CRM for Outlook Basics

- Find your data and work with lists

- Visualize your data with dashboards

- Email, appointments, tasks, and other activities

- Nurture leads through the sales process

- Take your work and go offline

- Make it yours

Microsoft

Contents

Welcome to the CRM for Outlook Basics guide

This guide contains the essentials you need to use Microsoft Dynamics CRM for Outlook, the Microsoft Outlook add-in that works together with Microsoft Dynamics CRM. In this guide, we'll show you how to navigate CRM for Outlook, enter and edit data, and move your customers successfully through the sales cycle.

We know you're busy, so we only included what you need to know to get productive right away, and we kept every topic as short as possible (think bite-sized servings!).

Have it your way

You can read this guide straight through in order, or read just the topics you're interested in. If you're the person responsible for training people at your organization, you can use the guide to walk through the topics in training sessions.

Create your own training materials

To make it easier for you to create your own training materials, we're giving you a link to our editable files, so that you can replace screen shots, change the text, or use your own logo— whatever works to make the training materials match your system and style.

Find more answers and training online

If you're new to Microsoft Dynamics CRM, you may also want to check out our CRM Basics eBook. It covers the same content as this guide, but from the perspective of the Microsoft Dynamics CRM web client.

To find more eBooks, videos, and other great content to help you get the most out of Microsoft Dynamics CRM and CRM for Outlook, check out the CRM Customer Center from your favorite device at www.CRMCustomerCenter.com.

> **Talk to us**
> Is this the kind of guide you'd like to see more of? Did we leave something out you'd like to know about? We'd love to know what helps you, or what doesn't work so well. Please take a minute to send us a quick note. We'll use your feedback to improve our content.

Meet CRM for Outlook

A new, but comfortably familiar face

If you're like many people, you already use Microsoft Outlook as your communications, scheduling, and contact management hub. But maybe you're new to Microsoft Dynamics CRM and all that it has to offer? With CRM for Outlook, a free add-in for Microsoft Outlook, you can take advantage of what you already know about Outlook to make it easier to learn and work with Microsoft Dynamics CRM.

When you install CRM for Outlook, you can send and receive email, and create tasks and appointments the same way you always have in Outlook. But the add-in alters the Outlook interface in a few key ways. For example, CRM for Outlook adds a **CRM** section to the **Home** tab for email, appointments, contacts, and tasks. It also adds a new **CRM** tab to the ribbon.
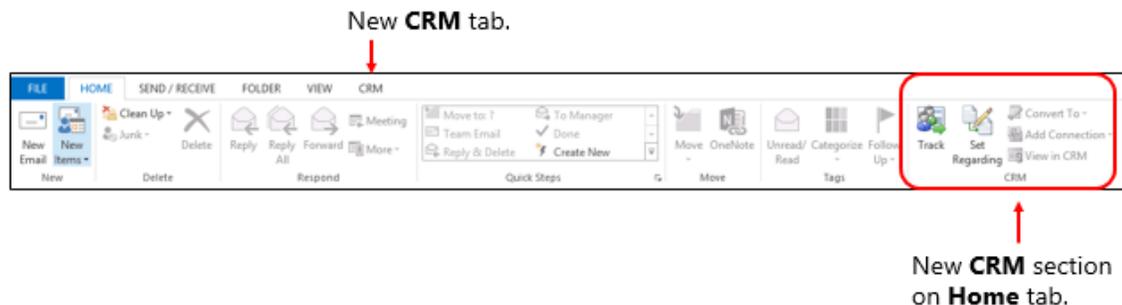
On the left side of the screen, below your email Inbox, you'll see a new navigation pane with the name of your organization and folders you can use to find your way around CRM for Outlook:
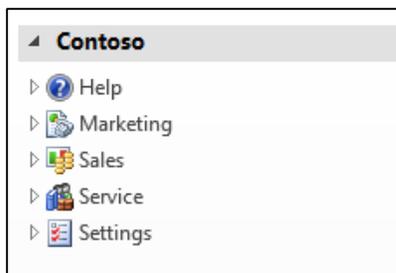
These and other interface components make it possible to access all the core Microsoft Dynamics CRM features directly from Outlook.

Next up: Take advantage of what you already know

Take advantage of what you already know

If you already use Outlook for email, appointments, and tasks, you'll feel right at home with CRM for Outlook. In fact, you'll instinctively know how to accomplish many tasks. For example, you can sort, categorize, and flag your data using the same tools you would use in Outlook:

Sort a column by clicking a column header.

Choose a Categories check box to categorize your data by color.

Choose a flag to mark a record for follow-up or to set a reminder.

CRM for Outlook also offers features that aren't available through Microsoft Dynamics CRM. We'll cover those next.

Next up: Track your Outlook email, appointments, contacts, and tasks

Track your Outlook email, appointments, contacts, and tasks

A big part of working in Microsoft Dynamics CRM is creating and recording different types of activities—sending email, creating appointments, creating tasks—that revolve around a sales or service process. With CRM for Outlook, you can create these types of activities the same way you always do in Outlook, but to record the activities in Microsoft Dynamics CRM, you **track** them. Tracking an email message, appointment, contact, or task is as simple as choosing the **Track** button on the ribbon.
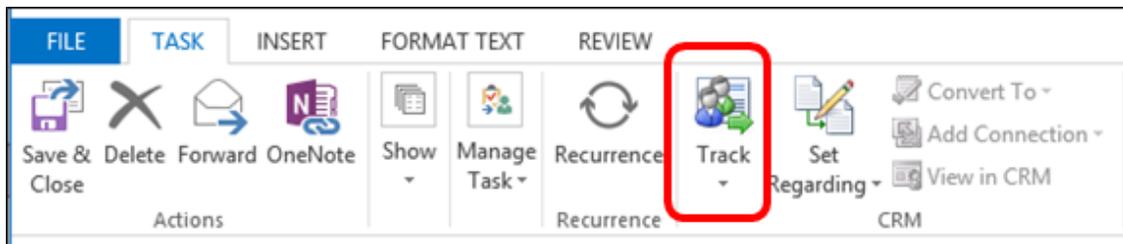
When you track an email, appointment, contact, or task record, a copy of that record is created in Microsoft Dynamics CRM. After a record is tracked, you can still access that record from CRM for Outlook by choosing **View in CRM**. You or anyone who has access to your activity records can also access them in Microsoft Dynamics CRM.

You can use the Microsoft Dynamics CRM tracking pane at the bottom of a tracked record to see that a record is tracked, and to easily access related records.

The tracking pane appears at the bottom of a tracked record.
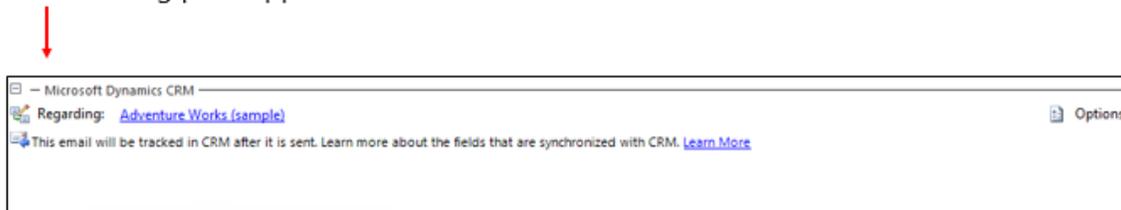
Tracking provides a great way to keep your personal Outlook records separate from your Microsoft Dynamics CRM records since you track just the records you want to synchronize with Microsoft Dynamics CRM.

Next up: Enhanced email capabilities make you more productive

Enhanced email capabilities make you more productive

After you track an email message in CRM for Outlook, you can access several Microsoft Dynamics CRM features from the CRM for Outlook ribbon. For example, if you receive email from a potential sales lead, you can convert the email message directly into a CRM lead record. Likewise, you can convert email messages into opportunities or cases.
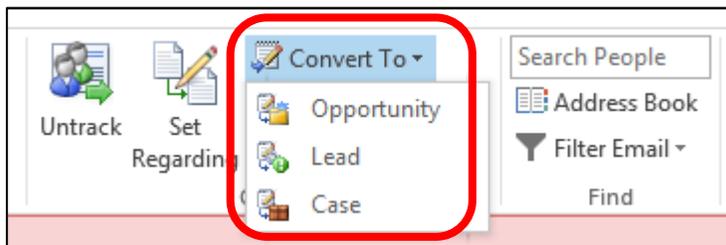
You can also insert a Microsoft Dynamics CRM email template or a Knowledge Base article into your email message, or even attach a sales brochure or other sales literature stored in Microsoft Dynamics CRM.
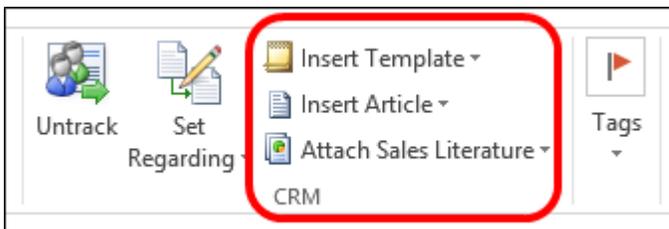
All of these features make you more productive because you can work in a single tool that you're already familiar with, but access Microsoft Dynamics CRM features at the same time.

Next up: [Take your work with you when you go offline](#)

Take your work with you when you go offline

One of the great things about CRM for Outlook is you can take your work with you when you unplug. For example, if you travel to a customer's site, you can look up your Microsoft Dynamics CRM contacts, review and add new activities, run reports, and more without connecting to the Internet.

CRM for Outlook stores up the changes you make while you're offline and automatically synchronizes them with Microsoft Dynamics CRM when you go back online.

Could it be any easier?

Next up: Security settings—What if you can't access a feature?

Security settings – What if you can't access a feature?

Microsoft Dynamics CRM comes with security settings that control your access to certain features, data, or even fields on screens, depending on your role.

If you can't see or access something described in this guide, or if some data is marked "read only," check with the person who manages your system day-to-day. You may need to get additional security permissions.

Next section: <u>Get Help when and where you need it</u>

Get Help when and where you need it
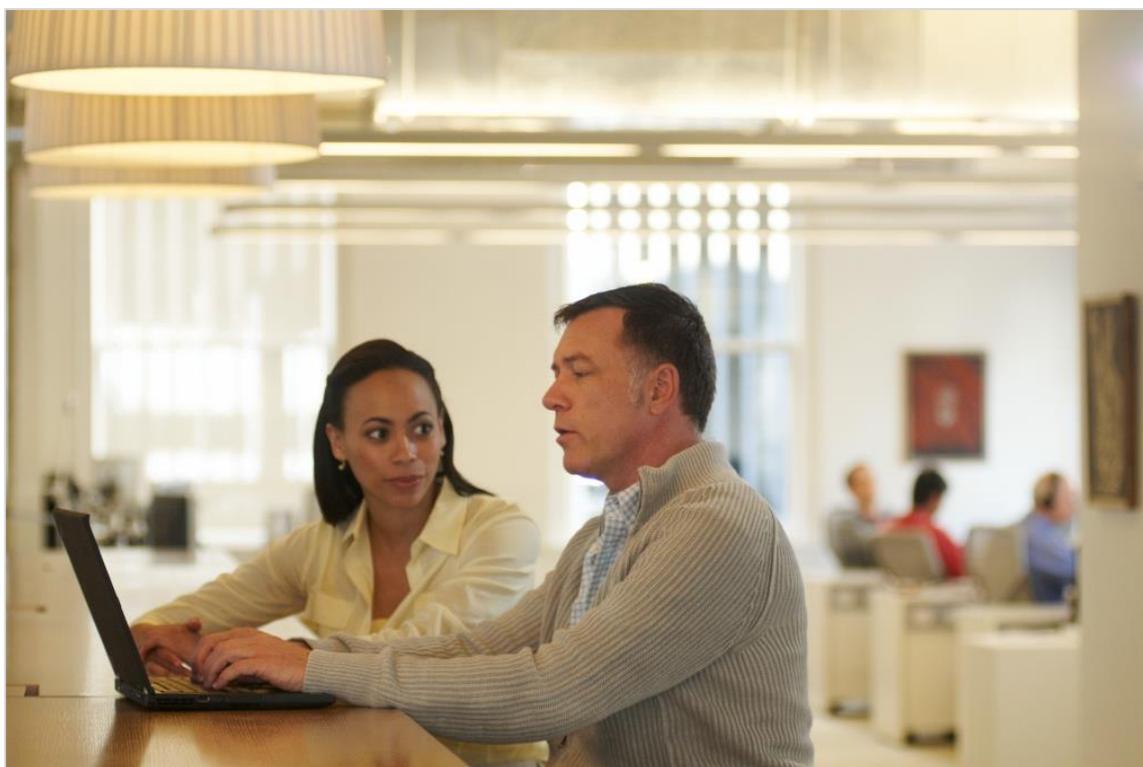
Get Help on a specific dialog box, window, or error message

As you use CRM for Outlook, you can access Help for specific windows, dialog boxes, and error messages. You can access Help by choosing:

