

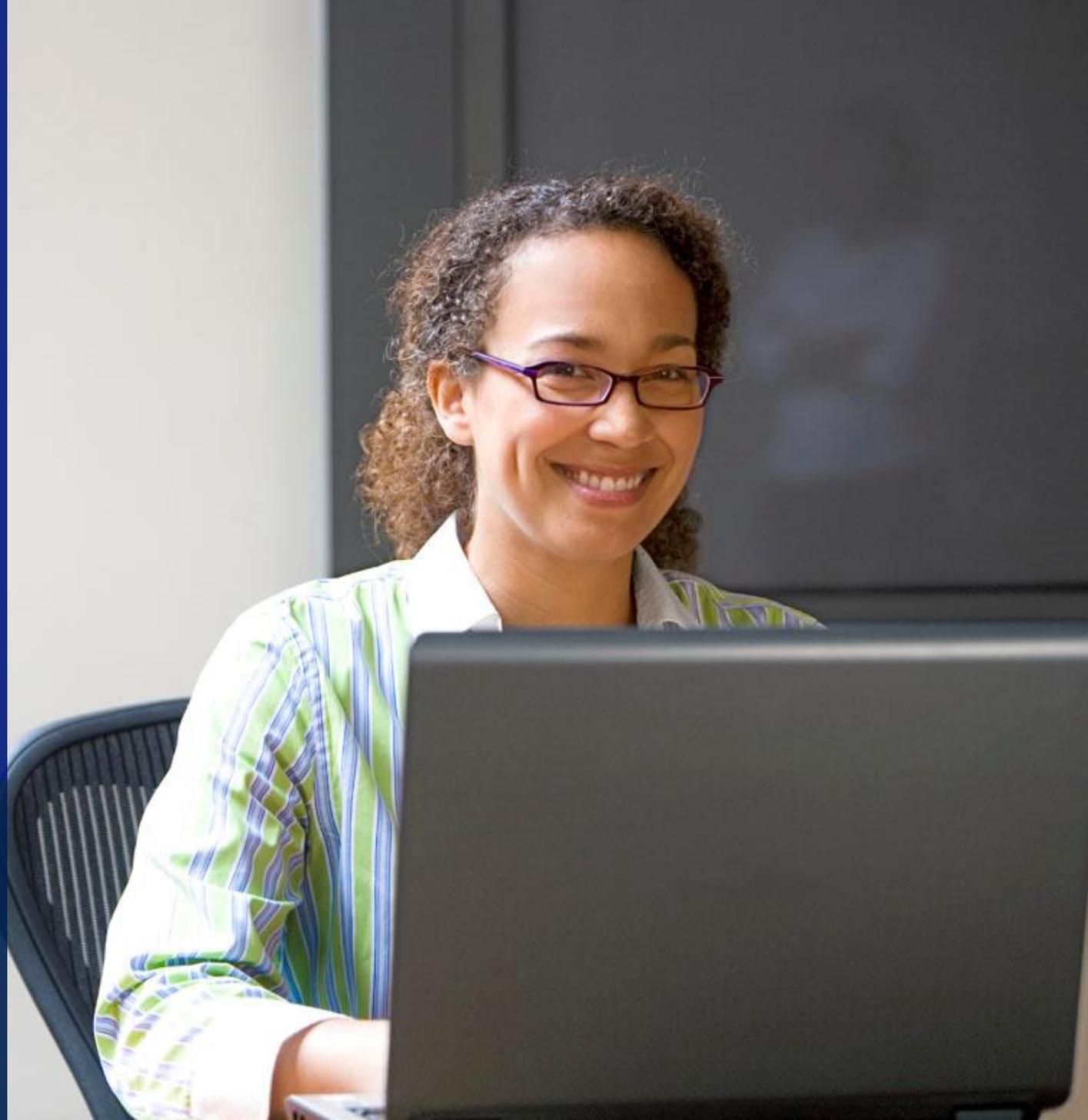
Start working in CRM

Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2013 or 2015 (on-premises)

Get up and running quickly
with common tasks

Microsoft Dynamics



welcome to Microsoft Dynamics CRM!

Ready to get going with CRM?

You're in the right place.

In this eBook, you'll learn how to:

- Get around CRM and find what you need
- Enter data quickly and easily
- Work with contacts, accounts, leads, and opportunities
- Place calls, send email, and take notes
- Check the current status of service cases for a customer

Soon you'll be using Microsoft Dynamics CRM to keep track of your sales and win more business.



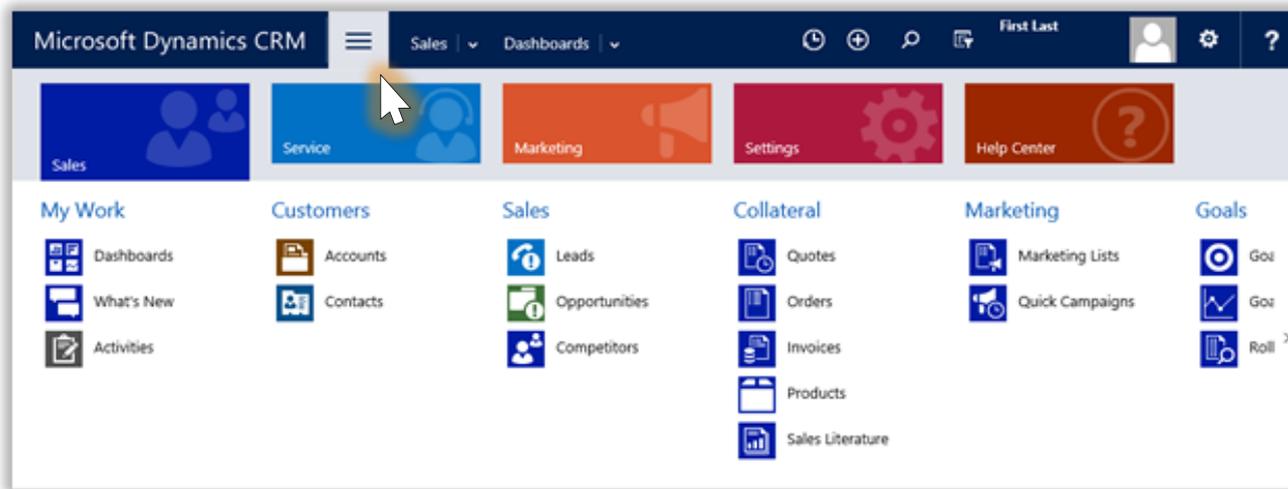
New to CRM? You may also want to [check out our CRM Basics eBook](#). It covers all the same essentials you'll find here, with a bit more detail. (Don't worry. It's still pretty short.)



get around and find your data

If your screen looks like this (latest version):

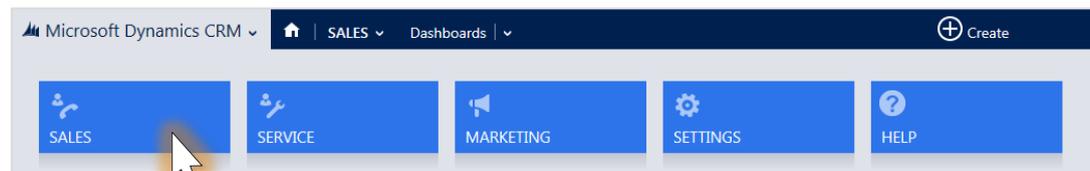
When you choose the Main Menu from the nav bar, you can access your work areas, records, or other items.



