



## **RAH SOFTWARE LIMITED**

### **Microsoft Dynamics CRM – Information Guide**



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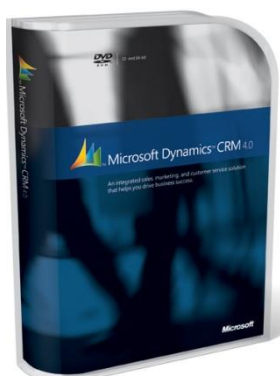
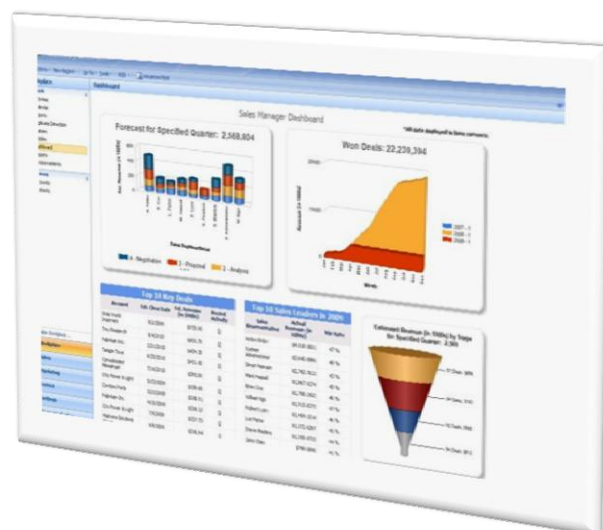
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## Microsoft Dynamics CRM Overview

**M**icrosoft Dynamics® for customer relationship management empowers your employees to boost sales, satisfaction, and service with automated CRM that's easy to use, customise, and maintain.

Microsoft Dynamics® business software offers a wide spectrum of feature-rich, affordable CRM solutions to help you meet your specific needs.

Whether you run a small, growing business or a large organization with a high number of customers and large sales and marketing teams—you can use Microsoft Dynamics to help you manage relationships even better. The Microsoft Dynamics® suite of CRM-related solutions includes:



- Microsoft Dynamics® CRM
- Microsoft Dynamics® AX for field service
- Microsoft Dynamics® AX for sales and marketing
- Microsoft Dynamics® GP for field service
- Microsoft Dynamics® NAV for sales and marketing
- Microsoft Dynamics® NAV for service management
- Microsoft Dynamics® SL for field service
- Microsoft Outlook 2003 with Business Contact Manager

The CRM solutions and capabilities within Microsoft Dynamics® connect closely to other Microsoft technologies that you may already use. This brings together data, helping your sales people to answer customer questions without making the customer wait. Marketing planners can review the true results of marketing campaigns, from customer inquiries to sales and services delivered. Managers can use business data to assess the value of customer relationships for your organization and make them more productive.

When your employees use the CRM functionalities of Microsoft Dynamics®, they work within a familiar Microsoft® software environment. This helps reduce distractions of having to learn and work with disparate software tools. For example, you can access customer and business information and manage customer communications through your e-mail program. Or you can analyse data and create reports in your spreadsheet application.

## Microsoft Dynamics® CRM Features

- Opportunity management
- Sales process management
- Quotes
- Order management
- Sales force management
- Email/Direct Marketing
- Case/Service management
- Email Response Management
- E-mail management
- Searchable knowledge base
- Marketing campaign management



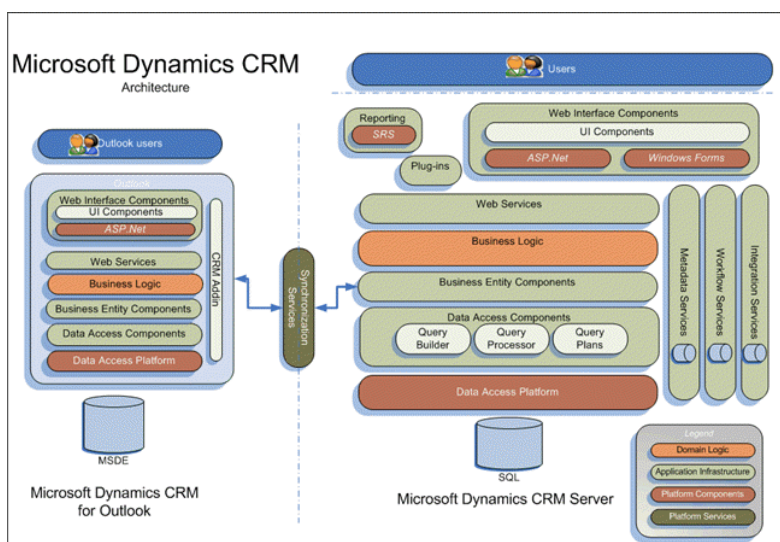
## Microsoft CRM Key Strengths

- Tight integration with the Microsoft Office® system and Office Outlook, allowing employees to easily pull information from Microsoft Dynamics® CRM into Office system applications such as Microsoft Office® Excel spreadsheet software and Microsoft Office® Word word processing software.
- Quick and easy access to your data through context-sensitive information for populating forms or taking next steps without changing screens.
- Customized workspaces that allow users to create, save, and reuse favourite views of customer data without the distraction of unneeded information.
- Great mobile support that helps enable field workers to get instant access to customer data from most popular portable devices including mobile phones with Web browsers, and laptops.

## Microsoft Dynamics CRM Architecture

The platform is the heart of the Microsoft Dynamics CRM system. When you use the Microsoft Dynamics CRM SDK, you are building on top of this system. The Microsoft Dynamics CRM platform supports smaller deployments and can scale for application service provider models also. The security mode protects the platform from unauthorized access across the Web. The main platform components are as follows:

- Microsoft SQL Server database
- Web services
- System services (workflow, metadata, and integration)
- A query processor that supports the entity model
- Secured ad hoc queries that use an XML fetch statement to protect the physical database
- Plug-ins for business logic extensibility
- Reporting services



When you develop an application that uses the Microsoft Dynamics CRM server, you use Web services to communicate with the underlying platform layer.

The server platform is responsible for creating domain-specific objects. In Microsoft Dynamics CRM, these objects include contact, lead, opportunity, account, business unit, and more. The goal of the

platform is to implement the service-specific rules by manipulating and combining the underlying domain objects.

The platform does not impose business-specific logic. This layer imposes only generic domain constraints. It contains the building blocks for an application, but by itself is nothing more than a collection of related objects. However, the interaction between those objects within the domain can be assumed to implement more extensible logic such as the quote-to-order-to-invoice processing and pricing logic.

The server platform also controls access to objects through security, controls access to the database, and raises events for workflow processes and custom business logic implementations. The platform layer provides for both incoming and outgoing e-mail processing through Microsoft Exchange.

## Interested to know more?

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If you would like more information about Microsoft Dynamics CRM, then why not contact RAH Software today?

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