Microsoft Dynamics CRM Clients

A user can work with Microsoft Dynamics CRM in two ways:

- By accessing the Microsoft Dynamics CRM application using Microsoft Internet Explorer, Google Chrome, FireFox, and Safari on a computer or a mobile device
- Through Microsoft Dynamics CRM for Microsoft Office® Outlook®

Both methods provide a similar user experience. However Microsoft Dynamics CRM for Outlook provides a user experience that is highly integrated with Microsoft Office Outlook. For example, records can be viewed using the Outlook reading pane. Additionally, only through Microsoft Office Outlook can a user track emails, tasks, contacts, and appointments and link them to existing Microsoft Dynamics CRM records.

The Web Client

Using Internet Explorer, Google Chrome, Safari, or FireFox as the browser client provides access to Microsoft Dynamics CRM functionality without requiring the installation of client software on the user's computer.

Users can potentially access CRM data from anywhere in the world where they have access to the Internet and a browser.

Microsoft Dynamics CRM for Microsoft Office Outlook

Microsoft Dynamics CRM for Outlook provides a user experience that is highly integrated with Microsoft Office Outlook. Many organizations use Microsoft Office Outlook. Using Microsoft Dynamics CRM for Outlook means that organizations can take advantage of the experience staff has in using Outlook.

Microsoft Dynamics CRM for Outlook provides significant features:

- Microsoft Dynamics CRM records and features can be accessed from within Outlook, removing the need to open a separate window.
- Outlook items such as e-mails, tasks and appointments can be copied to the Microsoft Dynamics CRM database.
- Microsoft Dynamics CRM activities and contacts can be copied and synchronized with Outlook.

The second point is particularly important as it means that users who are familiar with working in Outlook can quickly start tracking interactions with customers and suppliers. For example, if a user writes an e-mail to a customer, he or she can click **Track** to store the correspondence in Microsoft Dynamics CRM. A user can also configure Microsoft Dynamics CRM for Outlook to automatically track

incoming e-mails and responses to e-mails. Beyond tracking e-mails, users can leverage the Microsoft Office Outlook integration with Microsoft Dynamics CRM to track Tasks, Appointments, and Contacts from within Microsoft Office Outlook.

Microsoft Dynamics CRM for Outlook provides an optional capability where a partial copy of the Microsoft Dynamics CRM data is stored on a user's computer providing offline capability. This feature means that users can continue to work with Microsoft Dynamics CRM even when disconnected from the company network.

For organizations that do not use Outlook, users work with Microsoft Dynamics CRM in the Web client.

Security

Microsoft Dynamics CRM provides a comprehensive security model to ensure that users only have access to the appropriate records as determined by business rules. The model is based on an organization structure based on business units, user accounts, and security roles.

User Accounts

All access to Microsoft Dynamics CRM must be authorized and authenticated; anonymous access to Microsoft Dynamics CRM data is not permitted. User accounts are used to grant and authenticate access to Microsoft Dynamics CRM.

For on-premise installations (these are installations where the software is installed on a server somewhere on the organization's network), user accounts are linked to Windows Active Directory accounts. This means that once a user has logged on to their computer using their Windows account they do not need to provide their login details again to connect to Microsoft Dynamics CRM. For Microsoft Dynamics Online (a cloud-based service hosted by Microsoft), Windows Live accounts are used to handle the authentication to the application.

Security Roles

Any user that will access Microsoft Dynamics CRM must be assigned at least one security role. Security roles determine user privileges. A security role specifies for every record type the actions that a user can take on the record type. For example, a user may be assigned a security role that provides rights to create, view, and delete account records but only to view contact records. A user can be assigned more than one security role. In this case, the user gets the most generous combination of permissions across all assigned security roles. These permissions not only control what actions the user can take upon the data, but also control which buttons, navigational items, and functionality is made available to the user.

Planning the appropriate security roles is an essential part of the implementation

of Microsoft Dynamics CRM.

Microsoft Dynamics CRM Records

Information is stored in Microsoft Dynamics CRM in records. Each record type has a specific purpose and is similar to a table in a database. Two important record types are *Accounts* and *Contacts*. Account records are used to store details of organizations and contact records are used to store details of people.

