



Microsoft Dynamics CRM Product Reviewer's Guide

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Introduction: Microsoft Dynamics CRM

Not long ago, the mindset for most any customer relationship management (CRM) project was to acquire information technology (IT) as fast as possible in order to keep up with the competition. This approach did not focus on economics and productivity; this was a race to see who could acquire the most software solutions the fastest. By the time most business executives began questioning the benefits of unfocused spending on business solutions—most of which often ended up as useless “shelf-ware”—a worldwide economic slowdown stalled the exuberant growth of technology and forced decision-makers to assess the real impact of business technology on internal and external business processes.

No longer is the mindset about acquiring lots of technology. Today, it is about buying CRM solutions that leverage existing infrastructure, assets, and skills. And, more important, it is about acquiring tools and solutions that people will use and that integrate easily into the existing business environment.

Microsoft Dynamics™ CRM version 3.0 was designed specifically to address these requirements. Microsoft® CRM is designed to work the way you do, work the way your business does, and work the way technology should.

IT'S ABOUT THE BUSINESS — NOT THE TECHNOLOGY

Microsoft CRM is a customer relationship management solution that provides the tools and capabilities needed to create and easily maintain a clear picture of customers, from first contact through to purchase and post-sales. With modules for sales, marketing, and customer service, Microsoft CRM delivers a fast, flexible, and affordable solution that drives consistent, measurable improvements in every business process, enabling closer relationships with customers and helping to achieve new levels of profitability.

A cornerstone of Microsoft CRM is customer choice. Microsoft CRM offers a broad scope of architectural, deployment and licensing options designed to provide the maximum in flexibility to meet your business needs both today and tomorrow.

The Power of Choice
Microsoft CRM offers the flexibility and freedom to meet your business needs today and tomorrow
Powerful Features - Flexible Options - Transparent Migration

User Experience	Business Fit	Flexible Deployment	Licensing Options
Native Outlook	Fully Customizable	Hosted	Subscription
Web Browser	Application Integration	On-premise	Perpetual
Online & Offline	Vertical Solutions	Hybrid	Financed

SALES: CREATE DEMAND AND GENERATE NEW BUSINESS

Even for companies with the most complex of sales processes, Microsoft CRM provides easy-to-use features and capabilities to help improve the way sales and marketing organizations target new customers, manage marketing campaigns, and drive sales activities. The Sales module helps you:

- Increase the sales pipeline with qualified sales leads and opportunities.
- Streamline the sales strategy through centralized, coordinated sales processes.
- Enable the sales force to arrive prepared for important customer meetings by accessing sales opportunities and service histories for each customer.

MARKETING: BETTER DECISION MAKING AND A CLEARER VIEW OF CUSTOMERS

In today's information-driven economy, most companies are awash in customer data. Success requires the ability to transform that information into clear, actionable knowledge and respond more quickly to changing customer needs and preferences. With Microsoft CRM, sales and marketing organizations can have instant access to complete customer information, regardless of where it is stored, along with the tools needed to turn that information into action. This allows your sales and marketing force to:

- Create a single view of each customer based on every piece of information collected.
- Focus marketing efforts using intelligent list and segmentation tools.
- Execute smarter marketing campaigns with powerful analytic tools.
- Understand what customers are really saying with reporting and analysis tools built on Microsoft SQL Server™.

CUSTOMER SERVICE: PROVIDE MORE VALUE TO CUSTOMERS

Every interaction with a customer is an opportunity to strengthen that customer's loyalty by providing high-quality, personalized service. Because it benefits your company to offer customers targeted, relevant information about the products and services that interest them, Microsoft CRM can help enhance customer relationships while maximizing the ability to both up-sell and cross-sell. With the Customer Service module your organization can:

- Respond faster to service issues by delivering the right answers to customers in real time.
- Resolve customer issues according to desired service levels.
- Use centralized scheduling and dispatching to manage resources and coordinate services.

MOBILITY: MICROSOFT CRM ON THE GO

Microsoft Dynamics CRM Mobile 3.0 lets your sales force use Microsoft CRM as effectively in the field as in the office. Because CRM Mobile 3.0 employs wireless technology, your sales team can manage account information, add and organize contacts, schedule meetings, and track existing opportunities to help them sell more effectively to close deals faster, regardless of location. CRM Mobile 3.0:

- Helps sales teams to keep its collective finger on the revenue pulse while on the go thanks to familiar Microsoft CRM interfaces and functionality.
- Improves information management by letting mobile users subscribe to their specific CRM data and business priorities to ensure decisions can be made quickly and efficiently.
- Deepens customer relationships through continuous access to rich customer and sales opportunity management functionality.

FLEXIBLE PLATFORM: A SOLUTION THAT GROWS WITH YOUR BUSINESS

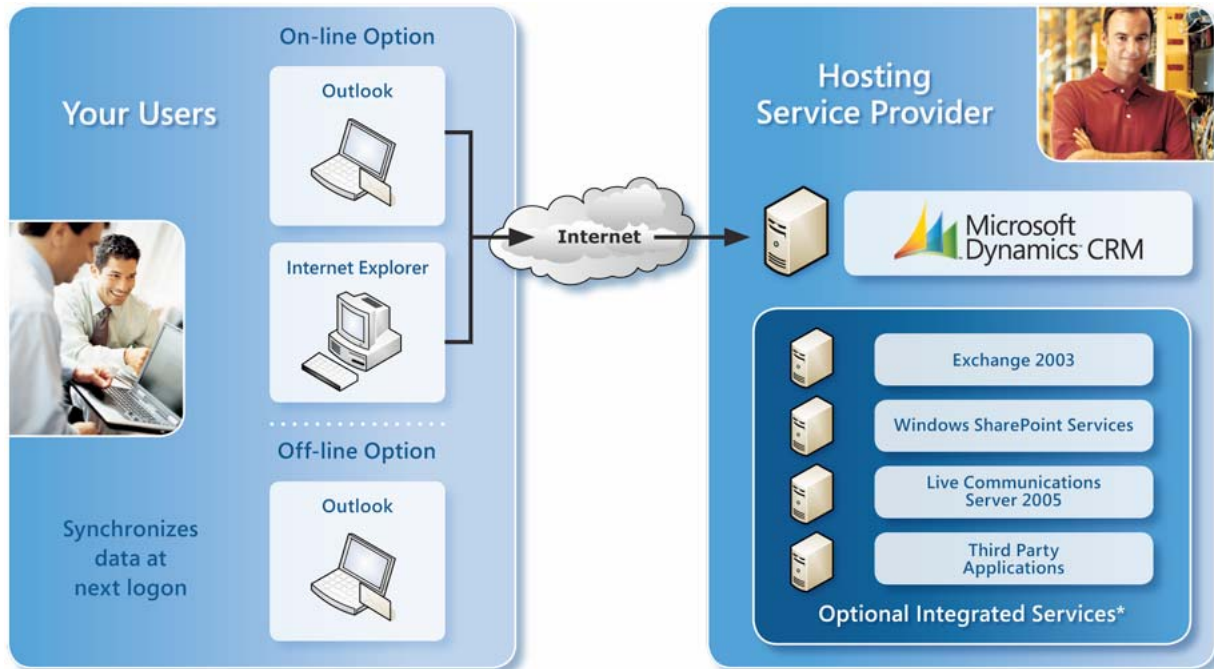
Microsoft offers customers choices and flexibility in how they integrate or extend their CRM technology into their business environment as they grow. Customers and partners can take advantage of pre-packaged connectors and connector templates to streamline and accelerate the integration of data and process flows between Microsoft CRM and other packaged and custom applications. This will be discussed in more detail on page 20.

Additionally, Microsoft CRM allows for powerful customization and integration to meet your evolving business needs. Your Microsoft Certified Partner can help you customize and integrate a hosted Microsoft CRM solution into your business. This includes the integration of third-party ISV applications such as specialized vertical solutions, giving you the ultimate in flexibility.

Key Benefits	
Works the Way You Do	Rich CRM capabilities with a native Microsoft Office experience
Works the Way Your Business Does	Consistent customer processes with real-time business insight
Works the Way Technology Should	Fast to deploy, simple to customize, and easy to manage

The Power of Choice

Microsoft CRM addresses the key opportunities and challenges that determine the success or failure of any CRM initiative: user adoption, business fit, and total cost of ownership. The Microsoft CRM hosted solution is built on the exact same code base as Microsoft CRM Professional Edition, providing a choice of user interface, on-line or off-line usage, flexible solutions and deployment, and the ability to migrate data as your business needs evolve.



Microsoft CRM offers you true power of choice, including:

USER EXPERIENCE:

Users have a full range of client interface options, just as they do with an on-premise solution:

- **Microsoft Office Outlook®** Users have access to the complete set of Microsoft CRM functionality without ever leaving Microsoft Office. Users also have the option of working off-line and automatically synchronizing the next time they log in.
- **Internet Explorer** Hosted CRM users also have access to the complete set of Microsoft CRM functionality using Internet Explorer 6.0 or higher.

