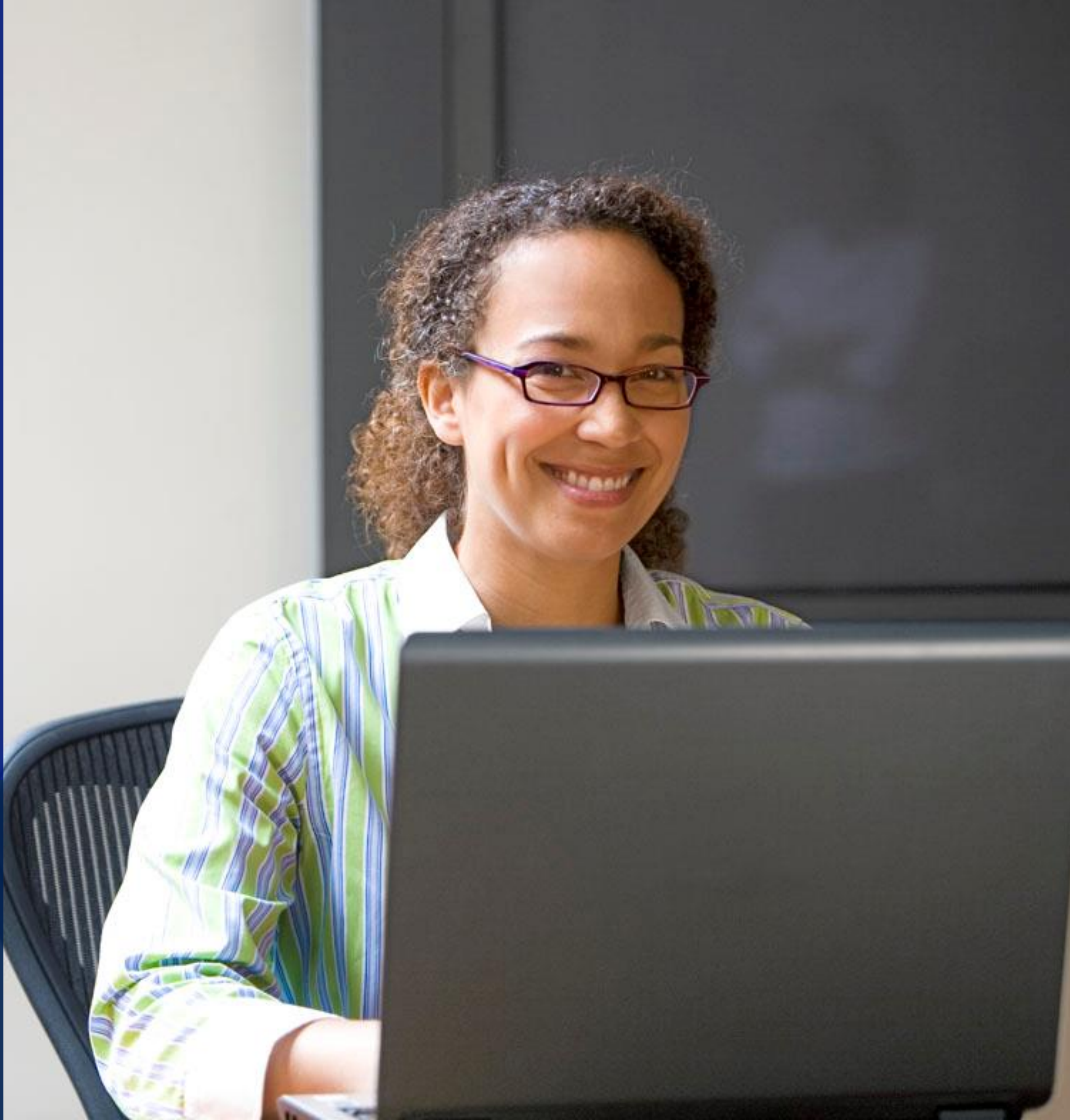
Start working in CRM

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:

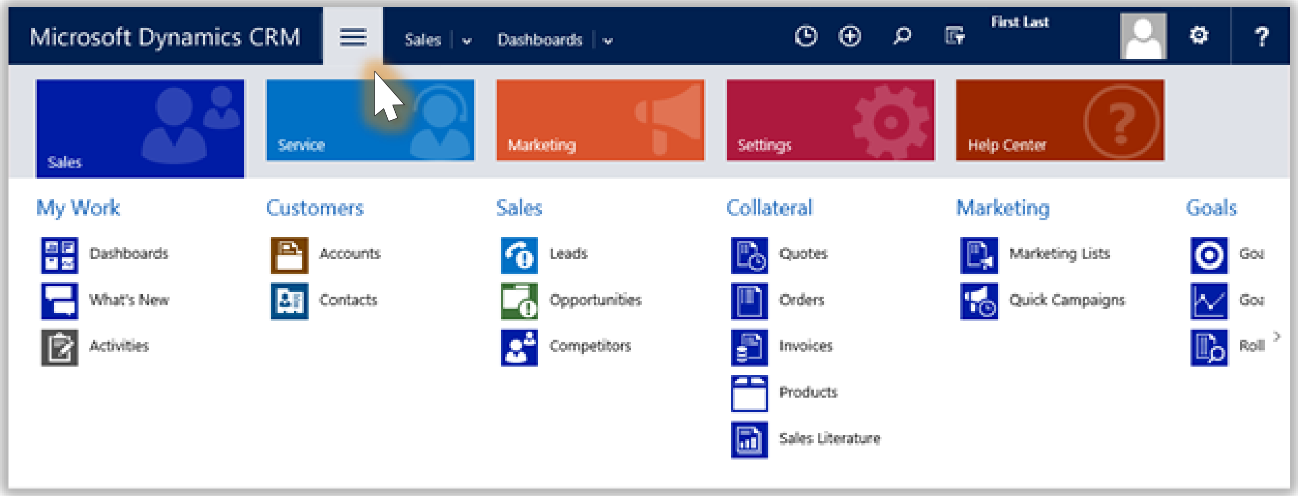
- Get around CRM and find what you need
- Enter data quickly and easily
- Work with contacts, accounts, leads, and opportunities
- Place calls, send email, and take notes
- Check the current status of service cases for a customer

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.)

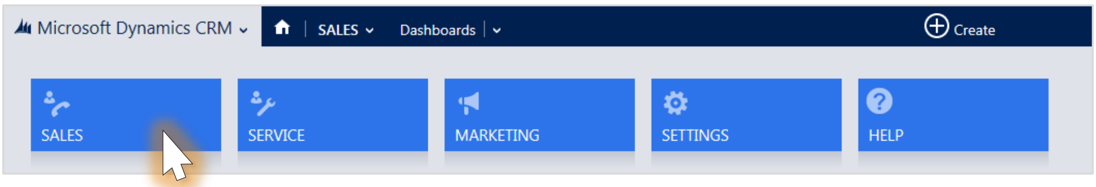
get around and find your data

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.