 [Take a video tour](#)

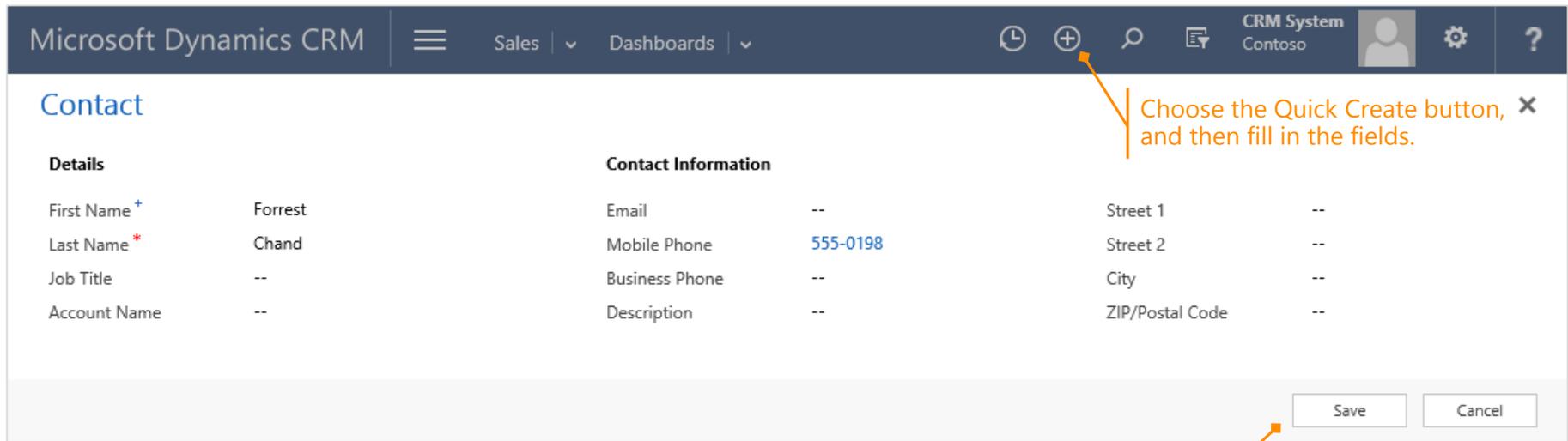
If your screen looks like this (older version):

On the nav bar, choose the **Microsoft Dynamics CRM** logo, and then choose the tile for your work area. You'll see the tiles for the different types of data and other items available.



enter contacts or other types of records

On the nav bar, choose the **Quick Create** button, and then enter data for a few fields. You can come back and fill in the gaps later when you have more time. Then, choose **Save**. An asterisk (*) indicates a required field.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes the text "Microsoft Dynamics CRM", a hamburger menu icon, "Sales" with a dropdown arrow, "Dashboards" with a dropdown arrow, a clock icon, a plus sign icon (Quick Create), a search icon, a document icon, "CRM System Contoso", a user profile icon, a settings gear icon, and a help question mark icon. Below the navigation bar, the page title is "Contact". The form is divided into two sections: "Details" and "Contact Information".

Details		Contact Information			
First Name ⁺	Forrest	Email	--	Street 1	--
Last Name [*]	Chand	Mobile Phone	555-0198	Street 2	--
Job Title	--	Business Phone	--	City	--
Account Name	--	Description	--	ZIP/Postal Code	--

At the bottom right of the form, there are two buttons: "Save" and "Cancel".

Choose the Quick Create button, and then fill in the fields. ✕

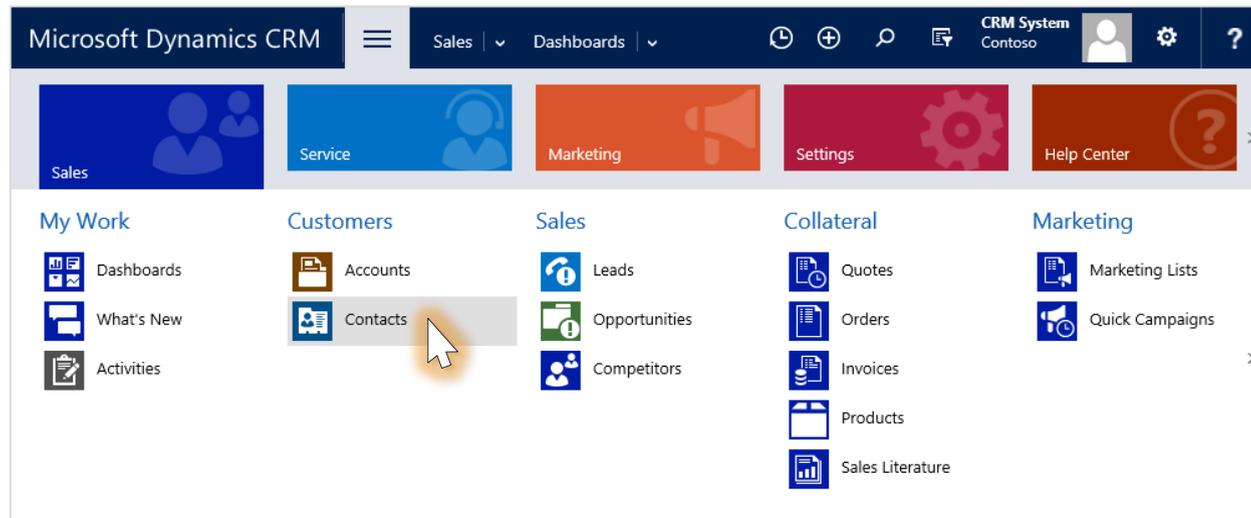
Choose **Save** when you're finished entering data.



find your contacts

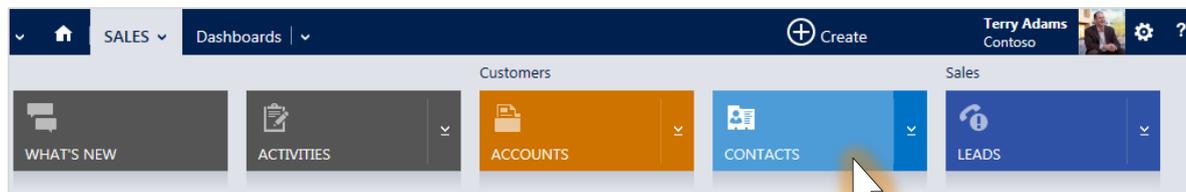
Similar to Microsoft Office Outlook or other email programs, you store data about the people you know and work with as contacts.

