab key. Microsoft Dynamics CRM will then try to automatically resolve your entry to an existing record.
- **Select recently used** As you start typing in a lookup field, you might notice that a list of records automatically appears under the lookup field. This list of records is known as the most recently used list. To choose one of these records, simply click the one you want.

Tip The automatic resolution feature in lookups can provide a significant time savings when you work with many different records.

Microsoft Dynamics CRM will try to match records in the lookup by using the find fields of the entity. The record name is typically included as a find field, but your administrator might configure additional find fields that you can use with automatic resolution. If Microsoft Dynamics CRM finds just one matching record during the automatic resolution, it will populate the lookup field with a link to that record. If more than one match is found, the lookup field will display a yellow match icon and color the text you entered as red. Click the yellow match icon to view the potential matches, and then select the record you want. Microsoft Dynamics CRM will then use that value for the lookup field.



If Microsoft Dynamics CRM does not find any potential matches, it will color the text red and display a red circle with a white X.

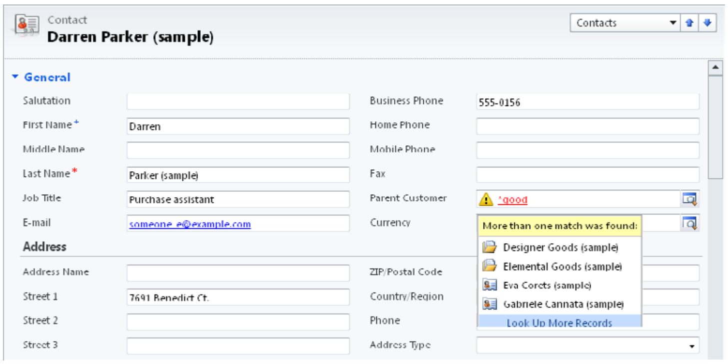
If you want to remove a value from a lookup field, you can select the white portion of the field (without clicking the hyperlinked text) and then press the Backspace key or Delete key.

In this exercise, you will use the most recently used list to populate a lookup value.

SET UP **Log on to the Microsoft Dynamics CRM website through the web client before beginning this exercise. Make sure that you have the Microsoft Dynamics CRM sample data loaded.**

1. Navigate to a contact view and open any contact record.
2. In the **Parent Customer** field, click the white space and start typing an account name. For this exercise, type ***good*** and press the Tab key. You will see that Microsoft Dynamics CRM did not find any matching records, and therefore it displays the red circle with the white X.
3. In the same **Parent Customer** field, click the white space and type ***good***. This time you added the asterisk wildcard in front of your entry. As you learned in the Quick Find section earlier in this chapter, the asterisk wildcard expands the search to include anything that has the text *good* in it. In our first example (without the wildcard), Microsoft Dynamics CRM only searches for matching records that *begin* with the text *good*, and it didn't find any matches.

4. With the wildcard included in the search, Microsoft Dynamics CRM will display the yellow match icon. Click this icon to see the list of records that matched your ***good** entry. You will see that four possible matches are listed: two accounts and two contacts. Even though the contact records don't appear to have the text *good* in their name, they appear as a possible match because these contacts are linked to the accounts that do have the text **good* in their name.

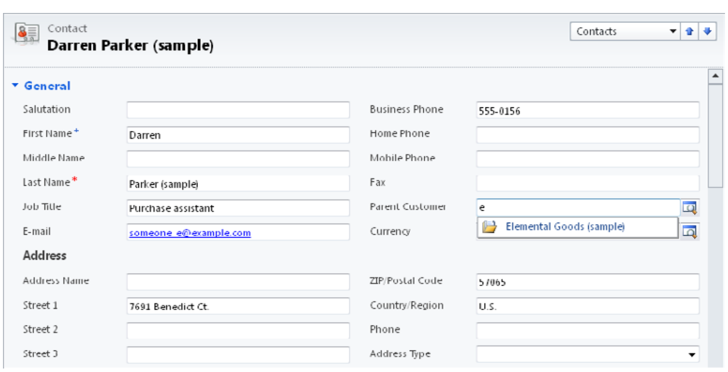


5. Select **Elemental Goods (sample)**. When you do so, Microsoft Dynamics CRM automatically adds this record to your most recently used list. Now you will access that list from a lookup field, but first you will need to clear out the existing value.

6. In the **Parent Customer** field, click the white space and press the Delete key. This will blank out the **Parent Customer** field.

7. Now click in the **Parent Customer** field and type ***e***. Microsoft Dynamics CRM will display the most recently used list directly beneath the lookup field.

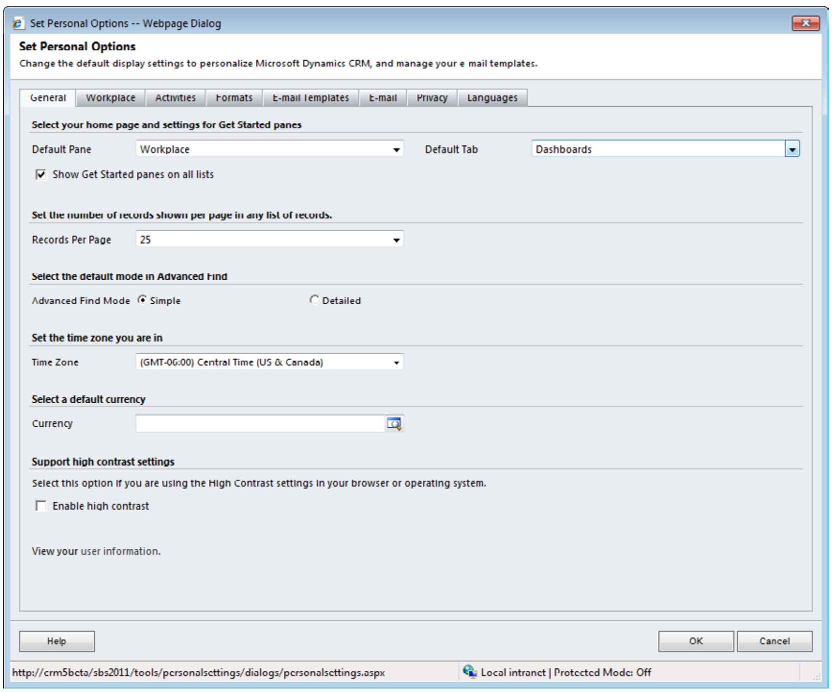
8. To select a record from this list, click it with your mouse. Alternatively, you can use the down arrow on your keyboard to select the record you want and then press Tab.



Tip If you want to manually remove a record from the most recently used list, point to it with your mouse and click the Delete button.

