

Microsoft Business Solutions MS CRM 1.2

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Agenda

Introduction to CRM Concepts and Solutions

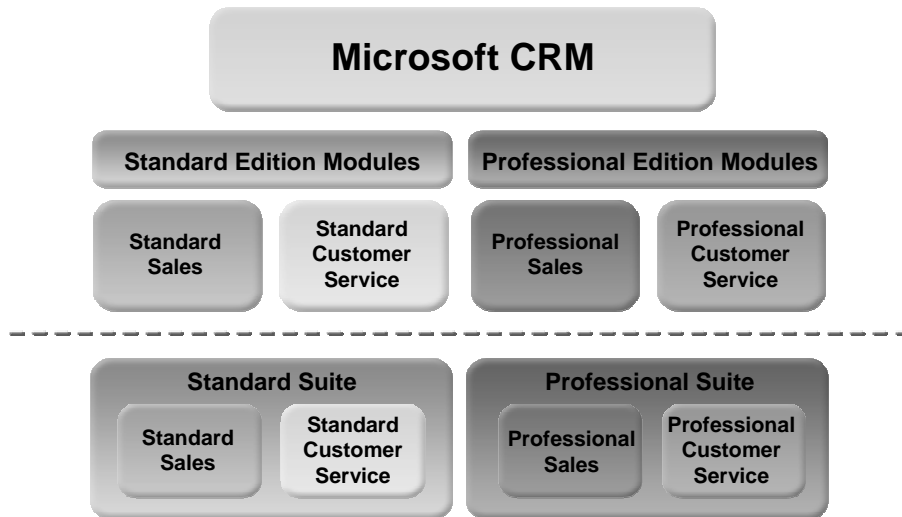
Recommended Training

7-2-2004

Introduction to CRM Concepts and Solutions

- Edition
- Sales Module
- Customer Service Module
- Customization

Editions and Modules



Microsoft CRM All Editions

	Standard Sales	Standard Customer Service	Standard Suite	Pro Sales	Pro Customer Service	Pro Suite
Home Page	✓	✓	✓	✓	✓	✓
Work Place	✓	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓	✓
Customization Tools	✓	✓	✓	✓	✓	✓
Sales Standard	✓		✓			
CRM Sales for Outlook	✓		✓	✓		✓
Customer Service Standard		✓	✓		✓	
Work Flow Manager				✓	✓	✓
Sales Professional				✓		✓
Customer Service Professional					✓	✓

What is CRM?

Sales Force Automation	Lead & Opportunity Management, Customer Tracking, Contact Info, Activity Management
Marketing Automation	Direct marketing, Automated micro-marketing, Campaign Management, Data mining, etc.
Customer Service	Help desk & call center, Web self-service, field dispatch, knowledge base
Partner/Channel Management	Lead Routing, Material distribution, catalog syndication
Knowledge Management	Doc share, Email, Customer Collaboration, White papers, Q&A, etc.
Order Management	Order entry & status, pricing & configuration, inventory availability, delivery management

Software Requirements

● Servers:

- Windows 2000 SP4 or Windows Server 2003
- SQL 2000 Server SP3
- Exchange Server 2000 or 2003

● Clients:

- Office 2000 or 2003
- Windows 2000/XP
- IE 6.0 SP1
- Microsoft SQL Server Desktop Engine (MSDE)

● Component:

- MSMQ
- Indexing Service
- IIS 6.0
- MDAC 2.71a/2.8
- MSXML 4.0 SP2
- Microsoft .NET Framework 1.1
- Crystal Report 9.2.2 (Customize Report)