Note: Users can switch between access methods any time they wish

FLEXIBLE SOLUTION SCENARIOS:

Most customers will use Microsoft CRM in conjunction with other solutions, such as Microsoft Exchange Server and third-party ISV applications. To address these instances, Microsoft provides a variety of Software as a Service (SaaS) arrangements, creating flexible options to best fit your unique business needs. Following are three possible solution scenarios:

- **Microsoft CRM Hosted Solution with On-premise Exchange** In this scenario the only service that is hosted off-site is the CRM solution. Many organizations already operate on-premise Exchange Servers and do not wish to move this service off-site.
- **Microsoft CRM Hosted Solution with Hosted Exchange** In this scenario you can opt to host Exchange along with Microsoft CRM 3.0. This frees you from needing to provide on-site messaging systems, as the service provider manages and maintains both services.
- **Additional Applications and Services** In addition to the Microsoft CRM hosted solution, many service providers offer a wide range of other integrated applications and services, including Microsoft Windows® SharePoint® Services, Microsoft Office Live Communications Server, and third party ISV applications.*

*All options may not be offered by your service provider.

Development and Design Background

In more than 200 interviews and site visits with Microsoft customers and their customers, the Microsoft Dynamics CRM product and research planning teams found several common themes among companies that were considering customer relationship management solutions.

First, customers expressed an expectation that software must work the way the user does, and, without requiring the user to learn an entirely new set of tools, it must streamline basic tasks in a noninvasive manner. Microsoft CRM addresses this issue by making tools and applications more intuitive and easy-to-use, enabling companies to increase user adoption and corporate compliance across the organization. Additionally, by simplifying complex tasks and ongoing administration, companies are able to free up IT staff and budgets for more strategic purposes, hereby improving customer service throughout the sales cycle. Moreover, because Microsoft CRM 3.0 integrates seamlessly with key software programs such as the Microsoft Office System and Microsoft Outlook, Microsoft-centric IT organizations are able to empower their users work with the tools they already know, allowing them to take advantage of the power of a full-featured CRM system. This maximizes the business value of the CRM system and drives usability excellence.

A second theme was the need for broadened CRM applicability throughout the entire business process. Generally, CRM systems were used almost exclusively by the sales representative or the customer service agent to manage contacts and track cases. However, few organizations were able to extract additional value from the rich business data contained within. Microsoft research has uncovered great potential in increasing the role of CRM as the hub of a customer-centric ecosystem. By improving access to CRM data for use in activities outside of sales, such as marketing and product development, the entire organization can exploit the capabilities of the CRM system to create more satisfying customer experiences and develop strategies for sustained business success. Furthermore, when combined with Microsoft's Software as a Service (SaaS) approach, your selected CRM system ensures that everyone in your organization is able to access critical information or get the support they need—quickly, easily, and regardless of where they are or at what time of day they log on.

Finally, regardless of industry or business size, each customer expressed unique CRM requirements that could not be addressed by “out of the box” solutions or without undertaking expensive or difficult customization work. Microsoft Dynamics CRM 3.0 delivers vast improvements that empower users, developers, and administrators to form CRM solutions that address their specific needs, all without adding unnecessary time, effort, or cost.

DESIGNED IN RESPONSE TO CUSTOMER REQUESTS AND BUSINESS REQUIREMENTS

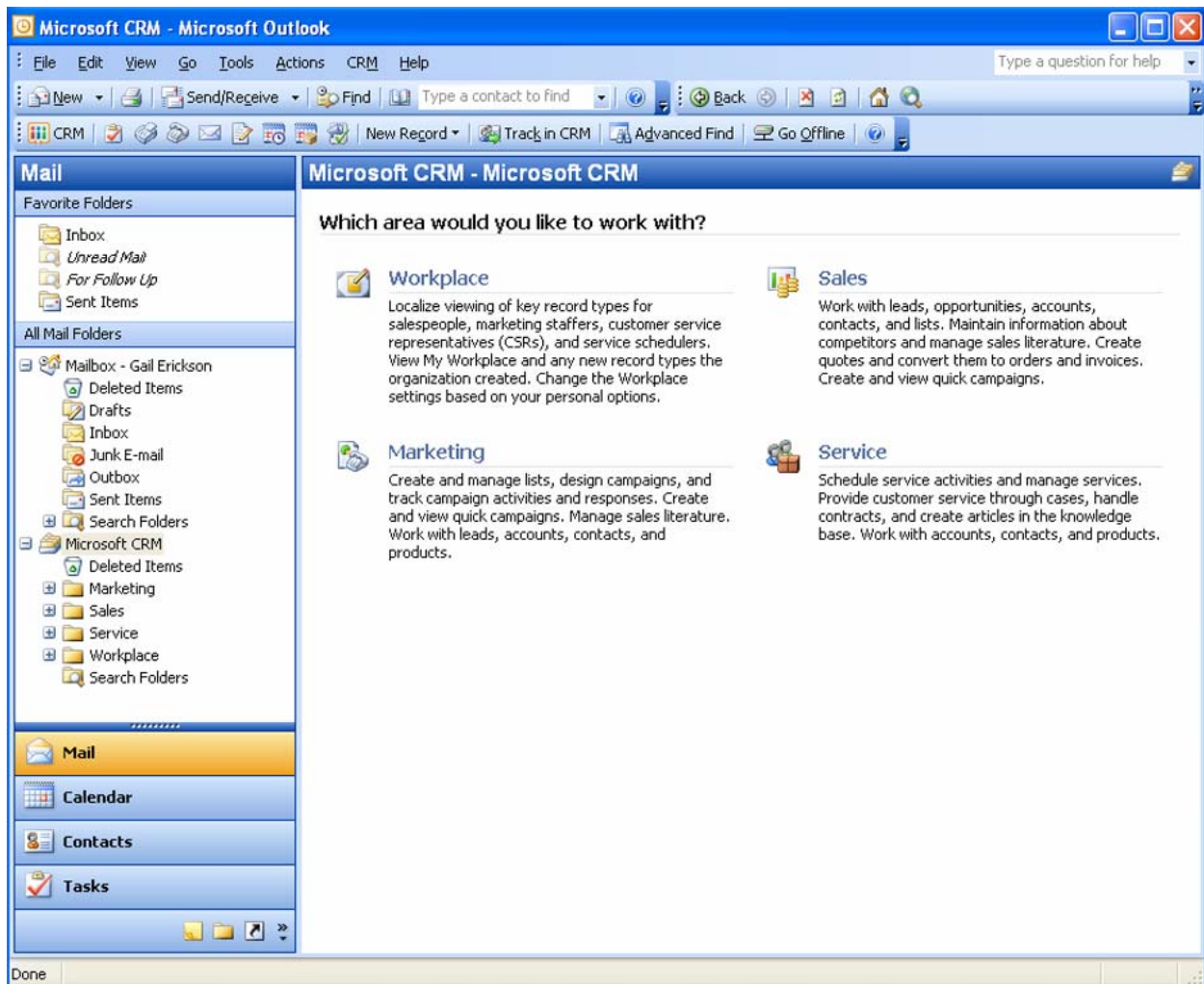
Today, customers can find a myriad of CRM solutions to fit a variety of needs—from the fully customizable self-hosted solution for the global enterprise, to the Web-hosted solution for smaller businesses dependent on outside expertise. Through its interviews, Microsoft learned that customers wanted a solution that would enable businesses of any size to realize the value of their CRM investment—without requiring users to fundamentally change the way they do their jobs. That is, they wanted a CRM system that would maintain current business processes. Rather than take on a wholesale change in operations to fit the technology, they sought a solution that would work effectively within the requirements of their established IT infrastructure. Microsoft CRM delivers on these requests while staying true to the design principles that support the Microsoft vision of customer relationship management.

Design Principles and Objectives

The following are the overarching principles and design objectives used to create Microsoft Dynamics CRM.

WORKS THE WAY YOU DO

Integration with the familiar tools users already use and the automation of everyday tasks should be key goals of any software solution. Microsoft has gone beyond the minimal level of compliance by delivering native integration with the Microsoft Office System, as well as with new wizards that help users increase productivity for sales, service, and marketing functions.



Microsoft Dynamics CRM adds a toolbar to Outlook and adds Microsoft CRM folders to the Outlook folder list.

Integration with the Microsoft Outlook toolbar

Many companies continue to face obstacles in fully integrating CRM into their organizations. Because Microsoft designed Microsoft CRM to integrate natively with Microsoft Outlook, however, employees gain access to tools that are already familiar, enabling them to easily update all of their important sales, marketing, and customer service data without ever leaving Microsoft Outlook. Not only does this reduce overall training costs, it minimizes the ramp-up time required for end users, specifically customer-facing personnel. Native email, task, contact, and appointment forms in Outlook include a CRM command bar; with a single click, a user can create a connection to CRM during or after record creation. The "Track in CRM" button then becomes the "View in CRM" button, which enables direct access to the related CRM record.