If your screen looks like this (latest version):
Go to **Sales, Service, or Marketing** > **Contacts**.



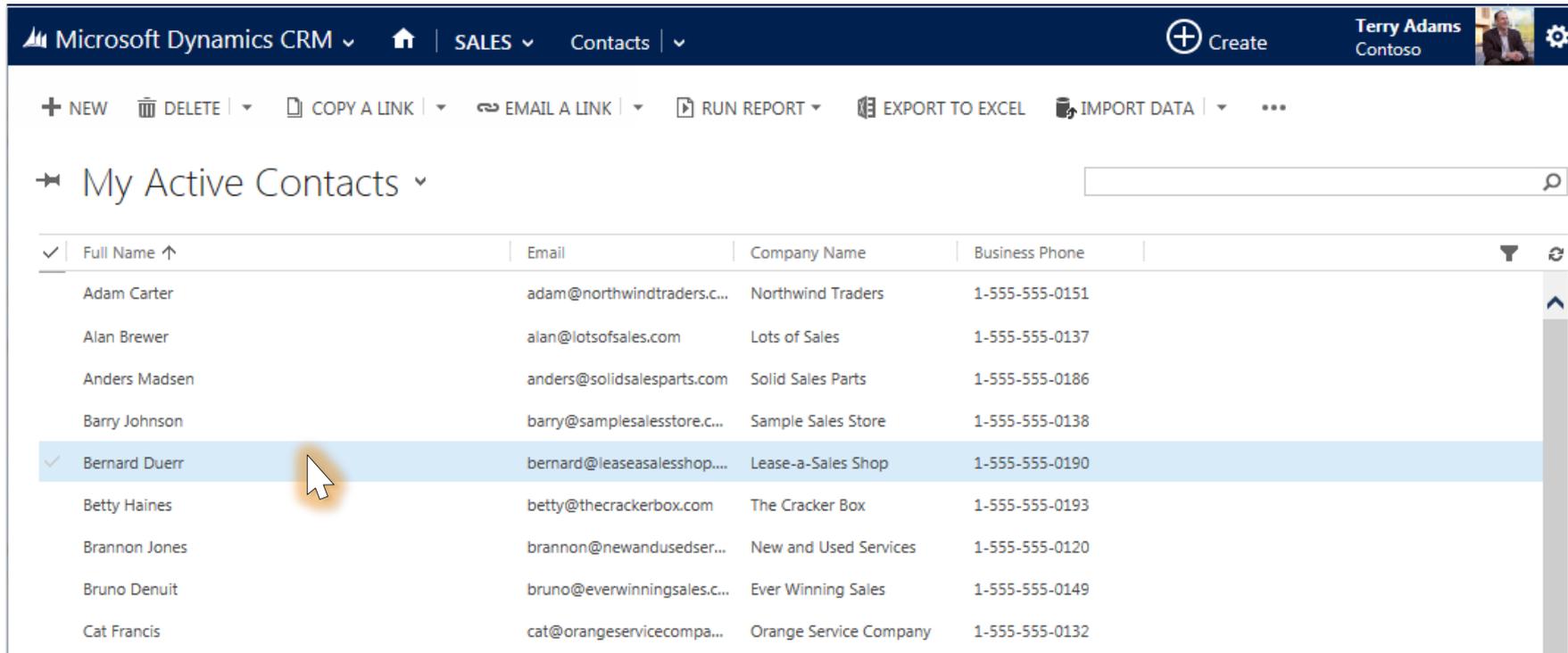
[Take a video tour](#)

If your screen looks like this (older version):
On the nav bar, choose your work area, and then choose the tile for **Contacts**.



view your contacts in a list

When you go to your contacts, you'll see the names in a list. Choose a name to see details or to enter more data.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', and 'Contacts'. A 'Create' button is visible on the right. Below the navigation bar, there are several action buttons: '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', and 'IMPORT DATA'. The main content area is titled 'My Active Contacts' and contains a table of contact information. A mouse cursor is hovering over the row for 'Bernard Duerr'.

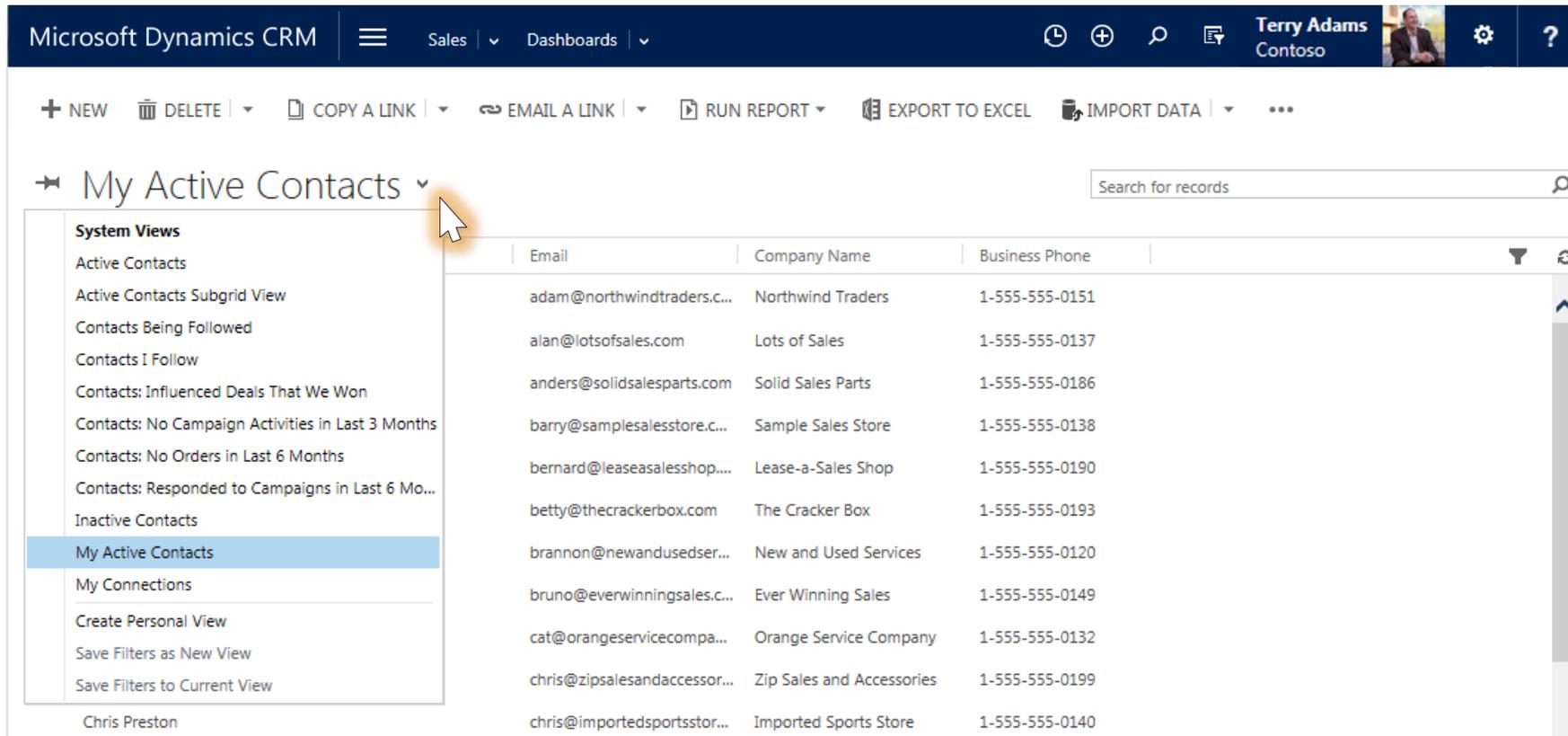
Full Name ↑	Email	Company Name	Business Phone
Adam Carter	adam@northwindtraders.c...	Northwind Traders	1-555-555-0151
Alan Brewer	alan@lotsofsales.com	Lots of Sales	1-555-555-0137
Anders Madsen	anders@solidsalesparts.com	Solid Sales Parts	1-555-555-0186
Barry Johnson	barry@samplesalesstore.c...	Sample Sales Store	1-555-555-0138
✓ Bernard Duerr	bernard@leaseasalesshop....	Lease-a-Sales Shop	1-555-555-0190
Betty Haines	betty@thecrackerbox.com	The Cracker Box	1-555-555-0193
Brannon Jones	brannon@newandusedser...	New and Used Services	1-555-555-0120
Bruno Denuit	bruno@everwinningsales.c...	Ever Winning Sales	1-555-555-0149
Cat Francis	cat@orangeservicecompa...	Orange Service Company	1-555-555-0132