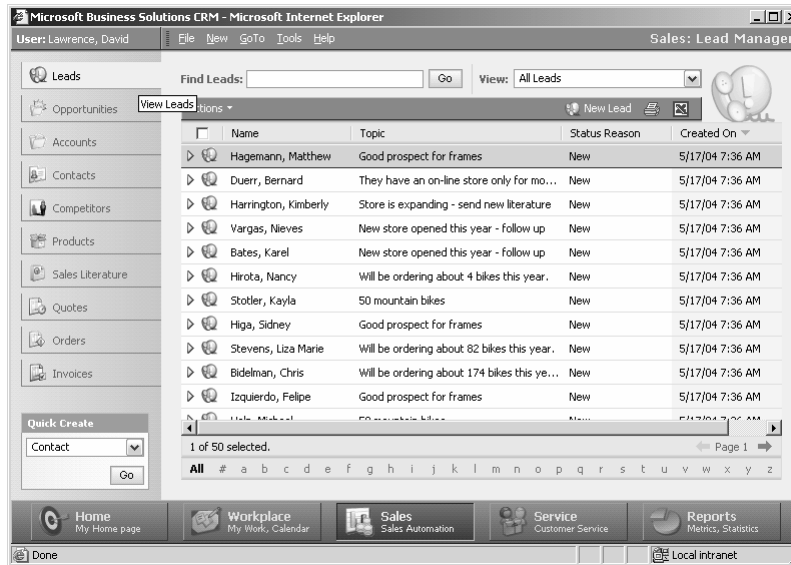
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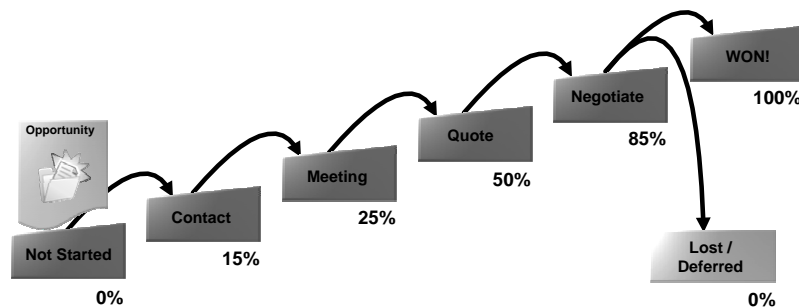
Microsoft CRM Sales Factsheet

- Microsoft Outlook Integration
- Complete customer view
- Leads Routing
- Opportunities, Sales Activities Management
- Sales Process management
- Product Catalog
- Order management: Quotes, Orders and Invoices
- Quotas
- Territory Management
- Reports (120 standard pre-formatted reports)
- Sales Literature
- Competitor Tracking
- Workflow
- Correspondence and mail merge
- Integration with Microsoft Business Solutions