Extensibility Inside of Microsoft Office System for Automation of Everyday Tasks

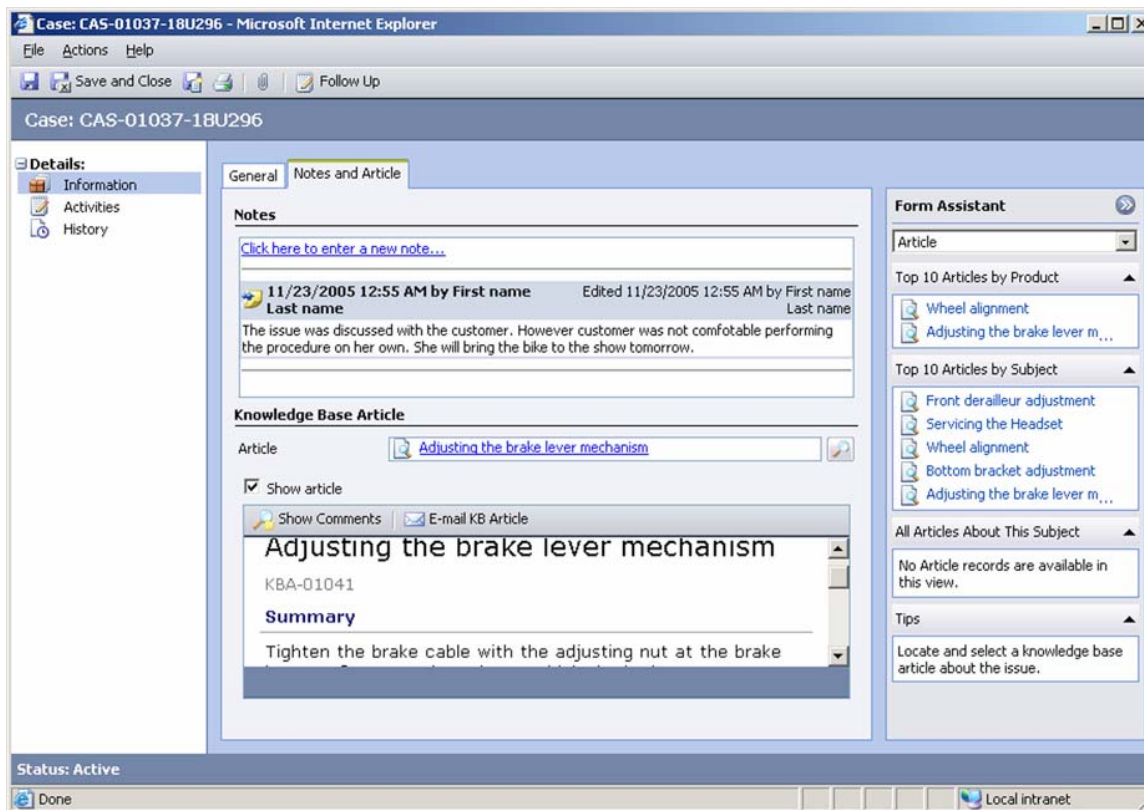
In addition to integration with Microsoft Outlook, customers are looking for ways to effectively integrate their CRM system with other desktop applications. Right out of the box, Microsoft CRM uses the direct functionality within the Microsoft Office System to complete common tasks. For example, to complete a direct-mail campaign using data from Microsoft CRM, Version 3.0 allows the user to implement the Microsoft Word mail-merge utility directly from Microsoft CRM, without needing to start Microsoft Word. Further integration can be achieved through the Microsoft CRM Software Development Kit (SDK). With the release of Microsoft CRM 3.0, a series of solutions built with the CRM SDK will be available to download at <http://www.microsoft.com/dynamics/crm/using/downloads/default.aspx>. Solutions will include task pane functions that allow users to view Microsoft CRM data in a side-by-side window while simultaneously working in an Office software program such as Word or Excel.

A cleaner, simpler user interface

In evaluating the successes and failures of CRM solutions currently used by customers, the CRM product team quickly learned that user interfaces are often overdeveloped to the point of irrelevance; with so many tools and functions to choose from, users are routinely left dumbfounded. For Microsoft CRM 3.0, a priority for the product team was to simplify the screens, related mouse clicks, and windows so that users could focus on managing the customer rather than wrestling with the data. At the same time, users required a certain level of flexibility to capture specific exceptions and ad-hoc requests that come with any one customer.

Improved notes pane

The notes pane provides users with a more flexible and intelligent way to record free-form information about customers and opportunities. Now requiring fewer clicks and windows, the notes pane improves the user experience by automatically attaching date and user stamped tags to create a chronological record of information during a customer interaction, meeting, or case resolution, among other situations. By leveraging the notes pane, users can quickly scan and share all the notes related to a specific exchange. Not only does this approach reduce the amount of time and effort required to capture information in real time, it also instantly provides a mechanism to communicate and deliver customer information across the organization. Finally, this approach ensures that an accurate activity history is recorded, tracked, and stored for future interactions.



Streamlined note taking in Microsoft CRM

Multiple-record editing

Microsoft CRM 3.0 gives users the ability to edit multiple CRM records at once from a variety of views including Accounts, Contacts, Leads, Opportunities, Orders, Invoices, and Contracts. To further improve integration with existing Microsoft Office applications, Microsoft in February 2006 released Microsoft Dynamics Snap. As a collection of software programs, known as snap-ins for the way in which they “snap in” to existing programs, Microsoft Dynamics Snap increases productivity by enabling information workers to complete crucial tasks within the familiar applications of Microsoft Office. Useful in the context of Microsoft CRM are the Timesheet Management Snap-In and the Business Data Lookup Snap-in, among others. Snap applications will soon be made available under the Microsoft Permissive License as shared source, allowing Microsoft Dynamics partners to extend and customize Snap functionality to meet specific company needs and drive productivity.

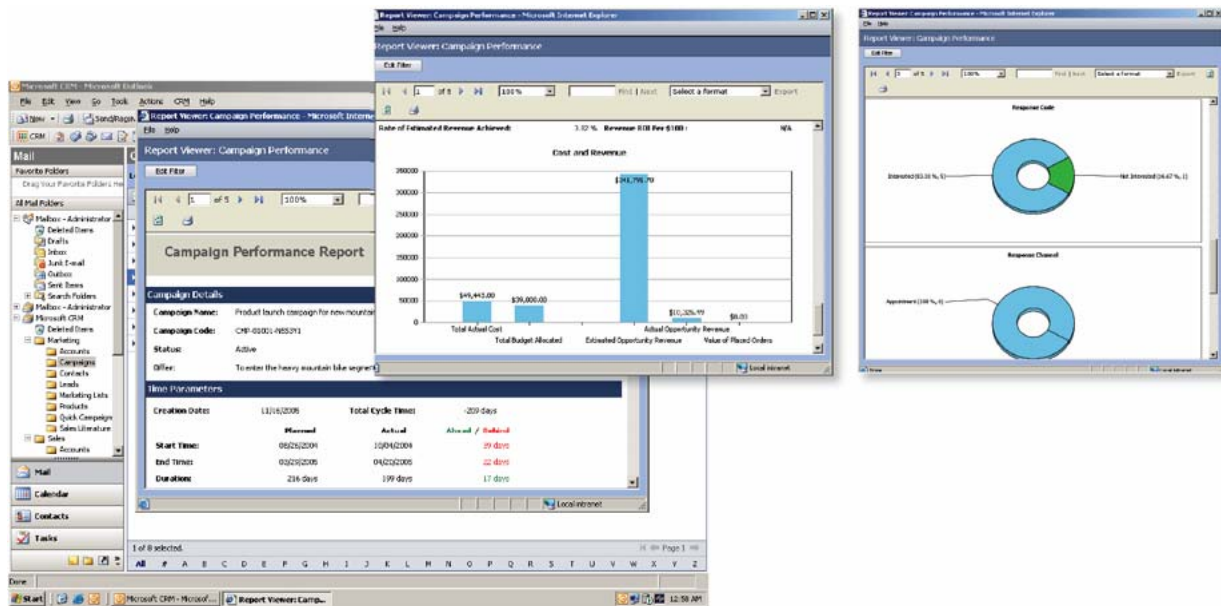
WORKS THE WAY YOUR BUSINESS DOES

Solving the challenges of the customer CRM experience requires a holistic approach; from marketing and sales to customer service and support, the complete CRM solution must address processes and activities throughout the entire customer-experience life cycle.

In the course of product planning and research, the product design team found that, although companies were familiar with the benefits of driving new sales opportunities, proactive measures aimed at generating demand and identifying new or expanded opportunities were markedly absent. This breakdown can be attributed to 1) certain functions, such as marketing, not being core competencies of the sales organization or of the management, and/or 2) simply not having enough time or staff power to make marketing or analysis and planning a priority. Similarly, in the case of service-oriented businesses, the day-to-day management of tasks was cumbersome and often paper-based, resulting in decreased accuracy and effectiveness in the support of customers and business processes. As a result, Microsoft designed Microsoft CRM to provide greater control and visibility of business performance, freeing managers and staff to focus on deepening customer relationships without requiring the development of additional skills or securing additional resources.

Automated project management

Microsoft CRM 3.0 broadens the definition of traditional customer relationship management by automating complex tasks such as marketing campaign management and service scheduling. Microsoft CRM also provides richer reporting and analysis tools to help businesses extract more insight from customer data collected in the sales and service components of Microsoft CRM. With this piece of the CRM puzzle in place, Microsoft CRM customers can integrate their sales, service, and marketing processes to maximize efficiency and present a single, consistent face to their customers.



Campaign performance report leverages integration with SQL Server Reporting Services (SRS) to reduce time spent on standard report generation and special reports requested by specific lines of business.