[How do I get here?](#)



filter the list to show the right contacts

When you go to your contacts, you'll see the names in a list. You can filter to see only the contacts you're interested in, such as all active contacts in the system, or only the ones you're following. Choose the down arrow next to **My Active Contacts**, and then point to the list you want (for example, **My Connections**).



The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'Sales', and 'Dashboards'. The user profile 'Terry Adams Contoso' is visible. Below the navigation bar, there are action buttons: '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', and 'IMPORT DATA'. The main content area displays 'My Active Contacts' with a search bar and a dropdown menu. The dropdown menu is open, showing a list of system views. The 'My Active Contacts' view is currently selected. Below the dropdown, a table of contacts is visible with columns for Email, Company Name, and Business Phone.

Email	Company Name	Business Phone
adam@northwindtraders.c...	Northwind Traders	1-555-555-0151
alan@lotsosales.com	Lots of Sales	1-555-555-0137
anders@solidsalesparts.com	Solid Sales Parts	1-555-555-0186
barry@samplesalesstore.c...	Sample Sales Store	1-555-555-0138
bernard@leasealesshop....	Lease-a-Sales Shop	1-555-555-0190
betty@thecrackerbox.com	The Cracker Box	1-555-555-0193
brannon@newandusedser...	New and Used Services	1-555-555-0120
bruno@everwinningsales.c...	Ever Winning Sales	1-555-555-0149
cat@orangeservicecompa...	Orange Service Company	1-555-555-0132
chris@zipsalesandaccessor...	Zip Sales and Accessories	1-555-555-0199
chris@importedsportsstor...	Imported Sports Store	1-555-555-0140

[How do I get here?](#)



see more details about a contact

You'll see everything going on with this customer, including any recent updates and posts, and the status of any service cases. Choose a field to update info for a contact right inline. No flipping to another screen.

The screenshot shows the Microsoft Dynamics CRM interface for a contact named Adam Smith. The contact information is displayed in a summary view, including fields for Full Name, Job Title, Parent Customer, Email, Business Phone, Mobile Phone, Fax, Preferred Method, and Address. A map shows the location of the contact. The page also displays a list of recent cases and opportunities. Orange arrows point to the phone number, email address, and address fields, and a scroll bar.

CONTACT INFORMATION

Full Name* Adam Smith
Job Title Concrete-Mixing-Truck Driver
Parent Customer Coho Winery
Email franzkohl@cohowinery.com
Business Phone 874-152-2115
Mobile Phone 425-283-8503
Fax --
Preferred Method c Any
Contact Address 4 Anfield Road
Liverpool
L4 0TH
United Kingdom

POSTS ACTIVITIES NOTES

Enter post here POST

Both Auto posts User posts

Request for help with Factory Designer
Case: Closed by CRM System for Contact Adam Smith.
On Request for help with Factory Designer's wall
8/3/2013 11:10 AM

Problem with Building Designer
Case: Closed by CRM System for Contact Adam Smith.

Street 1 4 Anfield Road
Street 2
Street 3 --
City Liverpool
State/Province --
ZIP/Postal Code L4 0TH
Country/Region United Kingdom

Company
Coho Winery

Recent Cases

Case Title	Priority ↑	Status ↓	Created
Problem with Building...	High	Resolved	8/3/2013
Request for help with F...	Low	Resolved	8/3/2013
Request for help with P...	Normal	Resolved	8/3/2013
Question about Plotters	High	Active	8/3/2013
Problem with 3D Comp...	Low	Active	8/3/2013

1 - 5 of 7
Recent Opportunities
No Opportunity records found.

Choose a **phone number** to call. Or, choose an **email** address to send a message.

Choose an address to see the **fields you can edit**.

Have a lot going on?
You might need to scroll up and down or left and right to see everything.



add notes about a contact

When you're viewing the details for a contact, choose **Notes**, and then type away.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'Sales', and 'Dashboards'. The user profile for Terry Adams is visible. Below the navigation bar, there are action buttons: 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', and 'ASSIGN'. The main content area displays the contact details for Adam Smith, including a photo and a list of contact information. The 'NOTES' tab is selected, and a note titled 'Met with Adam' is being added. The note text reads: 'He may be interested in placing an order next month. He is following up with his field service team and will get back with me next week.' Below the note text, there is an 'Attach' button and a 'Done' button.