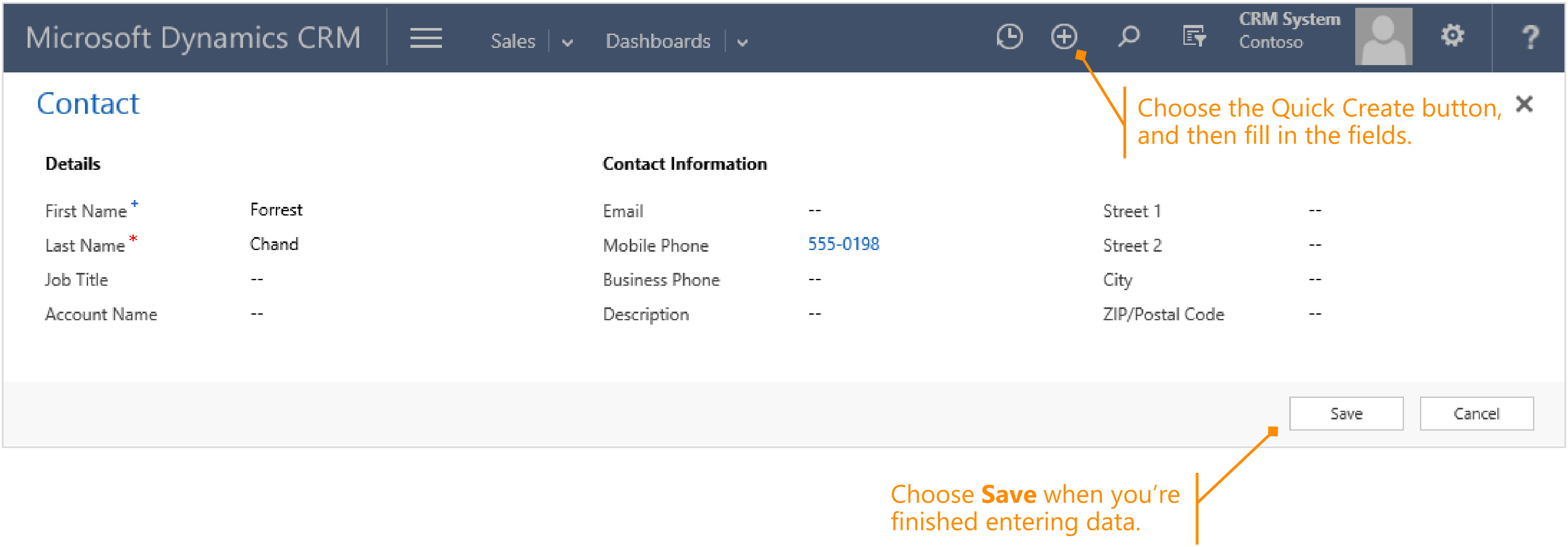
Take a video tour

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

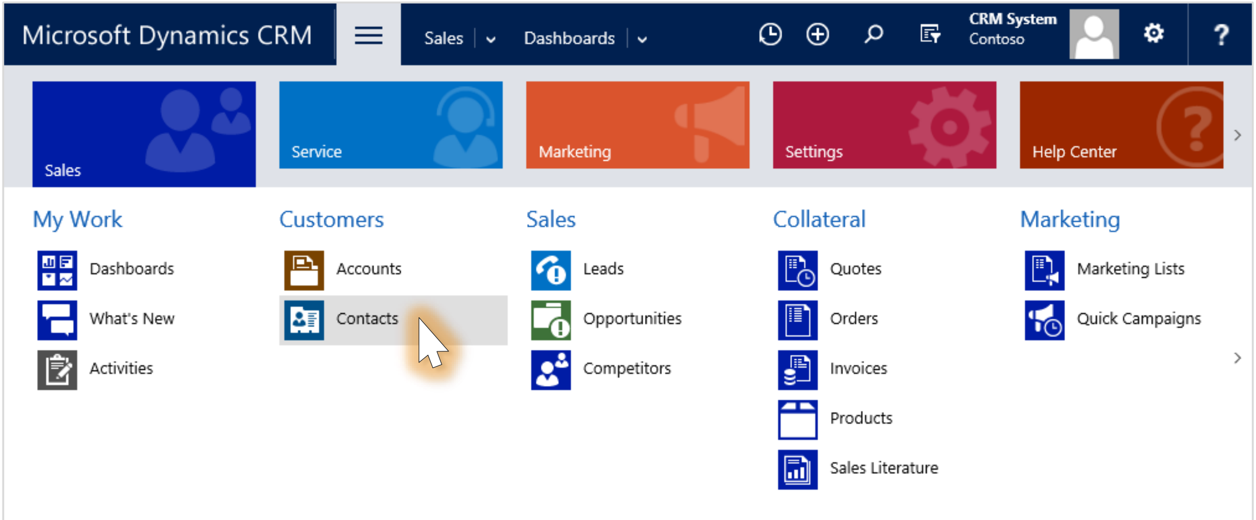
On the nav bar, choose the **Quick Create** button, and then enter data for a few fields. You can come back and fill in the gaps later when you have more time. Then, choose **Save**. An asterisk (*) indicates a required field.



find your contacts

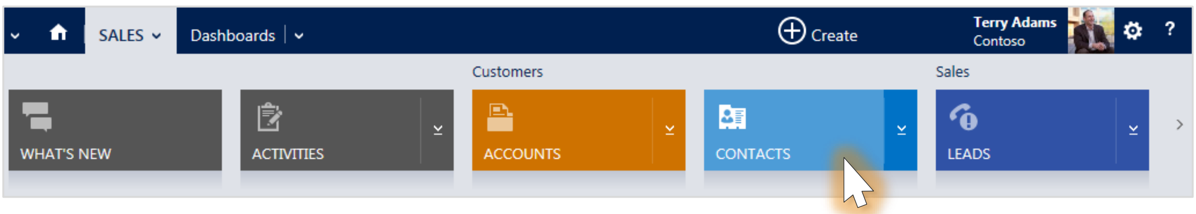
Similar to Microsoft Office Outlook or other email programs, you store data about the people you know and work with as contacts.

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



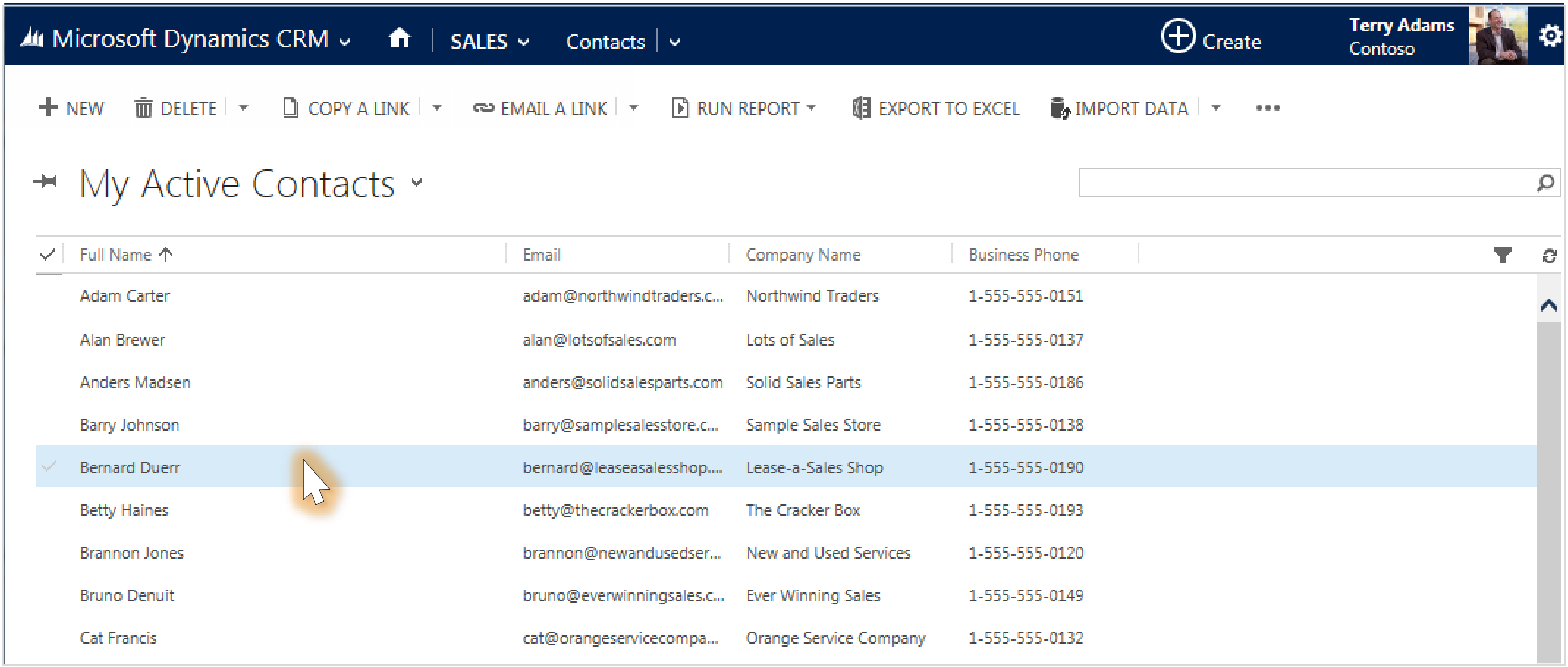
[Take a video tour]

