Quick Start guide to

Microsoft® Business Solutions CRM 1.2

on a Microsoft Windows®
Small Business Server 2003
Premium Edition

Microsoft | Partner Program

Welcome!

There are many resources available to help you install Microsoft CRM on your Microsoft Windows Small Business Server 2003 installation. If you have experience with setting up Windows Small Business Server 2003, this Quick Start Guide provides a path for getting started so that you can quickly move on to exploring Microsoft CRM.

For more information about planning your Small Business Server installation, configuring Microsoft CRM for your organization, or additional details about steps in this guide, see the following resources:

- *Microsoft Business Solutions CRM Implementation Guide* and Readme.htm file, available on the Microsoft CRM Documentation CD
- An updated Chapter 15 "Installing Microsoft CRM Server on Microsoft Windows Small Business Server 2003 " for the *Implementation Guide*, available from http://www.microsoft.com/downloads (From the **Product/Technology** list, click **Microsoft CRM**, and in the **Keywords** box, type **Implementation**.)
- *Installing and Securing Microsoft CRM 1.2 on a Windows Small Business Server 2003 Network*, available from http://www.microsoft.com/downloads (From the **Product/Technology** list, click **Windows Small Business Server**, and in the **Keywords** box, type **CRM**.)
- Microsoft Knowledge Base Article 870636, *Exposing Microsoft CRM to the Internet on Microsoft Windows Small Business Server 2003, Using ISA Server 2000*, available at http://support.microsoft.com/default.aspx?kbid=870636
- Microsoft CRM on Small Business Center: http://www.microsoft.com/smallbusiness/products/mbs/crm/detail.mspx
- Support: http://support.microsoft.com/mbscrm
- Microsoft Windows Small Business Server 2003: http://www.microsoft.com/windowsserver2003/sbs/default.m spx.

Microsoft CRM Editions

Microsoft CRM comes in several editions. When this guide refers to a task that can be completed only in certain editions, you will see one of the symbols in the following table:

PRO	Task can be completed only in **Professional editions** (Sales Professional, Service Professional, or Suite Professional).
SALES	Task can be completed only in **Sales editions** (Sales Standard, Sales Professional, Suite Standard, and Suite Professional).
SERVICE	Task can be completed only in **Service editions** (Service Standard, Service Professional, Suite Standard, and Suite Professional).

For more information about what is included in each edition, see http://www.microsoft.com/BusinessSolutions/crm/crm_edition_comparison.aspx.

Complete these steps,
and in **less than three hours,** you'll be
ready to explore Microsoft CRM

On the Windows Small Business Server

1	Verify Windows Small Business Server Installation	10 min
2	Choose Installation & Get License Key	5 min
3	Install Microsoft CRM Prerequisites	15 min
4	Create Web Site for Microsoft CRM	10 min
5	Install Microsoft CRM	30 min
6	Prepare Microsoft CRM for use	15 min
7	Install Microsoft CRM-Exchange E-mail Router	15 min

On the Client Computer

8	Set Up Client Computers	10-60 min

9 Explore Microsoft CRM

1.

10 minutes

Verify That Windows Small Business Server Installation Meets Microsoft CRM Requirements

This section assumes you already have your Windows Small Business Server 2003 Premium Edition set up. If this is not the case, see the resources listed in the "Welcome" section at the beginning of this guide.

The following table shows the hardware recommendations for running Microsoft CRM:

Processor	Dual 1.8-gigahertz (GHz) Intel Pentium 4 Xeon or comparable processor
Memory	1 gigabyte (GB) of RAM minimum, 2 GB or more recommended
Hard Disk	72 GB or larger Hard disk configuration matches backup requirements
Firewall	An external firewall, or if using the built-in firewall, two network cards

Tips:

- Ensure that your server has the option to add RAM. Adding RAM is an easy and inexpensive way to boost performance as usage expands.
- Consult early with your IT Partner for backup options, as some backup options require additional disk partitions or disk arrays.

