CRMUG® Magazine

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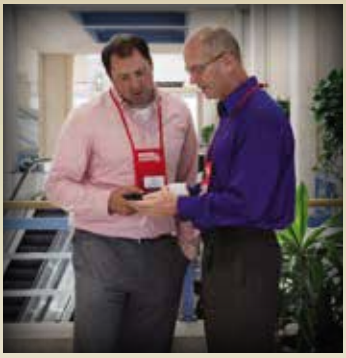

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CUSTOMIZING YOUR DASHBOARD

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letter

FROM THE CRMUG DIRECTOR

Driving Results with Mobile CRM

Tony Stein

At a former company, I once traveled with our team's number one salesperson. He was the ultimate road warrior as he alone drove more than 50 percent of the company's revenues. Amazing…even more so considering he once gave a yearly sales plan to management by simply walking up to a dry-erase board and drawing the diagram below, all while his lesser-selling peers struggled with SWOT analysis and "area" plans embedded in anxiety-filled PowerPoints.

It was a remarkable two-day trip with this warrior. His jovial yet direct sales approach – with obvious limited planning – was oddly impressive. Most importantly, it yielded results. I really didn't understand how, especially considering those days were a blur lost in 36 holes of golf, liquid courage-fueled conversations, and a late-night McDonald's run. This was merely his version in the art of selling. Amazingly or not, contracts found a way to come home, and despite this so-called play and/or work behavior, he flat out drove results. The real challenge was the downstream effect for the installation team, account managers, and the like who had to figure out details of these contracts with limited insight or knowledge, because we all know the last thing on this warrior's mind when lining up a birdie putt on the Par 5, 15th was whether or not he's updating his CRM forecast or notes accordingly.

I sincerely believe that this behavior wasn't that he's a non-coachable maverick or unwilling to input the forecast and use CRM accordingly. There are a whole host of reasons from the top down that support this behavior, but very simply put, he didn't do it because it's too cumbersome, the device and technology slow him down, it wasn't a priority (to him), and it wasn't required (of him) to do it. But what if executives and management really supported this warrior and the rest of the staff with the insight, tools, and capabilities to drive cross-team collaboration on the accounts he was selling to? What if this warrior could seamlessly use his tablet device or smartphone to very quickly update his notes and change his forecasts on the fly to keep others in the know?

The mobile worker has been a part of our lives seemingly forever and we finally are at a point in this digital age where we can truly help them help us. Mobile CRM is such an intriguing topic for this edition of the CRMUG® Magazine because it addresses the very people who influence our bottom lines the most, and mobile software now exists and influences us around adoption, enablement, and technology. So let's dive into mobile CRM and some of the details that surround its capabilities, challenges, and action so that instead of fighting or arguing with our mobile workers, we actually embrace them with good intent and better cross-group results for all.

I hope you all have a wonderful winter season, and I look forward to seeing you at Convergence 2014 in Atlanta.

Cheers,

Tony Stein
CRMUG Director

MIX
From responsible sources
FSC® C001560

members

WELCOME TO OUR NEW MEMBERS

Welcome to the new Members who have invested in CRMUG® Premium membership and Partner membership this year! Each new Member adds value not only to their own organization, but also to the entire CRMUG community as they share their knowledge and experiences. Please note that these organizations have given CRMUG permission to share their name publicly.

Premium Members Added Last Quarter

AAHOA
Bemis Associates Inc
CABLELABS
Celartem, Inc. dba Extensis
CIGNA
Evolution1
Florida Virtual Campus
Greene's Energy Group, LLC
Ingram Micro
ISK Industries
Johnson Bank
KaTom Restaurant Supply
Landmark
Metrohm USA
NewGround
North Dakota State University
Ohio Gratings, Inc.
Red Lion Controls
Rockwater Energy Solutions
Signature Flight Support
Stralfors
TECSYS INC.
Teracom Group
Thermon Manufacturing
Transitions Optical
University of Calgary
Woods Equipment Company

Premium Partner Members Added Last Quarter

Corporate Renaissance Group (Trend Miner)
DLD Business Solutions, Inc.
InGenius
Quosal
Solver, Inc.

evolution1®

Evolution 1

This quarter we're featuring Evolution1®, sharing a little about who they are and what they do.

Evolution1 simplifies the business of healthcare through innovative healthcare software and payment solutions that administer and manage consumer directed accounts. Together with its network of 500 Partner organizations, the company serves 80,000 employer groups and 9,500,000 consumers across the country.

"We are extremely happy to be a new Member of the flourishing CRMUG community! We recently migrated our CRM data from SalesForce.com to Microsoft Dynamics CRM, and we are looking for new and creative ways to scale our Microsoft Dynamics CRM system to meet the needs of our rapidly growing company," says Mitch Franks, business desk program manager at Evolution1. "Although we are a new Member, we have already found great value with our CRMUG membership."