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

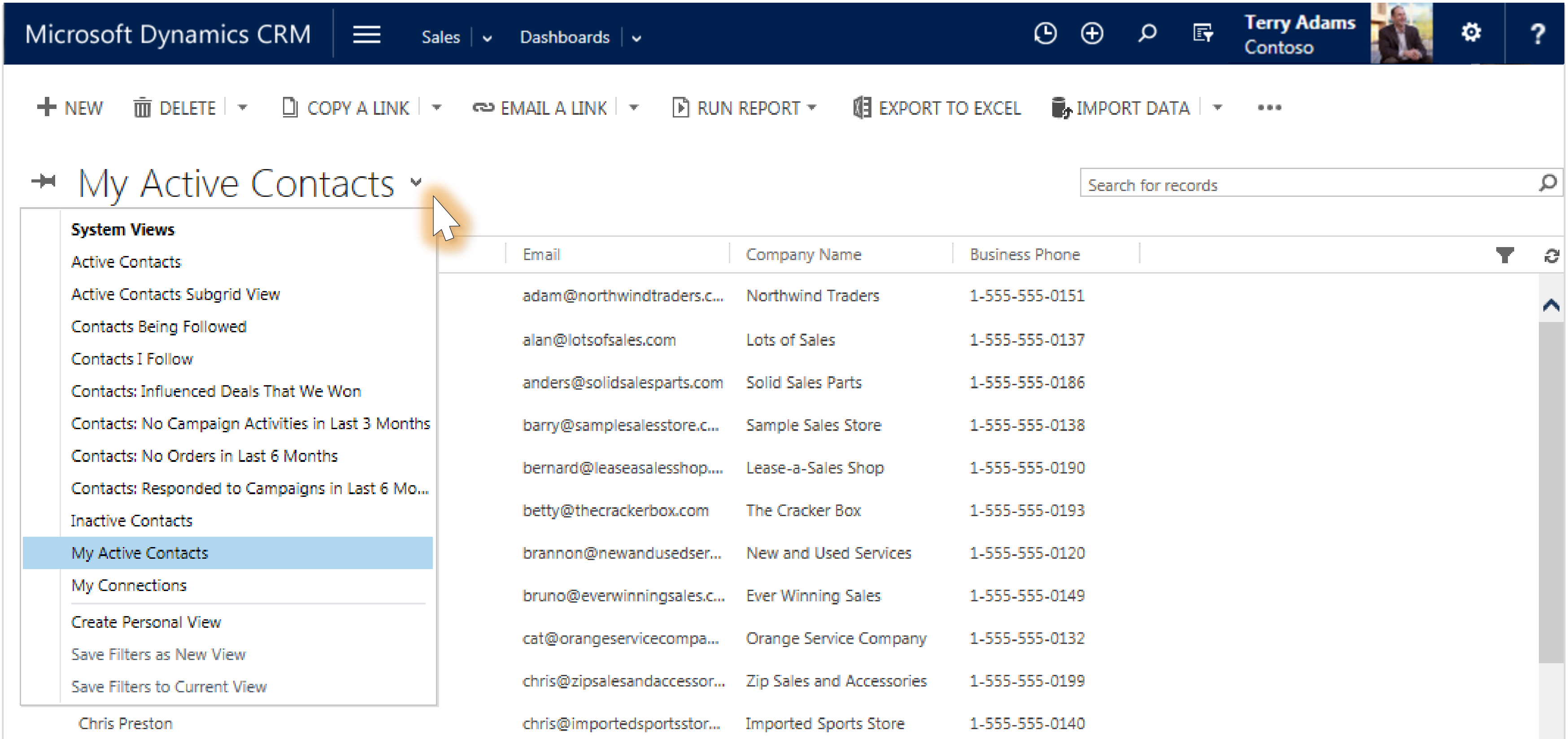
When you go to your contacts, you'll see the names in a list. Choose a name to see details or to enter more data.



How do I get here?

filter the list to show the right contacts

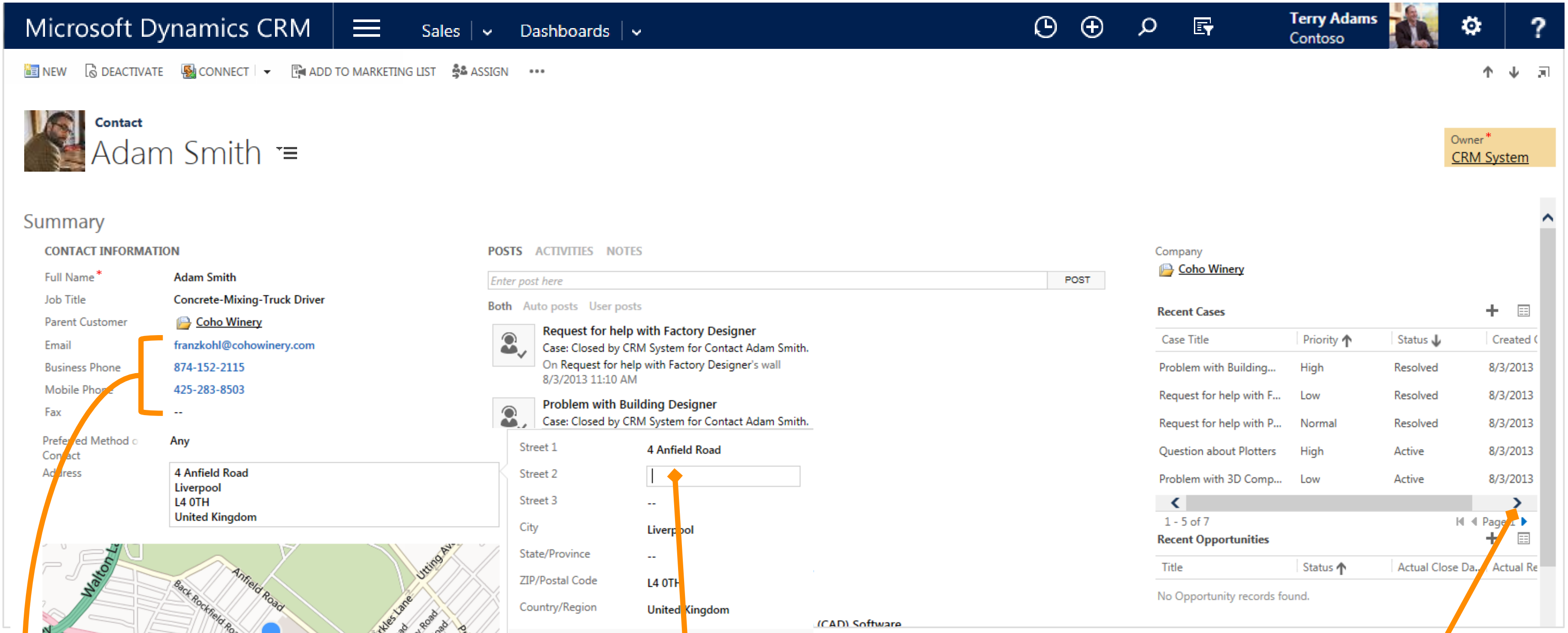
When you go to your contacts, you'll see the names in a list. You can filter to see only the contacts you're interested in, such as all active contacts in the system, or only the ones you're following. Choose the down arrow next to **My Active Contacts**, and then point to the list you want (for example,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



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.