Verify Windows Small Business Server Configuration

- Microsoft SQL Server™ 2000 installed:
    - Using Windows authentication
    - Installed as the default instance of SQL Server
    - With Service Pack 3a installed
    - With SQL Server Agent and SQL Server services set to Auto-start, and running
    - With a backup plan that will include the three databases created by Microsoft CRM: *Organization*_**MSCRM**, *Organization*_**METABASE**, and *Organization*_**CRMCRYSTAL**.
    - For security, the sample databases shipped with SQL Server deleted (optional)
- Microsoft Exchange Server 2003 installed and used as the e-mail server
- Internet Information Services (IIS) installed, and services running

2. 5 minutes

Choose Installation and Get License Key

You can either set up a demonstration installation that uses Microsoft CRM with sample Adventure Works Cycle users and data, or you can set up production installation that works with your own users and data. You cannot have both a demonstration and a production installation on the same server.

Whenever a step in this guide is different between a demonstration installation and a production installation, you will see the following symbols. If not noted, the step needs to be done for both.

	Adventure Works Cycle demonstration installation. The demonstration installation requires six Active Directory accounts. Only install this if you have enough Windows Small Business Server licenses. If you install a demonstration installation, when you are ready to use Microsoft CRM for your own data, follow the steps in the Appendix to this guide, "Switch from Demonstration Installation to Production Installation."
	Production installation.

Get License Key

In order to install Microsoft CRM, you need a license key. Each key is tied to a specific organization name.

	For a demonstration installation, you must use Adventure Works Cycle as the organization name, and 8QULY9UJ3165WMT5PEFZK as the license key.
	For a production installation, you must get a license key from http://www.microsoft.com/BusinessSolutions/MBSRegistration. The organization name you use when you request a license key will be required during Microsoft CRM setup.

3.

15 minutes

Install Microsoft CRM Prerequisites

Install Message Queuing and Indexing Service

1. Log on as a domain administrator.
2. On the **Start** menu, click **Control Panel**, click **Add or Remove Programs**, and then click **Add/ Remove Windows Components**.
3. Select **Application Server**, and then click **Details**.
4. In the **Application Server** dialog box, select **Message Queuing**, and then click **Details**.
5. In the **Message Queuing** dialog box, clear the **Active Directory Integration** check box, and then click **OK**.
6. In the **Application Server** dialog box, click **OK** to close the dialog box. From the **Components** list, select the **Indexing Service** check box, click **Next**, and then click **Finish**.
7. Close the **Add/Remove Windows Components** dialog box.

Create Organizational Unit in Active Directory (optional)

Tip: Creating an organizational unit (OU) for the Microsoft CRM installation helps keep your Active Directory organized.

- Open **Active Directory Users and Computers**, right-click your domain, click **New**, and then click **Organizational Unit**. In the **Name** box, type a name for your OU. For example, *Microsoft CRM OU*.

4. 10 minutes

Create a New Web Site for Microsoft CRM

1. Log on as a domain administrator.

Tip: Create a new account to use for installing Microsoft CRM, for example *CRMADMIN*. This account must be a member of the Domain Admins group. A Microsoft CRM license is not required for this account.

2. On the **Start** menu, point to **All Programs**, click **Administrative Tools**, and then click **Server Management**.
3. Expand **Advanced Management**, expand **Internet Information Services**, and then expand the server.
4. Right-click **Web Sites**, point to **New**, and then click **Web Site**.
5. Complete the wizard, using a description such as *Microsoft CRM version 1.2*.
   a. On the **IP Address and Port Settings** page, select the IP address of the internal (local) network adapter. This value should appear in the list.

      To distinguish between the default Web site and the Microsoft CRM Web site, in the **Host header for this web site** box, specify a host-header alias name, such as *MSCRM*, and then click **Next**.
   b. On the **Web Site Home Directory** page, click **Make New Folder**, and then click **Next**.