- The **Help** button on the ribbon:
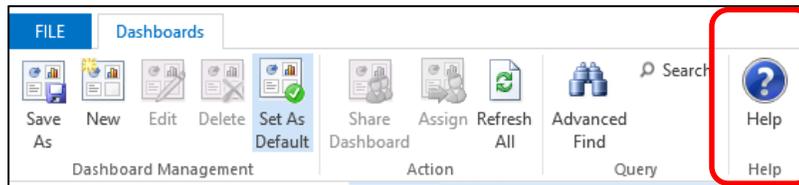
- The question mark button in the upper-right corner of a dialog box or window:
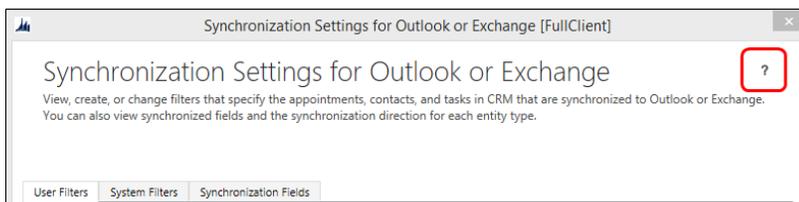
- Links in dialog boxes:
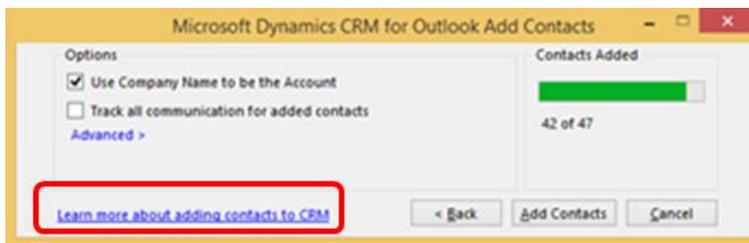
- Links or Help buttons in error messages:
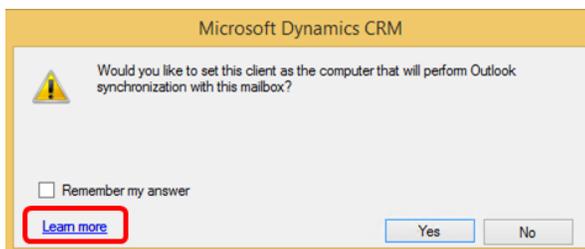
Next up: CRM for Outlook User's Guide provides in-depth Help

CRM for Outlook User's Guide provides in-depth Help

The guide you're reading now shows you how to get started with CRM for Outlook. When you need more than the basics, you can find in-depth help in the CRM for Outlook User's Guide.

Tip

Make sure to bookmark the URL for the CRM for Outlook User's Guide to put a wealth of CRM for Outlook information at your fingertips!

Next up: Your one-stop shop for Help and training

Your one-stop shop for Help and training

If you need help with other Microsoft Dynamics CRM tasks, go to the Microsoft Dynamics CRM Help & Training site at: http://www.microsoft.com/en-us/dynamics/crm-customer-center/default.aspx

The Help & Training site provides lots of great content, including task-based Help, short videos, eBooks, quick reference cards, walkthroughs, and customizable training content.

Make sure to bookmark the Help & Training site!

Next section: Find your data and work with lists

Find your data and work with lists
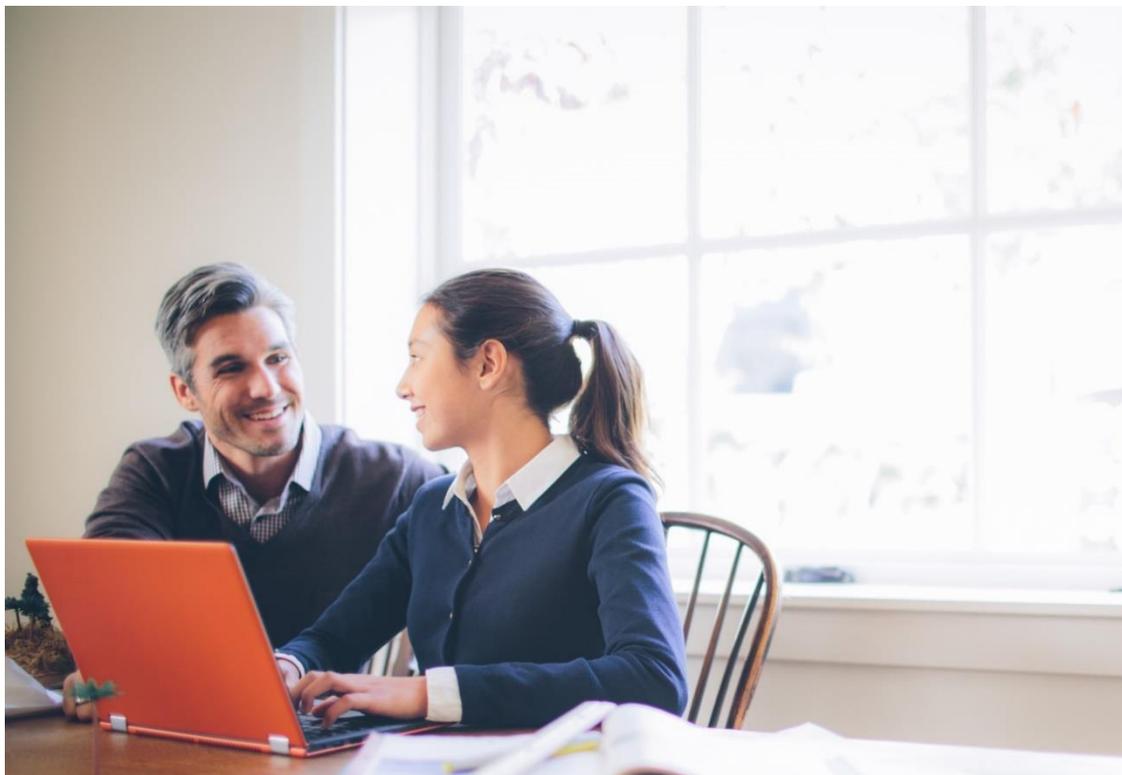
How CRM for Outlook data is organized

Although you don't need to know a lot about databases to start working with CRM for Outlook, it's helpful to know a few things about how data is organized.

In particular, there are two definitions you should know because they're used in many places in CRM for Outlook: **record** and **record type**.

What's a record?

In CRM for Outlook, a **record** is a complete unit of information. Think of it like a single row in a table or a spreadsheet, with multiple columns (or fields) to store the pieces of info that make up the entire row. For example, an accounts record might have a column for **Account Name**, **Phone**, **Address**, **Primary Contact**, and so on.

Each time you add a new account to the system, you're creating a new record in the CRM database.

What's a record type?

Each record you add to CRM for Outlook belongs to a certain **record type**, such as an account, contact, lead, opportunity, or case. (CRM for Outlook has several other types of records besides these, but these are the ones you'll probably work with most often.)

Record types (also called "entities") give you a way to group and organize similar data.

Next up: Find your data

Find your data

If you have worked with Microsoft Dynamics CRM, you know that you get around the system by using the navigation bar and tiles:

Navigate with tiles in Microsoft Dynamics CRM
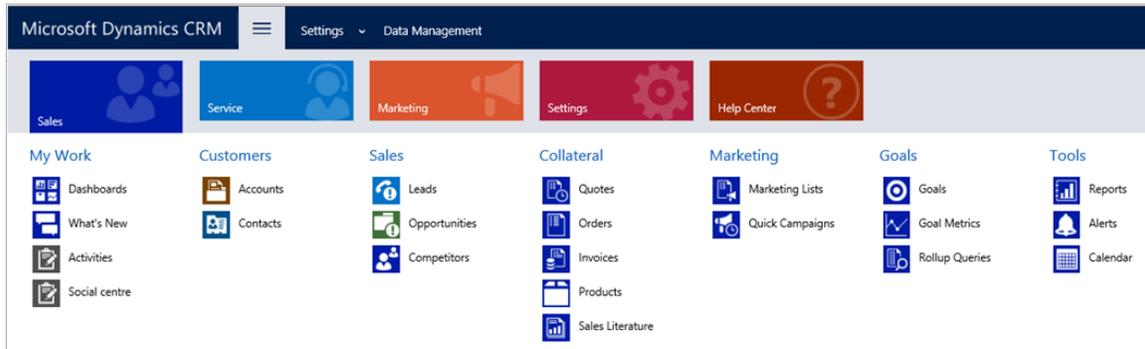
Your Microsoft Dynamics CRM screen may look different if you're using an earlier version.

In CRM for Outlook, the same information is available but through the navigation pane on the left side of the screen below your Outlook Inbox. The navigation pane organizes your CRM information into folders and subfolders under your organization name, which might be the name of your company, or a division within your company if you work for a large company.
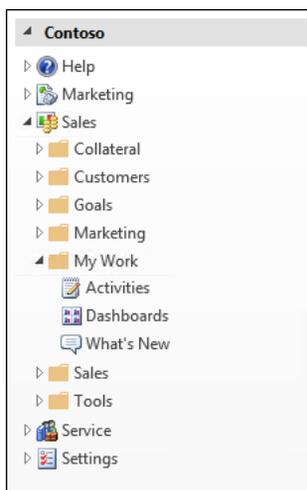
Navigate with folders and subfolders in CRM for Outlook

Next up: View records and record details

View records and record details

When you open a folder, such as the **Accounts** folder or the **Leads** folder, you'll see a list of the records for that record type. For example, if you open the **Accounts** folder, you'll see a list of customers with their addresses, phone numbers, and contacts. Lists provide a view of your data that's similar to a spreadsheet—you can see many records at the same time. Use lists to find and sort your records.

When you view a record in a list, you can see some but usually not all of the information for that record. For example, some of the columns may scroll off the screen or you may be able to see just some of the data in a particular column. If you want to see all the info for a record, just select it. The record details will be displayed in the Reading Pane below the list. Keep in mind that the information in the Reading Pane is read-only. It's just a quick way to preview all the info about a particular record.

Select a record in a list . . .

. . . to see all the info for that record in the Reading Pane.

> 💡 **Tip**
>
> You can customize the Reading Pane in a number of different ways. We'll show you how later in this guide.

Next up: [Edit the data in a record](#)

Edit the data in a record

So what if you **do** want to edit the data in a record? To edit data, you need to open a Microsoft Dynamics CRM form. You don't have to leave CRM for Outlook to do that though. Just double-click any record in a list to open a Microsoft Dynamics CRM form.

Double-click a record in a list. . .

. . .to open a CRM form for that record.

When the Microsoft Dynamics CRM form is open, you can edit the data or do any other actions you would normally do in Microsoft Dynamics CRM.

> 💡 **Tip**
>
> If you want to edit several records at the same time, select the records you want from the list, choose **Edit** from the ribbon, and then edit the fields you want in the **Change Multiple Records** window.

Next up: Find a record (fast!)

Find a record (fast!)

Want a quick way to find a record? Use the search box at the top of a list to search for the record you want.

- Type the search term, and then choose the **Search** icon 🔍 . Use an asterisk (*) to include a wildcard character.

Next up: View a subset of records

View a subset of records

If you work with a lot of records, it's helpful to filter the list of records to just the records you want. CRM for Outlook comes with several pre-defined filters that you can choose from for each record type. For example, you can view all active accounts, or only the accounts you're following. These pre-defined filters are called **system views**.

Choose the down arrow to see the available views to choose from.

When you choose a view from the list, CRM for Outlook creates a tab for that view and pins it above the list. This makes it easy to switch among views you use often. Just select the view to filter your records, then choose another view to filter them in a different way.

Views are pinned as tabs in CRM for Outlook.
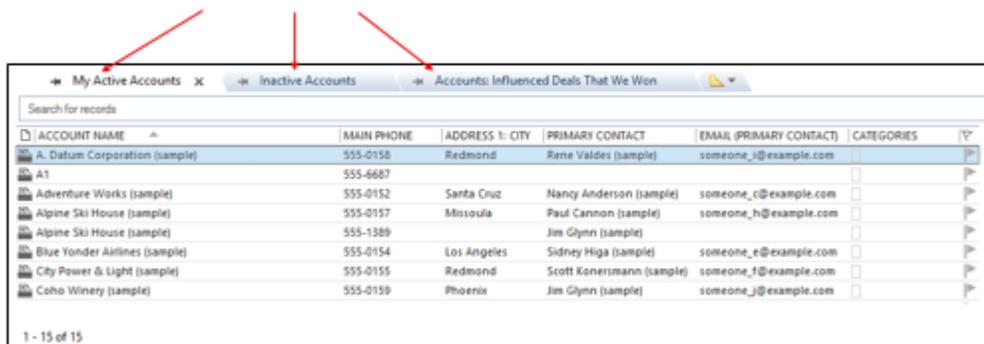
If you choose the **Pin** button , the views will be available the next time you open CRM for Outlook. This keeps the information you use most often at your fingertips.