Setting Personal Options

Microsoft Dynamics CRM allows you to set personal options to modify the user interface. You can access your personal options by clicking the File tab in the ribbon and then clicking Options to open the Set Personal Options dialog box. Although we won't review all of the personal options available, we do want to review a few common configuration options.



On the General tab, you can specify the following:

- **Default home page** By changing this selection, you can determine which page Microsoft Dynamics CRM will start on after you log on with the web client. Select the pane and tab you use most frequently.
- **Show Get Started panes on all lists** If you want to turn off the Get Started panes throughout the entire system, deselect this check box.

- **Records per page** As we mentioned earlier, you might want to change the number of records that appear on a page. By displaying more records on a page, you can apply actions to a larger data set. However, you should be aware that users with a large number of records per page might experience slower performance as the page loads, so use caution with this setting.
- **Time zone** Be sure to select the correct time zone to match the time zone of your computer. If this time zone setting does not match the time zone on your computer, you might find that appointments synchronized to Outlook are shifted by a few hours.

On the Workplace tab, you can select which application areas to display in the navigation pane. This setting will appear only to you as an individual user; it will not apply to all users in the system. Therefore, feel free to set up the Workplace area in whatever manner is most comfortable for you. In this exercise, you will modify your Workplace pane to include new areas of the user interface.

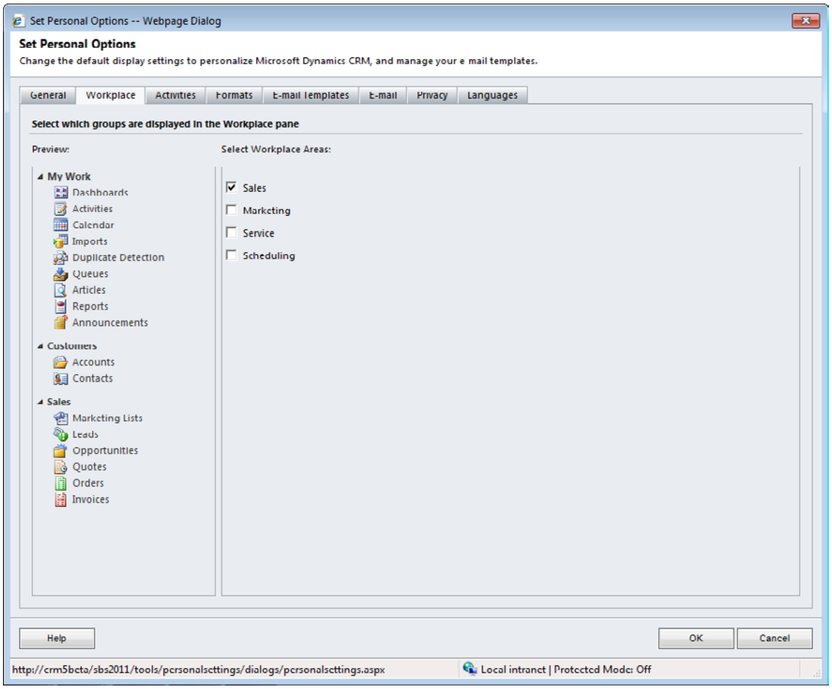
> **Tip** The Set Personal Options dialog box in Microsoft Dynamics CRM for Outlook provides additional configuration options when compared with the dialog box in the web client. For more information about the personal options in Outlook, see Chapter 5.

SET UP Log on to the Microsoft Dynamics CRM website through the web client before beginning this exercise.

1. On the ribbon, click the **File** tab.
2. Click **Options**.

   The Set Personal Options dialog box appears.
3. Click the **Workplace** tab.
4. Select the check box to the left of **Sales**.

   Microsoft Dynamics CRM updates the preview on the left side of the dialog box to include the Sales area.

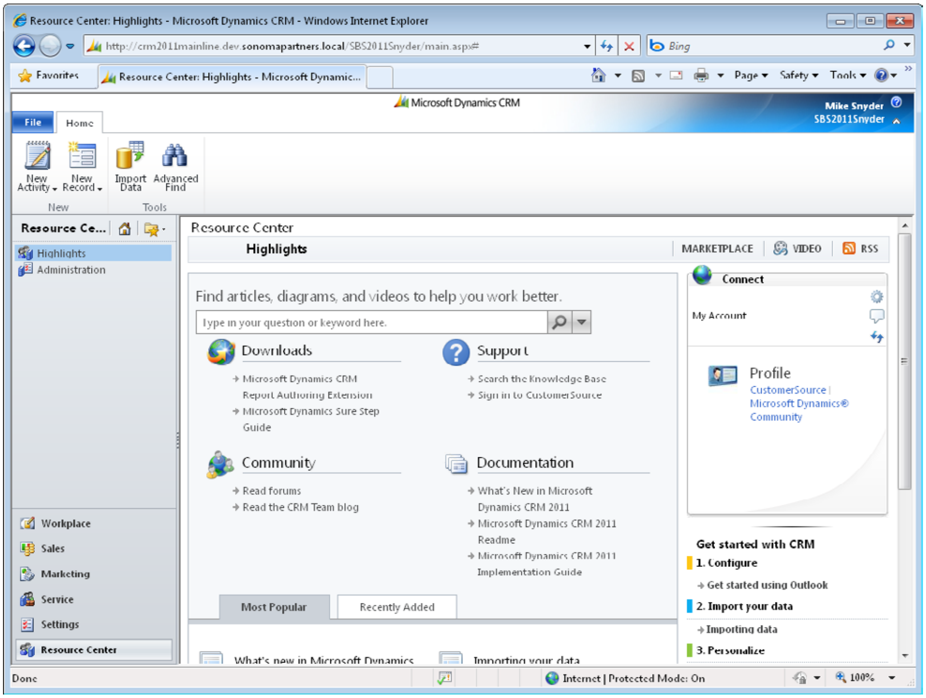


5. Click **OK**.
6. Click **Workplace** in the application areas.

   Microsoft Dynamics CRM now includes the Sales area that you just added in the application navigation pane.

Using the Resource Center

Microsoft Dynamics CRM includes a Resource Center that provides additional information about the software. To access the Resource Center, simply click Resource Center in the application navigation pane. The Resource Center contains dynamic content hosted on the Microsoft servers, and Microsoft provides continual updates to this content. You will need an Internet connection to access content from the Resource Center.



In addition to articles about using the software, the Resource Center contains links to other Microsoft Dynamics CRM resources such as downloads, support information, online communities, and documentation.

Accessing Help in Microsoft Dynamics CRM

Even though most users indicate that Microsoft Dynamics CRM is intuitive and easy to learn, you might have questions about the software. Fortunately, Microsoft Dynamics CRM includes help guides for end users as well as for administrators. To access help, you can click the Help button that is always located in the upper-right corner of the screen.