      Use a descriptive folder name, such as *Microsoft CRM Web*.
   c. On the **Web Site Access Permissions** page, click **OK** to accept the default (**Read** and **Run Scripts)**, click **Next**, and then click **Finish**.
6. In Windows Explorer, right-click the folder you created for the Microsoft CRM Web site. On the **Security** tab, click **Add**.
7. In the **Enter the object name to select** box, type **Domain Users**, and then click **OK**.
8. In the **Server Management** window, under **Advanced Management**, double-click **Computer Management**, double-click **Services and Applications**, double-click **DNS**, double-click the Windows Small Business Server computer, double-click **Forward Lookup Zones**, and then click the domain name for the Windows Small Business Server network. (Ignore the forward lookup zone beginning with _msdcs.)
9. Right-click the primary forward lookup zone for the domain, and then click **New Alias (CNAME)**.
10. In the **New Resource Record** dialog box, in the **Alias name** box, type the host header alias you created in step 4, *MSCRM*. In the **Fully qualified domain name (FQDN) for target host** box, type the DNS name of the computer running Windows Small Business Server, for example, *SBSSRV.example.office.com*, and then click **OK**.
11. To verify that DNS is set up properly, at the command prompt, type the following: **ping** *MSCRM*, where *MSCRM* is the host-header alias name you used for the Web site. If DNS is set up correctly, you should see replies. If you receive a message that ping could not find *MSCRM*, go back through the previous steps in this process to search for any discrepancies.
12. To verify that the empty Web site is properly set up, create a default.htm page that has one word on it, and put this page in the folder you set up in step 5. Browse to **http://***MSCRM***/default.htm**. If the Web site is configured correctly, you should see this new page. Once you have verified this, delete your test page.

5. 30 minutes

Install Microsoft CRM

Run Microsoft CRM Setup

1. Log on as a domain administrator.
2. Insert the Microsoft CRM Server CD, and then click **Install Microsoft CRM Server**.
3. On the Set Up Licenses page:

   For a production installation, type your license number and the organization name you used when you requested the license.

   For a demonstration installation, type the organization name **Adventure Works Cycle**, type the license number **8QULY9UJ3165WMT5PEFZK**, and then click **Add**.

   Important: If you install a demonstration installation, when you are ready to use Microsoft CRM for your own data, follow the steps in the Appendix to this guide, "Switch from Demonstration Installation to Production Installation."
4. Click **Next**. If prompted, select **Install Components,** and then click **Next** to install required components.
5. On the **Select SQL Server** page, from the **Server** list, click the computer running Windows Small Business Server. Make sure that **Create New Databases** is selected, and then click **Next**.
6. On the **Set Up Organization** page, if you want the organizational unit for Microsoft CRM set up at the top level of Active Directory, click **Next**. If you have set up an organizational unit that you want Microsoft CRM installed under, select the location, and then click **Next**.
7. On the **Select Installation Locations** page, in the **Web site** box, select *Microsoft CRM version 1.2*, the name you set up for your Microsoft CRM Web site. For **Installation directory**, use your default location for applications.
8. On the **Specify Security Account** page, click **Next**.
9. After completing Setup, restart the computer.

Verify Microsoft CRM Installation

1. Verify that the **Microsoft CRM Security Service** has started. In **Administrative Tools**, click **Services**. Verify that the **Status** column for Microsoft CRM Security Service shows that the service is **Started**. If not, right-click the service, and then click **Start**. Close the **Services** window, and then close Internet Explorer.
2. Use Internet Explorer on the server, and browse to **http://***MSCRM*. Microsoft CRM should open. This will be a limited view of Microsoft CRM that does not include the **Sales** or **Service** areas, as no license is yet assigned.
3. Click **Reports**, click **Admin Reports**, click **User Reports**, and then double-click **User List**.

   The report should run, and you should see a list with one user. Close the report, and close the browser.
4. On the **Start** menu, point to **All Programs**, point to **Microsoft CRM**, and then click **Deployment Manager**.

   If the installation is correct, Deployment Manager should open. Close Deployment Manager.

5.

Set Up Temporary License for Installer

After Setup, Microsoft CRM will have one user, the person who installed Microsoft CRM. By default, no license is assigned. Without an assigned license, you can add users and configure Microsoft CRM, but you cannot view or use the **Sales** and **Service** areas.

In order to complete the installation steps in this guide, and fully explore Microsoft CRM, you need to have a Microsoft CRM license assigned to your user in Microsoft CRM. This license can be removed once you are done installing, so that the installer does not waste a Microsoft CRM license.

Tip: When you are done installing and testing the installation, set up another user account with the Microsoft CRM System Administrator security role and a Microsoft CRM license. This account does not need to be in the Administrator or Domain Admin groups. Remove the license from the installing user.