Next up: Create your own filter to select just the records you want

Create your own filter to select just the records you want

What if the pre-defined views don't provide the subset of records you need? No worries. You can easily create your own custom filters. For example, let's say you want to know where your sales leads are coming from. You know that a lot of them came from people filling out interest cards at a trade show. You can create a filter that finds all the Lead records that came by way of interest cards.

1. Choose the drop-down arrow next to **Filter** in the upper-right corner of a list.
2. Point to **Add Filter**, and then in the menu to the left, select a column to filter on. In this case, we'll select the **Topic** column since that column stores the information about the interest cards.

Create a filter.
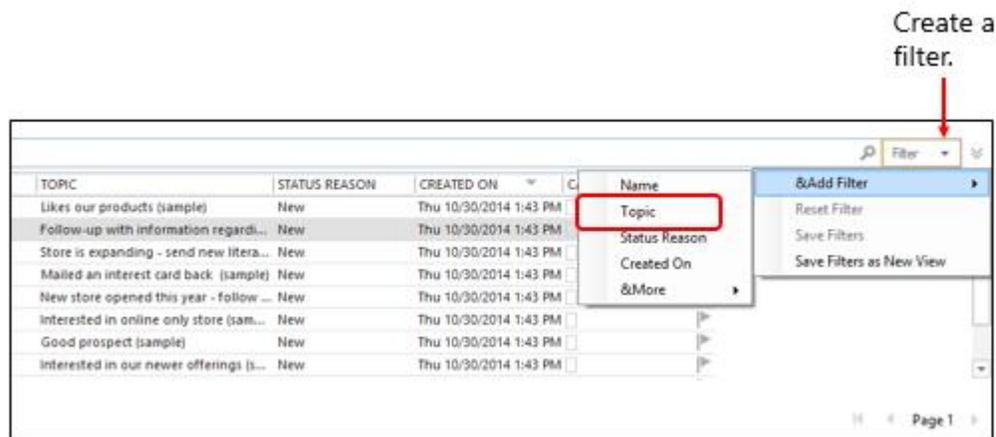
3. In the **Custom Filters** dialog box, in the first list, choose the drop-down arrow, and then select **Contains**. In the box to the right, enter the words **interest card**.

   This is what we're telling CRM for Outlook to do: In the **Leads** record type, find all the records that **contain** the words **interest card** in the **Topic** column.

> 💡 **Tip**
>
> Want to reuse the same filter again? Choose **Save Filters as New View**
> from the **Filters** menu. Your new filter will show up on the same list with the pre-
> defined views we used earlier. Filters you save in CRM for Outlook will appear in
> Microsoft Dynamics CRM.

Next up:

Add a column to a list

What if your list doesn't include all the columns you want? For example, maybe you want to add a second business phone field. It's simple to add a column.

1. Right-click any column in a list.
2. Choose **Add Columns**.
3. In the **Show Columns** dialog box, under **Available columns**, select the column you want to add, and then choose **Add**.
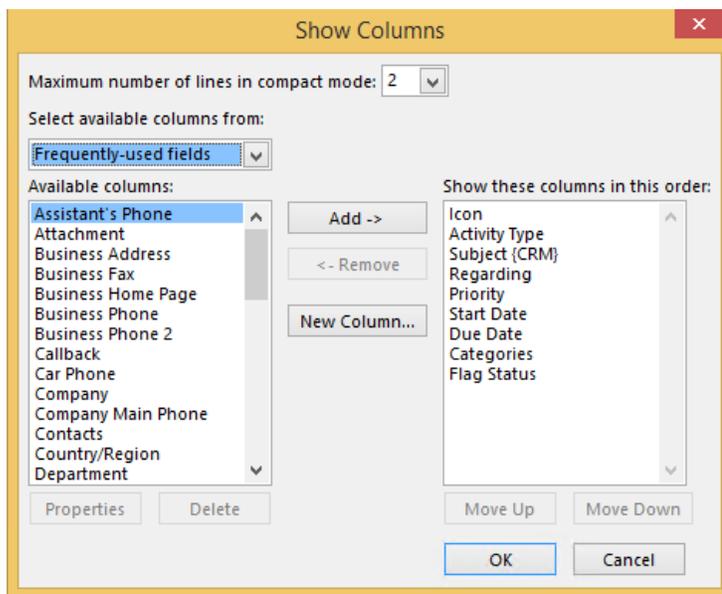
4. Repeat for any additional columns you want to add.

> **Note**
>
> To remove a column from a list, just right-click the column, and then choose **Remove This Column**.

Next up: [Sort records in a list](#)

Sort records in a list

It's all about finding the data you need. Sorting provides another tool to help you find records fast.

To sort records in a list, just choose a column heading. For example, if you select the **Account Name** column heading in the list below, CRM for Outlook automatically sorts the list from A to Z. If you click the column heading again, it sorts the list from Z to A.

ACCOUNT NAME	MAIN PHONE	ADDRESS 1: CITY	PRIMARY CONTACT ▲	EMAIL (PRIMARY CONTACT)	CATEGORIES	⊽
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com	☐	▷
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com	☐	▷
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com	☐	▷
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com	☐	▷
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com	☐	▷
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com	☐	▷

You can also sort records to group similar records together. For example, let's say the records in a list have 4 possible values. If you select the column to sort the records, all the records with the same values in that field will be grouped together. This is a quick way to find a subset of records.

Next up: [Resize and move columns in a list](#)

Resize and move columns in a list

Don't like the arrangement of columns in your list? Move them around to put information in the order that works for you.

To resize a column, drag the column header.

ACCOUNT NAME	MAIN PHONE	ADDRESS 1: CITY	PRIMARY CONTACT	EMAIL (PRIMARY CONTACT)	CATEGORIES	
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com		
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com		
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com		
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com		
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com		
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com		

To move a column, click the column name and drag it to a new spot.
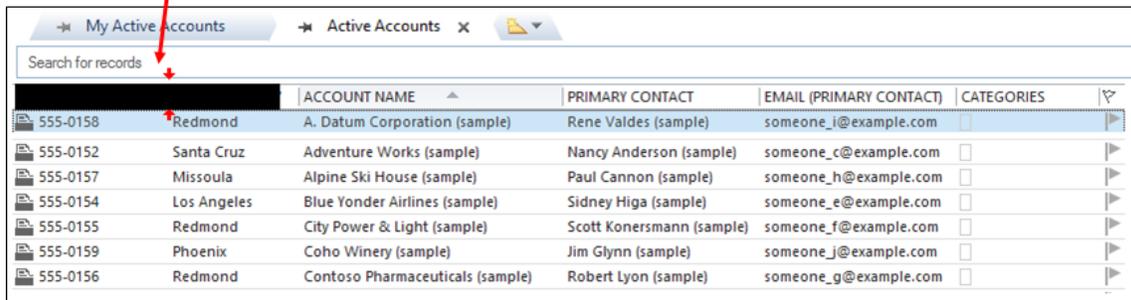
My Active Accounts	Active Accounts ✕					
Search for records						
		ACCOUNT NAME	PRIMARY CONTACT	EMAIL (PRIMARY CONTACT)	CATEGORIES	
555-0158	Redmond	A. Datum Corporation (sample)	Rene Valdes (sample)	someone_i@example.com		
555-0152	Santa Cruz	Adventure Works (sample)	Nancy Anderson (sample)	someone_c@example.com		
555-0157	Missoula	Alpine Ski House (sample)	Paul Cannon (sample)	someone_h@example.com		
555-0154	Los Angeles	Blue Yonder Airlines (sample)	Sidney Higa (sample)	someone_e@example.com		
555-0155	Redmond	City Power & Light (sample)	Scott Konersmann (sample)	someone_f@example.com		
555-0159	Phoenix	Coho Winery (sample)	Jim Glynn (sample)	someone_j@example.com		
555-0156	Redmond	Contoso Pharmaceuticals (sample)	Robert Lyon (sample)	someone_g@example.com		

Note

Changes you make to column widths are saved when you close CRM for Outlook; changes you make to column order are not saved.

Next up: Use color to categorize your records

Use color to categorize your records

If you know how to use color to categorize records in Outlook, you already know what to do.

1. In the **Categories** column, right-click the check box next to the record you want to categorize.

2. Select a color category.

> ### Tip
> If you want to rename the color categories to make them more meaningful to you, choose the **All Categories** menu item. To set a single color as the color to apply when you click a check box, choose the **Set Quick Click** menu item.

Next section:

Visualize your data with dashboards

Start your day with a dashboard

You may want to start your day by opening a dashboard. A dashboard provides easy-to-read lists and charts that help you see how you and your team are doing with key metrics (also known as key performance indicators, or KPIs).

For example, if you're in sales and you open the Sales dashboard, you'll see the status of open opportunities in the sales pipeline, or how many leads were generated by your marketing campaigns.

- To open a dashboard, in the left navigation pane, open the folder for your area. For example, open the **Sales** folder. Open the **My Work** subfolder, and then open the **Dashboards** subfolder.
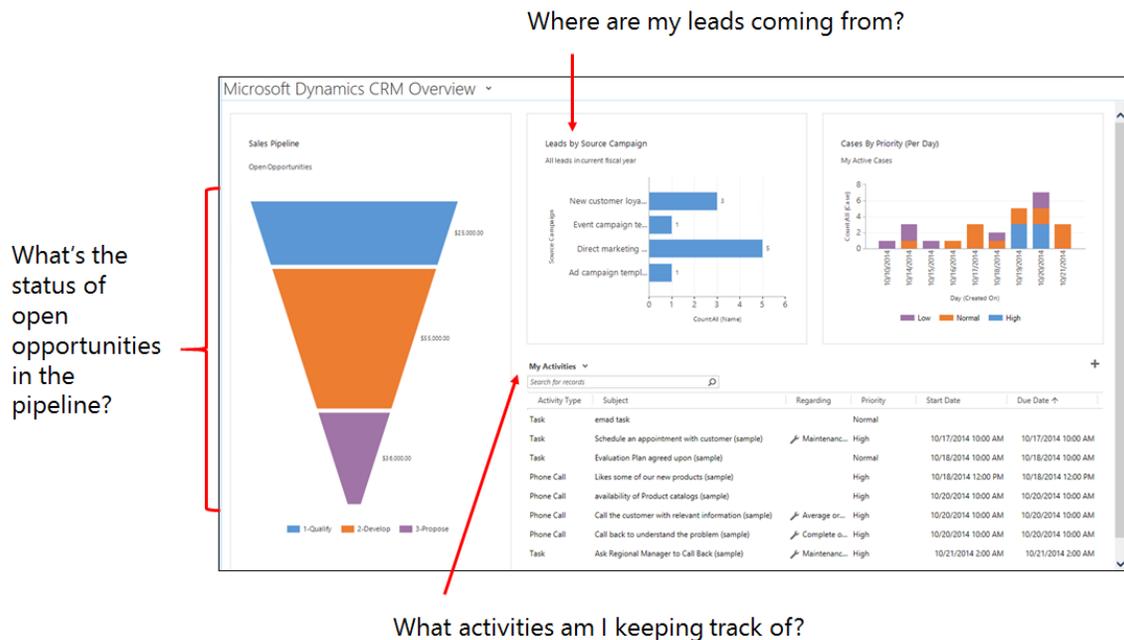
Next up: Find the right dashboard for your role

Find the right dashboard for your role

CRM for Outlook comes with several different dashboard layouts to help you highlight the data and performance metrics you're most interested in. The best way to find one you like is to take a look at a few.

- To see the different dashboard layouts, choose the drop-down arrow next to the name of the dashboard, and then select the layout you want. For example, if you want to see a **What's New** list on your dashboard, try the Sales Activity Social Dashboard.
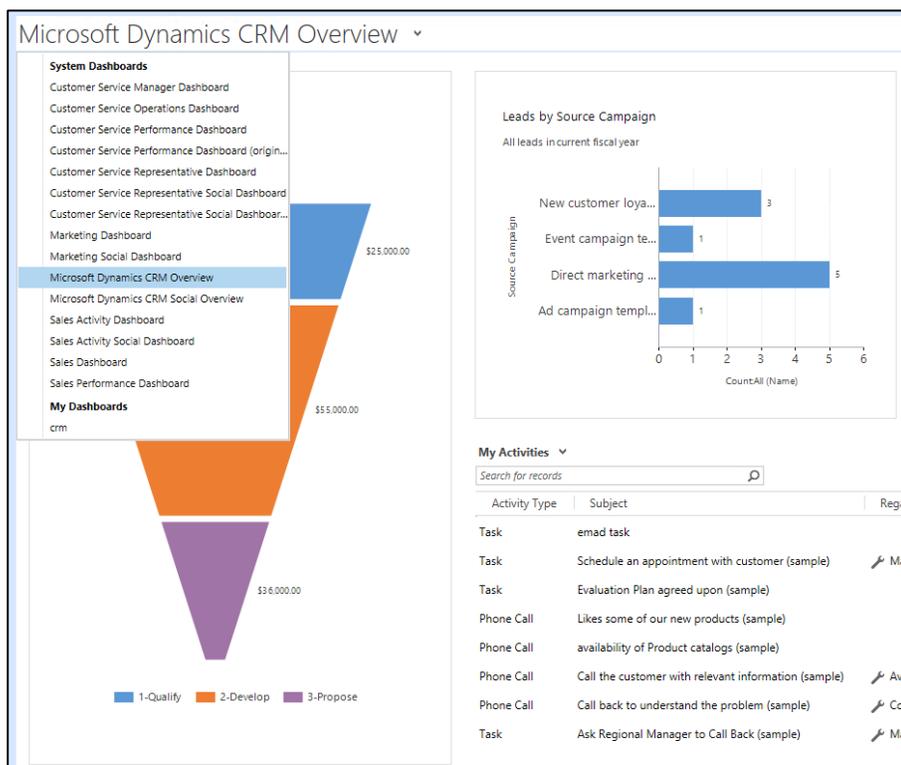
> 💡 **Tip**
>
> You can modify an existing dashboard if you want to add different lists or charts.