Each record type has a defined set of fields for storing information. For example, the fields for a contact include:

- First name
- Last name
- E-mail address
- Business phone
- Mobile phone
- Job title

If an administrator discovers that there are additional fields that are needed to track information relevant to their organization, additional fields can be created and added to the record type. Additionally, new record types (also known as entities) can be created, such as customer projects, to store data that does not readily fit into any of the standard record types.

Forms

Data is entered into Microsoft Dynamics CRM in fields on a form. Each record type has its own form.

A form is divided into tabs which are used for navigating between different parts of a form. On each tab, fields are shown in sections. A section controls how fields are displayed. For example, a field might occupy the full width of the form or there might be four columns of fields. An administrator can change the way fields, sections and tabs are displayed on a form.

FIGURE 2.4: FORM FOR A CONTACT

Related Items

The Related area of a form shows other record types that are linked to the record shown on the form.

For example, on the *Account* form, one of the related items is contacts. Clicking **Contacts** will show a list of contacts that are linked to the account on the form.

FIGURE 2.5: RELATED CONTACTS FOR AN ACCOUNT

Application Navigation

This topic describes ways to navigate Microsoft Dynamics CRM.

Navigation by Functional Area

Microsoft Dynamics CRM shows records grouped by functional area. In the Web client, the buttons on the left are used to navigate between the functional areas.

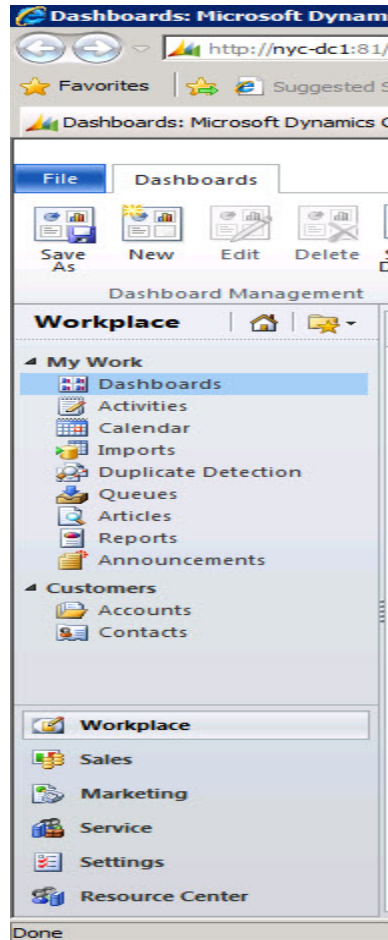Clicking a button changes the records shown in the area above the navigation buttons.

FIGURE 2.6: NAVIGATION IN THE WEB CLIENT

In the Microsoft Dynamics CRM for Outlook client, the functional areas are shown as a series of folders below the user's mail folders. The folders are shown in alphabetical order. The folder at the top of the folder tree has the same name as the Microsoft Dynamics CRM organization.

For example, to navigate to a list of contacts:

1. Click the parent CRM folder.
2. In the navigation area on the right showing the functional areas, click **Sales**.

3. In the updated navigation area on the right, click **Contacts**.

In Form Record Browsing

When a record is open, **Quick Access** can be used to navigate to other records without having to close the record. A user can either select a specific record using the **Quick Access** drop-down or click **Previous Record** or **Next Record** arrows to the right to move to adjacent records.

The records available when using Quick Access are related to the view from which a record is opened. For example, if a user opens an account from the Active Accounts view, then the records available in Quick Access are the records shown in the Active Accounts view.
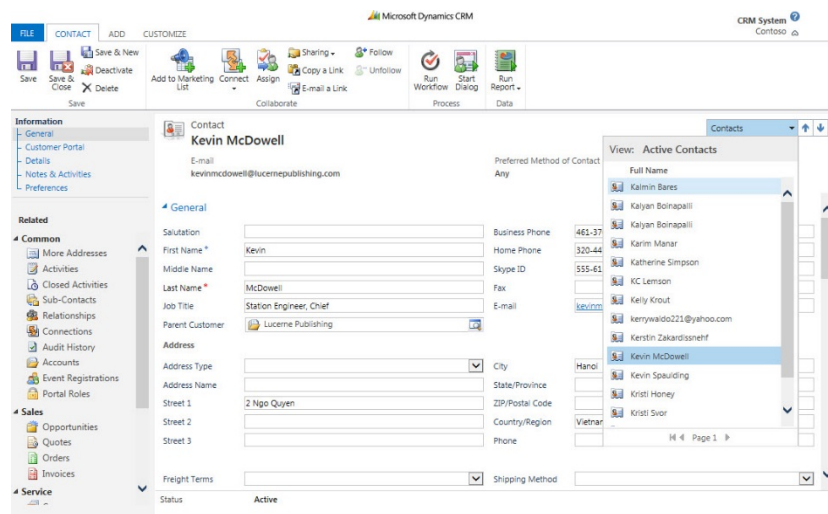