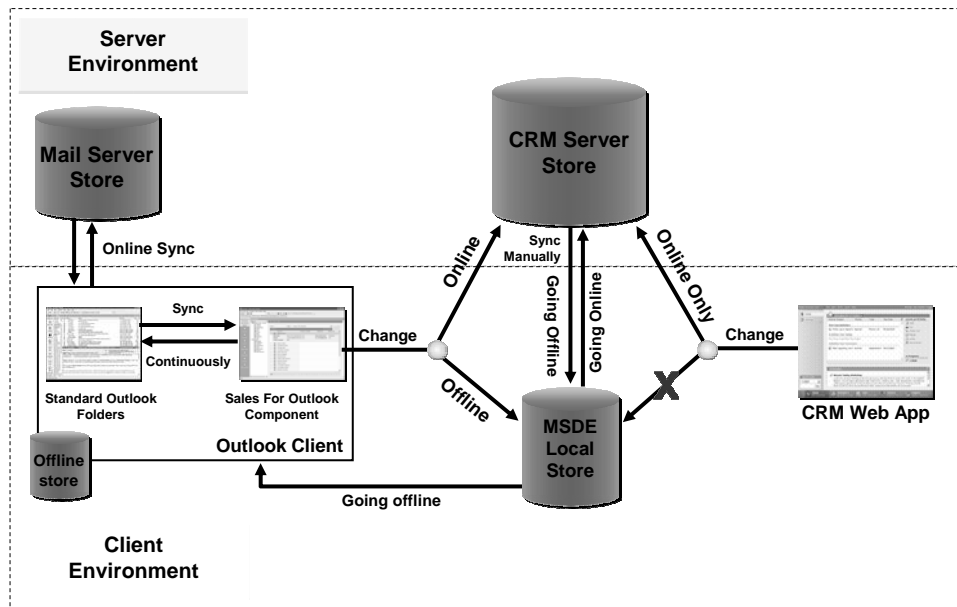
Microsoft CRM Sales Module



Sales Process Standard: Example



Sales for Outlook Client Synchronization



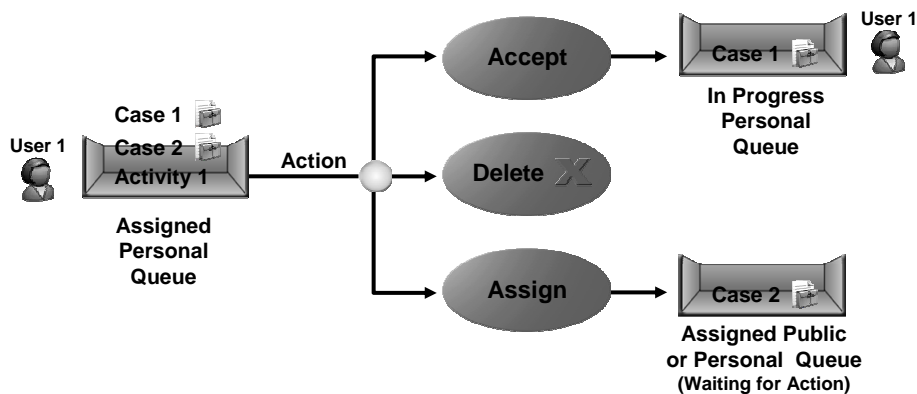
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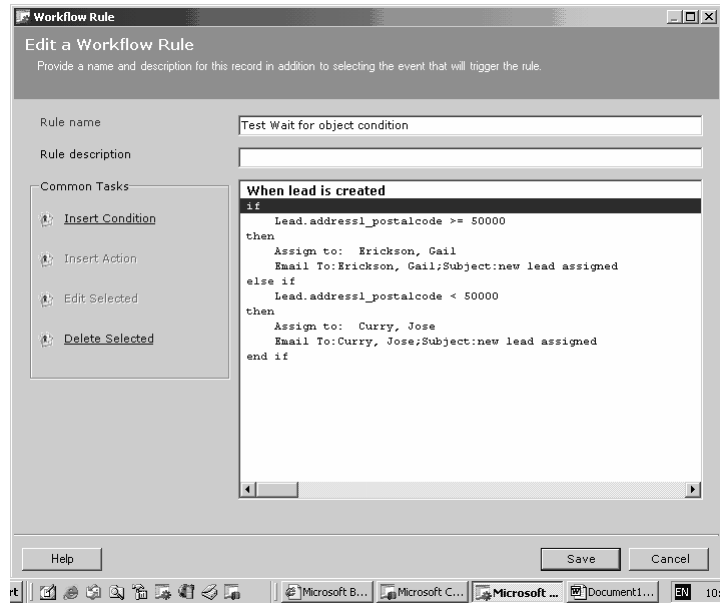
Microsoft CRM Customer Service Factsheet

- Case Management
- Service requests
- Queue
- Routing and workflow
- Searchable knowledge Base
- Contract Management
- E-mail management (include auto-response e-mail)
- Product Catalog
- Reports
- Integration with Microsoft Business Solution Financials