Alternatively, you can access the help information by clicking the File tab on the ribbon and then clicking Help on the submenu.

Microsoft Dynamics CRM Help is context sensitive, so the software can show you the portion of the help content most relevant to the page you're currently viewing. For example, if you're viewing a lead record and you click the Help On This Page option, Microsoft Dynamics CRM will automatically direct you to the Help topic titled "Work with Leads."

> **Tip** Your system administrator can customize the help content that appears in Microsoft Dynamics CRM to include specific instructions about your unique Microsoft Dynamics CRM deployment.

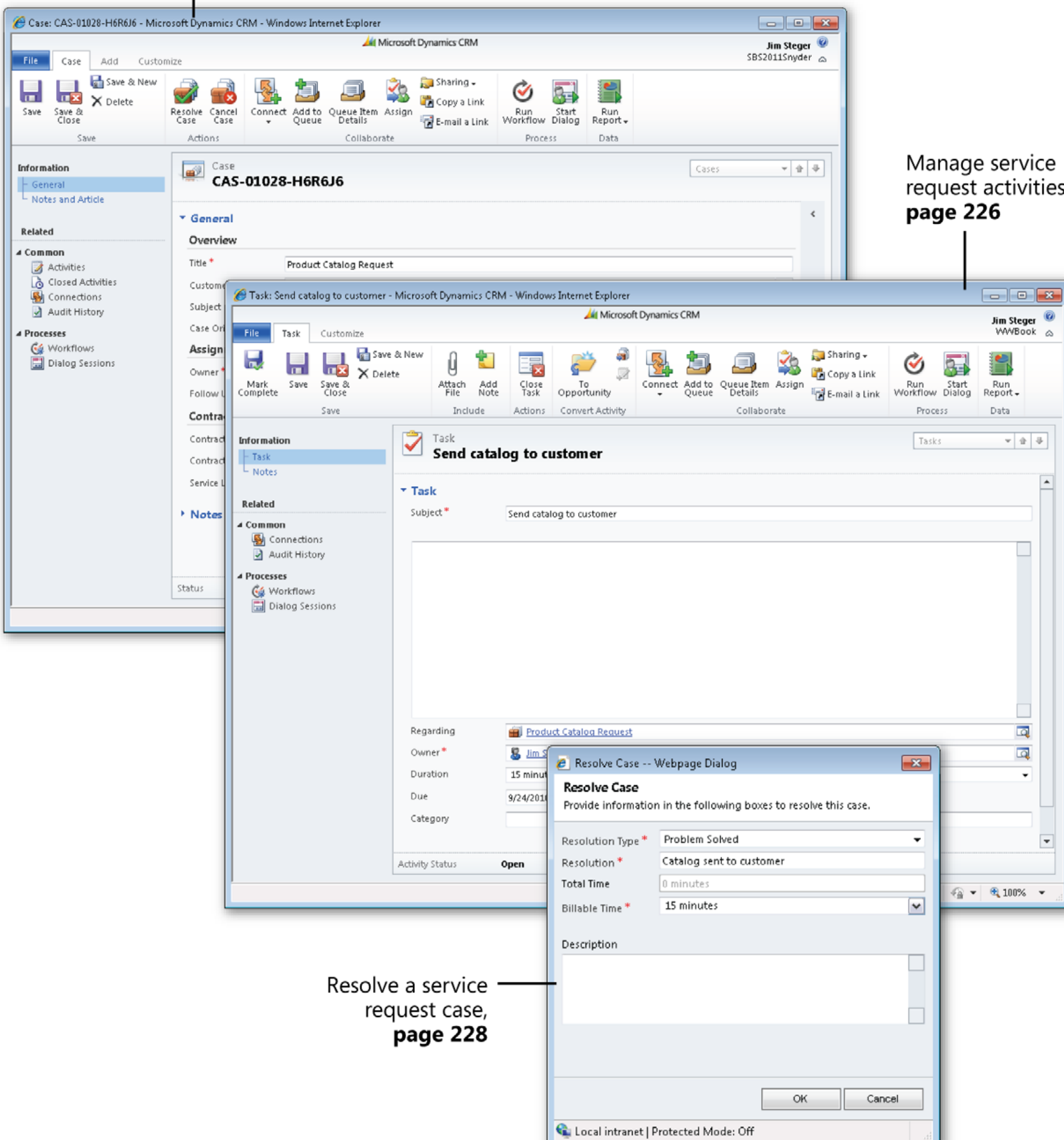
Key Points

- To sort records in a view, click the column heading to toggle the records in ascending or descending order. To sort by more than one column, hold down the Shift key and click a second column header.
- To select records in a view, use the Ctrl or Shift key to select multiple records. Selecting the check box will select all of the records on the page, but not all of the records in the view.
- You can modify multiple records at once, but you can only edit records one page at a time.
- The Quick Find feature allows you to search for records in a view. You can use the asterisk (*) as a wildcard character in your searches. You can also use the wildcard character in lookup fields.
- You can access recently viewed records and views through the recently visited menu, and you can pin views and records that you want to keep on the recently visited list.
- Lookups link records in the user interface. You can use the automatic resolution feature by typing text directly into the lookup field. You can also select records from the most recently used list with lookup fields.
- You can modify your personal options to specify your preferences, including the start page that will be displayed when Microsoft Dynamics CRM first loads or the number of records displayed on each page.
- The Resource Center and the Help section include additional information about using the Microsoft Dynamics CRM software.

Chapter at a Glance

Create a service request case, **page 220**

Manage service request activities, **page 226**



Resolve a service request case, **page 228**

10 Tracking Service Requests

In this chapter, you will learn how to

- ✔ Create and assign a service request case.
- ✔ Manage service request activities.
- ✔ Resolve a service request case.
- ✔ Cancel and reopen a service request case.

Many CRM system implementations are initiated by sales and marketing teams to build a shared, central repository of customer sales and order data. In the previous chapters of this book, you've learned how Microsoft Dynamics CRM can be used to manage marketing activities, prospective customers (leads), sales opportunities, and orders. Of course, after a sale is completed, your company's relationship with the customer does not end! To ensure that the customer is satisfied with the sale, customer service teams can use the information gathered during the marketing and sales processes to manage the post-sale relationship with the customer.

Consider the following scenario: You've just purchased a flight to your favorite vacation locale from a travel website. The day before you're scheduled to leave, you receive an email message indicating that your flight has been canceled and that you'll need to contact the travel website's customer service team for more information. You call the customer service number listed in the message, only to be routed through three customer service representatives, explaining your situation to each before someone finally books you on another flight.