Next up: [Set your default dashboard layout](#)

Set your default dashboard layout

When your system is set up, the system administrator picks the default dashboard layout for your work area. If you want to see a different dashboard when you go to your work area, you can override the default.

- Use the list of dashboards to select the dashboard you want, and then choose **Set as Default** on the ribbon.
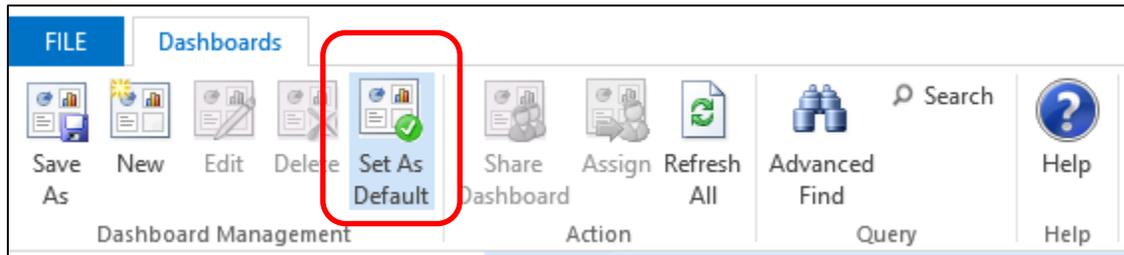
Next up: Drill in to see the data that makes up the chart on a dashboard

Drill in to see the data that makes up the chart on a dashboard

So where does the data come from for those charts? You can quickly see the underlying data for a chart by choosing the **Drill in** button ⊞ . You won't see the button until you point to the chart.

Choose this button to see the records used to create the chart.
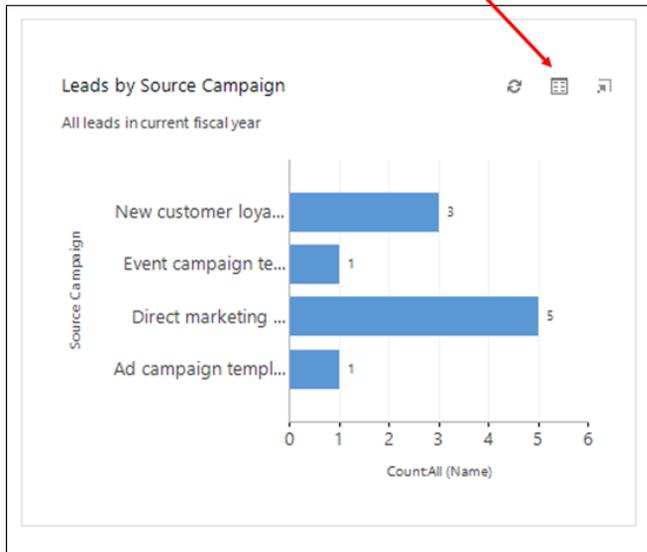
Next up: Pick a different type of chart or different fields for a chart

Pick a different type of chart or different fields for a chart

You can try out different types of charts, and see how your data looks when you use different fields for the calculations, right from the dashboard. (No customization required!)

1. On a dashboard, select a chart segment (for example, a single bar in a bar chart) and then select a different type of chart, such as a pie chart or scatter diagram. To try different fields, choose the drop-down arrow, and then select from the list.
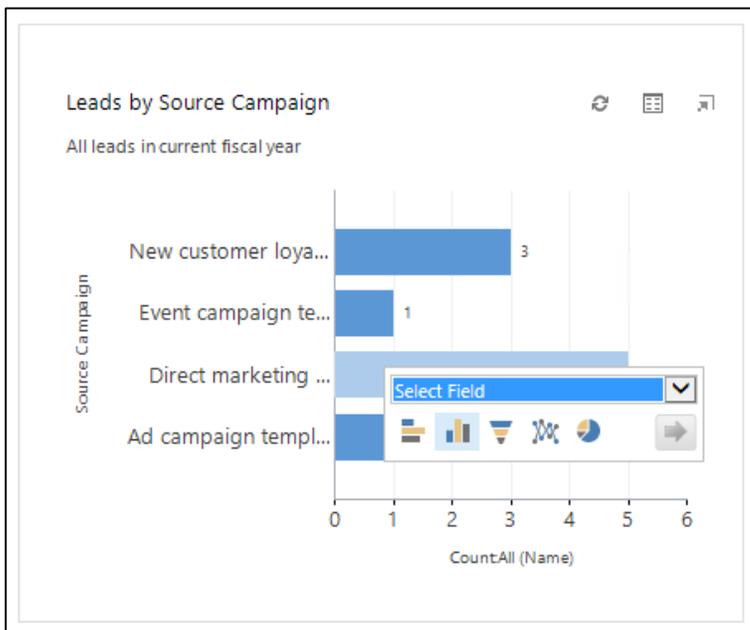
2. When you're ready, choose the right arrow icon to apply your changes.

Next section: Email, appointments, tasks, and other assorted CRM activities

Email, appointments, tasks, and other assorted CRM activities

Everything revolves around activities

In CRM for Outlook, you use **activities** to keep track of all your customer communications. For example, you might send email, make phone calls, set up appointments, assign tasks, or record notes as you work a sale. These actions are all considered types of activities.

To get the most out of CRM for Outlook, it's important for everyone in the organization to track all their customer interactions by adding an activity for every email, phone call, task, or appointment. That way, a customer's history is complete. As your organization's relationship with a customer builds over time, you and other people on your team can look through the list of activities as you work with the customer, and see the complete history of interactions.

Sharing information this way also makes it possible to provide key points of interest across the business. Activities can be included on dashboards and in reports to track your ongoing progress and to monitor how the team is doing.

Next up: Find activities for your area

Find activities for your area

Ready to find your activities and get to work? Go to your **My Work** subfolder.

- In the left navigation pane, choose the subfolder for your work area (**Sales**, for example), choose the **My Work** subfolder, and then choose the **Activities** subfolder.
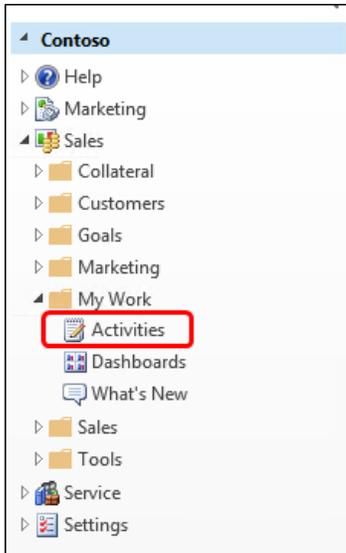
Next up: <u>View and filter your activities to show only the ones you want</u>

View and filter your activities to show only the ones you want

When you choose the **Activities** subfolder in the left navigation pane, you'll see the **My Activities** list. This list shows all activities assigned to you. If you want to see a subset of your activities, you can choose from the pre-defined system views. For example, you might want to focus your efforts on just task activities, or just appointment activities.

- Choose the drop-down arrow next to **My Activities**, point to a general area, and then select the view you want. For example, point to **Phone Call**, and then select **My Phone Calls**. If you want to see all activities (not just the activities you own), point to **Activity**, and then select **All Activities**.
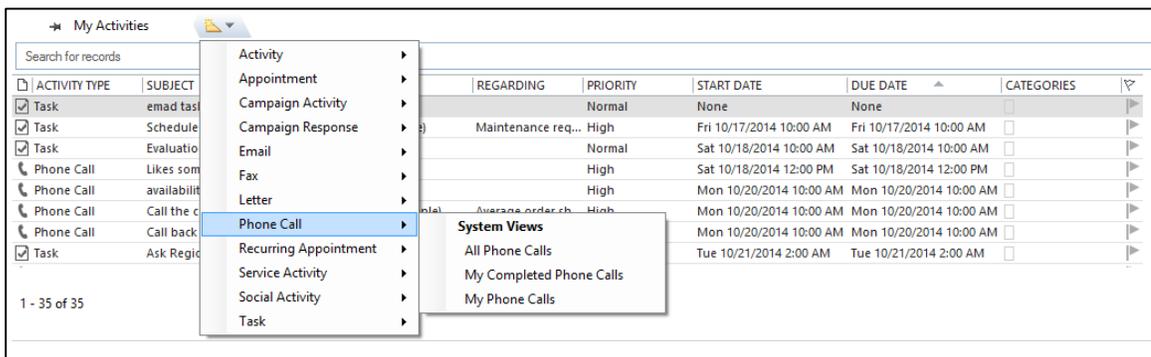
> ### 💡 Tip
>
> As we discussed earlier in this guide, you can create your own filters (views) if the pre-defined system views don't provide exactly what you need.

Next up: [Add a new activity by tracking it](#)

Add a new activity by tracking it

Adding an activity in CRM for Outlook is different than adding an activity in Microsoft Dynamics CRM. As we talked about earlier in this guide, email, appointments, and tasks are types of activities in Microsoft Dynamics CRM. When you create one of these activities in CRM for Outlook, you need a way to record that activity record so it's associated with the appropriate records in Microsoft Dynamics CRM. For example, you may want to associate a phone call activity with a particular sales opportunity. The way you create this association is through **tracking**.

When you track an email message, appointment, or task in CRM for Outlook, a copy of that record is created in Microsoft Dynamics CRM and linked (synchronized) with the Outlook record. After a record is tracked, you can continue to access that record in CRM for Outlook, and anyone with access to your activities can view that record in Microsoft Dynamics CRM.

To track an email, appointment, or task activity in CRM for Outlook, when you create the activity, you choose the **Track** button or the **Set Regarding** button on the ribbon.
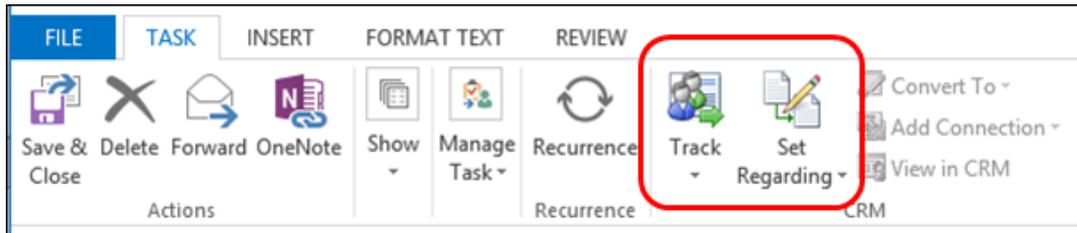
If you choose the **Track** button, CRM for Outlook associates the record with any Microsoft Dynamics CRM contacts included on the **To**, **Cc**, or **Bcc** lines by searching for records that have matching email addresses. This is great, but it may not be sufficient for your needs. You may work with the same contacts over a long period of time, so simply associating a record with a contact may not be enough. To track a record and associate it with a more specific record—for example, an opportunity or a case—you use the **Set Regarding** button.

Next up: Use the tracking pane to find related records

Use the tracking pane to find related records

When you choose the **Track** button or the **Set Regarding** button, CRM for Outlook adds a **Microsoft Dynamics CRM** pane at the bottom of the record. This "tracking pane" shows that the record is tracked and provides links to any related records. It also displays a link to the Regarding record, if you set one.

The tracking pane shows that this task is tracked.