Microsoft Dynamics CRM | Sales | Dashboards | Terry Adams Contoso

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN

Contact
Adam Smith

CONTACT INFORMATION

Full Name*	Adam Smith
Job Title	Concrete-Mixing-Truck Driver
Parent Customer	Coho Winery
Email	franzkohl@cohowinery.com
Business Phone	874-152-2115

POSTS | ACTIVITIES | **NOTES**

Met with Adam

He may be interested in placing an order next month. He is following up with his field service team and will get back with me next week.

Attach Done

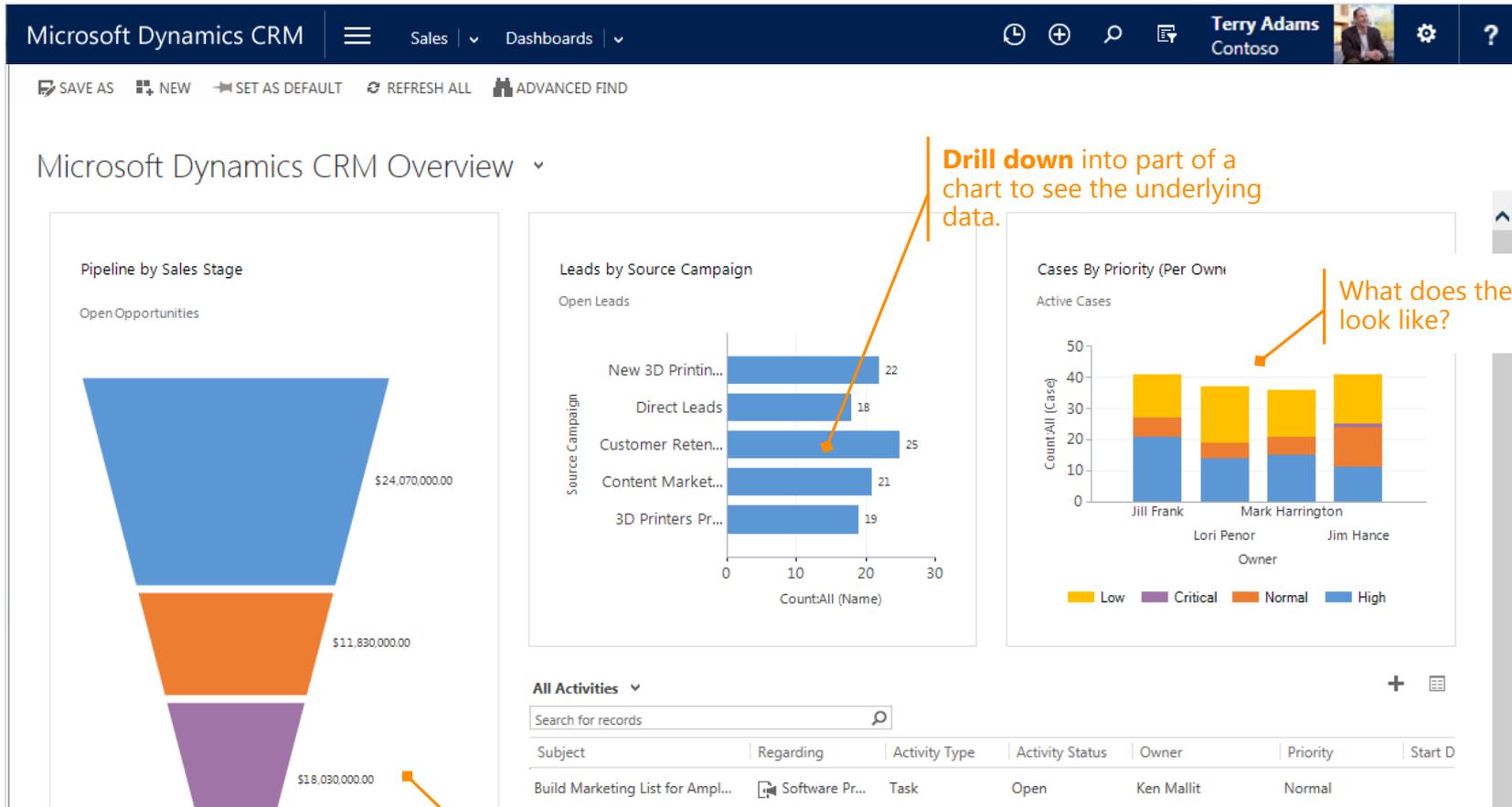
Choose **Notes**, and then start typing.

Attach documents, if you like.



track performance on the dashboard

You'll probably spend a lot of time each day checking the charts and graphs on your dashboard to see how you and your team are doing. You can interact with dashboard data and see the underlying data used to create it by choosing a bar on a chart.



Drill down into part of a chart to see the underlying data.

What does the case load look like?

What's in the sales pipeline?

[How do I get here?](#)



explore dashboard layouts

Want to see your data differently?

Not to worry.

The system comes with several 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.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with "Microsoft Dynamics CRM", a hamburger menu, and "Sales" and "Dashboards" dropdowns. Below this is a toolbar with "SAVE AS", "NEW", "REFRESH ALL", and "ADVANCED FIND". The main content area is titled "Microsoft Dynamics CRM Overview" with a dropdown arrow. This dropdown menu is open, showing a list of "System Dashboards" including "Customer Service Manager Dashboard", "Customer Service Performance Dashboard", "Customer Service Representative SLA Dashboard", "Demo Data Ager", "Microsoft Dynamics CRM Overview" (highlighted), "Microsoft Dynamics CRM Social Overview", "Opportunities Advanced Heatmap", "Opportunities HeatMap", "Sales Activity", "Sales Analysis", "Sales Dashboard", "Sales Management", "Sales Management Social", "Sales Performance Dashboard", "Sales Rep Social", and "Service Analysis". To the right of the menu, there's a bar chart titled "Leads by Source Campaign" showing data for "Open Leads". The chart has a y-axis labeled "Source Campaign" and an x-axis labeled "Count:All (Name)". The data points are: "New 3D Printin..." (22), "Direct Leads" (18), "Customer Reten..." (25), "Content Market..." (21), and "3D Printers Pr..." (19). Below the chart is a section titled "All Activities" with a search bar and a table of activity records.

Subject	Regarding	Acti
Build Marketing List for Amplif...	Software Pr...	Task
Prepare Collateral for Amplif...	Software Pr...	Task
Secure catering for Amplify y...	Software Pr...	Task

Choose this arrow to see more dashboard layouts.

[How do I get here?](#)



get back to recently viewed items

Choose the **Recently Viewed Items** button on the nav bar to get back to your recent work. Pin the customer records you use all the time to keep them handy at the top of the list.

The screenshot shows the Microsoft Dynamics CRM interface. The navigation bar at the top includes the text "Microsoft Dynamics CRM", a hamburger menu icon, "Sales" with a dropdown arrow, "Dashboards" with a dropdown arrow, a clock icon (highlighted with a mouse cursor), a plus icon, a search icon, a chat icon, and "CRM System Contoso".