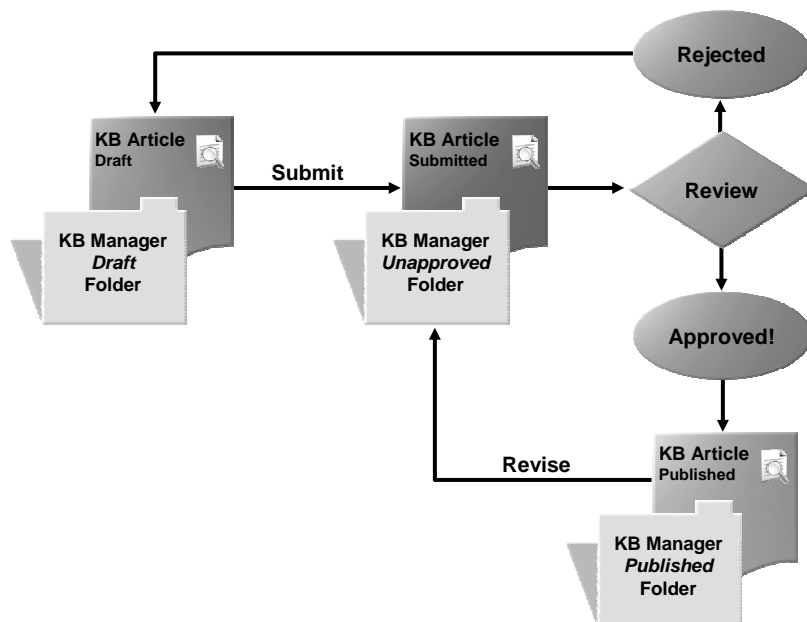
Queues



Workflow Manager



Knowledge Base: Article Life Cycle



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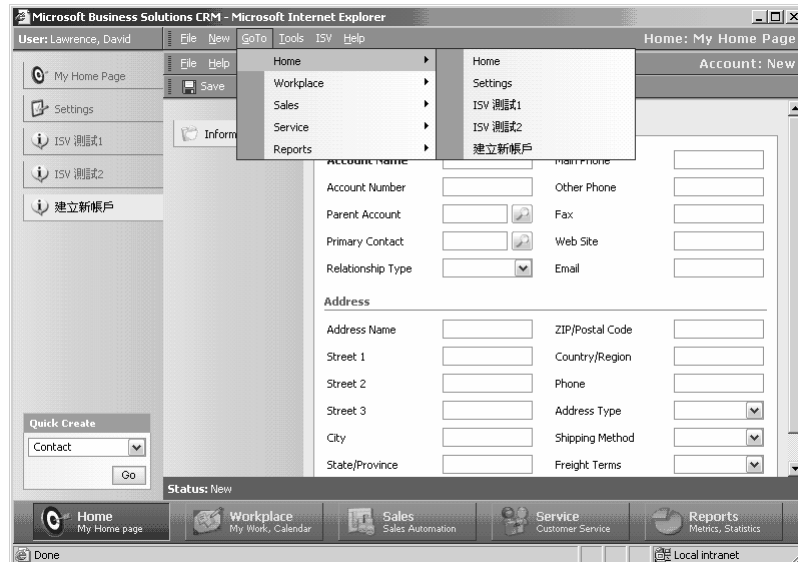
MSCRM Customization

- Application Integration
 - Custom Menus, Buttons and forms
- Extensibility using Web Services
 - Designed to be enhanced through connection to value-added web service and other applications, using standard APIs, SOAP, and XML
- Workflow Manager/Sales Process

