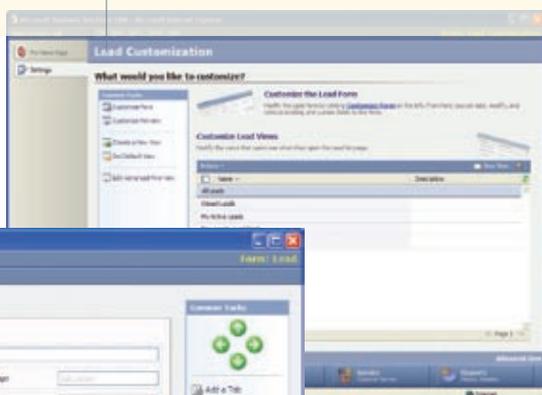Microsoft®
Business
Solutions
CRM

MICROSOFT BUSINESS SOLUTIONS **CRM CUSTOMIZATION**

Designed for maximum flexibility and low total cost of ownership, Microsoft® Business Solutions CRM adapts easily and affordably to meet business and industry-specific needs.

EASILY CUSTOMIZE MICROSOFT CRM FORMS to meet your exact business needs.

ADD, EDIT, OR DELETE SECTIONS, TABS, AND FIELDS, and position them according to business needs.

CHANGE THE LAYOUT AND FORMATTING of new and existing information fields.

Microsoft CRM is built from the ground up on the Microsoft .NET Framework, delivering tremendous business value through easy integration with third party applications and Web services.

MAXIMIZE FLEXIBILITY, WHILE KEEPING COSTS DOWN
Mold Microsoft CRM to meet specific organizational and industry needs with efficient customization processes that help minimize costs and speed return on investment.

AUTOMATE EXISTING BUSINESS PROCESSES
Configurable workflow rules free employees from time-consuming administrative tasks and help increase efficiency and accuracy for sales and service processes.

CAPTURE AND VIEW THE EXACT DATA YOU NEED
Quickly tailor forms and information views to capture and display the exact data employees need to close sales and offer consistent customer service.
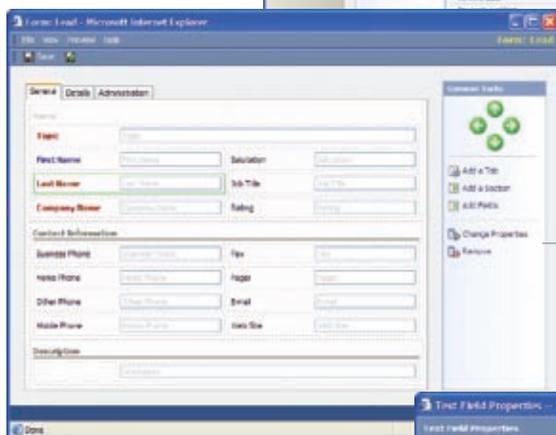
BUILD ADVANCED CUSTOMIZATIONS
Developers can enhance functionality, build customized vertical solutions, create integrations with third-party applications, and extend the solution to Web services platforms.

IMPLEMENT CUSTOMIZATIONS EASILY AND RAPIDLY
Because Microsoft CRM is browser-based, customizations can be published to the entire system in a single upload, with no need to reconfigure individual desktops or laptops.

UPGRADE CUSTOMIZATIONS SMOOTHLY
Microsoft CRM customizations carry forward with upgrades, helping reduce the burden on IT resources, minimize maintenance costs, and ensure uninterrupted productivity.

www.microsoft.com/BusinessSolutions/CRM

Tailor the user interface, settings, and workflow processes

Without touching database code, your administrator or Microsoft partner can modify Microsoft CRM to meet needs specific to your organization and industry.

Modify forms and views

Easily add new fields to the Microsoft CRM database schema to fit the data needs of a specific industry or business.

Quickly customize virtually any form within Microsoft CRM — accounts, contacts, opportunities, cases, orders, and more—so that you capture and manage the exact data you need to increase sales and service effectiveness.

Modify information views across the solution so that users can see critical information at a glance and sort data across records according to specific business needs.

Create custom templates for mail merge, e-mail, Knowledge Base articles, and quotes, helping ensure systematic content management and consistent customer messaging.

Modify business management settings

Use flexible default settings to mirror your business model by mapping organizational structures, including departmental, management, and team structures.

Protect information by selecting from a wide range of user roles and access rights, or modify or create roles that fit unique needs.

Automate business processes

Set up and modify rules that automate business processes, including leads routing and notifications, opportunity and pipeline management, case management, and data transfer to other applications.

Use workflow rules or build sales methodologies to automate stages in the selling process and establish milestones for assessing sales activity.

Create customized e-mails and set up specific rules for automatic order fulfillment notification, leads and opportunity follow-ups, service requests follow-ups, and more.

Advanced customizations

Microsoft CRM offers a rich environment for advanced customizations, including open application programming interfaces (APIs) and a comprehensive Software Development Kit (SDK).

Build customized integrations with third-party business solutions.

Extend the solution to Web services—for example, automatically perform credit checks whenever new opportunities are created in Microsoft CRM.

Enhance functionality to fit specific verticals and industries, or build new applications on top of the Microsoft CRM platform.

Microsoft CRM is available in U.S. English, International English, French, German, Spanish, Italian, Dutch, Brazilian Portuguese, and Danish.

Microsoft CRM works with the latest Microsoft operating systems and servers, including Microsoft Windows® Small Business Server 2003 Premium Edition.

A global network of Microsoft Partners can offer hands-on assistance with setup and maintenance processes for Microsoft CRM, along with comprehensive support and training resources.