

Ten Reasons for Happy CRM 3.0 Users to Upgrade to CRM 4.0

1. Outlook Client - Microsoft Dynamics CRM 4.0 offers an offline user experience that is consistent with the online user experience
 - A. No VPN - Microsoft Dynamics CRM can be accessed over the Internet without a Virtual Private Network (VPN) connection
 - B. Troubleshooting – Built-in diagnostic tools and self-healing clients for easier deployment and management
 - C. Background Synchronization – 4.0 manages the data required to go offline while you are on-line to improve speed and reliability at the time of offline synchronization.
 - D. Offline Reports – Reports can be run while the user is in the offline mode. Reports will run against the local data on the offline client.
 - E. CRM Activities – CRM Phone Call, Letter and FAX activities now map to the Outlook Task Activity so that they are visible in the Outlook Client.
2. Views
 - A. Related Entities - Advanced Find can be used to create and filter views of data based on any fields (attributes) in related entities.
3. Reports
 - A. Wizards - End-users can easily create, share, and use reports without IT intervention
 - B. Over the Internet – Reports can be run over the Internet without a VPN connection from the Outlook Client while online or from the Web Browser.
4. Entities
 - A. System-to-System Entity Relationships – Create new or multiple relationships between entities like Opportunities and Contacts – as an example: add lookups to multiple contacts: Decision Maker, Power Person, Project Manager, and Administrative Liaison to an Opportunity.
 - B. Many-to-Many Entities – Built in support to create associations between two entities to provide support for complex business relationships.
 - C. Auto Resolution – Start typing in a name into a lookup field and it comes back with an exact match or a list of choices. No more having to launch another window to do the lookup.
5. Workflow – CRM 4.0 uses Windows Workflow Foundation instead of the CRM proprietary tool.



-
- A. Personal – Users can now access Workflow from their CRM Web Browser. They are empowered to create workflows using a simple Web-based wizard. Model your best practices, automate simple actions, orchestrate long running business processes, check the status of a workflow from that entities' associated view.
 - B. Powerful – Create new entities from existing entities, more verbose email options. Perform actions on records that previously required extending CRM using code.
 - C. Extensive – A vastly expanded range of wizard driven options to create, manage and change records.
6. Data Management - Improved data import tools for administrators and end-users help insure the efficiency and accuracy of data import and migration
 - A. Duplication Detection – Built in, real time and batch processing customizable duplication detection for all entity types.
 - B. Data Maps – Improved import process with re-usable source-to-CRM data maps.
 - C. Import Errors – Now the process will identify the specific records that failed the import process so that they can be edited and re-imported.
 7. Email – Seamless email tracking makes it easier to track emails, including automatic tracking.
 - A. Subject line tracking – no longer required to track emails, then can now be tracked using multiple criteria – email subject, sender, recipients
 - B. Promoting – Emails can now be promoted in bulk from the Inbox to CRM.
 8. Licensing – Flexible options allow you to license CRM in a way that matches your business needs
 - a. Costs – If you are currently under Software Assurance the license upgrade is no charge (some exceptions apply).
 - b. Limited Access CAL – read-only view access at a reduced license cost.
 - c. Device CAL – great for situations where several users access CRM using one computer (Manufacturing, Support, Call Center)
 9. Upgrading
 - a. Codeless – All supported configurations, customizations, workflow, etc. made to Microsoft Dynamics CRM 3.0 are forward compatible to Microsoft Dynamics CRM 4.0
 - b. Client – In-place upgrade from the Outlook 3.0 client to 4.0
 - c. Time Effort – Designed by the CRM Team so that upgrades can be done 'over a weekend'.



10. Mail Merge

- a. All Entities and Fields – Create mail merges from any entity and any field (attribute)
- b. Browser – Mail merge is available from the browser view, not just from within Outlook.

And one reason not to ☹

1. Infrastructure: To provide the best user experience and operating system environment, support for SQL 2000, Windows Professional 2000 (client) and Windows Office XP have been retired.
 - a. Outlook Client – The operating system must be Windows XP or later and Office 2003 or later.
 - b. Server – Windows Server 2003 or Small Business Server 2003 R2 and later.
 - c. Database - SQL 2005 or later.