Below the navigation bar are two columns of items:

- Recent Views:**
 - Active Accounts (with a pin icon)
 - All Leads (with a pin icon)
 - My Active Cases (with a pin icon)
 - Active Cases (with a pin icon)
 - Published Articles (with a pin icon)
- Recent Records:**
 - Contact information requested (with a pin icon)
 - Sales Dashboard (with a pin icon)
 - Microsoft Dynamics CRM Overview (with a pin icon)
 - Sales Management (with a pin icon)
 - Sales Performance Dashboard (with a pin icon)

Annotations with orange arrows point to specific elements:

- An arrow points to the "Active Accounts" item in the "Recent Views" list with the text "Get back to recent views".
- An arrow points to the "Contact information requested" item in the "Recent Records" list with the text "Pin the records you use most often.".
- An arrow points to the "Sales Management" item in the "Recent Records" list with the text "Get back to recent dashboards and records".

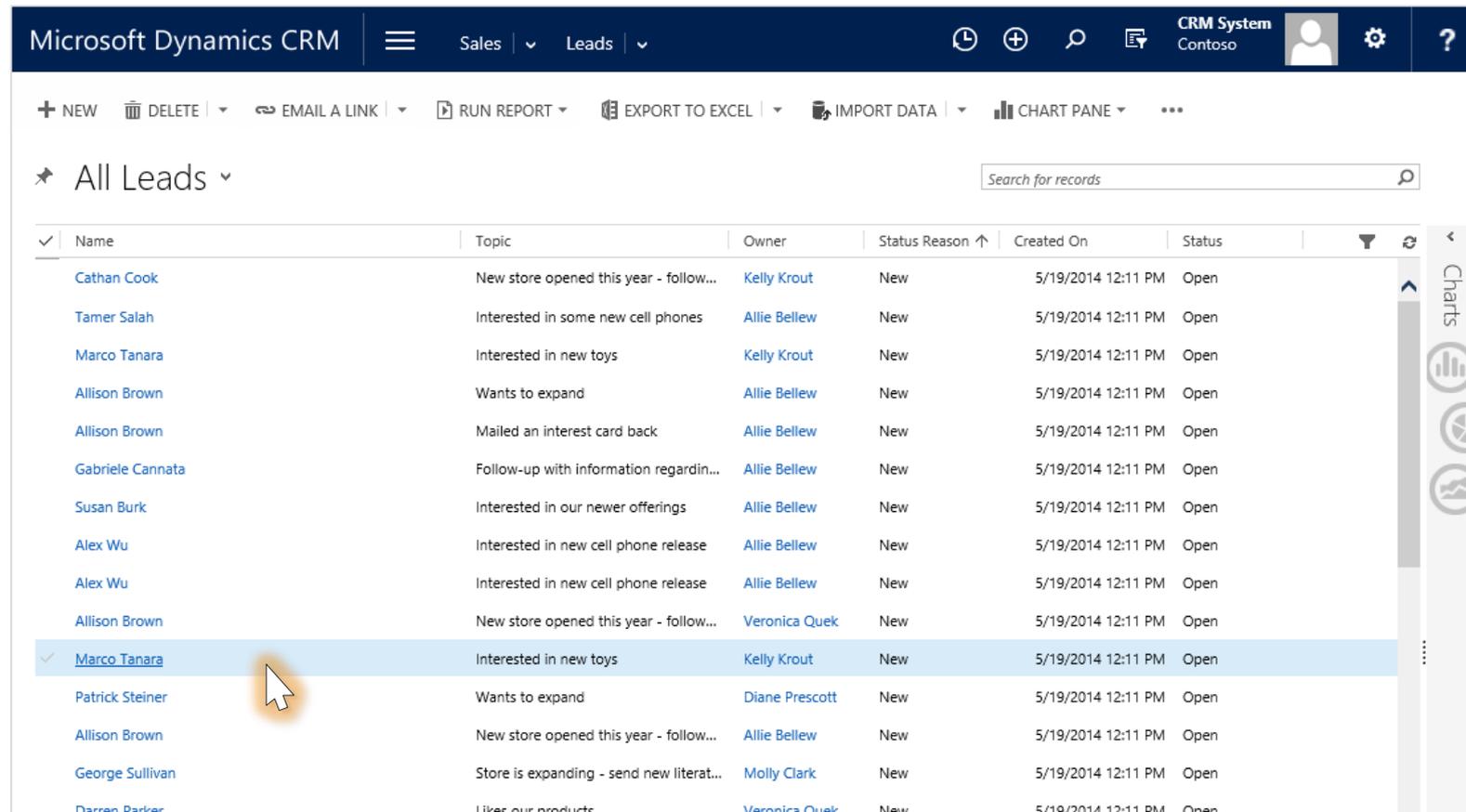


Applies to: Microsoft Dynamics CRM Online 2015 Update 1



find your leads

If you're in sales, you'll keep track of your potential business with **leads**. You can enter leads manually, generate them from marketing campaigns or inquiries from your website, buy them in mailing lists, or create them automatically from posts on Facebook or Twitter.



The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', and 'Leads'. Below the navigation bar, there are several action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', and 'CHART PANE'. The main content area shows a list of leads under the heading 'All Leads'. A search bar is located at the top right of the list. The list has columns for Name, Topic, Owner, Status Reason, Created On, and Status. The lead for 'Marco Tanara' is highlighted, and a mouse cursor is pointing at it.

Name	Topic	Owner	Status Reason	Created On	Status
Cathan Cook	New store opened this year - follow...	Kelly Krout	New	5/19/2014 12:11 PM	Open
Tamer Salah	Interested in some new cell phones	Allie Bellew	New	5/19/2014 12:11 PM	Open
Marco Tanara	Interested in new toys	Kelly Krout	New	5/19/2014 12:11 PM	Open
Allison Brown	Wants to expand	Allie Bellew	New	5/19/2014 12:11 PM	Open
Allison Brown	Mailed an interest card back	Allie Bellew	New	5/19/2014 12:11 PM	Open
Gabriele Cannata	Follow-up with information regardin...	Allie Bellew	New	5/19/2014 12:11 PM	Open
Susan Burk	Interested in our newer offerings	Allie Bellew	New	5/19/2014 12:11 PM	Open
Alex Wu	Interested in new cell phone release	Allie Bellew	New	5/19/2014 12:11 PM	Open
Alex Wu	Interested in new cell phone release	Allie Bellew	New	5/19/2014 12:11 PM	Open
Allison Brown	New store opened this year - follow...	Veronica Quek	New	5/19/2014 12:11 PM	Open
Marco Tanara	Interested in new toys	Kelly Krout	New	5/19/2014 12:11 PM	Open
Patrick Steiner	Wants to expand	Diane Prescott	New	5/19/2014 12:11 PM	Open
Allison Brown	New store opened this year - follow...	Allie Bellew	New	5/19/2014 12:11 PM	Open
George Sullivan	Store is expanding - send new literat...	Molly Clark	New	5/19/2014 12:11 PM	Open
Darren Parker	Likes our products	Veronica Quek	New	5/19/2014 12:11 PM	Open

[How do I get here?](#)



move leads through the sales process

Everyone on your team moves customers through standardized business processes with the same stages and steps. You complete a step by entering data or marking the step completed in the process bar at the top of the screen. When all the steps are done, you can move on to the next stage.