Customer service automation and service scheduling

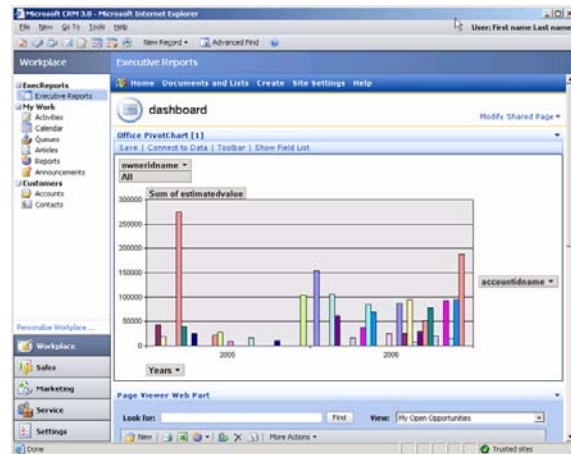
Microsoft CRM continues to build on its core customer service functions such as Case Management, Contract Management, and Knowledge Base Management. These tools support business requirements for customer and product support departments, including personnel who manage telephone, email, and Web-based customer service requests, loyalty programs, and issue resolution. To expand on those core capabilities, the Microsoft CRM product team identified service scheduling as a key area where customers could significantly increase the value of their CRM solution, particularly for the services industry. A number of service organizations still employ a manual process, resulting in considerable imprecision in daily work schedules. Imprecise scheduling makes planning difficult, hinders positive customer satisfaction, and wastes time. Among those businesses where the quality of services is dependent on scheduled appointments, dentist offices, property management, and accounting groups are prominent examples. For these and other service organizations, professional and efficient service delivery is essential to creating operational value. In no small way, Microsoft CRM creates a great opportunity to leverage “quality of service” in corporation branding initiatives. Many corporations, for example, tout local service and/or excellent customer care as proof of a real commitment to their customers. Utilizing Microsoft CRM, organizations can improve current customer relationships while tapping into new opportunities by advancing their reputation for excellent service delivery. Organizations that seek to establish a brand identity that portrays a strong customer service image will especially appreciate the positive marketing potential within Microsoft CRM customer service and service scheduling.

Automated sales management

Microsoft continues to expand the functionality of its automated sales management application. Customers requested enhanced capacity to deliver various approaches of marketing campaigns at different pivots, including at the local level, through brand offices or by individual sales representatives. In either case, Microsoft CRM provides customers with a vehicle to manage structured and unstructured customer data, integrating the management of sales, marketing, and service and support activities. It also includes tools to track and better predict sales metrics. This helps marketing teams measure the success of their campaigns while also helping to better inform business and marketing decisions.

Richer, more supportable reporting with SQL Server Reporting Services

Microsoft CRM 3.0 uses Microsoft SQL Server Reporting Services (SRS) as its primary reporting solution. SRS enables the creation, management, and delivery of both traditional paper-oriented reports and interactive Web-based reports. SRS expands the reporting capability for business users by providing more options for custom reports and formats, including HTML, Acrobat, and Excel files. SRS also makes it easier for system administrators to provide both bulk and individual customized reports on a subscription basis. SRS enables additional functionality, including on-demand delivery ("pull"), scheduled or event-based report delivery ("push"), as well as personal report subscriptions that allow users to choose specific preferences for their reports.



With Microsoft SQL Server Analysis Services, businesses can take advantage of powerful ad-hoc analysis, data mining, and forecasting features to extract more value out of their CRM data.

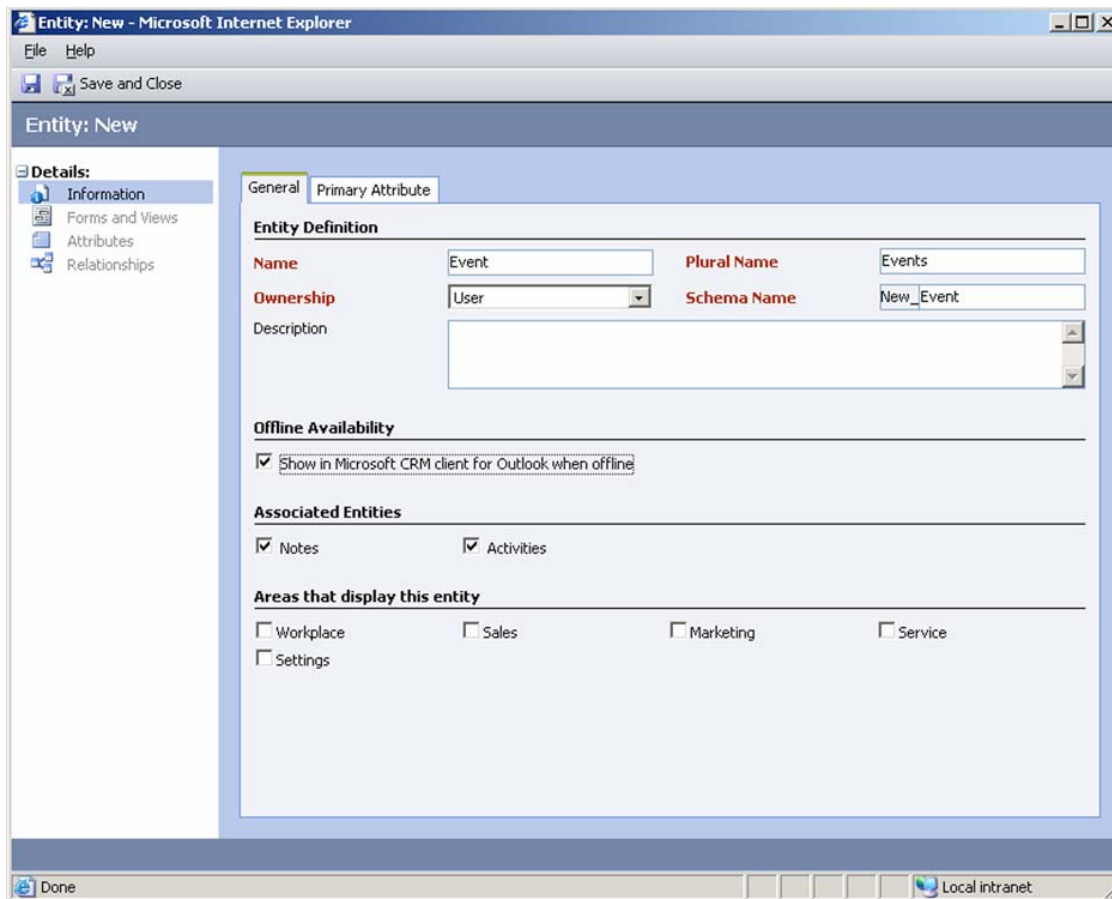
More powerful ad-hoc queries and analysis with Microsoft Excel

Seamless integration with effective analysis tools like Microsoft Excel means sales managers can quickly perform ad-hoc analysis, such as forecasting, using real-time CRM data.

Useful reporting right out of the box

Microsoft CRM 3.0 includes easy-to-use reports for certain business processes such as marketing campaigns and service scheduling.

- **Campaign-response tracking** Reports are generated automatically to track follow-up, attendance at events, and response to outsourced campaigns. Through integration with the sales and service components of Microsoft CRM, managers can see the direct effect of a campaign on customer actions. For the first time, marketing managers are provided with insight on the effectiveness of their campaigns, with no additional effort required on their part.
- **Service-scheduling reports** Service managers asked for reports that would allow them to spot trends and accordingly adjust resources and service offerings to meet market demands. Microsoft CRM allows users to see customer history, demographics, and preferences, enabling them to achieve the task requirements and use service history to better inform marketing and sales processes.



New Entity Customization Built on the Microsoft .NET Framework

Affordable and easier customization

Businesses have had difficulty in realizing value from CRM software because any given solution was often too general and too inflexible to be useful, or too expensive to design and implement. As a result, businesses would either stay the course without realizing the true benefits of a good CRM system, or continue to struggle with a solution that did not meet expectations. Microsoft CRM is built on the Microsoft legacy of ease and accessibility at all levels, both for users and for organizations. It was important to design a system that allowed for easy customization in order to address immediate needs, while at the same time allowing Microsoft CRM to be expanded for use as a development platform or as a component of a larger infrastructure solution. The customization is connected with CRM Web services to generate dynamic Web service definitions. These can be used by developers to work seamlessly with their customizations through the CRM application programming interfaces (APIs) within Microsoft Visual Studio® development system.

Features in Microsoft CRM are built on .NET to provide a more flexible, modern application as well as a consistent and easy-to-use programming model for partners and developers. Microsoft CRM allows for the extension and addition of business logic components using any of the .NET languages, and easily plugs them into the CRM application (callouts). Using a .NET programming language, developers can also create Workflow libraries and plug them into Microsoft CRM workflows to extend their functionality and add new business logic to business rules. Extensions to CRM functionality with .NET plug-ins provide a powerful approach to different industry or vertical markets, with enhanced security, extensibility, and connectivity capabilities.

Built-in Web services

Standards-based Web service capabilities empower businesses by seamlessly connecting Microsoft CRM to external service providers and suppliers of information like credit scores and financial data. Custom solutions are now more powerful because partners and developers can access all of the CRM functionality through a set of standards-based Web services. The Visual Studio integration enables developers to access and use Microsoft CRM APIs and object models directly inside Visual Studio, reducing the need for the documentation-intensive programming model required in the previous version of Microsoft CRM. The Web services increase the capability to interoperate with other legacy or modern compliant applications.