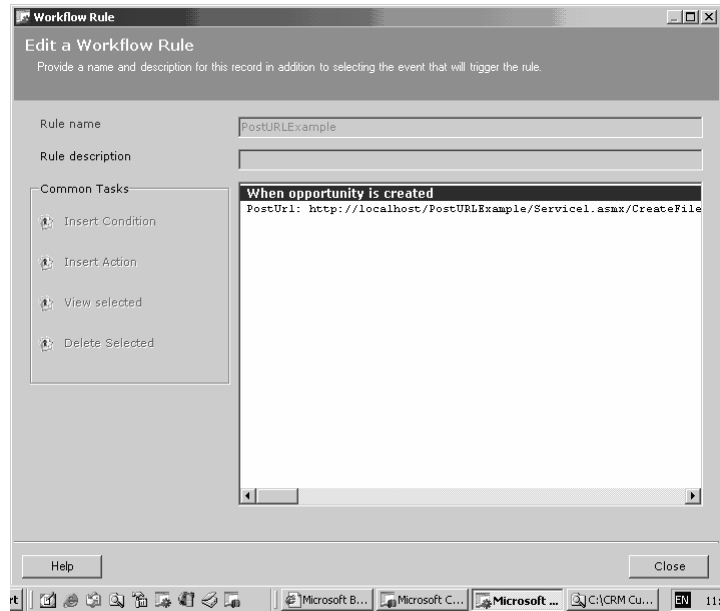
Customize Views



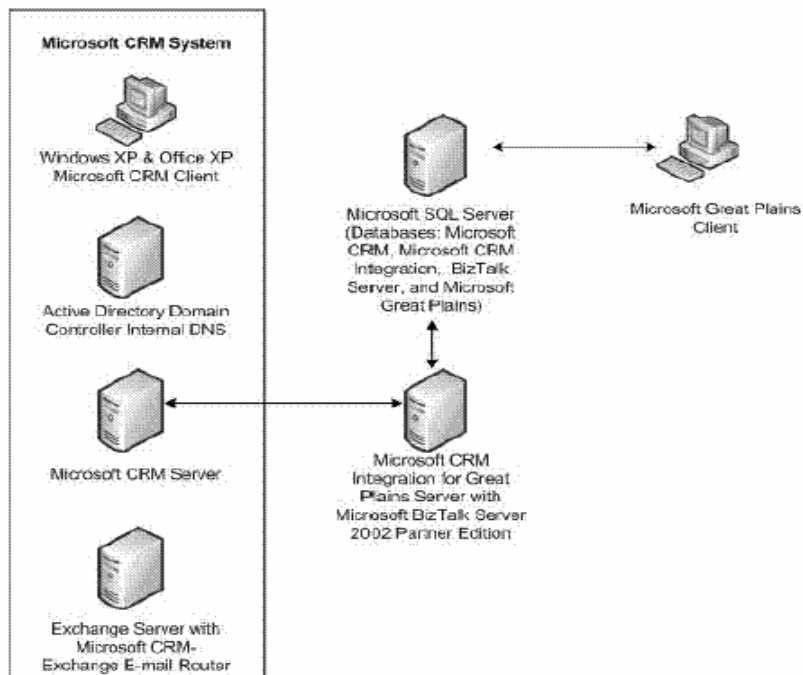
Customize Menus and Buttons



Using Web Services

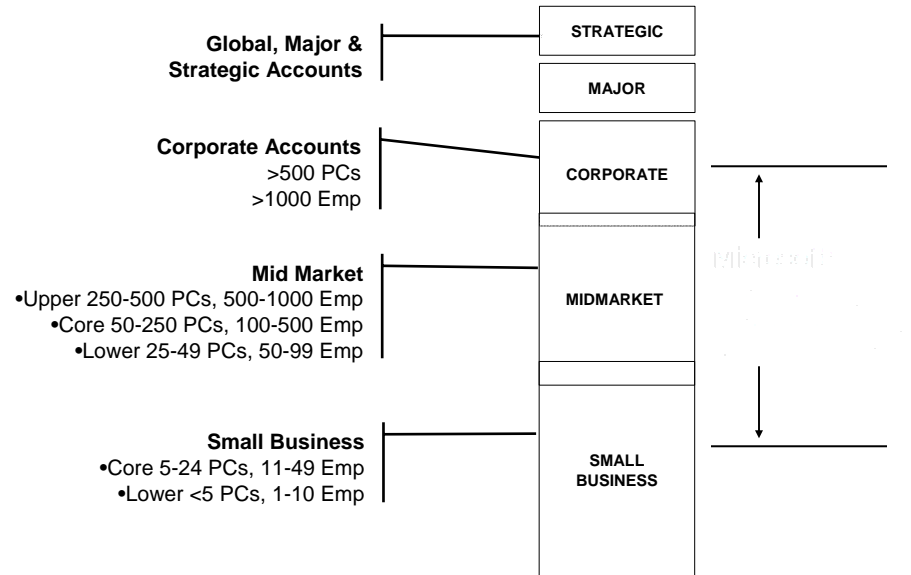


Microsoft CRM Integration for Great Plains system overview

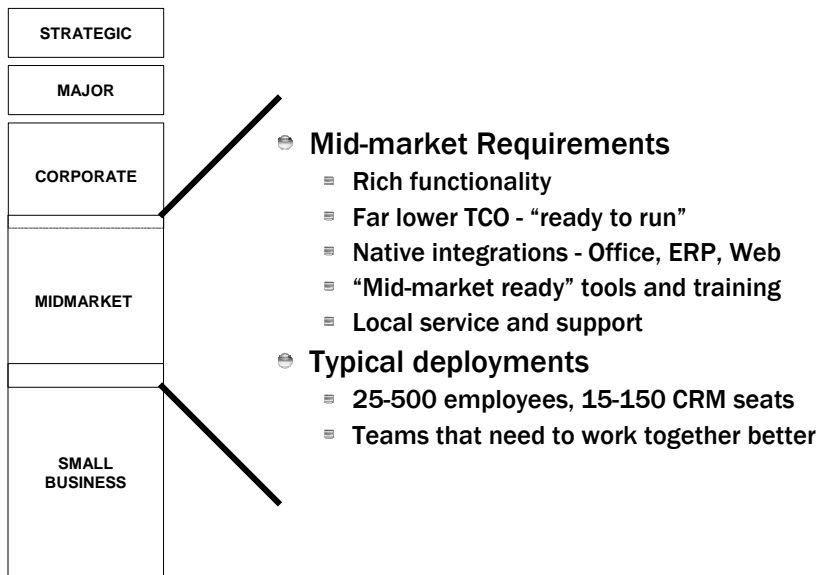


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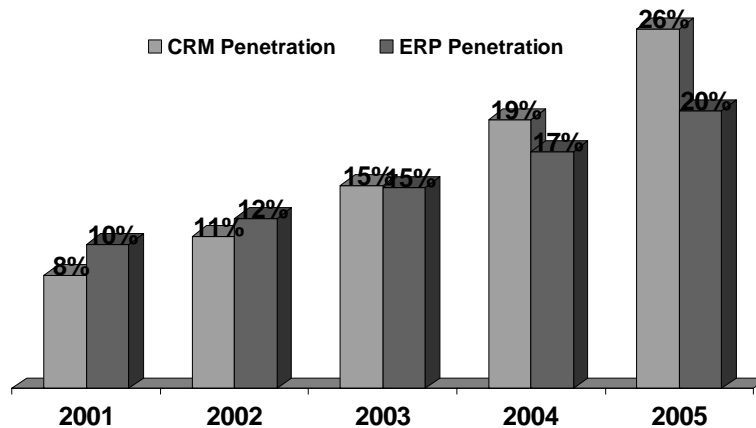
Microsoft CRM Target Market



Mid-market Needs Its Own CRM



CRM Midmarket* penetration expected to surpass ERP by 2005



* 50-500 employees
Source: AMI US-only

Main barriers to successful CRM implementation

- Lack of user input at the design stage.
- Difficulty in integrating old and diverse systems.
- Insufficient understanding of the functionalities of the system in the initial stages.
- The client being not specific about system needs when implementation is already underway. This causes delays and cost overruns.
- The economic and political power of information prevents free sharing of data.