The screenshot displays the Microsoft Dynamics CRM interface for a lead record. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', 'Leads', and the user 'Marco Tanara'. The process bar shows stages: 'Qualify (Active)', 'Develop', 'Propose', 'Close', and 'Next Stage'. An orange callout box points to the 'Develop' stage with the text: 'Enter data in the fields on the process bar, and then move on to the next stage.' Below the process bar, there are fields for 'Existing Contact?', 'Existing Account?', 'Purchase Timeframe', 'Estimated Budget', 'Purchase Process', and 'Identify Decision Maker'. The 'Summary' section is visible below, showing contact details for Marco Tanara and a post from the CRM System.

Microsoft Dynamics CRM | Sales | Leads | Marco Tanara | CRM System Contoso

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD | Marco Tanara

Qualify (Active) | Develop | Propose | Close | Next Stage

Existing Contact? [click to enter](#) | Estimated Budget \$1,710,500.00 | Capture Summary [click to enter](#)
Existing Account? [click to enter](#) | Purchase Process Individual
Purchase Timeframe This Quarter | Identify Decision Maker [mark complete](#)

Summary

CONTACT

Topic* Interested in new toys
Name* Marco Tanara
Job Title Owner
Business Phone 297-555-0192
Mobile Phone --
Email mtanara@tailspintoy.com

POSTS ACTIVITIES NOTES ONENOTE

Enter post here POST

Both Auto posts User posts

STAKEHOLDERS +

Name ↑
Aaron Nicholls Sta

Marco Tanara
CRM System created Marco Tanara
On Marco Tanara's wall
3/8/2015 8:40 PM



edit data right inline

When you're working on an opportunity, most fields are editable right inline. Choose a field to see what changes you can make.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity. The top navigation bar shows 'Microsoft Dynamics CRM' and the current context: 'Sales > Opportunities > Replacing SD exhibi...'. The main header area includes a toolbar with actions like '+ NEW', 'CLOSE AS WON', 'CLOSE AS LOST', 'RECALCULATE OPPORTUN...', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. Below this, the opportunity title 'Replacing SD exhibits with HDTVs' is shown along with key metrics: 'Est. Close Date: 11/21/2014', 'Est. Revenue: \$1,846,952.00', 'Status: In Progress', and 'Owner: Veronica Qui...'. A progress bar indicates the current stage is 'Qualify (Active)', with other stages being 'Develop', 'Propose', 'Price Execution', and 'Close'. Below the progress bar, a table lists tasks and their completion status:

Task	Status
Identify Contact	Cat Francis
Identify Account	Coho Winery
Purchase Timeframe	click to enter
Estimated Budget	click to enter
Purchase Process	click to enter
Identify Decision Maker	mark complete
Capture Summary	click to enter

The 'Summary' section below contains a list of fields for the opportunity, including 'Topic', 'Contact', 'Account', 'Purchase Timeframe', 'Currency', 'Budget Amount', 'Purchase Process', 'Probability', and 'Description'. The 'Probability' field is currently set to 80. An orange arrow points to this field with the text: 'Choose any field to enter or make changes to data.' To the right of the summary is a 'POSTS' section with a recent activity: 'Follow up to define customer need' completed by 'CRM System' on 3/9/2015 at 3:37 AM. Further right is a 'CONTACT INFORMATION' section with fields for 'First Name', 'Last Name', 'Email', 'Mobile Phone', and 'Company'.

Choose any field to enter or make changes to data.



add decision makers to an opportunity

You can add stakeholders to an opportunity so that you can keep track of all the decision makers for a deal in one place.

Microsoft Dynamics CRM | Sales | Opportunities | Replacing SD exhibi...

OPPORTUNITY

Replacing SD exhibits with HDTVs

Est. Close Date: 11/21/2014 | Est. Revenue: \$1,846,952.00 | Status: In Progress | Owner: Veronica Que...

Qualify (Active) | Develop | Propose | Price Execution | Close | Next Stage

- Identify Contact: [Cat Francis](#)
- Identify Account: [Coho Winery](#)
- Purchase Timeframe: [click to enter](#)
- Estimated Budget: [click to enter](#)
- Purchase Process: [click to enter](#)
- Identify Decision Maker: [mark complete](#)
- Capture Summary: [click to enter](#)

Summary

Topic*: Replacing SD exhibits with HDTVs

Contact: [Cat Francis](#)

Account: [Coho Winery](#)

Purchase Timeframe: --

Currency*: [US Dollar](#)

Budget Amount: --

Purchase Process: --

Probability: 80

Description: --

POSTS | ACTIVITIES | NOTES | ONENOTE

All | Add Phone Call | Add Task | ...

Follow up to define customer need
Reach out to Cat to determine what Coho is looking for
Completed by CRM System 3/9/2015 3:37 AM

First Name*: [Cat](#)

Last Name*: [Francis](#)

Email: [Cat@cohowinery.com](#)

Mobile Phone: --

Company: [Coho Winery](#)

STAKEHOLDERS +

Name ↑	Role
--------	------

Choose the **Add** button, and then select a name and role.



where is the save button?

Any time you want to save your data, choose the **Save** button at the bottom corner of the screen.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity record titled "Replacing SD exhibits with HDTVs". The top navigation bar shows "Microsoft Dynamics CRM" and "Sales Opportunities Replacing SD exhibi...". The ribbon includes actions like "NEW", "CLOSE AS WON", "CLOSE AS LOST", "RECALCULATE OPPORTUN...", "ASSIGN", "EMAIL A LINK", and "DELETE". The progress bar shows stages: "Qualify (Active)", "Develop", "Propose", "Price Execution", "Close", and "Next Stage". The summary section includes fields for "Topic", "Contact", "Account", "Purchase Timeframe", "Currency", "Budget Amount", "Purchase Process", "Probability", and "Description". A callout box with orange text and a line pointing to the bottom right corner states: "The Save button is at the bottom of the screen." The "Save" button is highlighted with an orange square.

Field	Value
Topic	Replacing SD exhibits with i
Contact	Cat Francis
Account	Coho Winery
Purchase Timeframe	--
Currency	US Dollar
Budget Amount	--
Purchase Process	--
Probability	80
Description	--

Current Situation
Coho Winery is a large corporation with a number of vineyards in countries all over the world.

check in on service cases

Want to check in on any active requests for customer service? Switch to the service work area, and then choose the case you want to view.