WORKS THE WAY TECHNOLOGY SHOULD

In examining past CRM implementations, Microsoft identified an opportunity to help customers achieve greater return on investment by simplifying the setup and deployment of CRM, particularly as the size of the business scaled down. Of the businesses interviewed, more than 75 percent of small businesses and 66 percent of medium-to-large enterprises stated they preferred to keep IT management in-house. Few, however, reported much success, either because they did not have the resources to design and deliver such a solution, or because the return on investment was unsatisfactory. Why? Few systems could be installed and deployed without incurring the high costs associated with technical experts or a dedicated IT team. Users of CRM solutions told Microsoft they wanted all the functionality and benefits of a CRM system, but without the complexity and costs associated with most CRM projects.

Microsoft promotes maximum flexibility, scalability, and maintainability of CRM for organizations of all sizes, from the small business to mid-size and enterprise organizations. To ensure that each IT dollar invested in CRM is best aligned and prioritized to each company's requirements, Microsoft focused on key elements of deployment, manageability, scalability, and reliability for Microsoft CRM 3.0.

Built on proven, industry-standard technology

Microsoft CRM is optimized for the Microsoft Windows Server™ platform and is one of the first applications with new features built on the .NET Framework architecture. Because they share the same development architecture, Microsoft CRM integrates cleanly with the Microsoft technology that customers already know and use, such as Microsoft Office, Microsoft Outlook, and Microsoft Exchange. It also integrates seamlessly with the third-party solutions and services that customers currently require, enabling them to provide a true end-to-end business solution.

Microsoft Exchange email integration architecture

Microsoft CRM and Microsoft Exchange work together to seamlessly integrate customer activities. Users can simply click the 'Track in CRM' button on any Outlook email, task, contact, or appointment. By doing this, users enable an automatic synchronization of those items between Microsoft CRM and Microsoft Exchange.

If a user sends an email to one of their customers and elects to track it in CRM, any replies from the customer will not only show up in the user's inbox, but they will also be automatically logged for that customer within Microsoft CRM.

Microsoft CRM uses Exchange routing rules to route inbound emails into the CRM system. In the event that the Microsoft CRM server is unavailable during this routing process, routed messages will be placed into a specific folder location, by which administrators can be notified.

Not only does Microsoft CRM and Exchange track inbound customer email, it can also log emails between Microsoft CRM users. For example, a simple Microsoft CRM Workflow rule may be used to automatically send internal email notification regarding case escalations. Just like customer email, these emails are not only delivered to the recipient's inbox, they are also logged within Microsoft CRM.

This architecture supports multiple CRM implementations within a single Exchange Organization environment. Microsoft CRM appends a tracking token to CRM-related emails. Administrators can customize the structure of this tracking token to accommodate multiple instances of Microsoft CRM. On the Microsoft Exchange Server, an administrator must create a sink mailbox for each Microsoft CRM instance. The structure of the tracking token helps the Microsoft CRM routing system determine for which sink mailbox and Microsoft CRM instance it is destined.

Faster, easier and more reliable deployment

A goal for the development of Microsoft CRM 3.0 was to simplify setup and installation while at the same time taking into consideration the necessary integration points with applications and services outside the immediate CRM environment. Administrators have access to easy-to-use and intuitive tools that provide greater visibility into and control over their CRM environment. Finally, Microsoft CRM end-users are empowered to design their own dashboard with improved client-based customization tools. This ultimately reduces IT help requests, freeing the staff to focus on more complex IT issues.

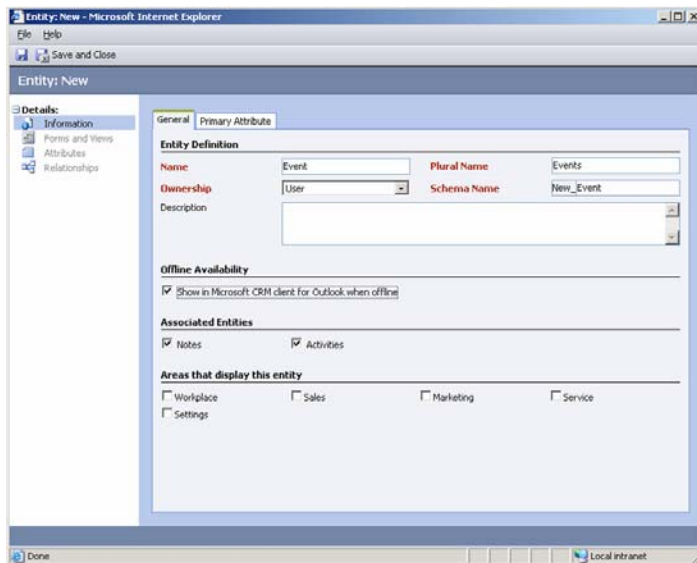
Easier, successful setup

Enhanced intelligence of the CRM server setup provides a smoother and more reliable setup experience for all types of Microsoft CRM installations. Customers told Microsoft that setting up a CRM solution correctly the first time was a daunting task and, if outsourced, system setup contributed to a significant portion of the cost. With utilities that provide improved visibility on issues and quicker methods for their resolution, Microsoft CRM 3.0 eases the installation process, reducing the time required to get up and running.

New environment diagnostic tool

Direct help within the setup process helps administrators identify and resolve issues prior to installation. The diagnostic tool provides a list of all the CRM requirements that are not fulfilled by their current environment configuration as well as detailed instructions on how to address each requirement. Before beginning the application setup process, the user is presented with a checklist of those conditions, an icon clearly indicating which conditions are met by the current environment, and which are not. For each condition that is not met, a Help item outlines the steps the user needs to take to meet the condition. This tool can also produce a detailed log file, which customers can forward to their partner or to Microsoft Support troubleshooting assistance. The Environment Diagnostic Tool is automatically implemented during 3.0 setup or upgrade.

Improved Small Business Server 2003 deployment



Microsoft Dynamics CRM Small Business Edition uses a Configuration Wizard that creates some predefined relationship roles upon installation.

In light of the resource and budget constraints on small businesses, Microsoft designed CRM 3.0 to deploy with minimal difficulty by optimizing it for Microsoft Windows® Small Business Server 2003 (SBS) and delivering a straightforward CRM deployment:

- Automatically installs server software and creates the CRM Web site
- Optimizes server settings and infrastructure components (Active Directory®, SQL Server, etc.) for running CRM
- Automatically installs the CRM Exchange integration components
- Automatically creates an administrative installation point for the Outlook client
- Modifies the SBS Setup Computer Wizard to include the Outlook client installation

Improved deployment for medium-sized and enterprise customers

A growing number of Microsoft CRM customers are departments or business units of larger enterprises. Deploying CRM in these environments poses some unique challenges. The IT team for the business unit deploying CRM, for example, often does not control the enterprise's Active Directory and Exchange environments (owned by the central IT team), to which changes must be made in order to deploy Microsoft CRM. This dependency makes it difficult for the business unit to get the solution it needs and significantly compromises the stability of the IT infrastructure. To mitigate any integration issues presented by a departmental installation, Microsoft CRM 3.0 addresses the requirements of both sides:

- **The Microsoft Operations Manager (MOM) Pack** Administrators can install the MOM Pack to monitor the status of the CRM services, errors, and security events from within MOM.
- **Support for Group Policy in Windows Server 2000/Windows Server 2003 Group Policy** support allows customers to deploy to Outlook client to users in an automated fashion.
- **Support for Clustered Environments** Microsoft CRM leverages existing Microsoft clustering services for SQL Server, Exchange Server as well as the Microsoft CRM application server utilizing Network Load Balancing. This allows for Microsoft CRM to be utilized with high availability.

More IT control over the Microsoft CRM client environments

To align with common IT policy, Microsoft CRM provides the IT administrator with the ability to limit the amount of control users have over their workstations.

- **Enabling pre-installation by the administrator** In the past, it was required that the installation of Microsoft Sales for Outlook client be conducted by the user. Now, enabling the IT department to administer the installation helps ensure a more successful process while granting the IT department more control over machine configuration. It also enables companies that do not grant their users admin rights to install the Microsoft CRM Outlook client on behalf of the user. An IT user with admin rights, for example, can install Microsoft CRM Outlook client for the user (who does not have admin rights and therefore cannot conduct the installation themselves). Only after IT has completed the installation is the user able to run the application.
- **Web-based customization tools for administrators** Based on an in-depth study on the different customer roles involved in administering and customizing CRM, Microsoft decided to further simplify and enhance Web-based customization tools for administrators in version 3.0. Most customizations and administration tools are available directly through the Web interface, making it easy to manage the application.
- **Smarter Exchange integration with the Exchange Router Wizard** With CRM's Exchange Router, the system administrator can use the Active Directory Computer and Users Console to deploy server-side rules for Microsoft CRM users—either in bulk or by user—and to manage the rules once they are in place. Through this step-by-step process, the administrator can be sure that Microsoft CRM integrates properly with Microsoft Exchange the first time it is deployed, reducing time and effort and enabling users to be productive from the outset.