You can go to the Regarding record by clicking this link (if set).
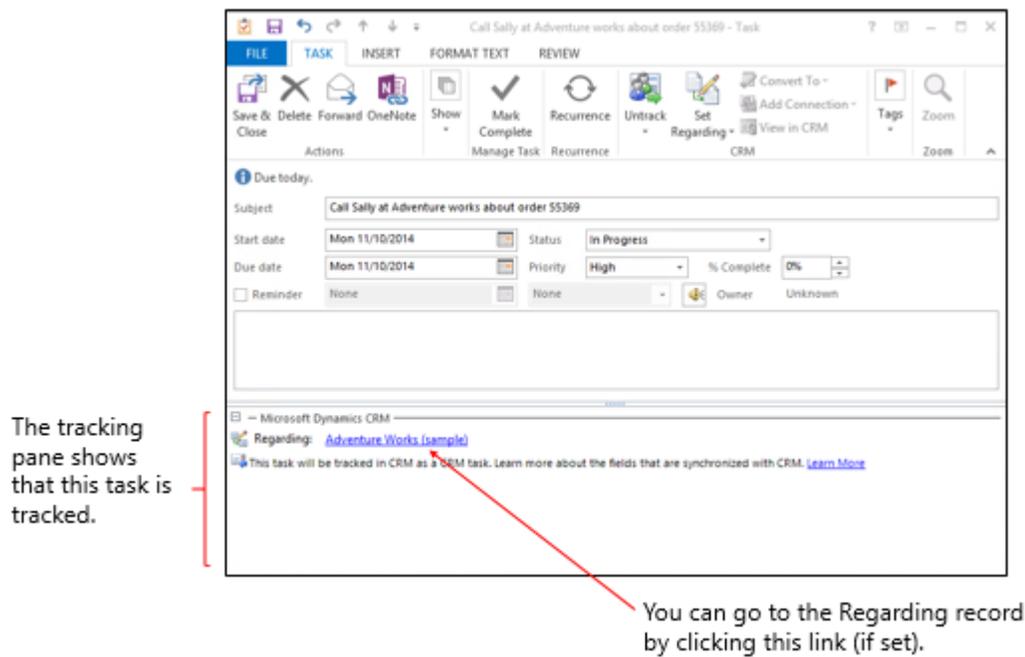
Next up: Track an incoming email activity

Track an incoming email activity

Most often, you'll want to track an email activity associated with a contact, opportunity, account, service case, or other type of record to help you keep track of all the communications with a customer. For example, let's say you receive an email message from a potential customer who wants to know about a product or service your company provides.

1. In your Inbox (the same Inbox that you use for all other Outlook email), select the email message. You don't need to open the email message to track it.
2. Choose the **Track** button or the **Set Regarding** button on the ribbon. Remember, you can choose either button, but it's usually better to choose the **Set Regarding** button so you can link the email activity to a more specific record.
3. If you choose the **Set Regarding** button, choose **More**.
4. In the **Look Up Record** dialog box, if CRM for Outlook has already selected the record type you want, you can just select a record in the list by clicking to the left of that record. After marking the record, choose **Add**.
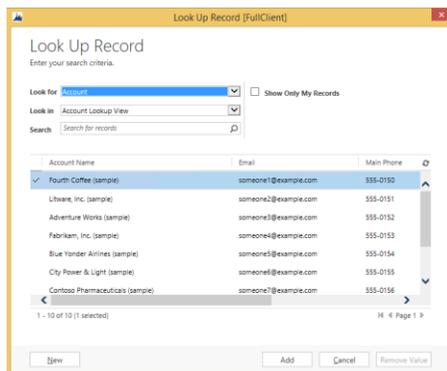
When you choose **Add**, CRM for Outlook adds the tracking pane at the bottom of the record. The tracking pane provides links to the Regarding record and other related records, such as contacts. If a contact is displayed in red, it means CRM for Outlook couldn't find that contact in the CRM database. You can click the contact name to easily add the contact or to create a lead. CRM for Outlook also adds the **Tracked in CRM** icon to the email message.

💡 **Tip**

Another way to quickly see a tracked record is to choose the **View in CRM** button on the ribbon. You can also use this button to enter data in fields that are only accessible through Microsoft Dynamics CRM forms.

Next up: [Create and track an outgoing email activity](#)

Create and track an outgoing email activity

If you're creating a new email message, tracking the email activity is basically the same process. When you compose an email message (or create a new task or set up a new appointment), you can search for a Microsoft Dynamics CRM contact directly from the **To** or **Cc** field.

1. Go to your Inbox, and then choose **New Email** on the ribbon.
2. Enter one or more email addresses in the **To** and **Cc** boxes. If you need to look up a contact, select the **To** box or **Cc** box. All of the contacts that have been added to Microsoft Dynamics CRM will appear in the address book.
3. Choose the **Track** button or **Set Regarding** button as described earlier.

> **Tip**
> You can set a personal option to determine which contacts you want to include in the address book. For example, you can include just the contacts you own or you can synchronize all the contacts in the Microsoft Dynamics CRM database.

Next up: [Create and track an appointment activity](#)

Create and track an appointment activity

Adding and tracking an appointment activity is very similar to adding and tracking an email activity.

1. Choose **Calendar** in the navigation pane at the bottom of the CRM for Outlook window.
2. On the ribbon, choose **New Meeting**.
3. Enter one or more email addresses in the **To** box.
4. Enter a **Subject**, **Location, Start time**, and **End time**.
5. Choose the **Track** button or **Set Regarding** button as described earlier.

> **Tip**
>
> CRM for Outlook remembers the Regarding record that you select and offers that record the next time you choose the **Set Regarding** button.

Next up: <u>Create and track a task activity</u>

Create and track a task activity

Adding and tracking a task activity is very similar to adding and tracking an email activity or an appointment activity. There are a few key differences to know about though:

- Microsoft Dynamics CRM has separate activities for phone calls, letters, and faxes. CRM for Outlook includes these types of activities within a task activity, so, for example, if you want to create a phone call activity, you need to start by creating a task activity.
- Only the owner of a task activity can track that task. If you want to assign a task to someone else, you can track the task before you assign it. The person you assign the task to can track the task if it's not already tracked.

Create and track a task activity

1. Choose **Tasks** in the navigation pane at the bottom of the CRM for Outlook window. You may have to choose the **More** (…) button to access tasks in the navigation pane.
2. On the ribbon, choose **New Task**.
3. Enter a **Subject**, **Start date**, and **Due date**. You may also want to set other options like **Status**, **Priority**, and **Reminder**.
4. To track the task, do one of the following:
   - If you want to track a normal task, choose the **Track** button or the **Set Regarding** button.
   - If you want to track the task as a phone call, letter, or fax, choose the drop-down arrow on the **Track** button, and then choose the type of task you want.
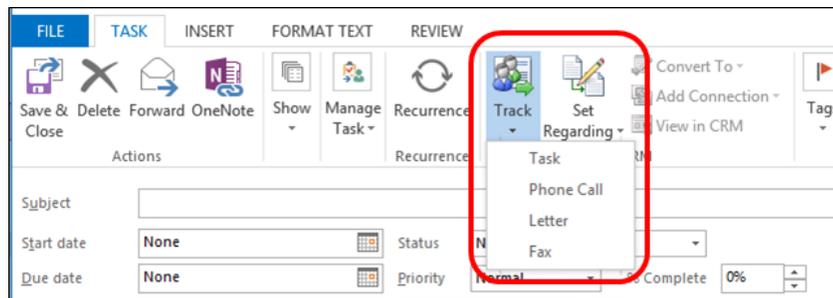
> 💡 **Tip**
>
> You can always set a Regarding record after you track the specific task. Just select the task, and then choose the **Set Regarding** button.

5. If you want to assign the record to someone else on your team, choose **Manage Task**, choose **Assign Task**, and then enter an email address in the **To** box.

Next up:

When are records synchronized with Microsoft Dynamics CRM?

When you track a record in CRM for Outlook, the data in that record will generally be available in Microsoft Dynamics CRM within 15 minutes (it may be available immediately, depending on how your administrator sets up synchronization). After a record is synchronized, you or anyone who has access to your activities can view that data in Microsoft Dynamics CRM.

Records added in Microsoft Dynamics CRM are also automatically synchronized with CRM for Outlook. So, for example, if you or someone else adds an activity record in Microsoft Dynamics CRM, you can view those records in CRM for Outlook.

By default, records that are synchronized **from** Microsoft Dynamics CRM are synchronized in 15-minute intervals. If you don't want to wait for records to synchronize, you can synchronize manually.

1. In CRM for Outlook, on the **File** menu, choose **CRM**.
2. Choose the **Synchronize** button, and then choose **Start Synchronization**.
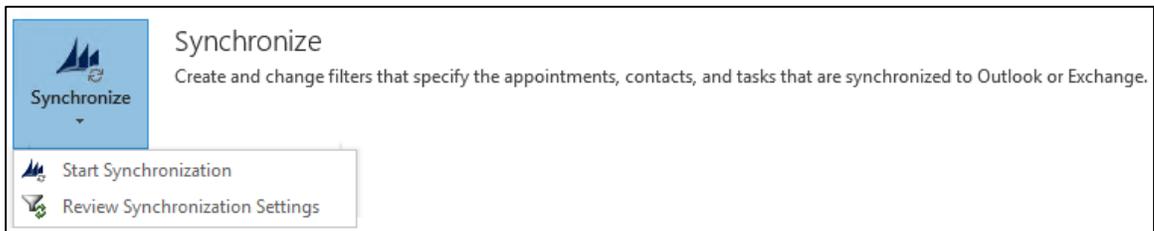
Next up: What if you want to stop tracking a record?

What if you want to stop tracking a record?

You may occasionally want to stop the synchronization of certain activities between CRM for Outlook and Microsoft Dynamics CRM. To stop synchronizing records, you untrack them.

1. Select the records you want to untrack.
2. On the ribbon, choose **Untrack**.
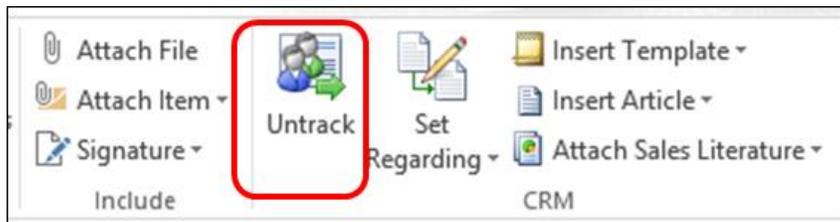
Next up: Mark your activity complete

Mark your activity complete

After you call someone, complete a task, send an email, or go to an appointment, you can mark the activity for that action as completed. When you mark an activity complete, CRM for Outlook moves the activity to the Closed Activities view.

1. Open the activity record.

2. On the ribbon, choose **Mark Complete**.
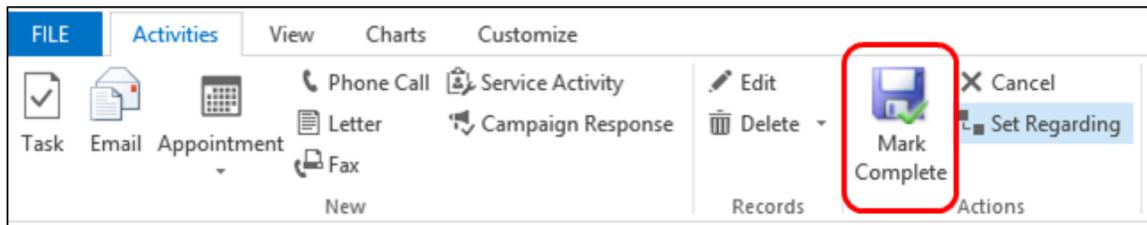
> 💡 **Tip**
>
> To mark several activities complete at the same time, select each activity in the **My Activities** list, and then choose **Mark Complete** on the ribbon. To select multiple activities, you can hold down the Shift key, or you can hold down the Ctrl key to select records that aren't next to each other.

Next up: <u>Flag an activity for follow up</u>

Flag an activity for follow up

Want to make sure you don't forget to follow-up on an important activity? Flag it. You can also set a reminder to make sure you don't forget to follow up on those really important activities. Flagging an activity in CRM for Outlook is exactly the same as flagging an email message or other activity in Outlook.

1. To flag an activity to follow up today, select the flag for the activity record.

This record is flagged for follow-up.

2. If you want to set a different time period for following up, or if you want to set a reminder, right-click the flag, and then select the appropriate option.

Next up: Best practices for activities

Best practices for activities

Now that you have a handle on how to work with CRM activities, here are some suggestions about how to use them to your organization's best advantage:

- **Add an activity for every customer interaction.** Make sure a customer's history includes a record of every communication you have with them.

- **Add activities for yourself, too.** You can keep track of your own assignments and events without associating these activities with a customer. Just choose the **Track** button instead of the **Set Regarding** button.

  To find these activities in a list, sort on the **Regarding** column. If the data for the **Regarding** column is blank, the activity isn't associated with a customer record.

  If you want to create an activity that isn't recorded in Microsoft Dynamics CRM, don't track it at all.

- **Keep in mind that activities "roll up" under their associated records.** Let's say you want to remind yourself to follow up with Chris Preston, a contact who's associated with the account, Imported Sports. It's best to track the task activity to the **contact record** for Chris, **not the account record** for Imported Sports.

  The contact record is associated with the account record, so if you track the task to the contact record, your task will "roll up" under the account automatically, and you and the people on your team will see the task when they're looking at the contact, **and** when they're looking at the account record for Imported Sports.

Next section:

Nurture leads through the sales process

Tell me about accounts, contacts, leads, and opportunities

Account and contact records store much of the information that you and your team collect from your customers.

You store data about companies you do business with in **accounts**. You store data about the people you know and work with in **contacts**.

Usually, an account has more than one contact associated with it, especially when you're working with a larger company with many departments or locations and you deal with several people to manage the account.