FIGURE 2.7: IN FORM RECORD BROWSING

Lookups

Lookup fields link one record to another. For example, a contact can be linked to an account record using the **Parent Customer** field. To choose the account:

1. Click the lookup icon to the right of the field.
2. In the **Look Up Record** window, search for and select the appropriate account record.
3. Click **OK**.

Auto-resolving in Lookup Fields

An alternative way to specify the linked record in a lookup field is to directly type all or part of the name of the linked record. As a user types in a lookup field, a list of items that have recently been used appears. Click an item in the list to select it. If only part of the name is entered and the user tabs away from the field and only one record matches the partial text, then Microsoft Dynamics CRM will

enter the full name of the record in the lookup field. If the typed text matches more than one record, then Microsoft Dynamics CRM underlines the text and displays a warning symbol. To choose the appropriate record, click the underlined text and then select the appropriate record from the list of records shown.

FIGURE 2.8: MULTIPLE MATCHES IN LOOKUP FIELD

If the typed text does not match any records, then the system underlines the text and an error appears.

FIGURE 2.9: NO MATCH IN LOOKUP FIELD

Recently Visited Items

Microsoft Dynamics CRM maintains a list of recently visited items. The Web client and Microsoft Dynamics CRM for Outlook client show the lists in different ways.

Web Client

To view the list of recently visited items in the Web client, click the icon under the ribbon as shown in the figure below.
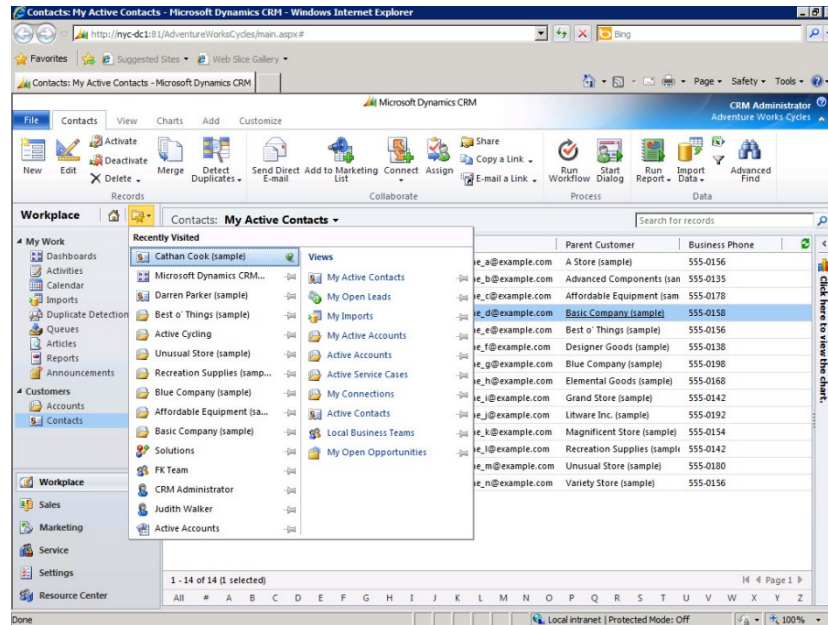
FIGURE 2.10: RECENTLY VIEWED PAGES AND VIEWS

The following actions can be performed on list items:

- To open an item, click the name.
- To pin an item to the list, click the pin.
- To un-pin an item, click the pin.

Microsoft Dynamics CRM for Outlook Client

In Microsoft Dynamics CRM for Outlook, recently visited items are shown for each folder that contains records and in a single list.