Integration with Existing Systems — With Ease

In order to simplify the efforts and process of connecting Microsoft CRM to other ERP, CRM, and other business applications, Microsoft offers customers choices and flexibility in how they integrate or extend their CRM technology into their business environment. Customers and partners can take advantage of pre-packaged connectors and connector templates to streamline and accelerate the integration of data and process flows between Microsoft CRM and other packaged and custom applications.

The Microsoft connector strategy includes:

- **Real-Time Integration Framework.** This framework is built on standard web-services to enable real-time connectivity, data access, and event handling between Microsoft CRM and other applications. Through Real-Time Integration Framework, a standardized approach can be employed to connect to any application both at data level as well as at business process level. This Framework functions as the foundation for the connector strategy. The Framework includes the following software components:
 - Integration Components & tools for data synchronization, monitoring and administration of settings. These components optimize data synchronization in real-time.
 - Microsoft CRM to BizTalk Adapter to define data mappings and process flows
 - Web Services SDK to enable point-to-point, standards-based real-time integration between Microsoft CRM and other applications
- **Data Migration Framework.** This framework provides batch connectivity for initial migrating of data from homegrown applications and legacy CRM systems to Microsoft CRM.
- **Dynamics Connectors.** Pre-built connectors for ERP applications within the Microsoft Dynamics family, with Microsoft Dynamics GP (formerly Great Plains) available today. Microsoft Dynamics NAV (formerly Navision) and Microsoft Dynamics AX (formerly Axapta) are planned to be delivered in early 2007.
- **Siebel CRM connector template with BizTalk.** Built on top of Real-Time Integration Framework, this integration allows businesses to extend the value of their existing Siebel system by deploying Microsoft CRM on the desktop and synchronizing information with Siebel servers.
- **Connector templates for integrating Microsoft CRM with a broad range of third-party ERP and homegrown applications via BizTalk.** Microsoft CRM will utilize the Microsoft CRM to BizTalk Adapter that defines the data mappings and process flows into and out of the Microsoft CRM systems. This adapter, in conjunction with packaged application adapters delivered as part of the BizTalk server platform, delivers connectivity to third-party applications such as SAP, Oracle, PeopleSoft and others. It also forms the basis of BizTalk-based connectors between Microsoft CRM and custom or legacy applications.

Snap in to Microsoft Office 2003

Microsoft Dynamics Snap, a collection of software programs that snap in to Microsoft Office 2003 enable users to enter or retrieve data using Microsoft CRM, within the familiar Office client environment. For example, information workers can search and browse data in Microsoft CRM, using Word, Excel and Outlook. By using a CRM task pane, they can then copy the CRM data into Microsoft Office documents. Or, they can copy Microsoft Office documents to the CRM record.

Microsoft customers, partners and other independent software vendors (ISVs) can benefit by using the shared source code in the Snap-ins that have been developed for Microsoft Office to enhance or customize solutions or to use them as examples to build new composite applications.

More reliable technology to keep the system safe and business data secure

As commercial interests continue their shift to the Internet, and as companies become more reliant upon electronic means for business transactions, the need for reliable technology that keeps business data safe from malicious intrusion increases. Microsoft CRM takes advantage of proven system security technology and easy-to-use, comprehensive tools in the Microsoft Windows Server architecture, helping to ensure that customers' business operations and data remain safe and secure.

Limiting Data Access Rights

Microsoft CRM allows businesses to preserve confidentiality and data access rights. Through Microsoft CRM, you can secure individual customer records to meet various industry requirements or government regulations.

Active Directory support

Without requiring additional usernames and password to access the system, Microsoft CRM leverages Active Directory to provide enhanced security with a single sign-on. Some benefits of using Active Directory with Microsoft CRM include:

- Provides Single Sign On for Users. This reduces the amount of passwords that the user has to remember to get access to the system.
- Provides the ability to ensure passwords meet corporate standards. In Active Directory you can enforce strong passwords, which will make your system and Microsoft CRM more secure.

Uses existing Active Directory Groups to ensure conformance to the enterprise's naming standards:

- Gives administrators the ability to turn off Active Directory management from within CRM
- Enables non-domain administrators to install Microsoft CRM
- Simplifies reporting from CRM

Top Features Quick Reference Guide

This section provides an overview of the top features and capabilities in Microsoft Dynamics CRM 3.0.

Works the Way You Do

Feature Set	Description	Target Audience	Integration Areas
Native Outlook Experience	<ul style="list-style-type: none"> Provides full integration to sales, marketing, and customer service from one centralized access point for all customer interactions and relationships. Laptop users can synchronize CRM data to an offline local database. 	<ul style="list-style-type: none"> All system end-users Sales, Service, and Marketing Professionals Business Decision-makers 	<ul style="list-style-type: none"> E-mail Calendar Contact Task CRM toolbar, menu, and folder system
Live Excel Integration	Provides dynamic snapshot and pivot of business performance so that users may analyze business performance and trends entirely with an always-on connection to Microsoft Excel.	<ul style="list-style-type: none"> All system end-users Sales, Service, and Marketing Professionals Business Decision-makers 	<ul style="list-style-type: none"> All CRM detailed forms Advanced Find query results Microsoft Excel data source for Microsoft CRM
Quick Campaign Wizard	Simplifies sales prospecting and cultivation by enabling sales and marketing professionals with a quick, five-step process for launching a campaign to a target group of customers.	<ul style="list-style-type: none"> Sales, Service, and Marketing Professionals Sales Managers Marketing Managers 	<ul style="list-style-type: none"> Detailed Account, Contact, and Lead views Advanced Find query results
Form Assistant (Adaptive User Interface)	<ul style="list-style-type: none"> Queries related system objects and delivers information in a simplified, non-intrusive form to simplify data entry into Microsoft CRM. Simplified navigation across core CRM data forms. Deliver correct, timely information right to system user. 	<ul style="list-style-type: none"> All system end-users Customer Service Professionals Service Scheduling Dispatchers 	<ul style="list-style-type: none"> All detailed forms Calendar Contact Task CRM toolbar, menu and folder system
Service Scheduling and Dispatch	<ul style="list-style-type: none"> Provides centralized, consolidated view of service professionals' work calendars and schedules. Match available and qualified service providers with customers by using easy-to-use, intuitive search function. Schedule service professionals, equipment, and resources from centralized, integrated utility. 	<ul style="list-style-type: none"> Service Dispatcher Service Delivery Personnel 	Microsoft CRM Web application or Microsoft Office Outlook
Centralized Relationships	<ul style="list-style-type: none"> Allows your organization to track all important associations and linkages across customers and pending sales opportunities. Navigate complex organizations within the sales function by assigning roles and influence to key decision-makers. Opportunity roles exist within the sales function to help sales personnel gain buy-in from the right individuals within an organization. 	<ul style="list-style-type: none"> All system end-users (Relationships) Sales Professionals (Opportunity Roles) 	Accounts link to Accounts, Contacts to Contacts, Accounts to Contacts, Contacts to Accounts
Ad-hoc Analysis	<ul style="list-style-type: none"> Uncovers groupings and associations across customer attributes and performance. Define rich customer segments and create bulk operations against a target group of customers by using this powerful utility. Quickly define, search, and analyze customers with similar attributes and behaviors. Use dynamic list-building capabilities to share insight across organization. 	<ul style="list-style-type: none"> All system end-users and power users Sales Managers Marketing Professionals Service Managers 	<ul style="list-style-type: none"> Microsoft CRM client for Microsoft Office Outlook Microsoft CRM Web client
Integrated Knowledge Management	<ul style="list-style-type: none"> Enables organizations to document best practices, standard operating procedures, and detailed product troubleshooting guides in a centralized, searchable index across the organization. Searchable index for detailed operational procedures and product troubleshooting. Integrated with CRM Customer Service cases for faster issue resolution. Can be sent by e-mail directly to customers. 	<ul style="list-style-type: none"> Service Professionals Information workers 	<ul style="list-style-type: none"> Customer Service cases Searchable library (Web application only)

