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Microsoft Dynamics CRM 4.0 Unleashed

Marc J. Wolenik, Damian Sinay

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Microsoft® Dynamics CRM 4.0 Unleashed *presents start-to-finish guidance for planning, customizing, deploying, integrating, and managing Dynamics CRM in your unique business and technical environment. Authored by two leading Microsoft Dynamics implementers, this book systematically explains how the system works, why it works that way, and how you can leverage it to its fullest advantage.*

The authors present clear examples, proven best practices, and pitfalls to avoid in using every significant Dynamics CRM capability. The far-reaching coverage ranges from Dynamics CRM's sales, marketing, and customer service features to its automated workflows; from Outlook and Office integration to reporting and security. The authors offer independent insight into Dynamics CRM's most powerful new features, from its improved interface to its new mail merge and data migration tools.

This book is for every IT professional who intends to work with Dynamics CRM, regardless of their experience with Dynamics or other CRM solutions. The authors provide example-rich, realistic coverage of advanced Dynamics customization, extensibility, and integration: information that is available nowhere else.

Detailed information on how to…

- Set up, configure, and maintain all facets of Dynamics CRM in any organization or industry
- Thoroughly understand both the on-premise and hosted versions of Dynamics CRM
- Make the most of Dynamics' new features, including email, the Outlook client, Internet Facing Deployment (IFD), and relationships
- Manage sales leads, opportunities, accounts, contacts, marketing lists, sales collateral, campaigns, quotes, orders, and invoices
- Improve customer service by integrating schedules, cases, contacts, product/service information, and more
- Build powerful automated workflows that streamline key sales tasks and liberate salespeople for more effective selling
- Efficiently administer and secure any Dynamics CRM implementation
- Drive greater value by integrating Dynamics CRM with Microsoft Office productivity tools
- Customize and extend Dynamics CRM using Visual Studio, .NET, and custom plug-ins and add-ons

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