
Project Name : Setting up Microsoft Dynamics CRM 3.0
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SCOPE:

This document provides process guidelines used to Design & Implement CRM Implementation within organization. The issues identified needs repetitive testing and through analysis before implementation in production environment. The process involves knowledge Windows Server 2003, Active Directory, Exchange & SQL Server 2005.

PROCESS REVIEW:

Customer Relationship Management (CRM) consists of the processes a company uses to track and organize its contacts with its current and prospective customers. CRM software; an important component of ERP implementation is used to support these processes; the software systems can be assessed, and information about customers and customer interactions can be entered, stored and accessed by employees in different company departments. Typical CRM goals are to improve services provided to customers, and to use customer contact information for targeted marketing.

While the term CRM generally refers to a software-based approach to handling customer relationships, most CRM software vendors stress that a successful CRM effort requires a holistic approach. A slow-growth economy and tight corporate budgets are forcing companies to shift their focus from long-term to short-term needs.

SPECIFICATIONS:

Server Configuration:

Server IP	: 192.168.1.200
Server Name	: ISTCLCRM
Processor	: P4
Hard Drive	: 60 GB
Memory	: 768 MB
Operating System	: Microsoft Windows Server 2003
CRM Version	: Microsoft Dynamics CRM 3.0

IMPLEMENTATION PLAN:

Step 1 : Installing Microsoft Dynamics CRM 3.0

- Step 2 : Configuring Microsoft Dynamics CRM 3.0
- Step 3 : Setting up CRM Website
- Step 4 : Defining CRM Components
- Step 5 : Analyze Working Process
- Step 6 : Document CRM Strategy

[Step 1: Installing Microsoft Dynamics CRM 3.0](#)

Installation:

Follow the instructions in [Microsoft CRM 3.0 Implementation Guide](#) to install Microsoft CRM Server.

Service Packs:

After successful installation of CRM, install Rollups

- <http://support.microsoft.com/kb/927751/> - Roll up 2
- <http://support.microsoft.com/kb/935364> - Roll up 3

[Step 2: Configuring Microsoft Dynamics CRM 3.0](#)

- Service Account on db ownership : TOR\Administrator
- Windows Integrated Authentication.
 - User has to be a domain user and should have access to database.
- Create Domain Group and add required users to this group
- Give group permission to all CRM and report databases.
- Only set to windows integrations.
- IIS → Websites → Microsoft CRM 3.0 → Properties → Directory Security → Authentication and Access Control → Edit → Select Integrated Windows Authentication.

[Step 3: Setting up CRM Website](#)

→ Server Redirect Script:

Please add the following in index.htm page of website:

```
<html>
<script>
    Location=http://www.hemalshah.com;
</script>
</html>
```

[Step 4: Defining CRM Components](#)

CRM is an important strategy in ERP Implementation. CRM has mainly 3 components and each component has a 3 tier approach:

1. CM: Contact Management

- Define Account
- Associate Contact with Account
- Associate Division with Contact

2. SFA: Sales Force Automation

- Define Prospect/Lead
- Lead becomes Opportunity
- Opportunity becomes Account

3. HDM: Help Desk Module

- Define Service Request
- Define New Hire
- MAC: Move/Add/Change

[Step 5: Analyze Working Process](#)

The process of fitting a CRM solution into a professional services organization provides a wonderful opportunity to evaluate processes and procedures across the firm. Working with the implementation team from the software provider, firm management should review, analyze and evaluate the firm's procedures as well as all of the data sources that will be migrated into the CRM solution. This is the perfect time to discuss and develop new procedures that will increase the firm's success.

[Step 6: Document CRM Strategy](#)

Your strategy should identify the specific business problems that need to be addressed, define objectives whose results can be measured (to demonstrate the ROI of your implementation), and outline solid insight into how CRM will impact the company, current operations, and your customers. To ensure organizational buy-off, boil down your CRM strategy into these critical points: How will CRM improve the lives of its users? How will it increase productivity? How will it impact sales? It is this strategy you then take back to the key stakeholders for final buy-off. It is this strategy that you will arm yourself with when researching and evaluating all possible CRM solutions available to you.

CONCLUSION:

CRM software is only a tool. But the implementation and use of this tool in sales is as important as good equipment in any professional endeavor. As with most efforts critical to a company's success, this tool requires total immersion from management down through all levels of the organization and a discipline that produces winning results.

REFERENCES:

- Explanation of Terms Used:
 1. Accounts: Person or business to which the salesperson tries to sell a product or service. The company billed in business transactions.
 2. Campaigns: Container for campaign activities and responses, sales literature, products, and lists to create, plan, execute, and track the results of a specific marketing campaign through its life.
 3. Contacts: Person with whom a business unit has a relationship. For example, a customer, a supplier, or a colleague.
 4. Leads: Prospect or potential sales opportunity. Leads are converted into accounts, contacts, or opportunities when they are qualified. Otherwise, they are deleted or archived.
 5. Marketing Lists: Group of existing or potential customers created for a marketing campaign or other sales purposes.
 6. Products: Information about products and their pricing information.
 7. Quick Campaigns: Container for campaign activities and responses, sales literature, products, and lists to create, plan, execute, and track the results of a specific marketing campaign through its life.
 8. Sales Literature: Storage of sales literature, which may contain one or more documents.
 9. Competitors: Tracks information about a business competing for the sale represented by a lead or opportunity.
 10. Invoices: Order that has been billed.
 11. Orders: Quote that has been accepted.
- Microsoft Support
- ISTCL Implementation Team
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