Works the Way Your Business Does

Feature Set	Description	Target Audience	Integration Areas
Dynamic Business Design	<ul style="list-style-type: none"> Allows system implementers to customize the core CRM data model by adding and renaming business entities. Customize CRM objects, forms, views, and relationships without custom programming 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> Microsoft CRM Web application System customization Import XML Export XML
Adaptive Workflow Engine	<ul style="list-style-type: none"> Enables businesses to automate and integrate business processes originating from Microsoft CRM across to other business applications and services Automate business processes with an easy-to-use process engine. Save time and money by reusing .NET code within the Microsoft CRM workflow engine. 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> Workflow Manager Workflow.config
SQL Server Reporting Services	<ul style="list-style-type: none"> Embedded reporting engine leverages the SQL Server Reporting Services engine to generate and deliver powerful insight to business decision-makers. Obtain new business insights from a powerful report generation engine. Schedule, prepare, and distribute business reports to groups of users. 	<ul style="list-style-type: none"> Business Decision-makers System end-users 	<ul style="list-style-type: none"> Microsoft CRM Reporting Detailed object lists Detailed object forms
SharePoint Technologies Integration	<ul style="list-style-type: none"> Enables dashboard generation and rendering for business decision-makers to provide snapshot of key business indicators and performance. Personalized view of CRM information across users and SharePoint® sites 	<ul style="list-style-type: none"> Business Decision-makers System Customizers Partner Consultants 	<ul style="list-style-type: none"> Microsoft Windows SharePoint Services (WSS) SharePoint Portal
Roles-based Navigation	<ul style="list-style-type: none"> Delivers pertinent customer information to the end user according to the job role (or workplace profile) selected by the end user. Adapt the Microsoft CRM Web and Outlook interfaces to display appropriate CRM information for end users upon logging onto Microsoft CRM. System administrators can design and specify roles-based home pages so that users see the most relevant information immediately. 	<ul style="list-style-type: none"> System end-users System Administrators Partner Consultants 	<ul style="list-style-type: none"> Microsoft CRM Web client Microsoft CRM Outlook client SiteMap.xml
Configurable System Navigation	<ul style="list-style-type: none"> Adapt the Microsoft CRM Web and Outlook client interfaces to meet the unique application requirements for an organization. By modifying the XML structure, organizations can add new tabs to the CRM interface, add new pages, for example dashboards and new role-specific home pages, definitions for business users, and replace/modify the Microsoft CRM home page 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> Microsoft CRM Web client Microsoft CRM Outlook client System customization SiteMap.xml
Activity Customization	<ul style="list-style-type: none"> Enables businesses to modify the Activity object and forms, add new activity schema fields and construct workflow on Microsoft CRM activities. Automate workflow rules for handling of Email auto response, task escalation, and campaign-response. 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> System customization Workflow Manager
Customization Import and Export	<ul style="list-style-type: none"> Enables businesses to build powerful customizations that can be moved across CRM servers and environments. Quickly import CRM templates across page views, database definitions, and workflow servers. 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> System customization Workflow Import Workflow Export
Simplified Setup for Small Businesses	<ul style="list-style-type: none"> Microsoft CRM 3.0 Small Business Edition (SBE) provides simplified setup for part-time and/or resource-constrained IT resources. Simple eight-click installation experience when running the CRM setup on Microsoft Windows Small Business Server 2003. Automatically create and register CRM Web site, SQL Servers, Exchange Router and client installation components without needing detailed knowledge of Windows network. 	<ul style="list-style-type: none"> Small Business Owners or Consultants System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> System installation Windows Small Business Server 2003 CRM required technology components (IIS, SQL Server, Exchange Server, and Active Directory)
[SBE only] Consultant-in-a-Box (Configuration Wizard)	<ul style="list-style-type: none"> Accelerates CRM configuration for system implementers and IT project management. Intuitive, easy-to-follow assistance to uncover important business and CRM configuration settings. The System Configuration Wizard will also apply these configurations to Microsoft CRM Small Business Edition. Apply customizations immediately or save customization files as templates to be deployed across CRM servers. 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	

Works the Way Technology Should

Feature Set	Description	Target Audience	Integration Areas
Environment Diagnostics Wizard	<ul style="list-style-type: none"> Provides system administrators with a central point of administration and diagnosis of the Microsoft CRM 3.0 architecture. Quickly analyze, diagnose, and resolve issues when they occur on the underlying Microsoft CRM architecture. Create an environment diagnosis report to be used in logging and resolving issues. 	<ul style="list-style-type: none"> System Administrators Partner Consultants 	<ul style="list-style-type: none"> CRM server installation and upgrade Microsoft CRM server utility
Pervasive System Security	<ul style="list-style-type: none"> Ensures that all important customer and business information is protected, across users, teams, and business units. Security model remains constant when using third-party reporting tools and Microsoft Excel. Secure customer relationships with robust and dependable data security. Secure information across users and teams, applications, and reports with CRM 3.0's security model. 	<ul style="list-style-type: none"> System end-users System Administrators 	<ul style="list-style-type: none"> Microsoft CRM Web and Outlook clients SQL Server Reporting Services Custom Reports Third-party applications Web services
Enhanced Outlook Synchronization	<ul style="list-style-type: none"> Ensures that Microsoft CRM and Microsoft Outlook, including e-mail, contacts, appointments and tasks, are always synchronized. Ensure that updates to shared CRM contacts and assigned CRM work tasks are scheduled and up-to-date. 	System end-users	<ul style="list-style-type: none"> Contacts Tasks Appointments, E-mail
Enhanced Offline Synchronization	<ul style="list-style-type: none"> Synchronizes only the relevant information you need when working away from the office. Enables business users to define personalized data filters for synchronizing to local database—resulting in much improved synchronization times and synchronization reliability. Synchronize faster with increased reliability. 	<ul style="list-style-type: none"> System end-users System Administrators Partner Consultants 	Microsoft CRM laptop client for Microsoft Office Outlook
Enhanced SDK and Application Development	<ul style="list-style-type: none"> Enables system developers to rapidly build custom solutions on top of Microsoft CRM. Gain access to all core system objects and custom system objects through a strongly typed programming interface. 	<ul style="list-style-type: none"> System Developers System Administrators Partner Consultants 	<ul style="list-style-type: none"> Microsoft Visual Studio 2003/2005 Web services
Enhanced Exchange Integration	<ul style="list-style-type: none"> Offers seamless, reliable synchronization of Microsoft CRM e-mail and a user's Exchange Mailbox store. Automatically track all e-mail correspondence and customer responses within Microsoft CRM. Synchronize Microsoft CRM calendar and shared contacts with Microsoft Exchange Server. 	<ul style="list-style-type: none"> System Customizers System Administrators Partner Consultants 	<ul style="list-style-type: none"> User Mailbox E-mail Calendar Contact
Service-oriented Architecture (SOA):	<ul style="list-style-type: none"> Build rich integrations across your organization with a centralized, easily discoverable set of Web services. Connects Microsoft CRM's Web services with a common integration framework across business systems, applications, and processes. 	<ul style="list-style-type: none"> System Developers System Architects Partner Consultants 	<ul style="list-style-type: none"> Visual Studio .NET 2003/2005 Web services
Automated Client Installation	Automatically install Microsoft CRM client for Microsoft Office Outlook on all clients that connect to your server domain.	<ul style="list-style-type: none"> System Administrators Partner Consultants 	<ul style="list-style-type: none"> E-mail Calendar Contact Task CRM toolbar, menu and folder system
[SBE only] Simplified Maintenance and Administration	<ul style="list-style-type: none"> Manage and administer all CRM server components from a simple, easy-to-use administration console. Perform routine maintenance with ease. 	<ul style="list-style-type: none"> System Administrators Partner Consultants 	<ul style="list-style-type: none"> Server management (Windows Small Business Server) System Health Monitor

Microsoft CRM Editions

Microsoft CRM version 3.0 is available in the following editions:

- Microsoft Dynamics CRM 3.0 Professional Edition
- Microsoft Dynamics CRM 3.0 Small Business Edition

The Small Business Edition has three features that integrate with Microsoft Windows Small Business Server:

- Small Business Server Console Integration
- Microsoft CRM 3.0 Data Migration Wizard for Microsoft Office Outlook 2003 with Business Contact Manager
- Small Business Server Fax Server Integration

Microsoft Dynamics CRM 3.0 hardware and software requirements

URL: <http://www.microsoft.com/dynamics/crm/product/systemrequirements.mspx>

The hardware and software requirements discussed in this article are provided as general requirements. There are many factors that must be considered that can affect these requirements, including:

- Number of servers involved and how they are configured
- Dependency of Microsoft Dynamics CRM on Microsoft SQL Server 2000 or Microsoft SQL Server 2005
- Number of users the Microsoft CRM implementation will support
- Integration of Microsoft CRM with the Microsoft Exchange servers
- Performance of your servers and the local area network
- Whether or not you already have Microsoft SQL Server Reporting Services installed

The Microsoft CRM 3.0 Implementation Guide provides detailed information about the installation and implementation requirements for Microsoft CRM 3.0. The following additional installation topics are covered in Chapter 5 of the guide:

- Multiple server deployment (including hardware recommendations for Microsoft SQL Server and Exchange Server)
- Single server deployment
- Installing Microsoft CRM on a virtual machine
- Using special and extended characters
- Planning server requirements for reporting

For more information, download the Microsoft CRM 3.0 Implementation Guide at: <http://www.microsoft.com/dynamics/crm/using/downloads/default.mspx>

MICROSOFT CRM PROFESSIONAL SERVER SYSTEM REQUIREMENTS

When you use Microsoft Windows 2000 Server or Windows Server 2003, you can combine Microsoft CRM Server on the same computer as either SQL Server or Exchange Server. Microsoft, however, does not recommend these configurations.

The following table shows the system requirements for Microsoft CRM Professional Server.

Requirement	Minimum	Recommended
Computer/processor	Dual 1.8 GHz Pentium (Xeon P4)	Dual 1.8 GHz Pentium (Xeon P4) or better
Memory (RAM)	512 megabytes (MB)	1 gigabyte (GB)
Hard disk	8 GB free hard-disk space	SCSI with hardware RAID 5 with 10 GB free hard-disk space
Network card	10/100 Mbps	Dual 10/100/1000 Mbps
Operating system	<ul style="list-style-type: none"> Microsoft Windows 2000 Server Microsoft Windows 2000 Advanced Server All with the latest service pack 	<ul style="list-style-type: none"> Microsoft Windows Server 2003, Standard, Enterprise, or Web Editions All with the latest service pack
Internet Information Services (IIS)	Version 5.0 (included with Windows 2000 Server) or later	Version 6.0 (included with Windows Server 2003)
Microsoft Data Access Components (MDAC)	Version 2.71a	Version 2.8 (included with Windows Server 2003)

MICROSOFT CRM SMALL BUSINESS EDITION SERVER SYSTEM REQUIREMENTS

Microsoft CRM Server Small Business Edition is designed for Microsoft Windows Small Business Server 2003 Premium Edition and Small Business Server 2003 R2 Premium Edition, on which Microsoft CRM Server can coexist on the same computer as both Microsoft SQL Server and Exchange Server. Small Business Server can be deployed in operating environments that support fewer than 75 users.