Mitch shares that Evolution1 thoroughly enjoyed attending its first CRMUG Summit this past October and found great value in the event. He adds that Evolution1 really looks forward to becoming more active in the CRMUG communities, blogs, and regional events. Welcome to CRMUG, Mitch and Evolution1!

If you, too, want to explore the benefits of CRMUG Premium membership and take advantage of membership opportunities, simply visit www.CRMUG.com > Join CRMUG. Our Premium Members are the lifeblood of our organization and enable us to continue to provide valuable networking, educational events, and solution-specific programming. **CRMUG**

events

SESSIONS MEETINGS COURSES

The event calendar on www.CRMUG.com and the weekly CRMUG® newsletter are your best sources for the latest CRMUG event information as this list is subject to change. Events are added weekly, so check back often and get registered for the next exciting CRMUG event.

CRMPC PreGame

MARCH 3 | OMNI HOTEL AT CNN CENTER | ATLANTA, GEORGIA
www.CRMpartnerconnections.com

Microsoft Dynamics Convergence 2014

MARCH 4-7 | ATLANTA, GEORGIA
www.microsoft.com/dynamics/convergence/atlanta14

The Partner Connections Event

OCTOBER 12-14 | ST. LOUIS, MISSOURI
www.thepartnerconnectionsevent.com

CRMUG Summit 2014

WEEK OF OCTOBER 12-17 | ST. LOUIS, MISSOURI
www.CRMUGsummit.com

Regional Chapter/Global Branch Meetings

JANUARY 15 – Dakotas | Fargo, North Dakota
JANUARY 15 – Ohio (Columbus) | Columbus, Ohio
JANUARY 16 – Ohio (Cincinnati/Ohio River Valley) | Cincinnati, Ohio
JANUARY 23 – Florida (Jacksonville) | Jacksonville, Florida
JANUARY 23 – Florida (Miami/Ft. Lauderdale) | Ft. Lauderdale, Florida
JANUARY 23 – Florida (Tampa Bay) | Tampa, Florida
JANUARY 24 – New England (Boston) | Cambridge, Massachusetts
JANUARY 28 – Denmark | Jylland, Denmark
JANUARY 29 – Louisiana | Baton Rouge, Louisiana

12,000 Microsoft Dynamics community members can't be wrong.

The premier Microsoft Dynamics event is happening in Atlanta, GA, March 4–7, 2014.

Here are just a few things you can look forward to:

Learn.
See how you can make your life easier when you get back to work.

Connect.
Find out how others successfully use Microsoft Dynamics.

Expand.
Visit the Expo Hall and see how the latest innovations bring new value to Microsoft Dynamics.

Discover.
Watch Microsoft experts demo the new releases and talk about the product roadmaps.

Envision.
Hear where Microsoft executives and analysts think the industry is going.

Enjoy.
Hang out with new friends at evening events and listen to a GRAMMY-winning band at the Closing Celebration.

Convergence 2014

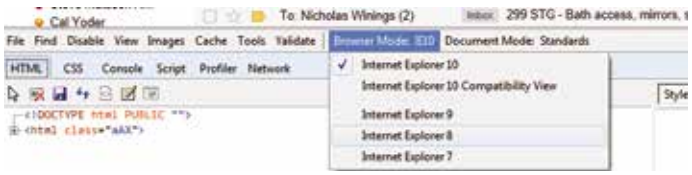
March 4–7, 2014 / Atlanta, GA

Register today and start planning your trip to Atlanta! To find out more or to register online, visit: *www.microsoft.com/convergence*