Perform the following to view recently visited items for a record type such as contacts:

4. Right-click a folder that contains records, such as contacts.
5. Click **Recently Visited**.

Perform the following actions to view all recently used records:

6. Click the **File** tab.
7. Click **CRM Recent** in the list underneath **File**.

The following actions can be performed on an item in the Recently Used CRM Records list:

- To open an item, click its name.
- To pin an item to the list, click the pin.

- To un-pin an item, click the pin.

Shortcut Menu

In the Web client, a shortcut menu appears when the mouse cursor hovers over items (for example, accounts, contacts, and leads) in the left navigation pane.

The shortcut menu provides the following items:

- A link to create a new record.
- A list of views.
- A list of recently visited records.

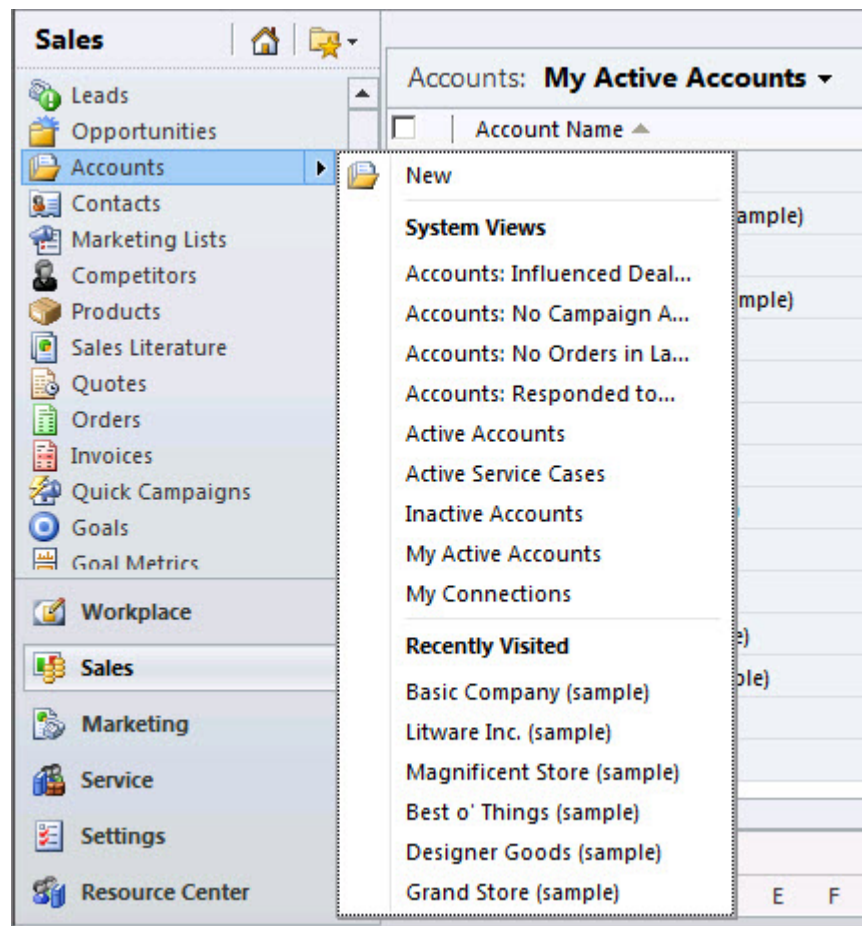**FIGURE 2.11: SHORTCUT MENU FOR ACCOUNTS**

Reading Pane

The reading pane is an Outlook feature and is therefore only available in Microsoft Dynamics CRM for Outlook.