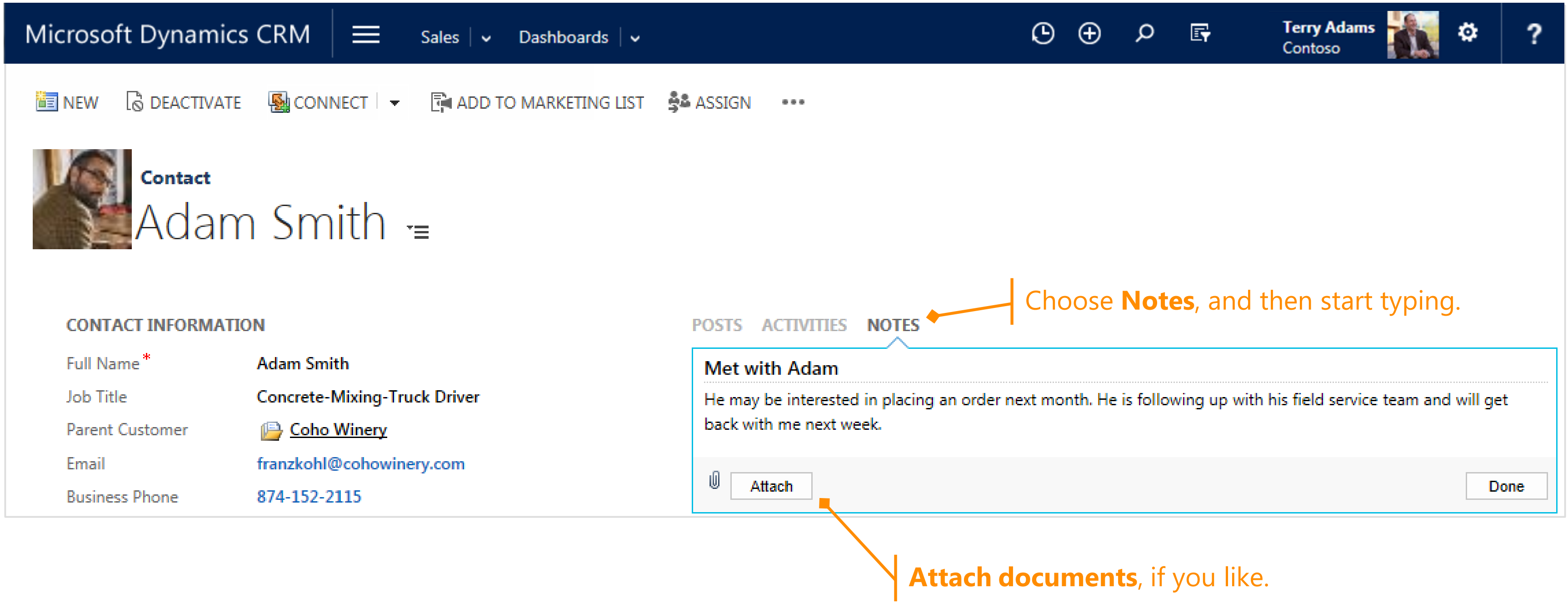
Choose a **phone number** to call. Or, choose an **email** address to send a message.

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.

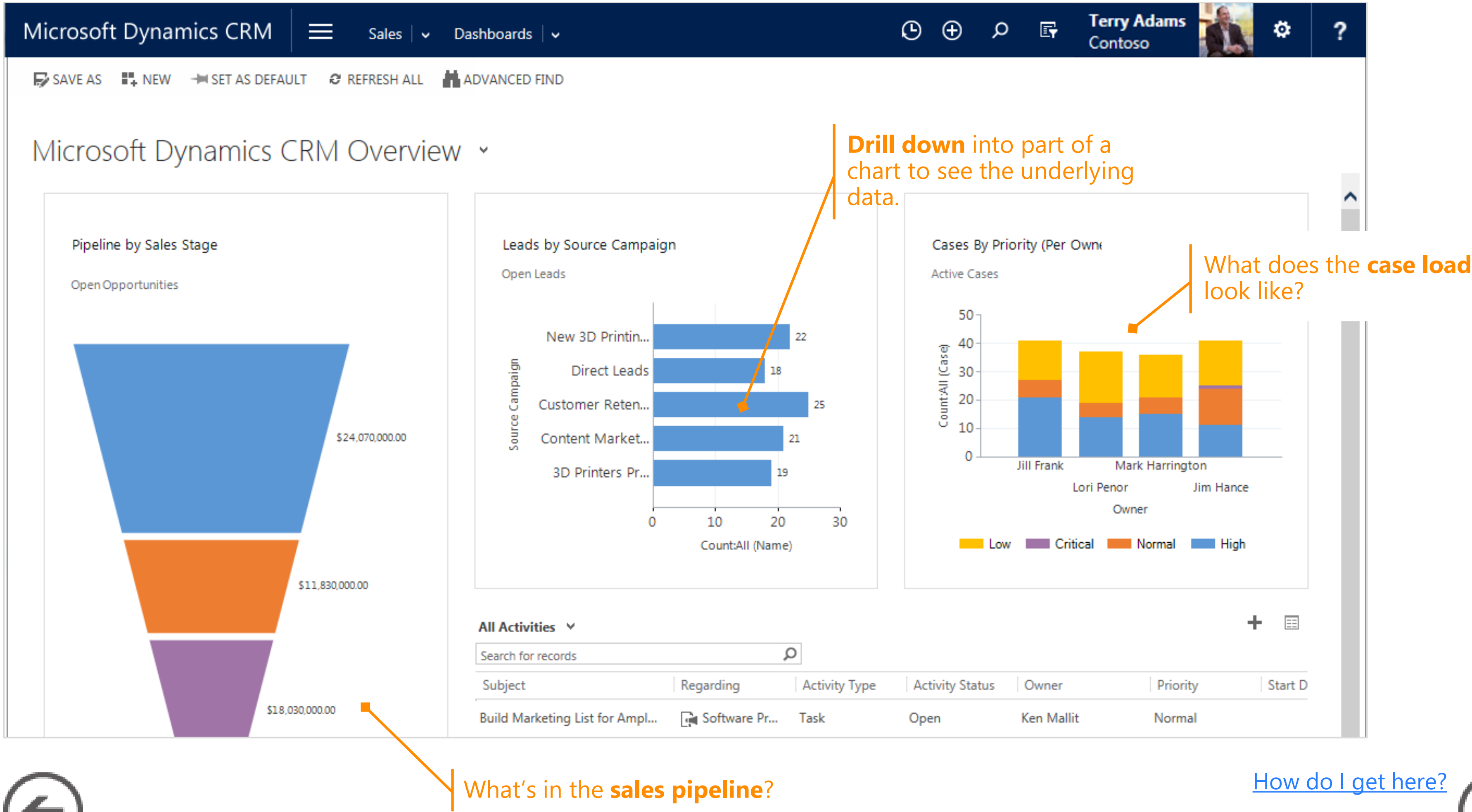
add notes about a contact

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



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.



How do I get here?

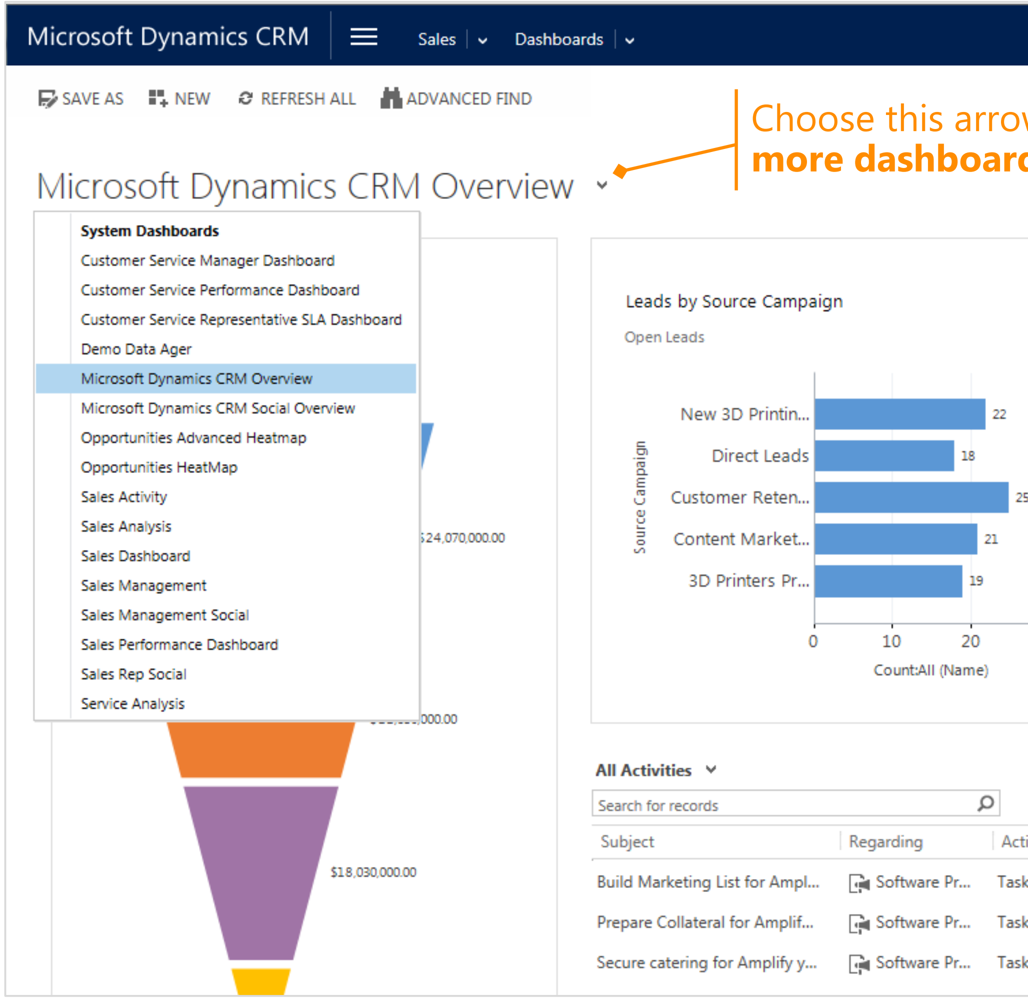
explore dashboard layouts

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.