Leads are for potential sales, and most organizations get leads from many sources. For example, you can enter leads manually from business cards, generate them from marketing campaigns or inquiries from your website, buy them in mailing lists, create them automatically from posts on Facebook or Twitter—the possibilities are almost endless.

If all goes well, after you nurture a lead, you'll be able to promote the lead to an **opportunity**, which is another name for a deal you're getting ready to close.

What if you see different names for the types of records in your system?

One of the beauties of Microsoft Dynamics CRM is that it's so easy to customize to match your organization's industry, business goals, or preferences. If your Microsoft Dynamics CRM system has been heavily customized, you may see different names for the types of records in CRM for Outlook because your organization calls that type of data something different. For example, your system administrator may have changed "account" to "company," or "contact" to "individual."

Next up: Why would I want to add my Outlook contacts to Microsoft Dynamics CRM?

Why would I want to add my Outlook contacts to Microsoft Dynamics CRM?

If you have worked with Outlook for a while, you probably have a lot of contacts. To take full advantage of Microsoft Dynamics CRM and all that it has to offer, you'll want to add your Outlook contacts to Microsoft Dynamics CRM. That way, you can track all customer-related activities in one place. After adding and linking your Outlook contacts to accounts in Microsoft Dynamics CRM, you'll see the email, tasks, and appointments records associated with those contacts in CRM for Outlook. You (or others if they have access to your activities) will also be able to access those contact records in Microsoft Dynamics CRM. In other words, it works both ways.

Also, if you sync Outlook on your smart phone or other mobile device, you can access your CRM contacts from that device.

**But what about personal contacts?**

If you're like most people, you probably mix your Outlook business contacts with some personal contacts. CRM for Outlook makes it easy to keep your personal contacts separate from your business contacts. Your personal contacts will never show up in Microsoft Dynamics CRM unless you decide to track them.

Next up: Add Outlook contacts to Microsoft Dynamics CRM

Add Outlook contacts to Microsoft Dynamics CRM

You can add your contact records to Microsoft Dynamics CRM in the same way that you add an activity record—by tracking them. Earlier in this guide, we showed how to link an activity record to a particular record, such as an opportunity or case by using the **Set Regarding** button. With contacts, you can do the same thing, but you link the contact to a Microsoft Dynamics CRM account instead.

1. In CRM for Outlook, choose **People** in the navigation pane.
2. Select up to 20 contacts. (Hold down the **Shift** key to select multiple contacts next to each other or the **Ctrl** key to select contacts that aren't next to each other.)
3. On the ribbon, do one of the following:
   - Choose the **Track** button to copy the contact record to Microsoft Dynamics CRM without linking the contact to an existing account record.
   - Choose the **Set Parent** button to copy the contact record to Microsoft Dynamics CRM and link it to an account record at the same time.
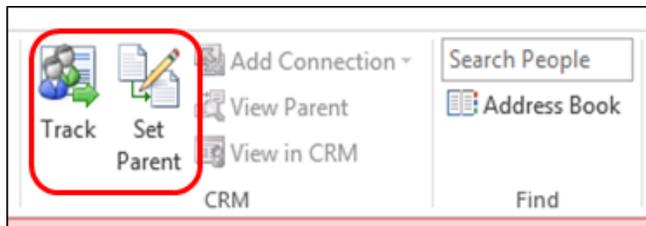
4. If you choose the **Set Parent** button, in the **Look Up Record** dialog box, select the account name to link the contact to, and then choose **Add**.

When you track a contact, CRM for Outlook displays the tracking pane below the person's contact card. The tracking pane shows that the contact is tracked and provides a link to the account record if you used the **Set Parent** button to track the record.

> 💡 **Tip**
> If you want to fill in specific fields in Microsoft Dynamics CRM that aren't available in the Outlook form, choose the **View in CRM** button.

Next up:

Add all (or lots!) of contacts to Microsoft Dynamics CRM

What if you want to add more than 20 contacts at a time, or if you want to add all of your Outlook contacts to Microsoft Dynamics CRM? There's a wizard for that.

1. Before you run the wizard, make sure your Outlook contact data is as complete and as accurate as possible. For example:

    - Fill in any missing info and verify that people's names are spelled correctly.
    - Make sure that account names use the same spelling in Outlook and Microsoft Dynamics CRM. This will make it easier to link the contacts to the appropriate accounts.

    You may also want to put all of the contacts you want to track into a single folder, or organize contacts into particular folders.

2. On the **File** menu, choose **CRM**.
3. Choose the **Import Contacts** button, and then choose **Add Contacts** from the drop-down menu.
4. Follow the steps in the wizard screens. If you get stuck anywhere in the process, click the **Learn more about adding contacts to CRM** link at the bottom of any wizard screen.
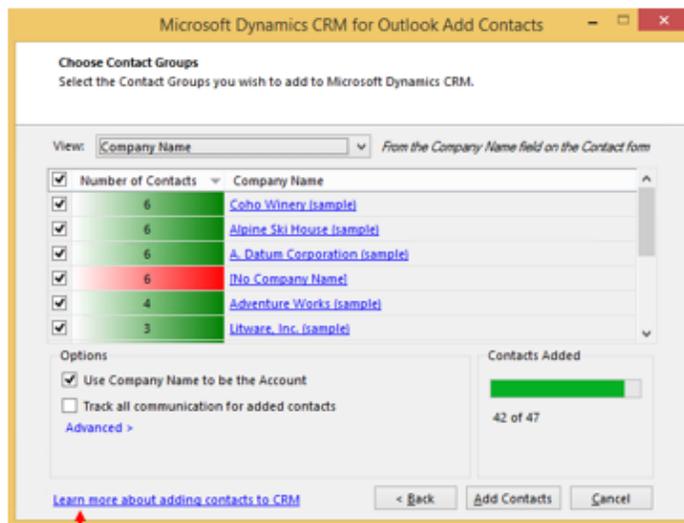

Click this link if you need Help with any wizard steps.

Next up: Convert an email message to a lead

Convert an email message to a lead

So you're ready to start creating your own leads. As we discussed earlier, leads can come from many different sources, but one of the easiest ways to create them is directly from an Outlook email message. For example, let's say someone has sent an email message to your website inquiring about a product or service your business offers. You can convert the email message to a lead.

1. Select the email message in your Inbox, and then choose **Track** on the ribbon. You must track the email message before you can convert it.
2. On the ribbon, choose **Convert To**, and then choose **Lead**. As you can see, you can also convert email messages into opportunities or cases, but we'll focus on leads for now.
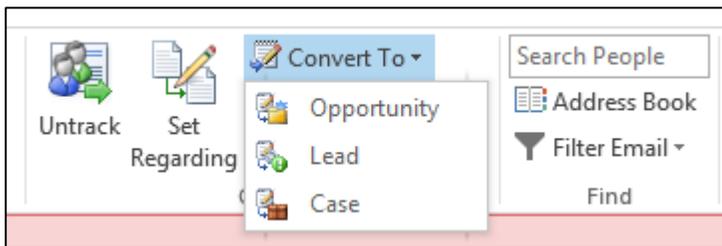
3. In the **Convert to Lead** dialog box, add a first name and last name for the contact, and a company name.
4. Choose **Convert**.

   CRM for Outlook creates the lead in Microsoft Dynamics CRM and opens that record in the Microsoft Dynamics CRM Leads form.

5. Fill out the information in the Leads form.

> 💡 **Tip**
>
> Looking for another easy way to create leads from an email message? When you receive email from someone who isn't already included in the Microsoft Dynamics CRM database, if you track the email message, that person's email address will be highlighted in red in the tracking pane. Just click the email address and then choose **Contact** or **Lead** to add to Microsoft Dynamics CRM.

Next up: It's all in the (business) process

It's all in the (business) process

So what do you do with leads after they've been added to Microsoft Dynamics CRM? Hopefully, you can turn these leads into opportunities and then eventually close the deal. But what's the best way to work through that process?

Microsoft Dynamics CRM helps you move customers through the sales process by using a visual process bar. You complete a step by entering data or marking a step complete in the process bar. When all the steps are done, you can move on to the next stage. The process bar highlights the stage you're in so you know where you are in the process, and shows you what to do next. No guesswork!

Business process bar

Enter data in the fields on the process bar, or mark a step completed.

For example, the business process in the illustration above starts with a lead. As the first step in the process, you **qualify** or **disqualify** the lead based on criteria established by the business. If you qualify the lead, it's converted to an opportunity. The business process then walks you through the stages of the opportunity: 1) Qualify; 2) Develop; 3) Propose; 4) Close.

Your team can use these standardized processes to make sure everyone on the team follows the same steps and has the same interactions with customers as you move them through the sales process. Business processes help everyone follow best practices, even when handling situations that don't occur very often.

Next up: Disqualify a lead

Disqualify a lead

Let's say that after talking to one of your leads, you determine that continuing to work that lead won't be worth your time, at least not for now. Not great news, but it happens.

You'll need to disqualify the lead, and give the reason. While you could delete the lead, we don't recommend that. Deletions can't be undone, and deleting a lead also deletes any notes and documents associated with the lead. Instead, disqualify the lead to preserve the history. In addition, disqualifying the lead allows you to re-open the lead later if needed.

1. Open the Leads list, and then double-click a lead record to open it.

    When the CRM form opens, you'll see the business process bar.

2. On the command bar in the Microsoft Dynamics CRM form, choose **Disqualify**, and then select the reason. For example, select **No Longer Interested**.
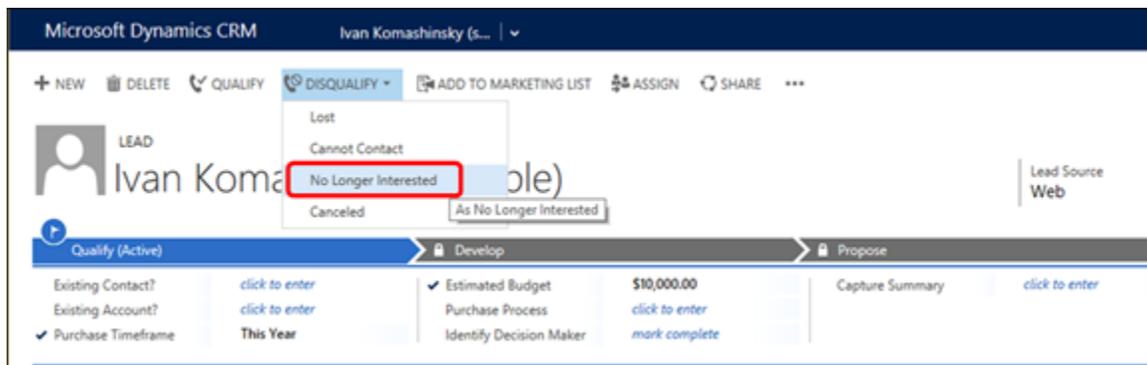
When you choose **Disqualify**, CRM adds a **Locked** icon 🔒 next to fields in the form. CRM for Outlook also moves the lead to the Closed Leads list. Why is that important to know? If you find that you need to reactivate that lead later, you'll need to know where to find it.

3. Close the CRM form to return to CRM for Outlook.

> 📝 **Note**
> You can also use a button on the CRM for Outlook ribbon to quickly disqualify a lead, but the ribbon doesn't provide access to the business process bar.

Next up: What if you want to re-open a lead that you thought wasn't interested?

What if you want to re-open a lead that you thought wasn't interested?

Great news! The lead you thought wasn't interested has contacted you, and it looks like the person will buy after all. Assuming that you disqualified the lead (instead of deleting it), you can re-open it without re-entering all the contact information.

1. Open the Leads list, choose the drop-down arrow to see other views, and then select the **Closed Leads** view.
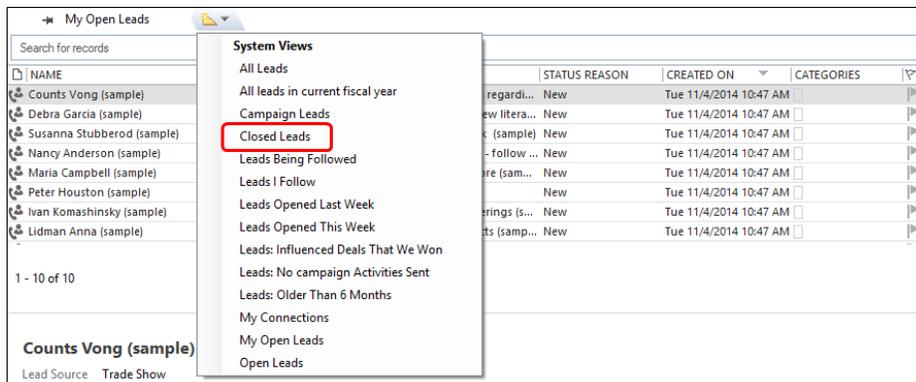
2. In the **Closed Leads** list, double-click the record for the lead you disqualified.