Regardless of the purchase, this scenario is not uncommon when customer support issues are involved, which is why a system that allows customer service teams to share sales and support information is such a powerful concept. All communications regarding the support request can be captured in one location and viewed by everyone on the team to ensure a speedy resolution. As the archive of service requests accumulates, customer service managers can identify common issues and trends that can then be used to drive enhancements to the sales process, service, or product development.

In Microsoft Dynamics CRM, service requests are called cases. A case represents any request or support incident for a customer. Typically, a case includes a description of the service issue or problem reported by the customer and the related notes and follow-up activities that service representatives use to resolve the issue.

Providing an avenue for customers to submit requests or issues during and after the sales process is critical to ensuring that customers are satisfied and willing to do business with your company in the future.

In this chapter, you'll learn how customer service teams can create, update, and resolve cases in Microsoft Dynamics CRM.

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, fields, or security roles 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.

Creating and Assigning a Service Request Case

Each case in Microsoft Dynamics CRM contains the details of a customer request or issue, as well as follow-up dates, resolution steps, and other details. Multiple cases can be tracked for each customer, and each case has its own follow-up dates and status value. Because of the flexibility of the case record and the ability to customize forms and fields in Microsoft Dynamics CRM, cases are often used to track more than just support requests. Examples of how we've seen cases used include the following:

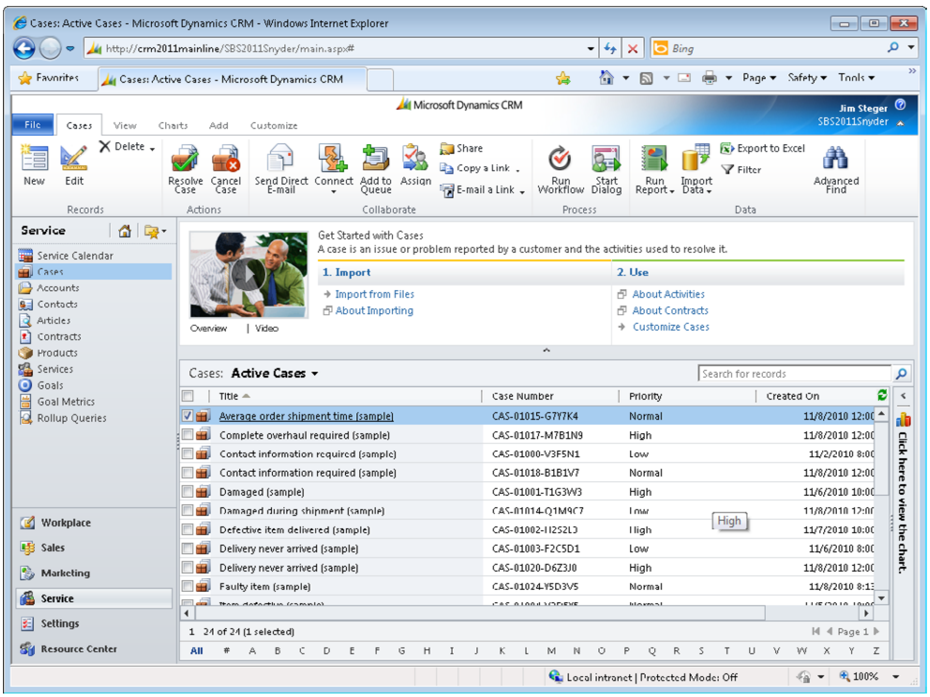
- Resolving call center support requests from customers of a financial services firm
- Managing concierge requests for top-tier clients of a hospitality provider

- Tracking safety requests to fix potholes and replace broken streetlights for a municipal government
- Capturing end-user requests for the CRM system itself
- Tracking warranty requests for residential home sales

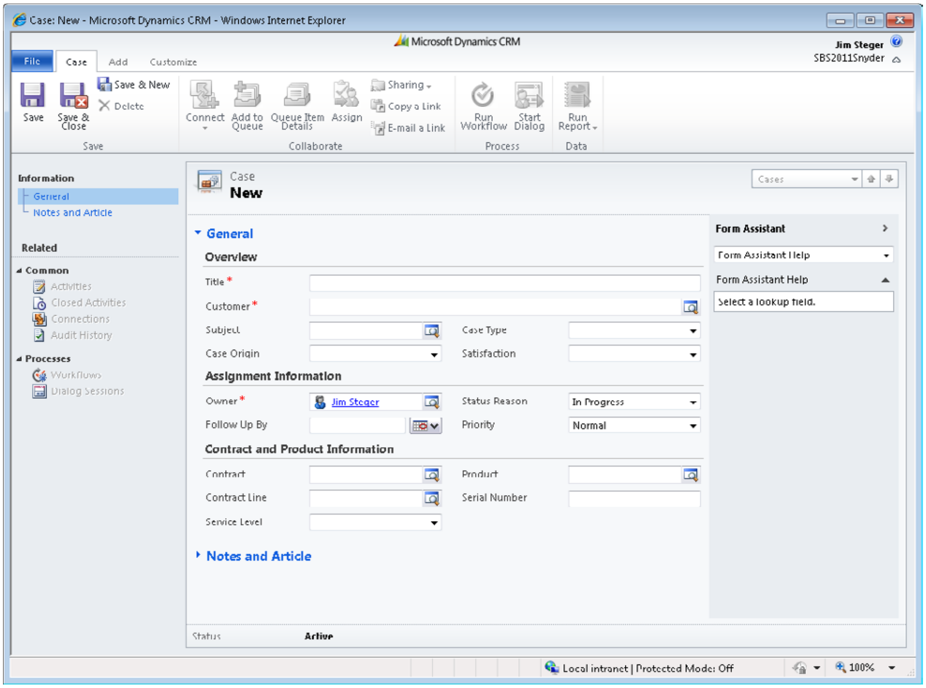
In this exercise, you'll create a new case for a customer who is requesting a product catalog. After creating the case with the appropriate details from the customer, you'll assign it to a customer service representative.

SET UP Use your own Microsoft Dynamics CRM installation in place of the CRM sample data shown in the exercise. Use the Windows Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website before beginning this exercise.