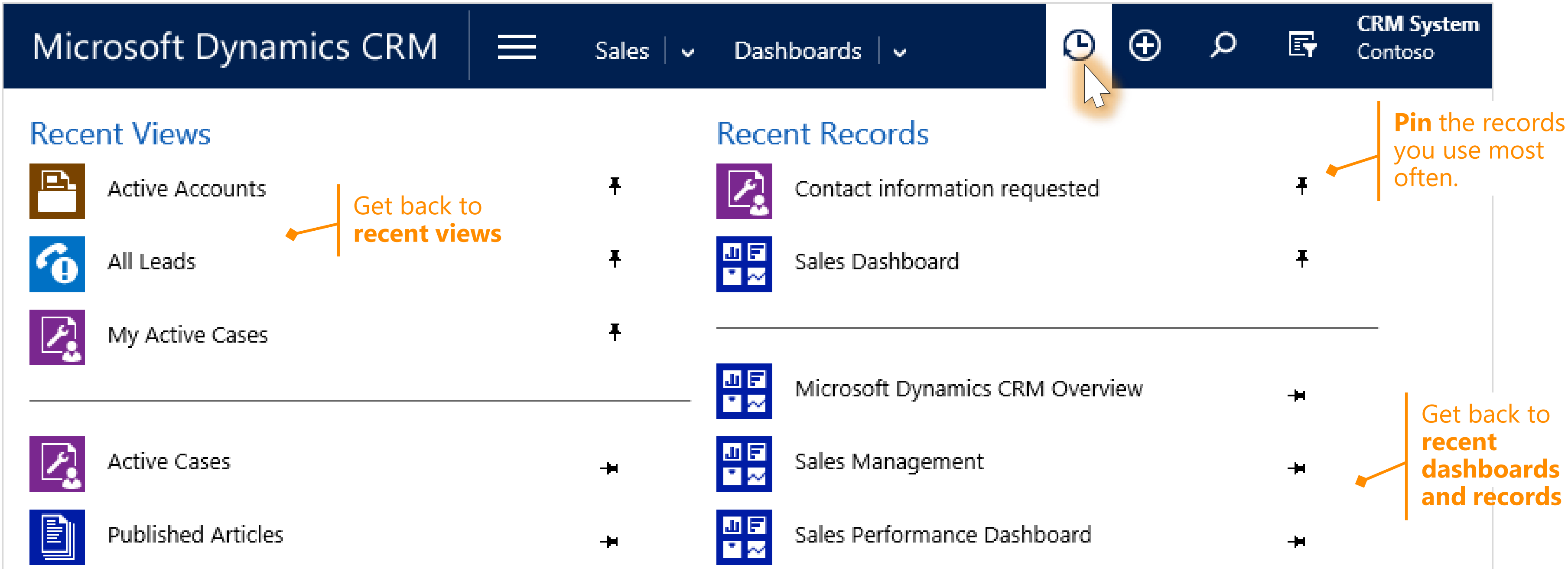


Choose this arrow to see **more dashboard layouts**.

How do I get here?

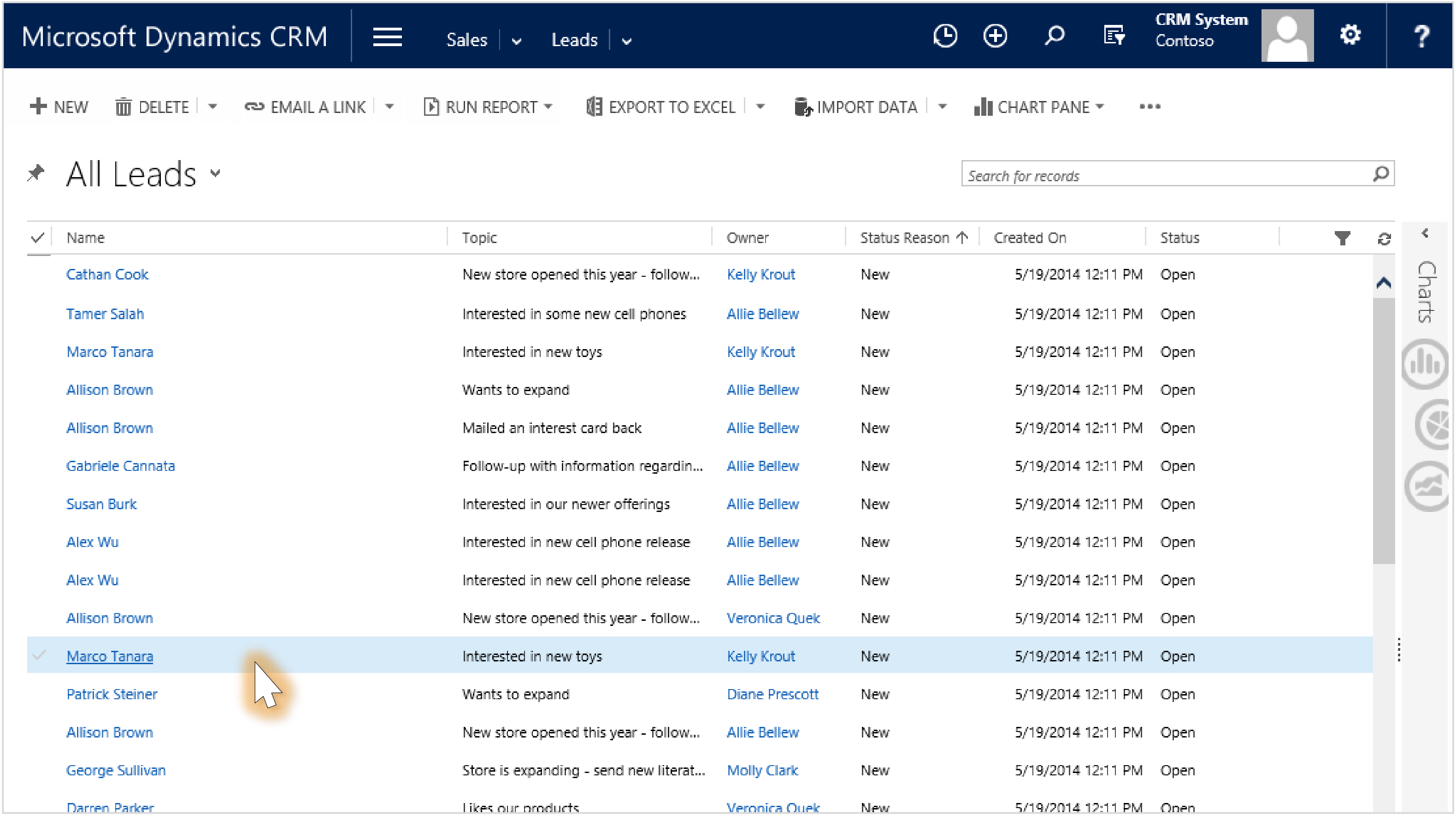
get back to recently viewed items

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.



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.