Add or Remove a License

1. Use Internet Explorer to go to **http://***MSCRM*. Depending on the browser settings, you may be prompted to log on to the site.
2. On the **Home** page, click **Settings**, click **Business Unit Settings**, and then click **Users**.
3. Double-click the only user. Type a value for **First Name**, **Last Name**, and **Primary E-mail** address. Use your e-mail address so you can use this account for verifying installation.
4. Select a license:

   Click **Licenses**, click **Manage Licenses**, and then select the **Microsoft CRM Suite Professional** license in the left column.

   Click **Licenses**, click **Manage Licenses**, and then select a license in the left column.
5. To add a license, click the arrow to move the selected license to the right column. To remove a license, click the arrow to move it to the left column.

Install Recommended Microsoft CRM Server Updates

To find each of the following updates, go to *Microsoft Business Solutions version 1.2 published updates and hotfixes*, available at http://support.microsoft.com/default.aspx?kbid=838986. This page contains links to the following recommended updates:

834791	Adding, Deleting and Renaming Microsoft CRM Reports Using Microsoft CRM 1.2 Report Manager
840934	Microsoft Business Solutions CRM version 1.2 update for 839153, 839159, and 839162

Change the Crystal Reports Administrator Password

Warning: Because this password is initially blank, failure to change the password will result in a security risk.

1. In Windows Explorer, go to the C:\Program Files\Microsoft CRM\Tools folder.
2. Double-click **Microsoft.Crm.Tools.CrystalAdmin.exe**.
3. In the **Microsoft CRM Web Site URL** box, type **http://***MSCRM*, where *MSCRM* is the host-header alias name you created for the Web site.
4. Leave the **Old Password** box blank, and then type a new password. Be sure to store this password in a safe location, as you will need to call Microsoft CRM support if you have forgotten this password.

6. 15 minutes

Prepare Microsoft CRM for Use

The steps to prepare Microsoft CRM for use are different for each type of installation. For the Adventure Works demonstration installation, follow the steps in "Prepare Adventure Works Cycle Demonstration Installation for Use." For a production installation, follow the steps in "Add Your Own Microsoft CRM Users."

Prepare Adventure Works Cycle Demonstration Installation for Use

1. Open **Active Directory Users and Computers**, expand the domain, and then expand **Users**. On the **Action** menu, point to **New**, and then click **User**. Use fictitious names, such as Test User1 and Test User2, so that you can easily remove these users from Active Directory when you are through using the demonstration installation.
2. Backup the Microsoft CRM databases in case a problem occurs during the import of the demonstration data.
   a. In Enterprise Manager, expand **Microsoft SQL Servers**, expand **SQL Server Group**, expand the server name, and then expand **Databases**.
   b. For both **Adventure_Works_Cycle_MSCRM** and **Adventure_Works_Cycle_Metabase**, right-click the database, point to **All Tasks**, and then click **Backup Database**. Specify the destination, and then click **OK**.
3. On the Microsoft CRM Server CD, navigate to the **SampleData** folder, and then double-click **Microsoft.Crm.SampleDataWizard.exe**.
4. Specify the **Microsoft CRM server URL** as **http://***MSCRM*.
5. On the **Select Users** page, select the five new users.
6. Log off, and log on again as one of the five users to see the data for that user.

OR

Add Your Own Microsoft CRM Users

This procedure assumes you already have users set up in Active Directory and Microsoft Exchange.

1. Starting with an organization chart, decide which Microsoft CRM roles are appropriate for each user. For information about roles, see Appendix B, "Security Role Tables," in the *Microsoft CRM Implementation Guide*.
2. On the **Start** menu, point to **All Programs**, point to **Microsoft CRM**, and then click **Deployment Manager**.
3. Expand **User Manager**, and then expand your organization name from the list.
4. On the **Action** menu, point to **New**, and then click **Create CRM Users**. Use the **User Manager Wizard** to add users with Microsoft CRM roles.

Tip: You can also add users from within Microsoft CRM: click **Settings**, click **Business Unit Settings**, and then click **Users**.

7.