For any list of Microsoft Dynamics CRM records a user can choose to use the

reading pane and position it below or to the right of a list of records. The reading pane shows selected information from a record.
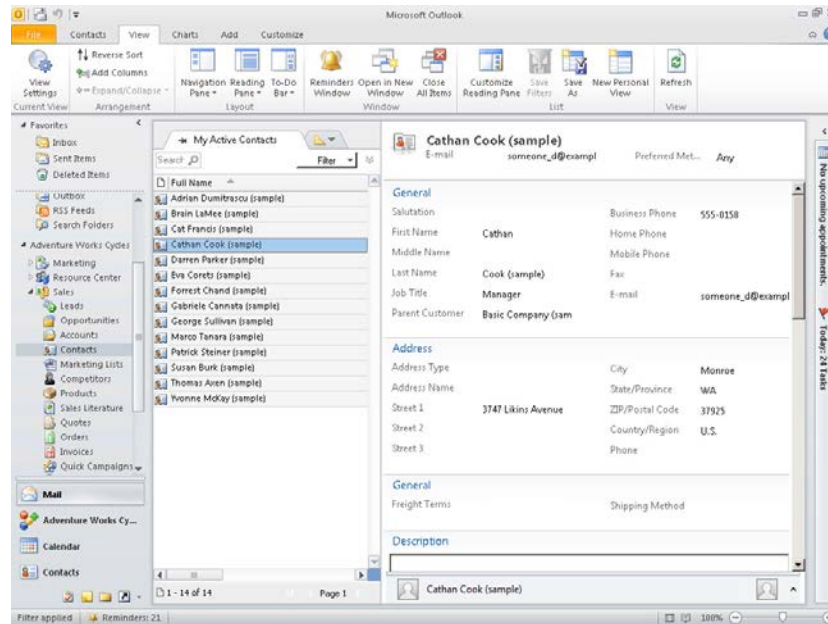
FIGURE 2.12: READING PANE IN OUTLOOK

Personalize the Reading Pane

By default, all sections of data for a record are shown in the reading pane. However, a user can choose the sections that are shown.

Change the sections shown as follows:

8. Click **Customize Reading Pane**.
9. In the **Personalize Reading Pane** window, use **Add**, **Remove**, **Up** and **Down** to choose which sections are shown and the order in which they are displayed.
10. Click **OK**.

FIGURE 2.13: PERSONALIZE READING PANE WINDOW

Lab: Lab 2.1 - Navigate Microsoft Dynamics CRM
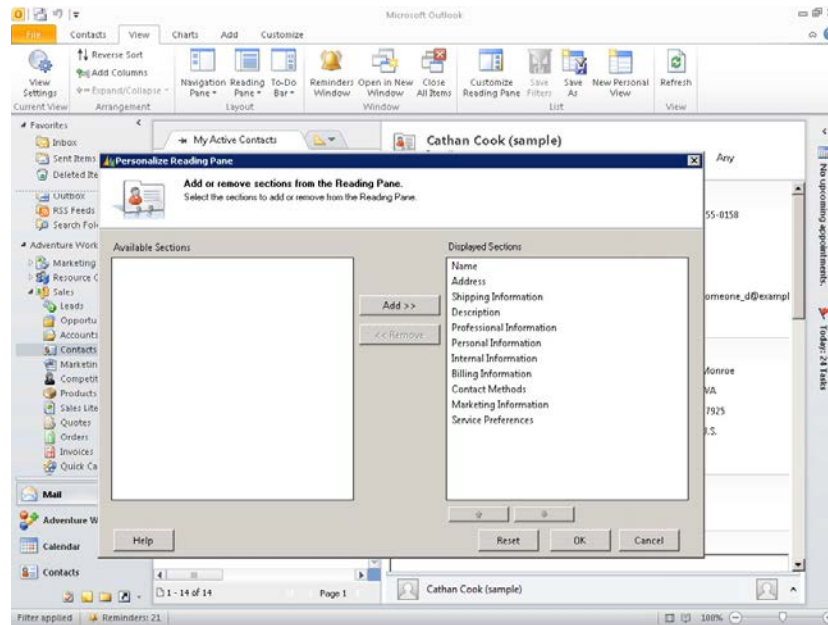
Scenario

Adventure Works Cycles has implemented Microsoft Dynamics CRM. As a new user you need to become familiar with navigating the application.

The Implementation Consultant has suggested that you complete the following tasks using the Web client:

- Navigate to the list of contacts.
- Collapse the Get Started pane.
- Open the record for the contact Cathan Cook.
- Navigate to the next record using the Next Record shortcut.
- Close Cathan Cook's record.
- Pin Cathan Cook's record in the list of Recently Viewed pages and views.

Complete the task in this lab using your student online environment.

Objectives

In this lab, you will explore Microsoft Dynamics CRM navigation features and use Help.

Exercise 1: Challenge Yourself

Exercise Scenario

Complete the tasks described in the scenario on the Microsoft Dynamics CRM Online student environment.

Exercise 2: Need a Little Help?