1. In the **Service** area, click **Cases** to view the case list.



2. On the ribbon, on the **Cases** tab, click the **New** button to launch the **New Case** form.



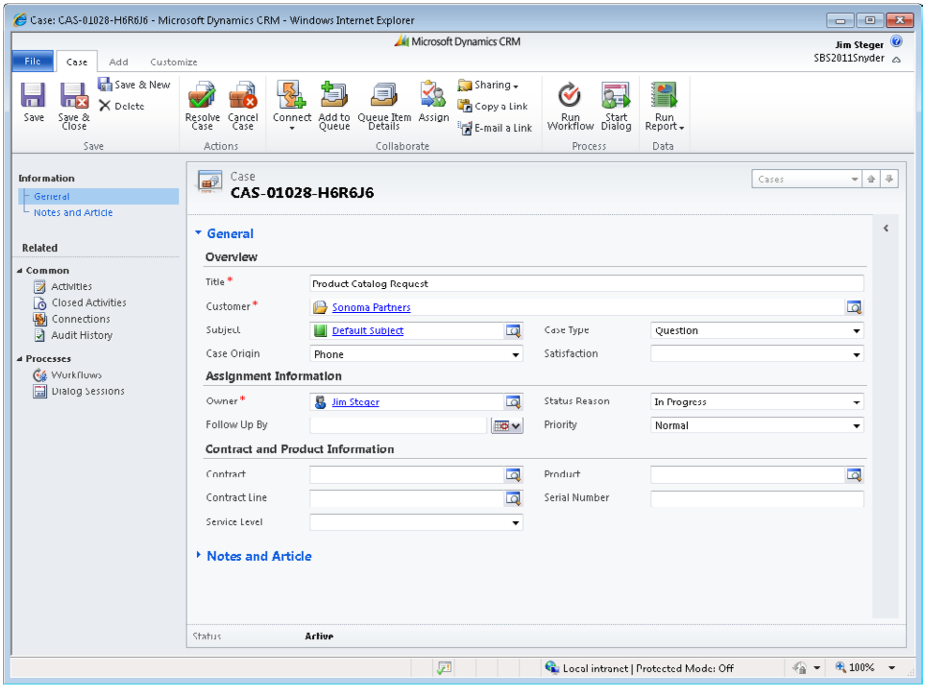
3. In the **Title** field, enter the following text description: ***Product Catalog Request***.

4. Click the **Lookup** button next to the **Customer** field, and select an account.

> **Tip** Each case must be related to a customer account or contact. In addition to customers, cases can also be related to service contracts and products.

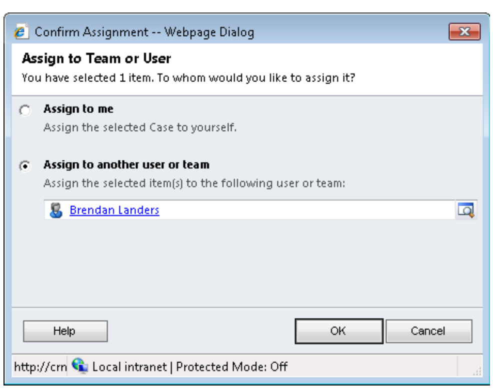
5. Select a **Subject** category for the case.
6. Set the **Case Origin** field to **Phone** to indicate that the customer called with this request.
7. Set the **Case Type** field to **Request**.

8. On the **Case** tab of the ribbon, click **Save** to create the case.



Tip Microsoft Dynamics CRM automatically assigns a number to each case when it is first saved. Case auto-numbering can be configured by system administrators in the Administration section of the Settings pane. By default, each case will be created with a three-character prefix (CAS), a four-digit code, and a six-character identifier—for example, CAS-01028-H6R6J6.

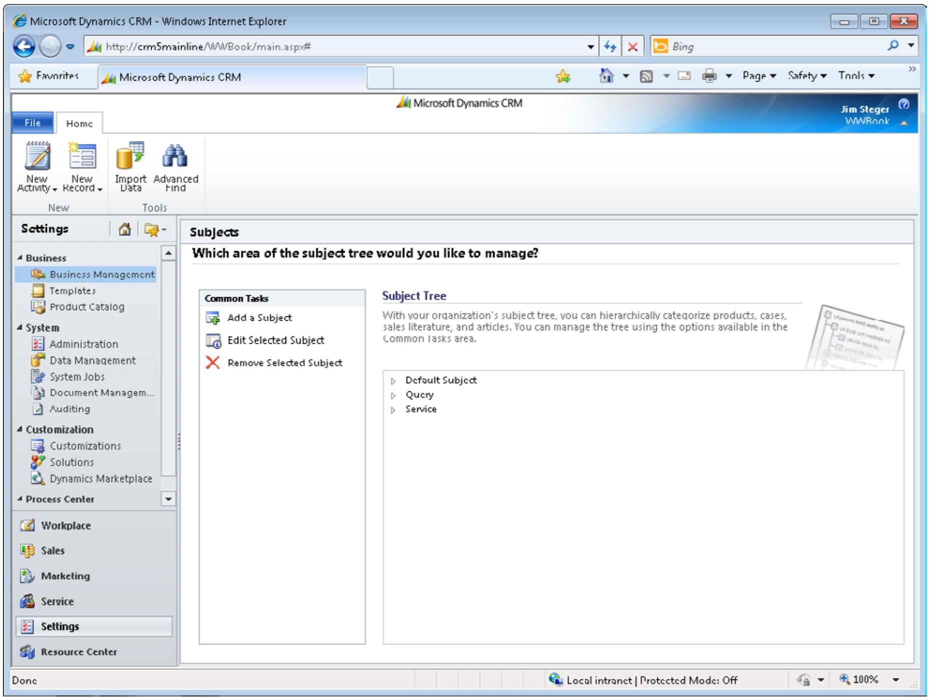
9. On the **Case** tab of the ribbon, in the **Collaborate** group, click the **Assign** button to assign the case to a customer service representative.
10. In the **Assign to Team or User** dialog box, select **Assign to another user or team** and use the **Lookup** button to select another user record.



11. Click **OK** to assign the record to the selected user.

Configuring the Subject Tree

Subjects are categories that are used to organize products, sales literature, cases, and knowledge base articles in Microsoft Dynamics CRM. Consider the subject tree as an index of topics related to your business. A hierarchical subject tree can be used in Microsoft Dynamics CRM to categorize your business information. Because subject categories are applied across sales and service records, it's important to consider the best categories for your business when configuring your Microsoft Dynamics CRM system.



Your subject tree might be aligned to your products or business divisions, or perhaps you want to track customer invoicing questions without relating them to a specific product or service. The following table includes sample subject trees for different industries.

Business Type	Sample Subject Tree

Financial services firm	– Brokerage services
	  – Product A
	    + Client relations
	    + Confirmations
	    + Settlements
	  + Product B
	+ Financial planning
	+ Foreign exchange

Software consulting company	+ Billing
	– Product support
	  + Product A
	  + Product B
	+ Sales and marketing
	+ Service agreements
	– Services
	  + Application development
	  + Consulting

Residential real estate developer	+ Buyers
	– Conversion management
	  + Tenants
	+ Marketing materials
	– Projects
	  – Property A
	    + Units
	    + Other inventory
	    + Warranties
	  + Property B

The subject tree is accessed and updated from the Business Management section of the Settings area in Microsoft Dynamics CRM. Because the right to create, edit, and remove subjects for your organization is considered an administrator function, changing the structure of the subject tree is outside the scope of this book. For assistance with creating the subject tree in your Microsoft Dynamics CRM environment, contact your system administrator.