3. In the Microsoft Dynamics CRM form, in the command bar at the top of the screen, choose **Reactivate Lead**.

4. If you're ready to qualify the lead, on the command bar, choose **Qualify**.

   In the process bar, you'll see that you've moved to the Opportunity stage.

5. Close the CRM form to return to CRM for Outlook.

Next up: Add stakeholders to your opportunity

Add stakeholders to your opportunity

You've qualified your lead, and now you're in the opportunity stage. As you work on converting the opportunity into a closed sale, you'll want to add key stakeholders and decision makers who can help you win the business.

1. Go to the **Opportunities** subfolder and open the Opportunities list. You can find it just below the **Leads** subfolder.

2. In the Opportunities list, double-click the record you want to add stakeholders to.

3. In the Stakeholders section of the Microsoft Dynamics CRM form, choose the **Add** button ✚, and then select the person's name.
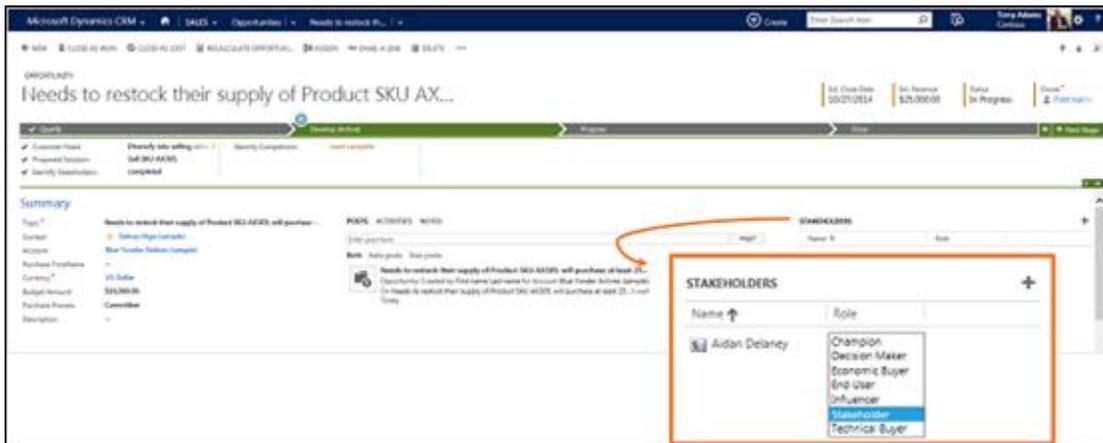

Next up: [Send a sales brochure to a potential customer](#)

Send a sales brochure to a potential customer

Your prospect is interested in your product. They send you email asking for a sales brochure. If your sales brochure is stored in Microsoft Dynamics CRM, you can send it directly from CRM for Outlook with minimal effort.

1. If the email message isn't already tracked, track it by choosing the **Track** button.
2. On the ribbon, choose **Attach Sales Literature**.
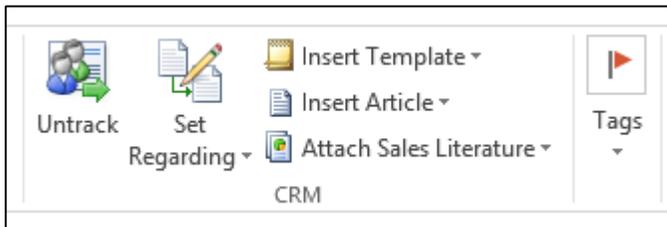
3. Select **More Sales Literature**, and then browse to the sales information that will help you close the deal.

> **Note**
>
> If you have recently attached sales literature to another email message, it will be available from the list.

Next up: [Send a sales proposal or a price quote](#)

Send a sales proposal or a price quote

As you move your prospect through the sales cycle, you'll probably need to send a detailed proposal that includes products and a price quote.

Because you may need to go back-and-forth with the prospect, the system keeps track of the history for you.

1. Open the Opportunities list, and then double-click the appropriate record to open the Microsoft Dynamics CRM form.

2. In the **Product Line Items** section, choose the **Add** button ➕, and then select the products. (Scroll down to see the **Product Line Items** section.)

3. In the **Quotes** section, choose the **Add** button ➕, and then fill in the fields to create the quote. (You may need to scroll down to see the **Quotes** section.)

4. On the command bar, choose **Activate Quote**.

5. Close the form to go back to CRM for Outlook.

Next up:

Close your opportunity as won or lost

Eventually you'll know whether you've won or lost a deal. Then you'll need to close the opportunity and enter a few details about the reason.

1. Go to the Opportunities list, and then double-click to open the appropriate record.

2. On the command bar, choose **Close As Won** or **Close As Lost**.

3. Select the reason from the drop-down list, and then enter a brief description of why.
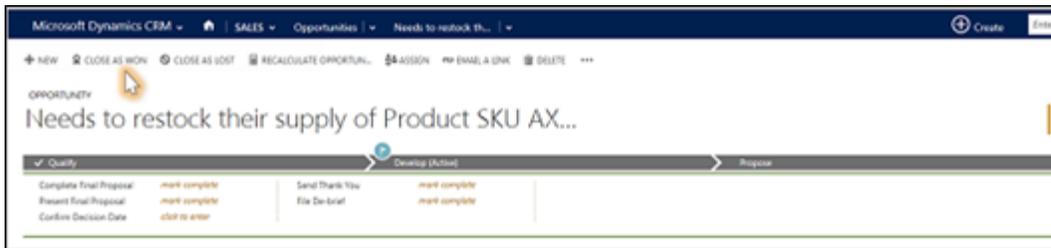
Next section: [Take your work with you and go offline](#)

Take your work with you and go offline

Select just the data you need before you go offline

One of the great things about CRM for Outlook is that you can use it to take your CRM data with you when you're on the go. For example, if you travel to a customer's site, you can look up your CRM contacts, review and add new activities, run reports, and more without connecting to the Internet.

CRM for Outlook stores up the changes you make while you're offline and automatically synchronizes them with Microsoft Dynamics CRM when you go back online.

But before you go offline, it's a good idea to think about the data you want to take with you. For example, CRM for Outlook automatically synchronizes the appointments, contacts, and task records you own to your local hard drive. If that's all you need, you're all set. But what if you want to synchronize records you don't own? Or maybe you want to make the synchronization process go faster by synchronizing a smaller subset of data? You can synchronize just the data you need by modifying the offline filters.

Next up: <u>Open an offline filter</u>

Open an offline filter

You're about ready to head out on a trip to a client site. If you don't modify your offline filters before you go, you'll have access to all the reports you own, but you want to also have access to your team reports while you're offline. In this example, we'll modify an existing offline filter and then save it as a new filter.

1. On the **File** menu, choose **CRM**.
2. Choose the **Go Offline** button, and then select **Manage Offline Filters** from the list.
3. In the **Go Offline Settings** dialog box, choose the **Outlook offline Reports** filter.
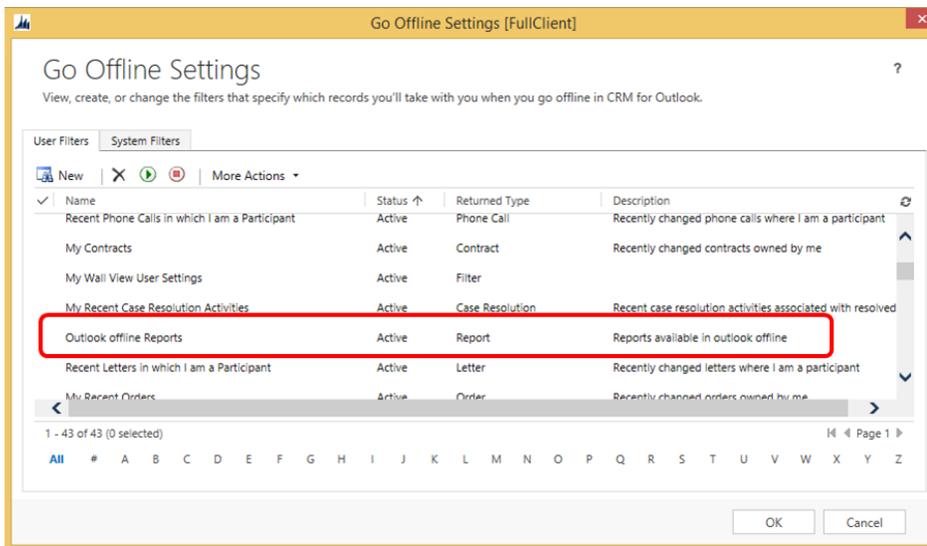
4. In the **New Filter** window, you'll see the **criteria** that defines the existing filter.
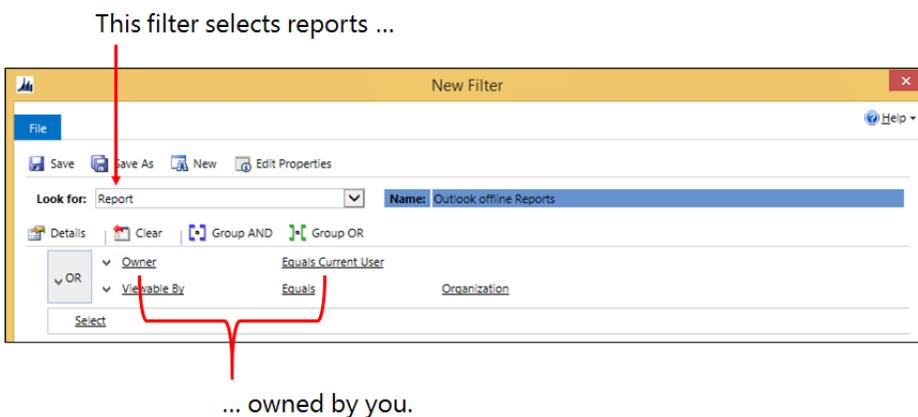

Next up: <u>Modify an offline filter to include additional reports</u>

Modify an offline filter to include additional reports

Now we'll edit the existing filter so that it selects all the reports owned by your team.

1. Choose the drop-down arrow next to **Equals Current User**, and then select **Equals Current User or User's Teams**.
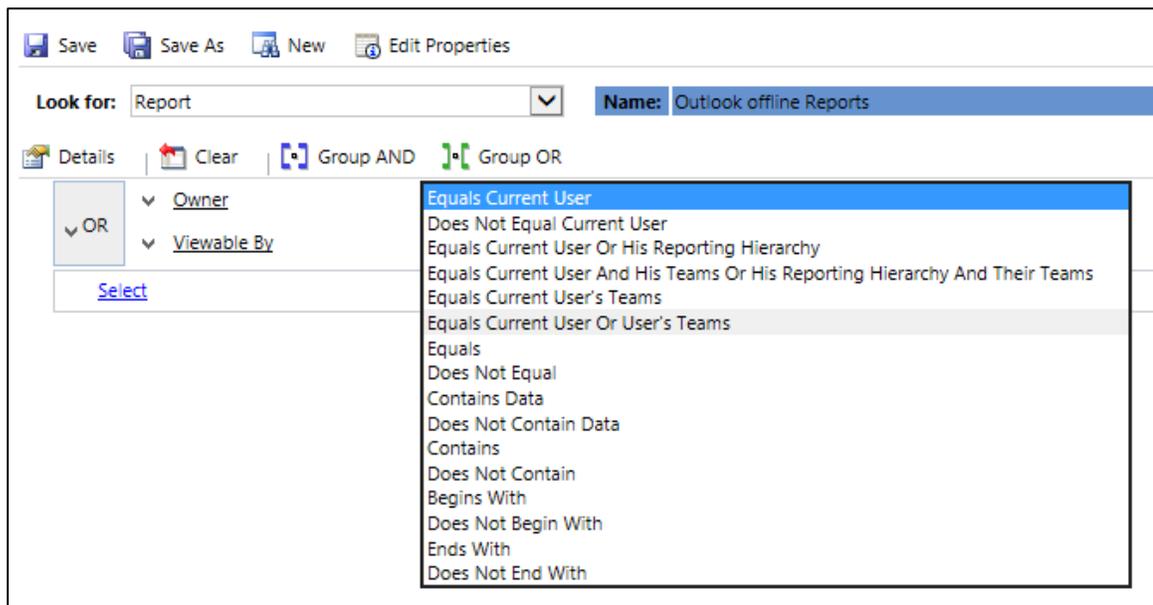
2. On the command bar, choose **Save As**, give the filter a new name like **All team reports**, add a **Description**, and then choose **Save**.

> **Tip**
>
> You could also just save the existing filter and modify it permanently but it's often better to create a new filter. This gives you the flexibility of using different filters for different needs.

3. Close the **New Filter** dialog box to return to the **Go Offline Settings** dialog box.
4. If you scroll to your new filter, you'll see that the filter is active.

Next up:

What else can you do with offline filters?