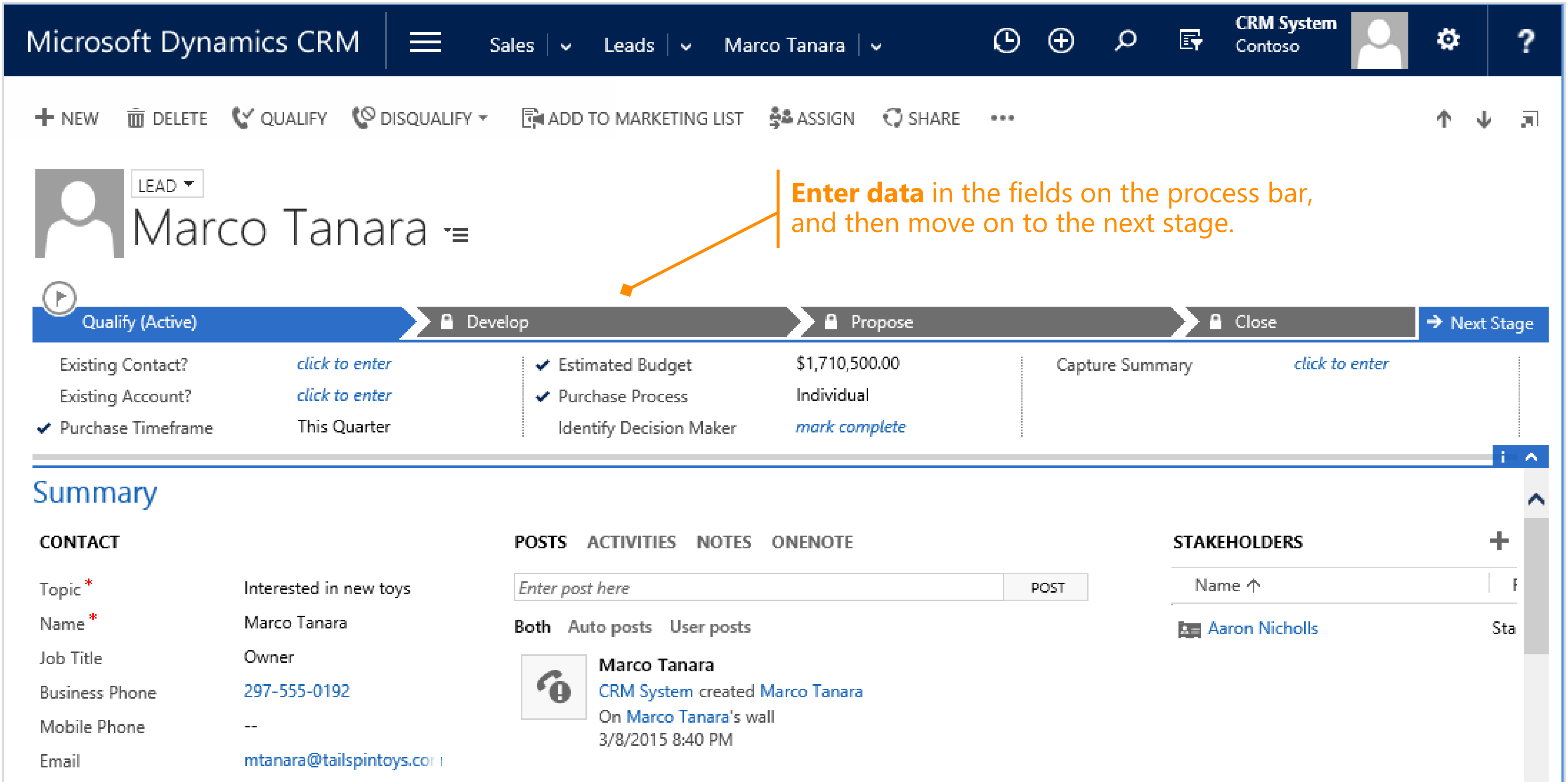


How do I get here?

move leads through the sales process

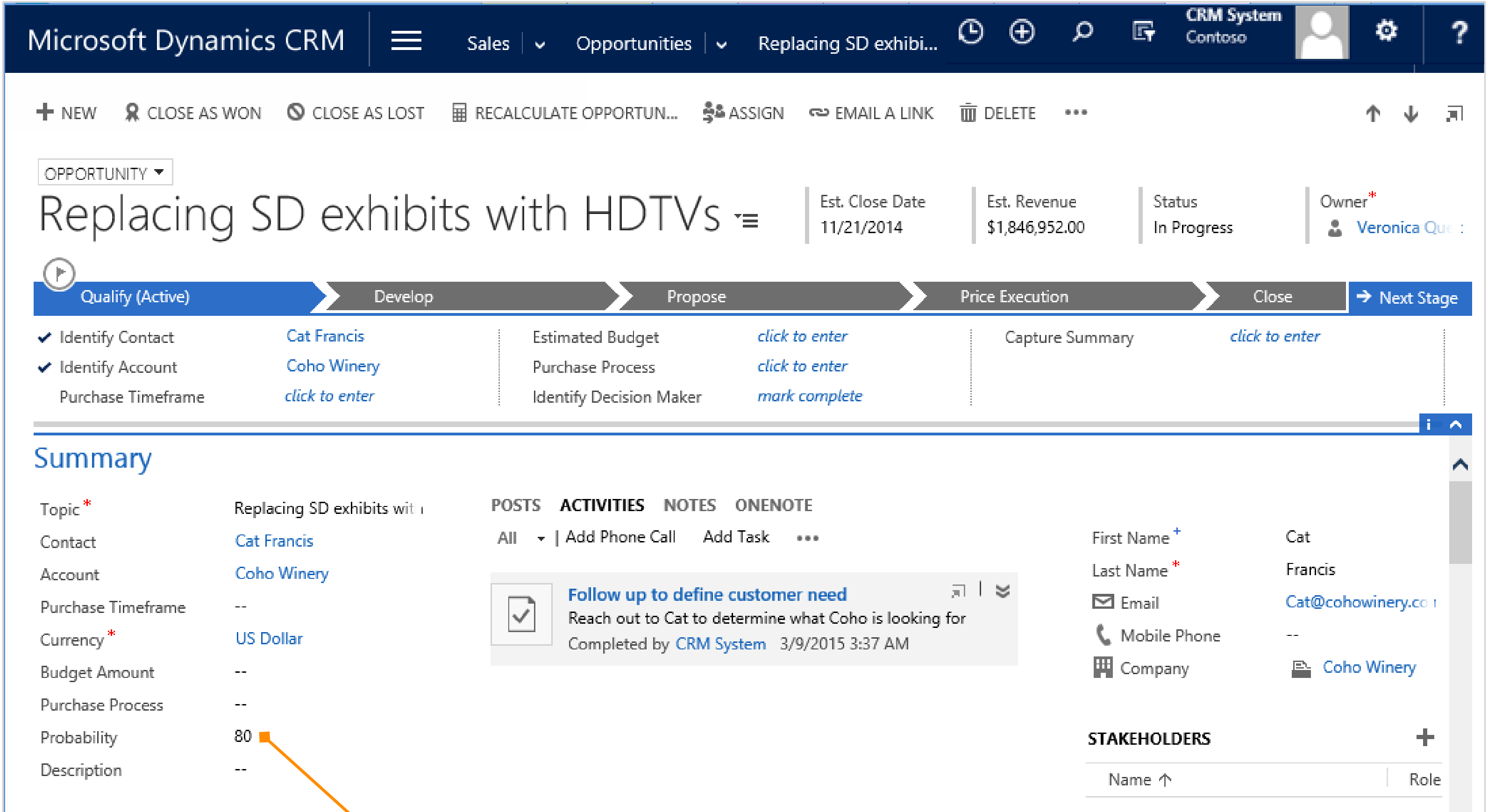
Everyone on your team moves customers through standardized business processes with the same stages and steps.