Managing Service Request Activities

Depending on the complexity of the customer request or issue, it might take a customer service representative just a few minutes to resolve a case, whereas more complicated cases might take days or even months before they are resolved. Because the workload of a customer service team is subject to the requests and support issues created each day, it's important for teams to continuously resolve issues and track progress on new issues as they're logged.

For example, the catalog request example in the previous section has a straightforward resolution: The customer service representative will create a task for the fulfillment clerk to send a catalog to the customer, and after this has been completed, no additional follow-up is required with the customer.

Many requests require more research, either internally or with the customer. After submitting an initial warranty claim for a malfunctioning stereo system, a customer might be asked to speak to a service representative on the phone several times and schedule an appointment at a service center before the stereo is fixed. And if it can't be fixed, the customer might be asked to ship the broken stereo to the manufacturer for replacement.

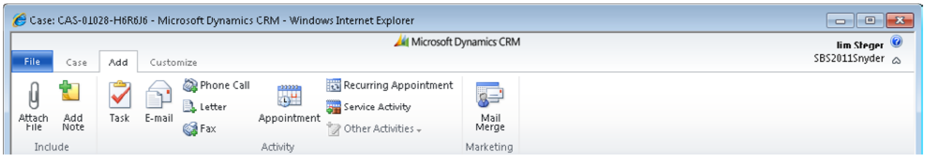
For customer service managers, tracking the steps taken during a case provides a way of identifying the best solution to frequently logged issues and managing the amount of time each representative spends on a case.

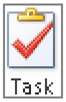
In this exercise, you'll log a follow-up activity for the case created in the previous section, creating a task activity to track time spent on the service request.

> **See Also** For more information about activities, see Chapter 4, "Working with Activities and Notes."

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise. You need the Product Catalog Request case you created in the previous exercise. Open the Product Catalog Request case.

1. On the ribbon, click the **Add** tab to display additional options for the case.

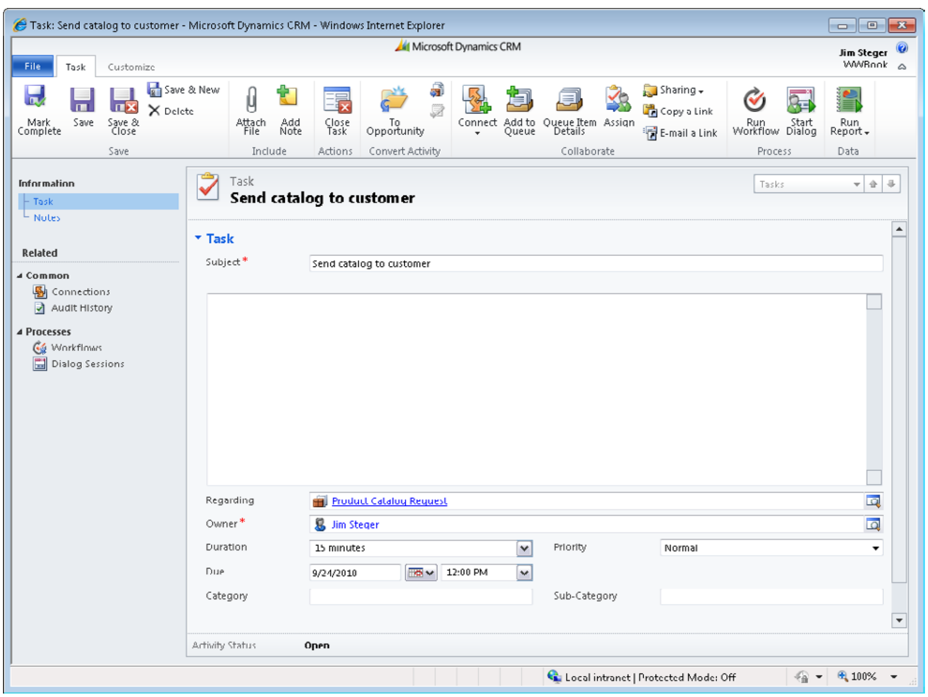




2. In the **Activity** group, click **Task** to create a new task related to the case.

> **Note** Activities can also be created from the Activities view accessed in the entity navigation pane of the Case form. See Chapter 4 for more information.

3. Enter the following in the **Subject** field: ***Send catalog to customer***.
4. In the **Due** field, select a date three business days from today's date.
5. Set the **Duration** field on the **Task** form to **15 minutes**. The duration is the anticipated time the task will take to complete.



6. Click the **Mark Complete** button to mark the task as completed.

   After the status of the task is updated to Completed, the Task form automatically closes.

Resolving a Service Request Case

As customer service teams work toward resolving service request questions and incidents, it's important to maintain an accurate status value for each case to ensure that new cases are addressed in a timely manner and worked on until a resolution is identified. When a case is resolved to the customer's satisfaction, customer service representatives can update the status of the case to Resolved, which will maintain the case record in the Microsoft Dynamics CRM database but remove it from the active case view.

Before a case can be marked as resolved, all open, related activities must be completed or canceled. The duration value of each completed activity regarding the case will be totaled when the case is resolved, so customer service managers can track the amount of time spent working on the case.

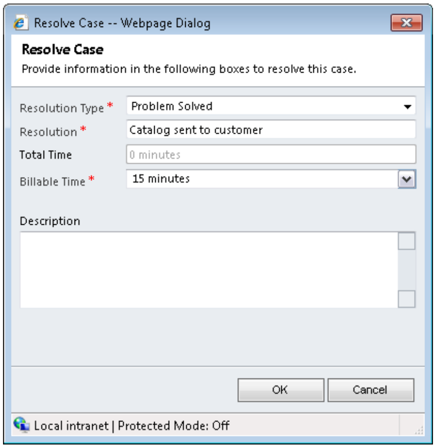
In this exercise, you'll mark the case created in a previous exercise as resolved.

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise. You need the Product Catalog Request case you created earlier in this chapter. Open the Product Catalog Request case.

1. On the **Case** tab of the ribbon, in the **Actions** group, click the **Resolve Case** button to resolve the case.

> **Important A case cannot be resolved until all open activities regarding the case have been closed. Before resolving the case, make sure all activities for the case have been marked as Completed or Canceled.**

2. In the **Resolve Case** dialog box, enter ***Catalog sent to customer*** in the **Resolution** field and leave ***15 minutes*** selected in the **Billable Time** field.