15 minutes

Install Microsoft CRM-Exchange E-Mail Router

If your organization uses Microsoft Exchange Server 2003 as the e-mail server for the organization, you can use the Microsoft CRM-Exchange E-Mail Router (the Router) to transfer e-mail from Microsoft Exchange Server to the Microsoft CRM system. Incoming and outgoing e-mail messages can then be tracked as activities within Microsoft CRM.

Important: Internet access is required to complete the following procedures.

Install the Router

1. On the Microsoft CRM Server CD, double-click **Splash.exe**, and then click **Install Microsoft CRM-Exchange E-Mail Router**.
2. On the **Specify Microsoft Business Solutions CRM Server** page, click **Configure**, and then click **Add**.
3. On the **Add Server** page, type the DNS name of the computer running Windows Small Business Server, type the URL for the Web site, for example **http://***MSCRM*, and then click **Next**.
4. On the **Specify Security Account** page, type the user name (in the provided format example) and the password of the service account you created for Microsoft CRM. **Important**: The user name must be in the format *Domain/username*. Click **Next**.
5. On the **Select Installation Locations** page, from the **Web site** list, click the *Microsoft CRM version 1.2* Web site, and then complete the setup wizard.

Verify Outgoing E-Mail

1. Go to **http://***MSCRM*, and log on as the system administrator.
2. On the Home page, under **Create a Record**, click **Contact**, and then set up a new contact with an external e-mail address to which you have access, such as your personal e-mail address.
3. In the **Contact** record, click **Send E-mail**, type the test subject text, and then click **Send**. The Router sends out the e-mail, and the system saves the e-mail as an activity record that you can view in **Activities**.
4. Verify that the e-mail arrived at the external address.

Verify Incoming E-Mail

1. From the external e-mail account, reply back to the test e-mail sent from Microsoft CRM.
2. Go to **http://***MSCRM*, and on the **Go To** menu, click **Sales,** and then click **Contacts**.
3. Double-click the contact you created, and then click **Activities**. You should see the e-mail message in the **Activity History** list. The e-mail message will also appear in your e-mail queue. To view it, click **Workplace**, click **My Work**, and then click **Assigned**.

8.

10–60 minutes

Set Up Client Computers

Client computers access Microsoft CRM in one of two ways:

- **Internet Explorer.** To open Microsoft CRM, any client computer with network access to the Windows Small Business Server can go to **http://***MSCRM*. No software needs to be installed on the client computer. All data is stored on the server.
- SALES **Microsoft CRM Sales for Outlook (the Outlook client).** Once installed, the user opens Microsoft Outlook® to view Microsoft CRM data. Data is stored on the client computer so that it is available when the user is offline. The data is synchronized when the user connects to the network.

  The Outlook client should not be installed on the Windows Small Business Server. It can only be installed once on a computer, and can only be associated with one Outlook profile on the computer. It can only be used from the client computer, and cannot be used if you remotely connect to the client computer.

  This step will take between 10 and 60 minutes, depending on the number of client setups and whether you are installing the Outlook Client.

If Needed, Set Up Pre-Windows 2000 Compatible Access Group

If you have any client computers on the Windows Small Business Server network that are running Windows operating systems earlier than Microsoft Windows 2000, you need to set up the Pre-Windows 2000 Compatible Access group.

1. Open **Active Directory Users and Computers**, expand your domain, and then click **Builtin**.
2. Double-click **Pre-Windows 2000 Compatible Access**, click the **Members** tab, and then click **Add**.
3. Click **Object Types**, select **Computers**, and then click **OK**.
4. Type the name of the service accounts you created for Microsoft SQL Server and Microsoft CRM.

Verify Users Can Access Microsoft CRM from Client Computers

On a client computer, browse to **http://***MSCRM*, and log on as one of the following users:

If you are using the sample database, log on as a test user.

If you are using your own data, log on as a user that does not have the Microsoft CRM System Administrator security role.