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.



edit data right inline

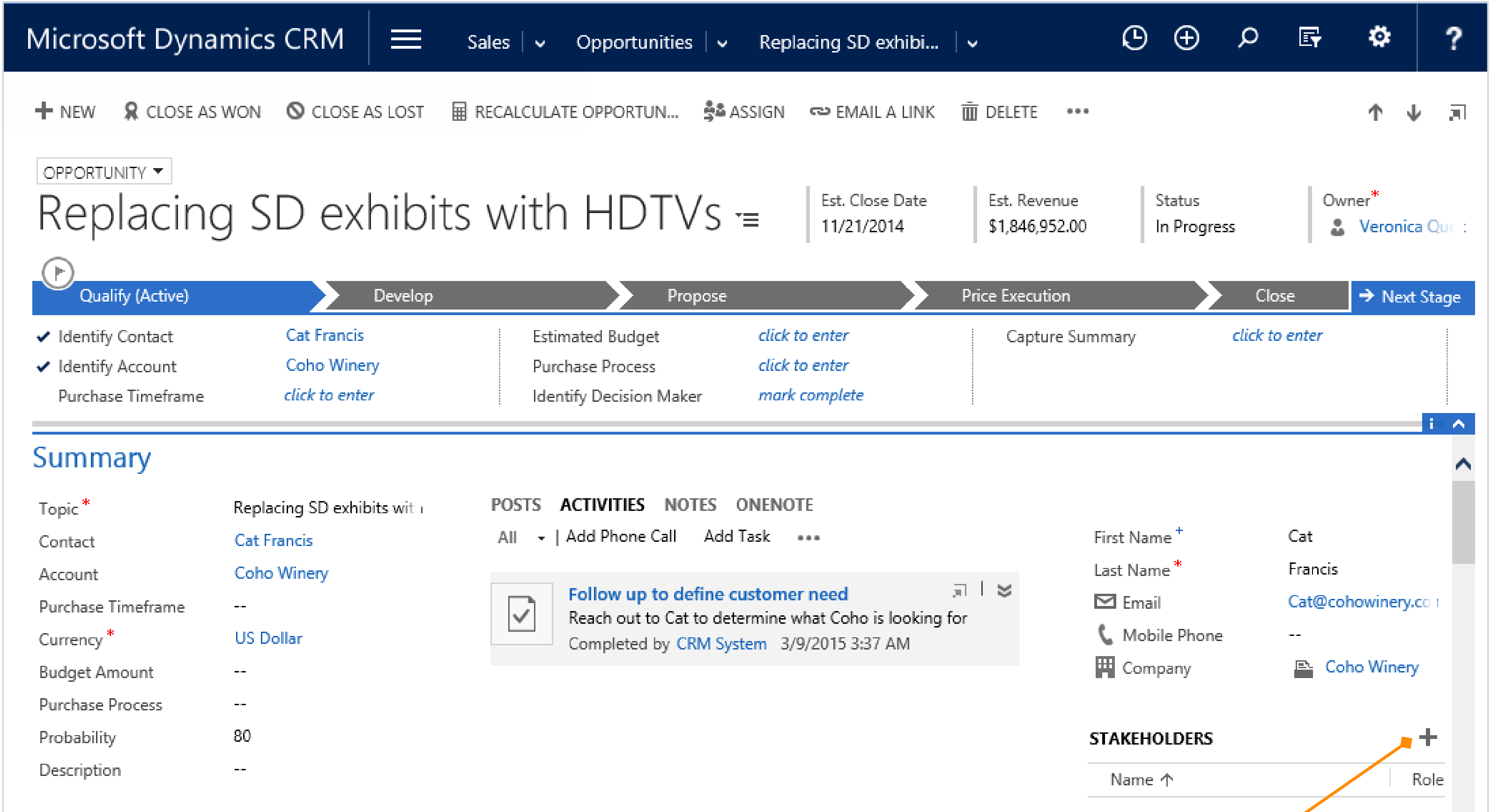
When you’re working on an opportunity, most fields are editable right inline. Choose a field to see what changes you can make.



Choose any field to enter or make changes to data.

add decision makers to an opportunity

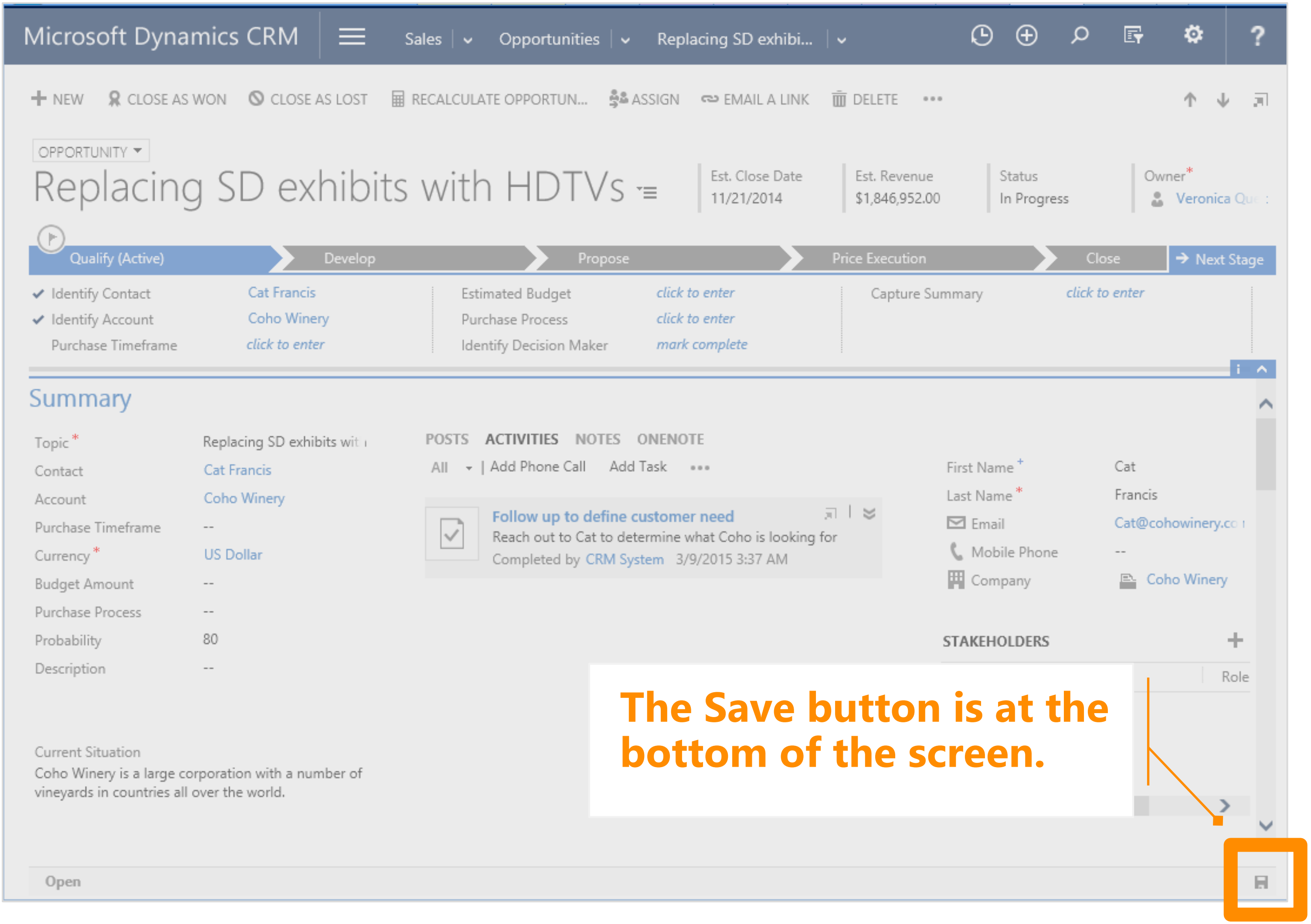
You can add stakeholders to an opportunity so that you can keep track of all the decision makers for a deal in one place.