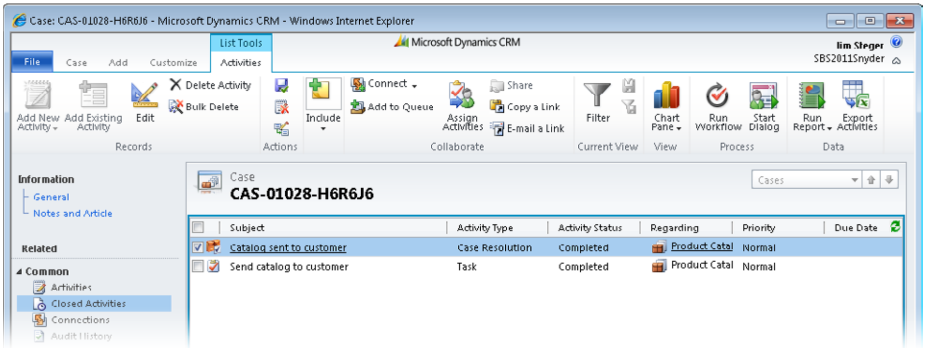


> **Note** By default, Microsoft Dynamics CRM includes only one status option for the Resolved case status: Problem Solved. This value will automatically appear in the Resolution Type field in the Resolve Case dialog box. The customization tools in Microsoft Dynamics CRM can be used to modify status reason values for cases to match your business needs. Contact your system administrator for assistance.

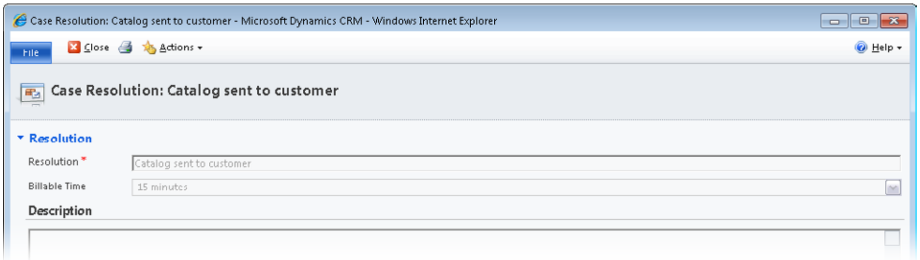
3. Click **OK** to update the case status to Resolved.

   All fields will be saved and made read-only on the form. Microsoft Dynamics CRM automatically creates a Case Resolution activity that stores the details of the resolution in the case's closed activities.

4. In the entity navigation pane for the case, click **Closed Activities** to view the completed activities for the case.



5. Open the **Case Resolution** activity. Note that the resolution and total time for the case are stored in the history for reporting and analysis.



Canceling and Reopening a Service Request Case

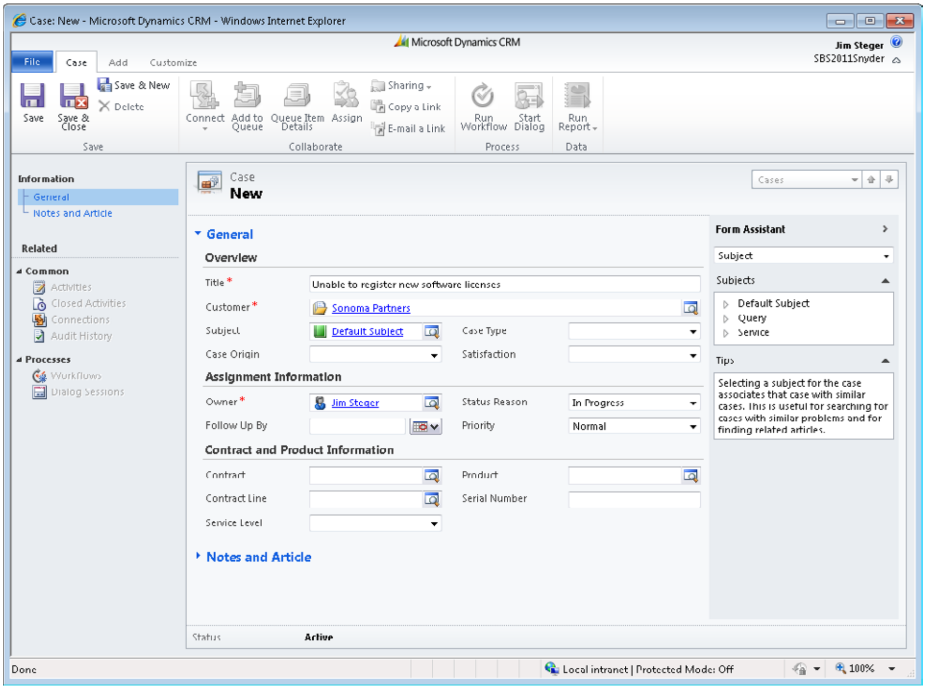
There will be times when a case drops off the customer's priority list or the customer resolves an issue internally. Imagine a situation in which a customer submits a warranty claim for a refrigerator he recently purchased. The day after the case was logged with the appliance company's customer service team, the company issues a recall of the customer's refrigerator model, having seen several similar cases logged against it in previous months. The customer service team sets up a new case tracking category to manage recall requests and logs a new case under it for the customer. To prevent the initial case from remaining in the customer service team's active case list, the case is canceled. Canceled cases are deactivated so that all fields on the form are read-only, but these cases can still be searched and referenced as necessary. Sometimes the reverse happens—a case that was previously resolved or canceled is reopened if the issue reoccurs for the customer. Resolved and canceled cases can be reactivated in Microsoft Dynamics CRM so that customer service teams can continue working with them. Software development companies often have cases that require ongoing customer input; these cases might be canceled if no response is received from the customer for a long period of time. In this example, the case could be reopened in Microsoft Dynamics CRM if the customer contacts the support team at a later date.

In this exercise, you'll mark a case as Canceled and then reopen it.

SET UP Use the Internet Explorer web browser to navigate to your Microsoft Dynamics CRM website, if necessary, before beginning this exercise.