SALES Verify Client Computers Meet Outlook Client Requirements

For each client computer on which you want to install the Outlook Client, make sure the computer and software meet the following requirements:

Processor	Intel Pentium 300-megahertz (MHz) or higher processor, Pentium III 1-gigahertz (GHz) processor recommended.
Memory	256 megabytes (MB) of RAM, 384 MB or more recommended.
Operating System	Windows 2000 Professional, including Service Pack 3, or Windows XP Professional, including Service Pack 2. Do not install on Windows Small Business Server, Windows 95, Windows 98, Windows ME, or Microsoft Windows NT® 4.0.
Microsoft Office	Microsoft Office Professional Edition 2003, or Microsoft Office Professional Edition XP with Service Pack 2, or Microsoft Office 2000, including Service Release 1, Service Pack 3, and Post-Service Pack 3 Hotfix 228512.
Other Software	Internet Explorer 6.01 or later. Indexing Service installed and running, and set to start automatically. Microsoft Outlook, started at least once, with a valid e-mail account configured.
Network Access	LAN or high-speed VPN access is required to install the Outlook client and for first synchronization. To verify network access to the Windows Small Business Server computer, in a command prompt on the client computer, type: **NSLookup** <*Small_Business_Server_computer_name*>.

8.

SALES Install Outlook Client

Important: You must log on as the user for whom you are installing the Outlook client. This user account must be in the Administrator group for the client computer, and must be set up in Microsoft CRM as a user.

1. Verify that the computer is online and that you can connect to the Microsoft CRM Server by browsing to **http://***MSCRM*. After verifying this, close the browser.
2. Insert the Microsoft CRM Sales for Outlook CD, click **Install Microsoft CRM Sales for Outlook**, select **Install all required components,** and then complete the wizard.
3. Restart the client computer. .
4. If the client computer runs Windows XP Professional with Service Pack 2, install the following Microsoft CRM update on the client computer:
   http://support.microsoft.com/default.aspx?kbid=870635.
5. To configure offline use of the Outlook client, in **Control Panel**, double-click **Administrative Tools**, click **Local Security Policy**, expand **Local Policies**, and then select **Security Options**. In Windows 2000, set the value in **Number of previous logons** to a value greater than zero (0). In Windows XP, set the value in **Interactive Logon: Number of previous logons to cache** to a value greater than zero (0).

SALES Verify Outlook Client Installation

1. Log on as the user and open Outlook. You should see the Microsoft CRM toolbar. In the **All Mail Folders** list, click **Microsoft CRM** and the Home page should display. .
2. Select an e-mail message, and then click **Promote to CRM Activity**. A Microsoft CRM e-mail activity appears.
3. Click **Go Offline**, located next to **Promote to CRM Activity**, and then click **OK**.
4. Click **Go Online** to verify that you can go online.

Notes:

- The first offline session takes longer than successive sessions.
- While offline, some features, such as reports and workflow, are unavailable.
- The Outlook client does not support customer service features.

SALES If Needed, Uninstall the Outlook Client

1. Log on as the user who installed the Outlook client, and reconnect to your network to synchronize data.
2. In **Add or Remove Programs**, select **Microsoft CRM Sales for Outlook**, and then click **Remove**.
3. Select **Microsoft SQL Server Desktop Engine (CRM),** and then click **Remove**.
4. Delete the **Microsoft CRM** folder located at C:\Program Files\Microsoft CRM, and the database folder and files located at C:\Program Files\Microsoft SQL Server\MSSQL$CRM.
5. Search for an **MSCRM.pst** file on the drive where the Outlook client was installed, and if it exists, delete it.

9.

Explore Microsoft CRM

Now that you have Microsoft CRM successfully installed, it is time to explore:

- Follow the suggestions on these pages to explore Microsoft CRM from various points of view.
- For tips, FAQs, chats, and more, visit Microsoft CRM Online at http://www.microsoft.com/smallbusiness/community/crm.mspx.

From a Microsoft CRM System Administrator's View

1. Start Microsoft CRM by going to **http://***MSCRM*.
2. Log on as a user with the System Administrator security role in Microsoft CRM.
3. On the **Help** menu, click **User's Guide**, and learn about the features of Microsoft CRM.
4. Explore how to customize Microsoft CRM to match your business terminology and your user's needs. On the **Home** page, click **Settings**, click **System Customization**, click **Contact**, and then click **Customize Form**. Try changing a label or removing a field that your users do not need. While you are in the **Settings** area, explore the ways Microsoft CRM can be customized for your business.