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

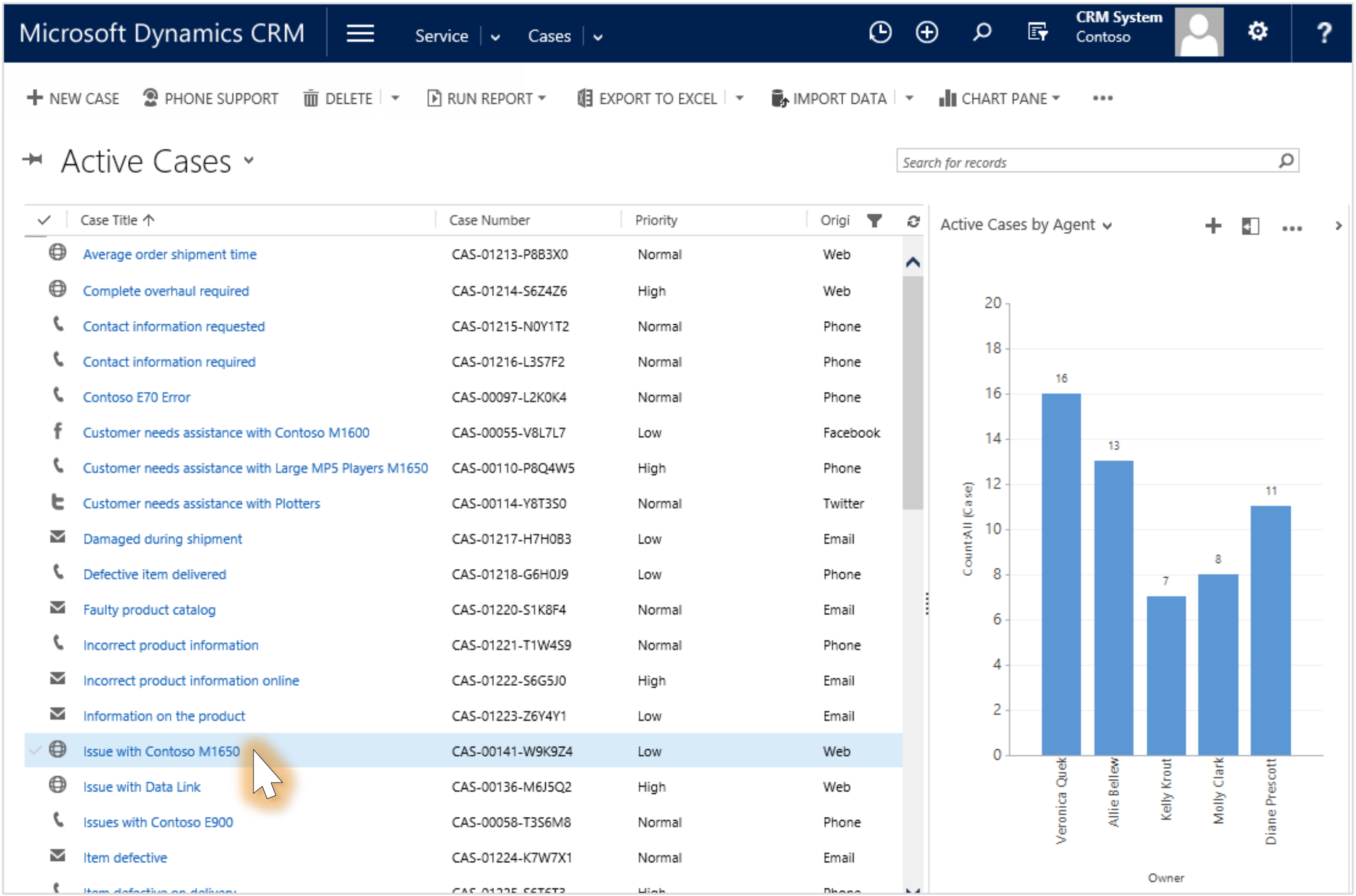
where is the save button?

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



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.

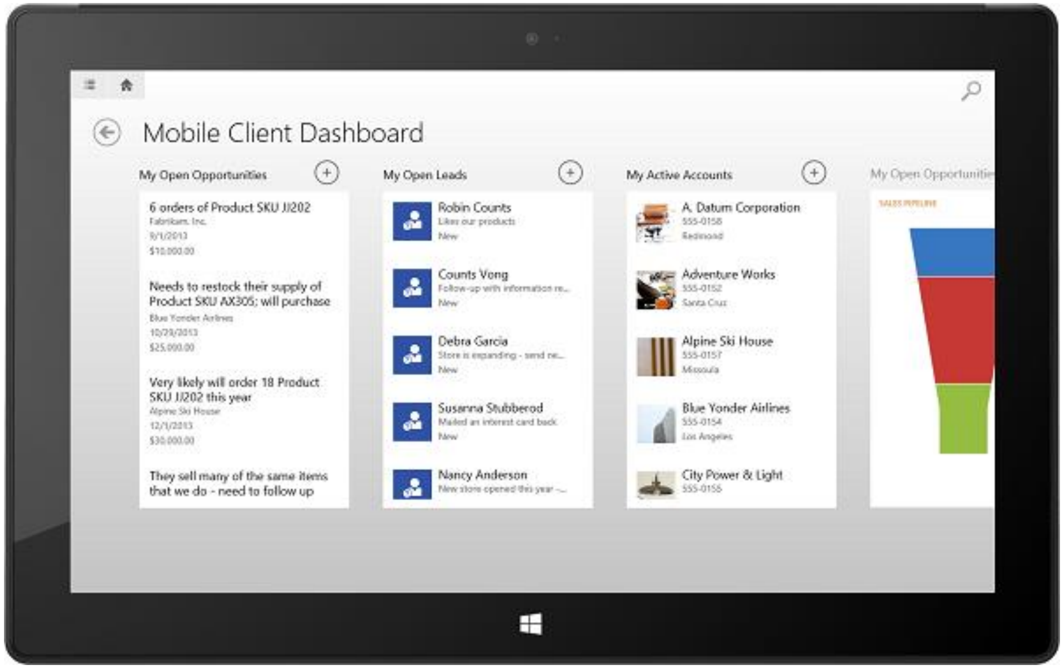


How do I get here?

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”).



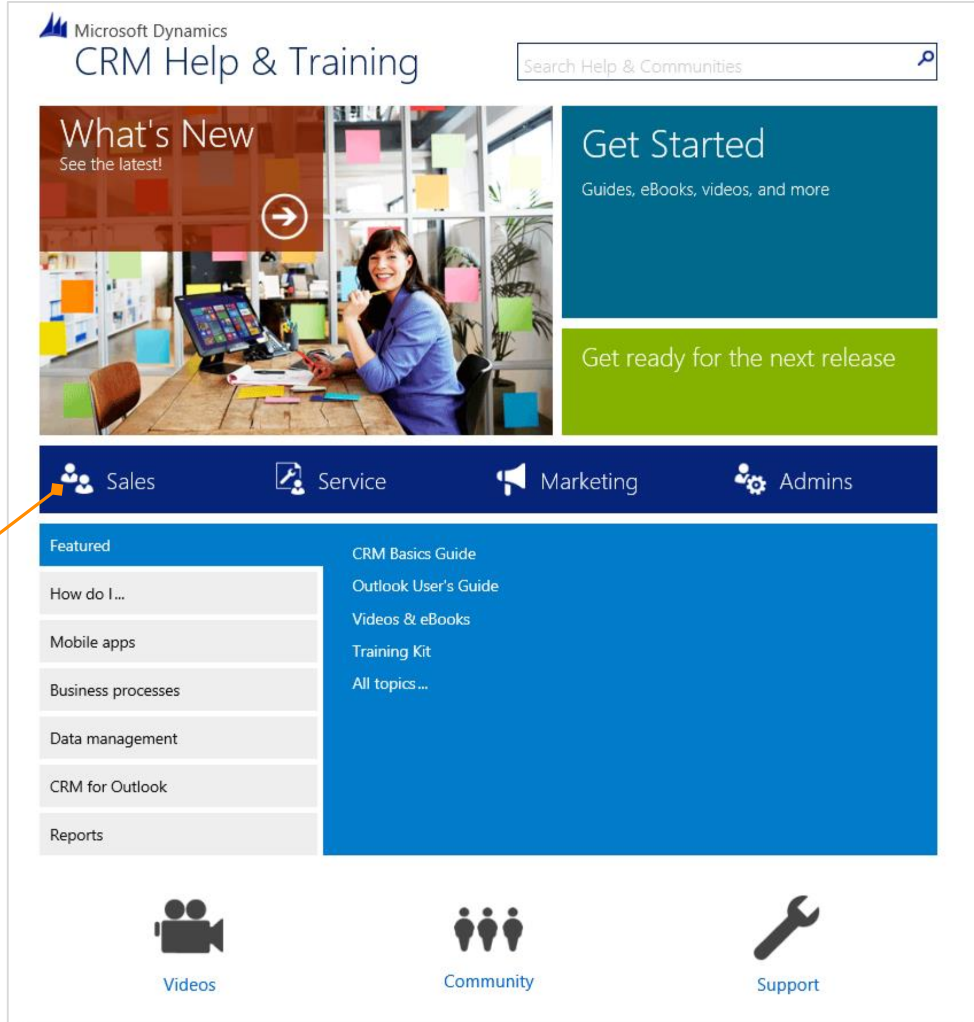
Note: You may need to check with the person who manages your system day-to-day, to make sure you have the security permissions required to use the app.

CRM Help & Training

The CRM Help & Training website has lots of great Help content including:

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

Find Help for your role.



www.CRMHelpandTraining.com

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Guides, eBooks, videos, and more

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