The following table shows the system requirements for Microsoft CRM Small Business Edition Server.

Requirement	Minimum	Recommended
Computer/processor	Dual 1.8 GHz Pentium (Xeon P4)	Dual 1.8 GHz Pentium (Xeon P4) or better
Memory (RAM)	512 megabytes (MB)	1-gigabyte (GB)
Hard disk	8 GB available hard disk space	SCSI with hardware RAID 5
Network card	10/100 Mbps	Dual 10/100/1000 Mbps
Modem	None	Two modems, one for Shared Fax Service and one for Remote Access Service, Shared Modem Service, and Internet Security and Acceleration Server dial-up service
Network card	10/100 Mbps	Dual 10/100/1000 Mbps
Operating system	Only Microsoft Windows Small Business Server 2003 Premium Edition	Microsoft Windows Small Business Server 2003 R2 Premium Edition
Internet Information Services (IIS)	Version 5.0 (included with Windows 2000 Server) or later	Version 6.0 (included with Windows Server 2003)
Microsoft Data Access Components (MDAC)	Version 2.71a	Version 2.8 (included with Windows Server 2003)

ADDITIONAL SOFTWARE COMPONENTS REQUIRED

The following table shows the additional software component requirements for Microsoft CRM Server.

Component	Notes
Indexing Service	Installed and service started.
Microsoft XML Core Services (MSXML)	Version 4.0 with Service Pack 2 (installed during Microsoft CRM Server installation)
Microsoft .NET Framework 1.1	Installed during Microsoft CRM Server installation.

The computer that is running Microsoft CRM Server must also have access to computers in the same Active Directory service domain that are running:

- Microsoft SQL Server 2000 Service Pack 4 and the latest updates or SQL Server 2005
- Microsoft Exchange Server 2003 or Microsoft Exchange 2000 Server with the latest service pack

Microsoft CRM Web software requirements

Microsoft CRM Server is accessed through a client. This client is either Microsoft Internet Explorer or Microsoft Office Outlook.

Microsoft CRM 3.0 Web client

To use Internet Explorer, you must have the following:

- Microsoft Windows 2000 (Server or Professional) with Service Pack 4, Microsoft Windows XP Professional with Service Pack 1, or Windows Server 2003 (Web, Standard, or Enterprise)
- Microsoft Internet Explorer 6 Service Pack 1

Microsoft CRM 3.0 client for Microsoft Office Outlook software requirements

There are two Microsoft CRM clients for Outlook:

- Microsoft CRM 3.0 desktop client for Microsoft Office Outlook. Install this client on workstations (including computers that are shared by several users) that do not go offline and do not have a connection to the local area network.
- Microsoft CRM 3.0 laptop client for Microsoft Office Outlook. Install this client on computers that go offline.

Both Microsoft CRM clients for Outlook require:

- Windows 2000 Professional with SP4 or Windows XP Professional with SP1 (Service Pack 2 is supported but not required)
- Microsoft Office 2003 Editions with SP1

OR

- Microsoft Office XP (2002) with SP3
- Microsoft Internet Explorer 6 SP1
- Microsoft .NET Framework 1.1
- Windows Indexing Service (for only the Microsoft CRM laptop client for Outlook)
- Microsoft SQL Server 2000 Desktop Engine (MSDE) (for only the Microsoft CRM laptop client for Outlook)

Although both clients have similar software requirements, there are several differences:

- Both clients cannot be installed and cannot co-exist on the same computer at the same time.
- Microsoft CRM laptop client for Outlook may be installed only for an individual user.
- To switch from one client to the other on the same computer, you must uninstall the old client and install the new client
- The Microsoft CRM desktop client for Outlook supports multiple users. However, each person logging on to the client computer must use the same client installation, and the computer must be set to a single language configuration.

Microsoft CRM-Exchange E-Mail Router requirements

The following is a list of prerequisite software and configuration items that must be installed before installing the Router:

- Microsoft Windows 2000 Server (or Advanced Server) with Service Pack 4, or Windows Server 2003 (Web, Standard, or Enterprise).
- Microsoft Exchange Server 2003
- Microsoft CRM Server (must be installed and operational)
- Microsoft Exchange Server 2003 (must be installed and operational on the computer where the Router is to be installed)
- The user installing the Router must be a member of the Domain Administrators group and have Local Administrator credentials on the Microsoft Exchange Server
- The installation must be completed on the computer that is to run Microsoft CRM by a user with Local Administrative privileges

The following components are required and are installed during Microsoft CRM-Exchange E-Mail Router installation:

- Microsoft XML Core Services (MSXML) 4.0 with SP2
- Microsoft .NET Framework 1.1

Microsoft Dynamics CRM 3.0 Resources

The following resources are available to help you understand and use Microsoft Dynamics™ CRM 3.0.

WEB RESOURCES

The [Microsoft CRM Web page](#) is a great place to start learning about the features and benefits of Microsoft CRM.

URL: <http://www.microsoft.com/dynamics/crm/default.aspx>

Using Microsoft CRM – Where people, ideas, and solutions meet

The Using Microsoft CRM Web page is ideal for finding current information about Microsoft CRM. You can find expert advice about a variety of topics plus how-to articles, whitepapers, and downloads.

URL: <http://www.microsoft.com/dynamics/crm/using/default.aspx>

Microsoft CRM Community

The official Microsoft CRM Community Web page contains links to thriving newsgroups, blogs, and other communities that focus on Microsoft CRM.

URL: <http://www.microsoft.com/dynamics/crm/community/default.aspx>

Microsoft CRM Sandbox

The Microsoft CRM Sandbox is an open community where you can share information and ideas with other Microsoft CRM administrators, users, and developers. Use the Sandbox to blog about Microsoft CRM, post to the message boards, and contribute code to the CodeGallery. There are downloads and articles from other Microsoft CRM users, as well as the ability to sign up for RSS feeds. In addition, you can sign up for alerts to find out whenever articles and downloads are added to any of these Web sites.

URL: <http://codegallery.gotdotnet.com/crm>

DOCUMENTATION RESOURCES

The Microsoft CRM 3.0 documentation is updated on a regular basis and posted to the Microsoft Download Center.

Microsoft CRM 3.0 Implementation Guide

The Implementation Guide provides the information you need to successfully implement Microsoft CRM in your business. This guide addresses the planning, installing (both hardware and software), pre-deployment testing, and operating tasks for the maintenance of the Microsoft CRM system.

URL: <http://go.microsoft.com/fwlink/?LinkId=55129>

Microsoft CRM 3.0 Customization Planning Forms

In conjunction with the Implementation Guide is a download that contains useful planning and implementation tools. This download includes one file for each customizable entity in Microsoft CRM. Each file includes default forms, views, attributes, and reports for the entity, with tables to add information on what you want to change. These files are designed to be printed and brought to meetings where managers and employees determine how to customize Microsoft CRM for their specific business needs.

URL: <http://go.microsoft.com/fwlink/?LinkID=55822>

Online Help

Use Microsoft CRM online Help to get help completing tasks and to learn about Microsoft CRM concepts and features. This guide is an excellent starting point for users who are unfamiliar with the fundamentals or need to gain a thorough understanding of Microsoft CRM. Help on This Page, also accessed from the Help menu, provides context-sensitive help; that is, the information relates to the page you are working on in Microsoft CRM.

In Microsoft CRM, click Help and click Contents.

Microsoft Download Center

URL: <http://go.microsoft.com/fwlink/?LinkId=63865>

Microsoft CRM 3.0 SDK

The Microsoft CRM 3.0 Software Development Kit (SDK) provides the information necessary for developers, system customizers, and report writers to integrate their applications into Microsoft CRM, and to build additional features on the Microsoft CRM platform. It contains the following sections:

- Server Programming Guide - A guide for developers writing server-side code, custom business logic, integration modules, workflow assemblies, and more. This guide provides an architectural overview of Microsoft CRM, the entity model, security model, Web services, and sample code.
- Client Programming Guide - A guide for developers customizing the Web or Outlook clients, including scripting, integration of custom Web pages, and sample code.
- ISV Programming Guide - A guide for independent software vendors (ISVs) developing installable add-ins for Microsoft CRM.
- Report Writers Guide - A guide for developers writing reports for Microsoft CRM using Microsoft SQL Server Reporting Services Report Designer.

URL: <http://go.microsoft.com/fwlink/?LinkId=63864&clcid=0x409>

OTHER RESOURCES

Knowledge Base <http://support.microsoft.com/search/?adv=1>

Downloads <http://www.microsoft.com/dynamics/crm/using/downloads/default.aspx>