PRO

5. Explore how you can automate steps in your sales and service processes.
   a. On the **Start** menu, point to **All Programs**, point to **Microsoft CRM**, click **Workflow Manager**, and then enter *MSCRM*, the host header name you used.

   SALES

   b. Select the **Opportunity** object.
   c. On the **File** menu, click **New**, and then enter a name and description for a new workflow rule to send an e-mail message when an opportunity is entered for more than $1,000. Leave the event set to **Create**, and then click **Next**.
   d. Click **Insert Condition**, and then click **Check Condition**. Select the **If** clause, click **Insert Condition**, and then click **Check Object Condition**. Select the **estimated value** field, select **>=**, type **1000**, then and click **OK**.
   e. Select the **Then** clause, click **Insert Action**, and then click **send e-mail**. Look up a recipient, pick a template, or type the text of the message, type a subject, and then click **OK**.
   f. Click **Save**. Right-click the rule, click **Activate**, and then close Workflow Manager.
   g. In Microsoft CRM, on the **Go To** menu, point to **Sales**, and then click **Opportunities**.
   h. Click **New Opportunities**, and then create an opportunity with Estimated Value greater than $1,000.
   i. When you save this opportunity, the e-mail message will automatically be sent.

From a Sales User's View

1. Start Microsoft CRM by going to **http://***MSCRM*.
2. Log on as a user with a Salesperson or Sales Manager security role in Microsoft CRM.
3. On the **Go To** menu, click **Sales**, and then click **Contacts**. If you are using the sample database, select **Active Contacts** in the **View** list.
4. If you are using your organization's data, click **New Contact**, and then add a contact.
5. If you have Outlook installed on the same computer, on the **Tools** menu, click **Import**, click **Contacts**, and then import a few contacts from your Outlook Contacts list.

6. Open a contact, click **Activities**, and then click **New Activity**. Schedule an appointment with a contact for later today. Click **Home** to view the activity.
7. Click **Reports**, click **Sales Reports**, click **Contact Reports,** and then double-click **Contact Activities and Notes**.
8. SALES Send e-mail to a group of leads, including importing a comma-delimited (.csv) list, creating an e-mail message, and specifying which leads to whom you want to send the message.
   a. On the **Tools** menu, click **Import**, click **Leads**, and then complete the wizard.
   b. On the Home page, click **Settings**, click **Template Manager**, click **E-Mail Templates**, and then click **New E-Mail Template**. From the **Template Type** list, select **Lead**. Type the subject and text for the e-mail message and the title to appear in the **Activity History** list, and then click **Save**.
   c. On the **Tools** menu, click **Advanced Find**. In the **Find in** list, click **Leads**. Specify a field and condition, such as **City Contains** *city*, and then click **Go**.
   d. On the **Actions** menu, click **Send Direct E-mail**. Select the template you created, and then click **Send**. The individual e-mails are shown on the **Activity History** tab for each lead.

SERVICE From a Customer Service Representative's View

1. Start Microsoft CRM by going to **http://***MSCRM*.
2. Log on as a user with a Customer Service Representative or CSR Manager security role.
3. On the **Go To** menu, click **Service**, and then click **Cases**. If you are using the sample database, in the **View** list, select **Active Cases**.
4. Click **New Case** to add a case.
5. Save your new case, and click the **Close** button.
6. Click to select the case, and then on the **Actions** menu, click **Assign**. Assign the case to another user.
7. Click **Reports**, click **Service Reports,** and then run a few reports.

Before Using Microsoft CRM, Do Required Configuration

Before using Microsoft CRM for real data in your organization, you will need to enter data in several areas to configure Microsoft CRM to match your organization. To enter this data, on the Home page, click **Settings**. For information about each setting, see Microsoft CRM online Help.

- **Organization:** Define business units and roles, enter users, and modify system settings, such as your fiscal year settings.
- SALES **Sales:** Define territories, quotas, product catalog, sales literature items, and e-mail message templates.
- SERVICE **Service:** Define subject hierarchy, queues, contracts, and knowledge base (KB) article templates.

You may also want to import existing business data, or set up workflow rules.