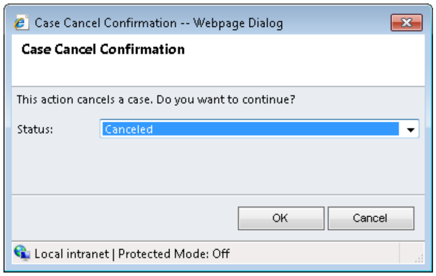
1. In the **Service** area, click **Cases**, and then in the on the **Cases** tab of the ribbon, click **New** to create a new case.
2. In the **New Case** form, type or select values in the required fields, as follows:

Field	Value
Title	***Unable to register new software licenses***
Customer	***Sonoma Partners***, or any account in your system
Subject	***Default Subject***, or any subject in your system



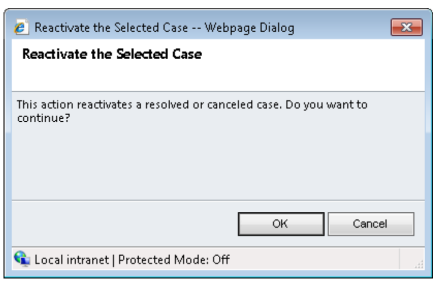
3. Click **Save** to create the case.

4. In the **Actions** group on the ribbon's **Case** tab, click the **Cancel Case** button.
5. In the **Case Cancel Confirmation** dialog box, select the appropriate status reason for the cancellation, and then click **OK** to confirm that you want to cancel the case.



After you click OK, the case will update to Canceled status and all fields on the case form will be read-only.

6. In the **Actions** group on the ribbon's **Case** tab, click the **Reactivate** button.
7. In the **Reactivate the Selected Case** dialog box, click **OK** to reactivate the case.



This will update the case to Active status, and all the fields in the form will again be editable.

CLEAN UP Close the case record.

Key Points

- A case represents any service request or support incident for a customer in Microsoft Dynamics CRM. Customer service teams can use cases to manage customer requests and problems.
- Customer service managers can analyze case data to identify frequently occurring customer issues, improve product or service offerings, and streamline the time it takes service representatives to resolve issues.
- By default, Microsoft Dynamics CRM requires that a case be assigned a Subject value. The subject tree allows you to categorize sales and support records in Microsoft Dynamics CRM and should be configured by a system administrator.
- Follow-up activities ensure that steps are taken to resolve a case. A follow-up activity might be a simple task to send a catalog or update a customer's address, or it could be more involved, such as a series of phone calls with the customer, service appointments, or research tasks.
- By tracking activities to a case, customer service managers can add the duration of each completed activity to the total time spent on the case. This total is automatically calculated in the Resolve Case dialog box.
- Maintaining the status value of each case accurately is important to ensure that new issues are addressed in a timely manner and resolved as quickly as possible.
- Cases can be marked as Resolved or Canceled to remove them from the active case list. Updating a case to Resolved or Canceled status makes the case read-only in Microsoft Dynamics CRM; however, cases with these statuses can be reactivated as needed—for example, if the customer reports the problem again or if additional edits to the case are necessary.

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About Sonoma Partners

This book's authors, Mike Snyder, Jim Steger, and Brendan Landers, are executives at the Chicago-based consulting firm Sonoma Partners. Sonoma Partners is a Microsoft Gold Certified Partner that sells, customizes, and implements Microsoft Dynamics CRM for enterprise and midsize companies throughout the United States and Canada. Sonoma Partners has worked exclusively with Microsoft Dynamics CRM since the version 1.0 prerelease beta software. Founded in 2001, Sonoma Partners possesses extensive experience in several industries, including financial services, professional services, health care, and real estate.

Sonoma Partners is different from other Microsoft Dynamics CRM partners because:

- We write the books for Microsoft. Consequently, we know the product inside and out, and our relationships with Microsoft product teams will save you tons of time and headaches down the line.
- We offer a cost guarantee on all of our deployments. We can do this because of our experience completing more than 400 Microsoft Dynamics CRM deployments.
- We offer clients our unique pre-built intellectual property that consists of a full library of tools, utilities, controls, and solutions that you can plug and play in your deployment—saving clients thousands of hours of development time.
- Sonoma Partners offers pre-built solution templates for professional services, financial services, healthcare, franchise management, and real estate.

In addition to the multiple books we've written for Microsoft Press, we share our Microsoft Dynamics CRM product knowledge through our email newsletter and online blog. If you're interested in receiving this information, you can find out more on our website at *http://www.sonomapartners.com*.

Even though our headquarters is in Chicago, Illinois, we work with customers throughout the United States and Canada. If you're interested in discussing your Microsoft Dynamics CRM system with us, please don't hesitate to contact us! In addition to working with customers who want to deploy Microsoft Dynamics CRM for themselves, we also act as a technology provider for Independent Software Vendors (ISVs) looking to develop their solution for the Microsoft Dynamics CRM platform.

Sometimes people ask us where we got our name. The name *Sonoma Partners* was inspired by Sonoma County in the wine-producing region of northern California. The wineries in Sonoma County are smaller than their more well-known competitors in Napa Valley, but they have a reputation for producing some of the highest quality wines in the world. We think that their smaller size allows the Sonoma winemakers to be more intimately involved with creating the wine. By using this hands-on approach, the Sonoma County wineries can deliver a superior product to their customers—and that's what we strive to do as well.

Mike Snyder

Mike Snyder is co-founder and principal of Sonoma Partners. Recognized as one of the industry's leading Microsoft Dynamics CRM experts, Mike is a member of the Microsoft Dynamics Partner Advisory Council and is a Microsoft Dynamics CRM MVP. He has co-authored several books about Microsoft Dynamics CRM for Microsoft Press that have sold more than 50,000 copies worldwide. Before starting Sonoma Partners, Mike led multiple product development teams at Motorola and Fortune Brands. Mike graduated with honors from Northwestern's Kellogg Graduate School of Management with a Master of Business Administration degree, majoring in marketing and entrepreneurship. He has a bachelor's degree in engineering from the University of Notre Dame. He enjoys ice hockey and golf in his free time.

Jim Steger

Jim Steger is co-founder and principal of Sonoma Partners. He has been developing solutions for Microsoft Dynamics CRM since the version 1.0 beta. Microsoft recognized Jim's leadership in the technical community with the Microsoft Dynamics CRM MVP award in both 2010 and 2009. Jim has co-authored books about Microsoft Dynamics CRM for Microsoft Press since the 3.0 version of the software. Before starting Sonoma Partners, Jim designed and led various global software development projects at Motorola and ACCO Office Products. Jim earned his bachelor's degree in engineering from Northwestern University.

Brendan Landers

Brendan Landers is a consulting director at Sonoma Partners, overseeing all of the company's Microsoft Dynamics CRM consulting projects. He has led numerous Microsoft Dynamics CRM implementation projects for companies in the following industries: professional and financial services, education, healthcare, hospitality, and others. Prior to joining Sonoma Partners, Brendan worked at Information Resources, Inc. as a Director, Quality Assurance and Delivery, where he led several data quality and business intelligence initiatives. He holds a bachelor's degree in management information systems from the University of Iowa.