

# customization



### Ensure maximum flexibility and low TCO

Mold Microsoft CRM to meet specific organizational and industry needs—but do it easily and affordably, with efficient customization processes that reduce costs and ensure high return on investment.

### Automate existing business processes

Easily configurable workflow rules free employees from time-consuming administrative tasks and increase efficiency and accuracy for sales and service processes.

### Capture and view the exact data you need

Quickly tailor forms to capture the data you need to close sales and offer consistent customer service, and provide employees the right view of critical customer information.

### Customize without limits

Connected with Microsoft .NET and comprehensive tools, developers can enhance existing functionality, build customized vertical solutions, create integrations with third-party applications, and extend the solution to Web services platforms.

### Implement customizations easily and rapidly

Because Microsoft CRM is browser-based, customizations can be published to the entire system in a single upload, with no need to reconfigure individual desktops or laptops.

### Upgrade customizations smoothly

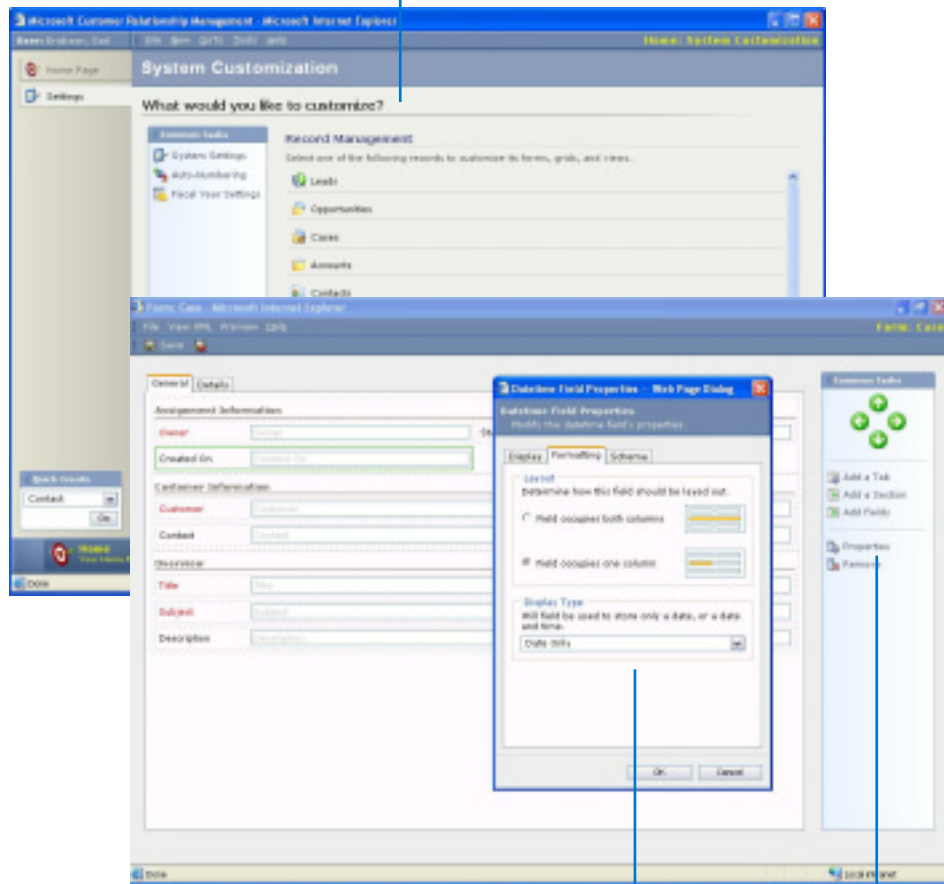
Microsoft CRM customizations carry forward with upgrades, reducing the burden on IT resources, minimizing maintenance costs, and ensuring uninterrupted productivity.

Microsoft CRM is **built from the ground up on the Microsoft .NET Framework**, delivering tremendous business value through easy integration with third-party applications and Web services.

### Microsoft Business Solutions CRM

Designed for maximum flexibility and low total cost of ownership, Microsoft® CRM adapts easily and affordably to meet business and industry-specific needs for companies.

Easily customize Microsoft CRM forms to meet your exact business needs.



Change the layout and formatting of new and existing information fields.

Add, edit, or delete sections, tabs, and fields, and position them according to business needs.

# Revolutionary TCO: Easy, efficient customizations that maximize productivity and minimize maintenance and upgrade costs.

## Microsoft CRM Customization

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### Tailor the user interface, settings, and workflow processes

Without touching database code, your administrator or channel partner can quickly and easily modify Microsoft CRM to meet needs specific to your organization and industry.

#### Tailor forms and views

- Easily add new fields to the Microsoft CRM database schema to fit the data needs of a specific industry or business.
- Quickly customize virtually any form within Microsoft CRM—accounts, contacts, opportunities, cases, orders, and more—so that you capture and manage the exact data you need to increase sales and service effectiveness.
- Modify information views across the solution so that users can see critical information at a glance and sort data across records according to specific business needs.
- Create custom templates for mail merge, e-mail, knowledge base articles, and quotes, helping ensure systematic content management and consistent customer messaging.

#### Modify business management settings

- Use flexible default settings to mirror your business model by mapping organizational structures, including departmental, management, and team structures.
- Ensure information is protected, yet accessible, by selecting from a wide range of user roles and access rights, or modify or create roles that fit unique needs.

#### Automate business processes

- Set up and modify rules that automate business processes, including leads routing and notifications, opportunity and pipeline management, case management, and data transfer to other applications.
- Use workflow rules or build sales methodologies to automate stages in the selling process and establish milestones for assessing sales activity.
- Create customized e-mails and set up specific rules for automatic order fulfillment notification, leads and opportunity follow-ups, service requests follow-ups, and more.

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### Advanced customizations

Microsoft CRM offers a rich environment for advanced customizations, including open application programming interfaces (APIs), a comprehensive Software Development Kit (SDK), and Microsoft BizTalk® Server 2002 Partners Edition.

- Build customized integrations with third-party business solutions, using BizTalk Server technologies.
- Extend the solution to Web services—for example, automatically perform credit checks whenever new opportunities are created in Microsoft CRM.
- Enhance Microsoft CRM functionality to fit specific verticals and industries, or build new applications on top of the Microsoft CRM platform.

*Microsoft CRM is designed to meet budget and support needs for your business. Delivery and implementation through a Microsoft partner include hands-on assistance with setup and maintenance processes, along with comprehensive training and support resources.*

For Microsoft CRM Sales & Support Contact CABC on 01635 570970 or visit [www.mscrm-cabc.co.uk](http://www.mscrm-cabc.co.uk)

For more information about Microsoft CRM, go to:

[www.microsoft.com/crm](http://www.microsoft.com/crm)