- SALES **Existing contacts and leads:** If you have existing contact and lead data that you want to import to Microsoft CRM, you can add contacts and leads using the **Import** command on the **Tools** menu.
- **Other existing data:** To import data from an existing database into Microsoft CRM, use the Microsoft CRM Data Migration Framework, available on PartnerSource and CustomerSource, or use third-party migration tools (http://www.microsoft.com/BusinessSolutions/crm/crm_isv.aspx).
- PRO **Business processes:** Set up workflow rules to match your business processes.

Switch from Demonstration Installation to Production Installation

1. In **Add or Remove Programs**, select **Microsoft CRM**, and then click **Remove**.
2. Delete all files from C:\Program Files\Microsoft CRM.
3. In **Active Directory Users and Computers**, delete the **Adventure Works Cycle** node.
4. In the **Users** node, delete the test users. Close Active Directory Users and Computers.
5. In Enterprise Manager, expand **Microsoft SQL Servers**, and then expand **SQL Server Group**.
6. Right-click **Local (Windows NT)** and then click **Delete SQL Server Registration**. Click **Yes**.
7. Right-click **SQL Server Group** and then click **New SQL Server Registration**. Click **Next**.
8. On the **Select a SQL Server** page, select the SQL Server name, click **Add**, and then click **Next**.
9. On the **Select Authentication Mode** page, select **The Windows Account information I use to log on to my computer**. Click **Next**.
10. On the **Select SQL Server Group** page, click **Add the SQL Server(s) to an existing SQL Server group**, click **Next**, click **Finish**, and then click **Close**.
11. Expand **SQL Server Group** and expand your server name.
12. ***Caution:*** Perform the following steps only if there are no other databases other than the Adventure Works Cycle Microsoft CRM databases on this SQL Server instance that are enabled for replication:
    a. Right-click **Replication**, select **Disable Publishing**, and then click **Next**.
    b. Select **Yes**, disable publishing on <*SQLServer*>, and then click **Next**, click **Next** again, click **Finish**, and then click **OK**.

    If there are other databases that are enabled for replication:
    a. Expand **Replication**, and then expand **Publications**
    b. In the **Details** pane, right-click the following two publications, and then click **Delete**:
    CRMMetaPub_Adventure_Works_Cycle_Metabase:Adventure_Works_Cycle_Metabase
    CRMPub-Adventure Works Cycle_MSCRM:Adventure Works Cycle_MSCRM
    c. Open SQL Query Analyzer for this SQL Server instance and type the following commands:
    exec sp_dboption Adventure_Works_Cycle_MSCRM, 'merge publish', false
    exec sp_dboption Adventure_Works_Cycle_Metabase, 'merge publish', false
    d. Close SQL Query Analyzer.
13. Expand **Databases**. For each of the following databases, right-click the database, select **Delete**, and then click **Yes**:
    Adventure_Works_Cycle_MSCRM
    Adventure_Works_Cycle _METABASE
    Adventure_Works_Cycle _CRMCRYSTAL
14. Delete the .mdf and .ldf files corresponding to the three databases from C:\Program Files\Microsoft SQL Server\MSSQL\Data.
    Caution: Do not delete all .mdf and .ldf files from this folder, as it will disable Microsoft SQL Server.
15. In SQL Server Enterprise Manager, expand **Security**, and then expand **Logins**.
16. Right-click **SQLAccessGroup**, click **Delete**, and then click **Yes**.
17. Right-click **SQLRepl**, click **Delete**, and then click **Yes**. Close Enterprise Manager.
18. Follow the steps "Run Microsoft CRM Setup" found in section 5 of this guide to install Microsoft CRM for a production installation.

This guide incorporates the experience and knowledge gained from successful Microsoft CRM installations on Microsoft Windows Small Business Server 2003. It has been test-driven by the following Microsoft Certified Partners:

- Frank Lee, President of Workopia, Inc.
- Guy Riddle, Managing Director of Snapdragon Consulting Pty Ltd.
- Wayne Small, Small Business Server MVP, and Technical Director of Correct Solutions Pty Ltd.
- Jeff Loucks, Small Business Server MVP, and Senior Solution Architect for Available Technology
- Scott Colson, Microsoft CRM MVP, and Vice President of Autonomix, Inc.