Offline filters in CRM for Outlook are very powerful and flexible. You can create a different set of filters for different situations. For example, you could create one set of filters that you use when you travel to a particular region and another set of filters for a different region. You can easily activate or deactivate filters depending on your needs by choosing buttons in the **Go Offline Settings** dialog box.
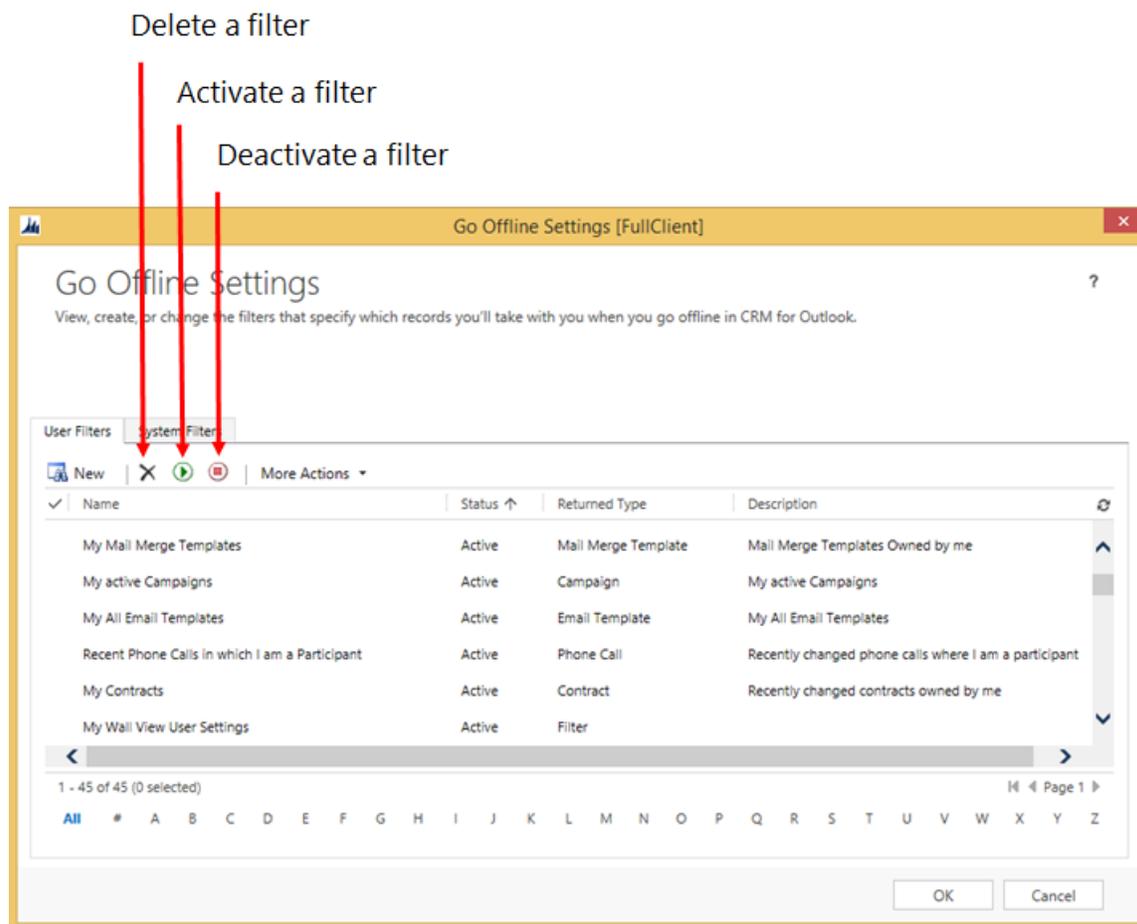
Also, keep in mind that you can have more than one active filter at a time, which offers ultimate flexibility. Each filter just adds to the data that's synchronized with your computer.

You can use the criteria rows in filters to make simple modifications, or you can create complex criteria. It's up to you! For more information on working with criteria rows, search for **offline filters** in the Customer Center.

Next up:

Go offline, and then go back online

You've selected the data you need for your trip. You're ready to unplug.

- On the **File** menu, choose **CRM**, choose the **Go Offline** button, and then choose **Go Offline** from the drop-down menu.
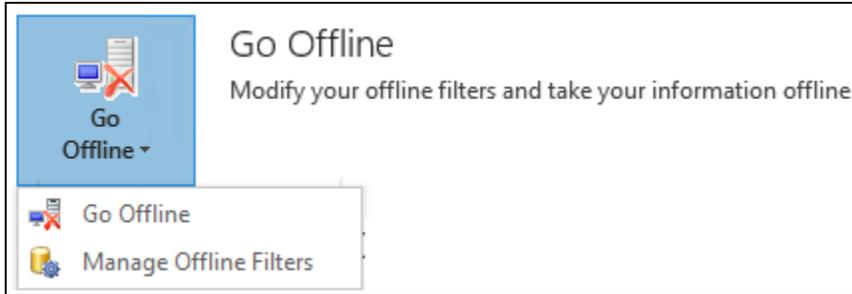
When you choose **Go Offline**, CRM for Outlook synchronizes your data to your local computer using the offline filters. When synchronization is complete, you can disconnect your computer from the network.

When you go offline, the **Go Offline** button changes to **Go Online**. The CRM toolbar and the **CRM** tab will also display the **Go Online** button. So now you also know how to go back online!

Next section: Make it your own

Make it your own

Set personal options

You can set personal options in CRM for Outlook to set things up for the way you work. Most of the options that you can set in CRM for Outlook have to do with tracking and synchronization. We'll highlight a few of the more common options in this section. But first, let's learn how to set a personal option.

1. On the **File** menu, choose **CRM**.

2. Choose the **Options** button.

   CRM for Outlook displays the **Set Personal Options** dialog box, which includes tabs for the different types of options.


Next up: Track incoming email automatically

Track incoming email automatically

As we talked about earlier in this guide, tracking email in CRM for Outlook is a manual process. You select the email you want to track, and then you choose the **Track** button or the **Set Regarding** button. Manual tracking provides a way to keep your personal email separate from your Microsoft Dynamics CRM email. As an alternative, you can set an option to track email messages automatically.

1. Open the **Set Personal Options** dialog box, and then choose the **Email** tab.

2. Under the **Select how Microsoft Dynamics CRM for Outlook should integrate email with Microsoft Dynamics CRM** section, select the **Check incoming email in Outlook and determine whether an email should be linked and saved as a Microsoft Dynamics CRM record** option.

3. Now you need to decide whether to track all email messages or only certain types. To do that, in the **Select the email messages to track in Microsoft Dynamics CRM** section, in the **Track** list, select an option. In most cases, you'll want to select the **Email messages in response to CRM email** option.

Next up: Automatically create contacts or leads from unknown email addresses

Automatically create contacts or leads from unknown email addresses

Here's a fast way to add contacts or leads using CRM for Outlook. You can set a personal option to automatically create them when you track an email or appointment record if the email or appointment record includes an unknown email address.

1. Open the **Set Personal Options** dialog box, and then choose the **Email** tab.

2. Under **Automatically create records in Microsoft Dynamics CRM**, make sure the **Create** check box is selected, and then choose **Contacts** or **Leads** from the list.

Next up: Set the number of records you see in lists

Set the number of records you see in lists

By default, when you view records in a list, CRM for Outlook displays 50 records per page. You can change this number to display more or fewer records.

- In the **Set Personal Options** dialog box, choose the **General** tab, and then under **Set the number of records shown per page in any list of records**, select the number you want.

Next up: Set whether to open Outlook forms or Microsoft Dynamics CRM forms

Set whether to open Outlook forms or Microsoft Dynamics CRM forms

Throughout this guide, we've shown how you can track email, appointments, contacts, and tasks by choosing the **Track** button or the **Set Regarding** button (**Set Parent** button for contacts). Tracking is very simple, and it enables you to work with the same Outlook interface that's probably already familiar to you.

You also have the option to open Microsoft Dynamics CRM forms directly, however, when you want to create an activity record or contact record. If you use the Microsoft Dynamics CRM forms, you don't need to track your activities and contacts.

Using the Microsoft Dynamics CRM forms can also be useful if someone has customized Microsoft Dynamics CRM. For example, a CRM admin may have added fields that aren't available through the normal Outlook forms.

Use Microsoft Dynamics CRM forms for new activities

- In the **Set Personal Options** dialog box, choose the **General** tab, and then under **Select which forms to use for new activities**, select one or more check boxes. For example, if you want to automatically open the Microsoft Dynamics CRM form when you create a new task, select the **Task** check box.
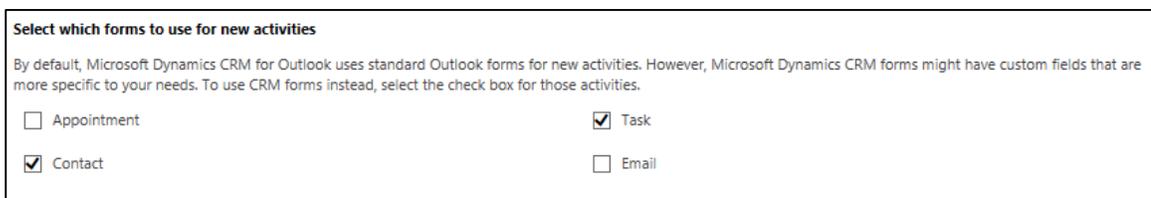
Select which forms to use for new activities

By default, Microsoft Dynamics CRM for Outlook uses standard Outlook forms for new activities. However, Microsoft Dynamics CRM forms might have custom fields that are more specific to your needs. To use CRM forms instead, select the check box for those activities.

☐ Appointment   ☑ Task
☑ Contact   ☐ Email

Next up: Customize the Reading Pane to add or remove sections

Customize the Reading Pane to add or remove sections

When you click a record in a list, you can view the details (read only) for the record in the Reading Pane below the list. You can customize the Reading Pane to add or remove sections. For example, for Leads records, you can add or remove the Marketing Information section. You can also change the order of info in the Reading Pane.

1. Open the list for a particular record type. For example, if you want to adjust what you see for Leads records, open the Leads list.

2. On the **View** tab, choose **Customize Reading Pane**.

3. In the **Personalize Reading Pane** dialog box, do one of the following:

   - If you want to remove information from the Reading Pane, under **Displayed Sections**, select the section you want to remove, and then choose **Remove**.

   - If you want to add a section, under **Available Sections**, select the section you want to add, and then choose **Add**.

   - If you want to change the order of sections, select a section, and then click the up or down arrow below the **Displayed Sections** list.
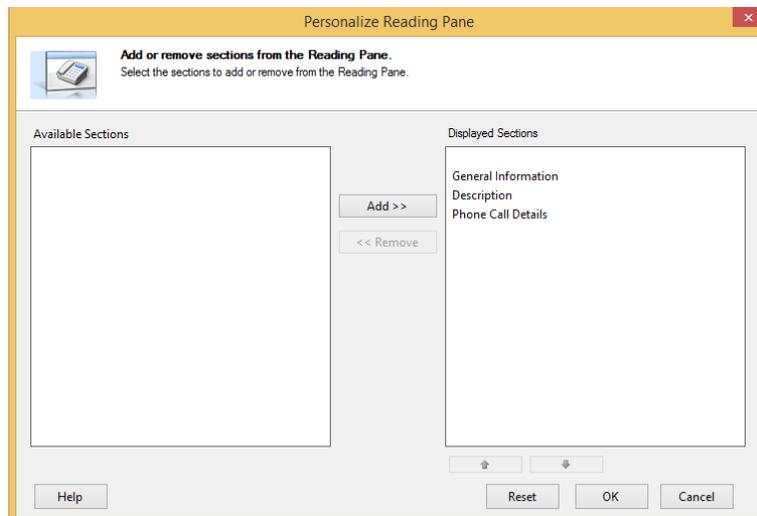
Change the position of the Reading Pane or turn it off

You can also move the Reading Pane to another position on the screen or turn it off altogether.

1. On the ribbon, choose **View**.
2. In the **Layout** section, choose **Reading Pane**, and then choose **Right**, **Bottom**, or **Off**.
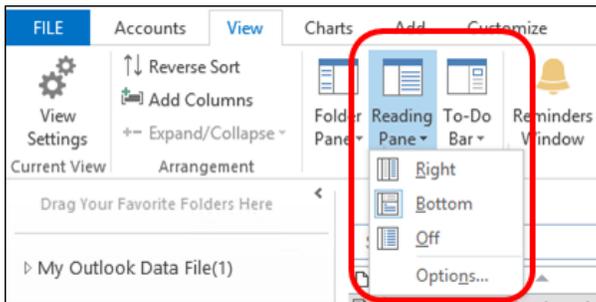
3. If you want to mark items as read that you've viewed in the reading pane, choose the **Options** button, and then select one or more options from the list.

Last one: Next steps

Next steps

Okay, now you've covered the basics, and you're ready to start turning your customers into lifelong fans of your products and services. We wish you the best!

Find more answers and training online

- To find in-depth information and videos on CRM for Outlook, go to the CRM for Outlook User's Guide.
- To learn about Microsoft Dynamics CRM basics, check out the CRM Basics eBook.
- To find more eBooks, videos, and other great content to help you get the most out of Microsoft Dynamics CRM, go to the CRM Help & Training site at www.CRMCustomerCenter.com.

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