Exercise Scenario

Complete the tasks on the server image.

1. Log on to your Microsoft Dynamics CRM Online student environment by opening a browser and entering the URL to your student environment.
2. Navigate to **Contacts**.
3. Collapse the **Get Started** pane.
4. Open the record for Cathan Cook (sample).

5. Navigate to the next record using the **Quick Access** area.

6. Close the form and pin the record for Cathan Cook (sample) in the **Recently Viewed Pages and Views** list.

Exercise 3: Step by Step

Exercise Scenario

7. Log on to your Microsoft Dynamics CRM Online student environment by opening a browser and entering the URL to your student environment.

8. In the navigation pane in the Web client, click **Sales**.

9. In the list of records under Sales in the navigation pane, click **Contacts**.

10. At the bottom of the **Get Started** pane, click the collapse icon.

11. In the list of **Contacts**, double-click **Cathan Cook (sample)**.

12. In the **Quick Access** area in the form header for Cathan Cook, click the down arrow to navigate to the next record.

13. In the form for the current contact, click **Save & Close** to close the window.

14. Click the **Recently viewed pages and views** icon (to the right of the home page icon) at the top of the navigation pane.

15. Click the pin icon to the right of **Cathan Cook (sample).**

16. Close the browser.

Module Review

Module Review and Takeaways

Microsoft Dynamics CRM provides opportunities to easily keep track of customer interactions and manage that data for sales, marketing, and service. The system can be set up so that users can access it through the Microsoft Outlook interface or from a web browser.

The clients are similar, however some navigation differences exist and administrators may customize or configure some parts of the system, including permissions.

Test Your Knowledge

Test Your Knowledge

Test your knowledge with the following questions.

1. Which of the following sales tasks does Microsoft Dynamics CRM not support?

    (   ) Qualifying leads

    (   ) Managing opportunities

    (   ) Managing inventory levels

    (   ) Forecasting sales

2. Describe some of the features of the service functionality of Microsoft Dynamics CRM.

    _____

    _____

    _____

    _____

3. Your company has deployed Microsoft Dynamics CRM and the client for Microsoft Outlook has been installed. You open Outlook and see that you have an e-mail from a supplier that you would like to track in Microsoft Dynamics CRM. What should you do?

    (   ) Nothing. Microsoft Dynamics CRM is not meant for storing supplier correspondence.

    (   ) On the Outlook e-mail form, click Track.

( ) Open the supplier's Microsoft Dynamics CRM record, and copy and paste the e-mail into a Note.

( ) In Outlook, drag the e-mail into the Microsoft Dynamics CRM folders.

4. Which of the following are true with regard to Microsoft Dynamics CRM security?

( ) Privileges are determined by the Microsoft Windows groups to which a user belongs.

( ) Privileges are linked to a Microsoft Dynamics CRM user record.

( ) Privileges are defined by a security role.

( ) Users can be assigned more than one security role.

Test Your Knowledge Solutions

Test Your Knowledge

1. Which of the following sales tasks does Microsoft Dynamics CRM not support?

    ( ) Qualifying leads

    ( ) Managing opportunities

    (√) Managing inventory levels

    ( ) Forecasting sales

2. Describe some of the features of the service functionality of Microsoft Dynamics CRM.

    MODEL ANSWER:

    Service functions include tracking complaints or queries, recording entitlement to service, scheduling appointments, and a Knowledge Base.

3. Your company has deployed Microsoft Dynamics CRM and the client for Microsoft Outlook has been installed. You open Outlook and see that you have an e-mail from a supplier that you would like to track in Microsoft Dynamics CRM. What should you do?

    ( ) Nothing. Microsoft Dynamics CRM is not meant for storing supplier correspondence.

    (√) On the Outlook e-mail form, click Track.

    ( ) Open the supplier's Microsoft Dynamics CRM record, and copy and paste the e-mail into a Note.

    ( ) In Outlook, drag the e-mail into the Microsoft Dynamics CRM folders.

4. Which of the following are true with regard to Microsoft Dynamics CRM security?

    ( ) Privileges are determined by the Microsoft Windows groups to which a user belongs.

    ( ) Privileges are linked to a Microsoft Dynamics CRM user record.

    (√) Privileges are defined by a security role.

    ( ) Users can be assigned more than one security role.