The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Service' and 'Cases' menus. Below the navigation bar, there are several action buttons: '+ NEW CASE', 'PHONE SUPPORT', 'DELETE', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', and a menu icon. The main content area is titled 'Active Cases' and features a search bar. A table lists various cases with columns for Case Title, Case Number, Priority, and Origin. The case 'Issue with Contoso M1650' is highlighted. To the right of the table, a bar chart titled 'Active Cases by Agent' shows the number of cases assigned to five agents: Veronica Quek (16), Allie Balfew (13), Kelly Krout (7), Molly Clark (8), and Diane Prescott (11).

Case Title	Case Number	Priority	Origin
Average order shipment time	CAS-01213-P8B3X0	Normal	Web
Complete overhaul required	CAS-01214-S6Z4Z6	High	Web
Contact information requested	CAS-01215-NOY1T2	Normal	Phone
Contact information required	CAS-01216-L3S7F2	Normal	Phone
Contoso E70 Error	CAS-00097-L2K0K4	Normal	Phone
Customer needs assistance with Contoso M1600	CAS-00055-V8L7L7	Low	Facebook
Customer needs assistance with Large MP5 Players M1650	CAS-00110-P8Q4W5	High	Phone
Customer needs assistance with Plotters	CAS-00114-Y8T3S0	Normal	Twitter
Damaged during shipment	CAS-01217-H7H0B3	Low	Email
Defective item delivered	CAS-01218-G6H0J9	Low	Phone
Faulty product catalog	CAS-01220-S1K8F4	Normal	Email
Incorrect product information	CAS-01221-T1W4S9	Normal	Phone
Incorrect product information online	CAS-01222-S6G5J0	High	Email
Information on the product	CAS-01223-Z6Y4Y1	Low	Email
Issue with Contoso M1650	CAS-00141-W9K9Z4	Low	Web
Issue with Data Link	CAS-00136-M6J5Q2	High	Web
Issues with Contoso E900	CAS-00058-T3S6M8	Normal	Phone
Item defective	CAS-01224-K7W7X1	Normal	Email
Item defective on delivery	CAS-01225-S6T6T3	High	Phone

Agent	Count
Veronica Quek	16
Allie Balfew	13
Kelly Krout	7
Molly Clark	8
Diane Prescott	11

[How do I get here?](#)

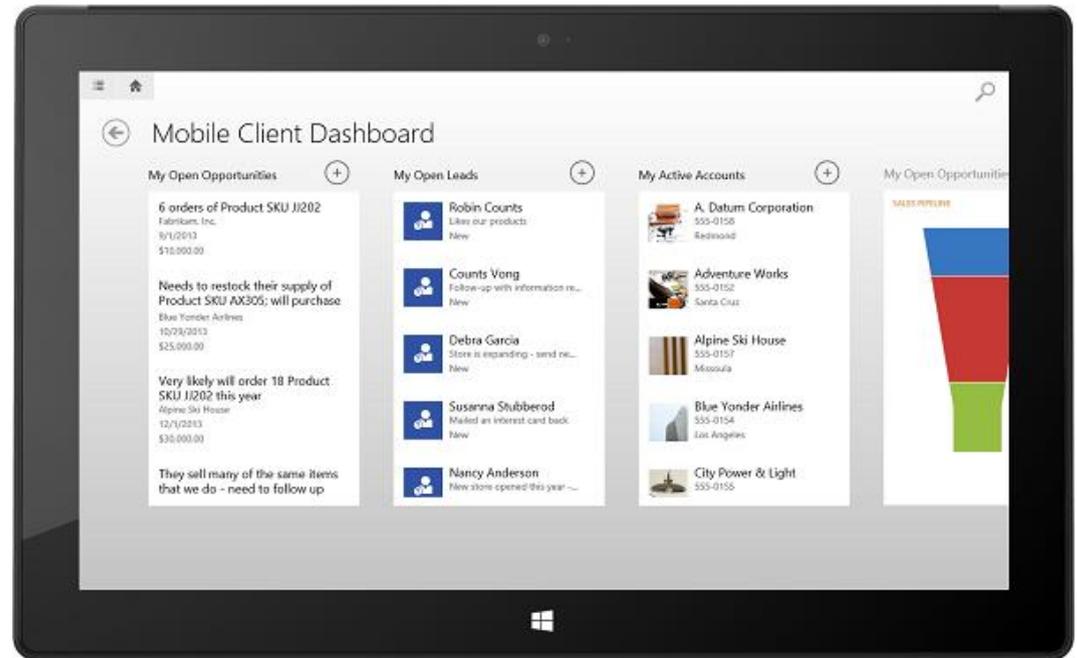


take your CRM work with you on mobile

Microsoft Dynamics CRM is not just for using in a web browser on a computer—you can also use it on your phone, on your Surface, or on your iPad.

Download the app from the online store for your phone or tablet (search for “Dynamics crm”).

Note: You may need to check with the person who manages your system day-to-day, to make sure you have the security permissions required to use the app.



CRM Help & Training

The [CRM Help & Training website](http://www.CRMHelpandTraining.com) has lots of great Help content including:

- videos
- eBooks
- walkthroughs
- customizable training
- ...and more!

Find Help for your role.

The screenshot shows the Microsoft Dynamics CRM Help & Training website. At the top, there is a search bar labeled "Search Help & Communities". Below the search bar, there are three main sections: "What's New" with a "See the latest!" link and a right arrow, "Get Started" with a link to "Guides, eBooks, videos, and more", and "Get ready for the next release". A navigation bar below these sections contains icons and labels for "Sales", "Service", "Marketing", and "Admins". Underneath the navigation bar, there is a "Featured" section with a list of links: "How do I...", "Mobile apps", "Business processes", "Data management", "CRM for Outlook", and "Reports". To the right of this list, there are links to "CRM Basics Guide", "Outlook User's Guide", "Videos & eBooks", "Training Kit", and "All topics...". At the bottom of the page, there are three icons: "Videos" (a video camera), "Community" (three people), and "Support" (a wrench).



www.CRMHelpandTraining.com



Thanks for reading!

Did this eBook help you?
[Send us a quick note.](#)
We'd love to know what you think.

[Guides, eBooks, videos, and more](#)

Version 7.1.0



This document is provided "as-is". Information and views expressed in this document, including URL and other Internet Web site references, may change without notice.

Some examples depicted herein are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred.

This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes.

The videos and eBooks might be in English only. Also, if you click the links, you may be redirected to a U.S. website whose content is in English.

© 2015 Microsoft. All rights reserved.

Microsoft, Excel, Internet Explorer, Microsoft Dynamics, Outlook, and Windows are trademarks of the Microsoft group of companies.

All other trademarks are property of their respective owners.