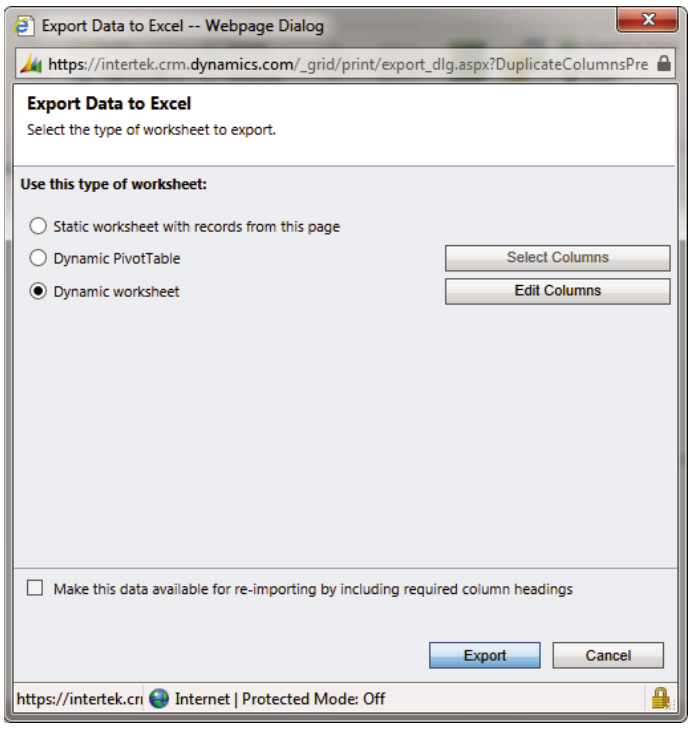
A Trio of Tips and Tricks

by **Scott Leopold**

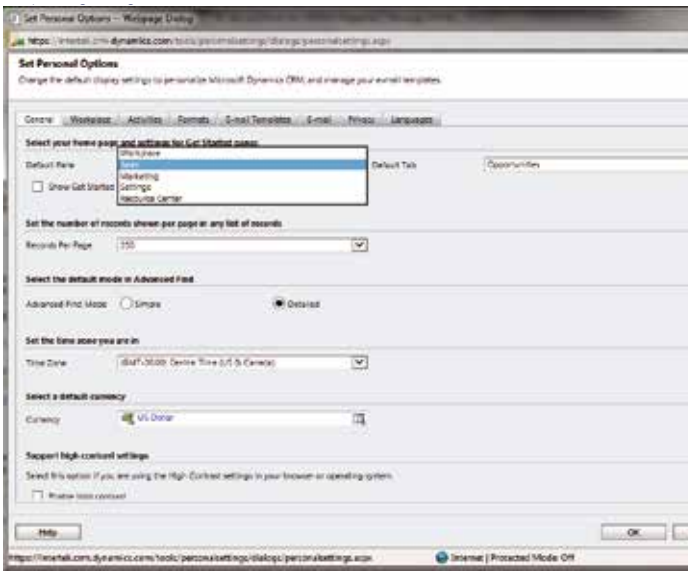
1. When you are testing the system and need to test new functionality in different browser versions of Internet Explorer, simply hit F12, and the HTML Editor displays. You can then select which version of the browser you would like to view the page in. This will show you if your changes work in different versions of IE.



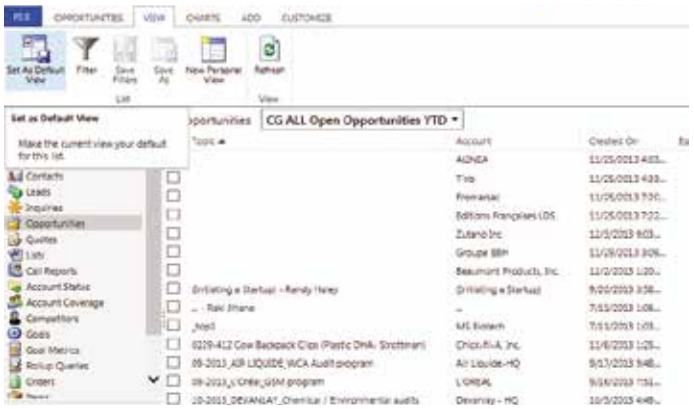
2. Dynamic Excel Spreadsheet Exports – I like to provide my Users with dynamic spreadsheets that they can refresh on a regular basis. This is a great way to create dynamic reports that they can manipulate in Microsoft Excel. The following screen shot shows how you create one. NOTE: The end User that is using the dynamic spreadsheet will need to have Microsoft Dynamics CRM Outlook Client in order for this to work.



3. During training, I like to show Users how to set their default Pane and Tab.



In addition to this, I show them how to set a default view. This way when they hit the home button (or when they log into the system), they go right to the module, tab, and view they want to work with and save clicks. **CRMUG**



Scott Leopold is a CRM business analyst at Intertek. He can be reached at Scott.leopold@intertek.com.

peers

MEET YOUR CRMUG PEERS

Brian Kasic

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How many CRM Users does your organization have?
600

When did you join CRMUG?
March 2012

What's your favorite learning platform within CRMUG?
Local User group networking and CRMUG website/blogs

What is your #1 goal for using Microsoft Dynamics CRM in 2014?
Creating additional process efficiencies using the application and leveraging the mobile client for Microsoft Dynamics CRM

David Goff

COMPANY
O'Neal Steel

TITLE
sales & marketing manager

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Goff@onealsteel.com

How many CRM Users does your organization have?
We currently have 350 Users.

When did you join CRMUG? We have four administrators, and we all joined CRMUG as a basic Member shortly after our initial rollout of Microsoft Dynamics CRM in the spring of 2011; I became the Alabama Regional Chapter chairman in the fall of that same year. Our organization has recently upgraded to a Premium Membership to take advantage of course offerings for our organization. The more training and resources we have available to our end Users, the more successful we will be as an organization.

What's your favorite learning platform within CRMUG? Collaborate! By far, what better source of information than other Users? We all want to think we have all the knowledge, but learning from other organizations and Partners has been priceless. Having attended Summit 2013 in Tampa this year, that conference ranks as one of the best experiences I have had in that setting. I was expecting the same old (tired) conference, but it was miles ahead of anything I had attended before. The session speakers were approachable and would relate to real-life experiences. My organization has already registered for Summit 2014 in St. Louis.

What is your #1 goal for using Microsoft Dynamics CRM in 2014? Business process flows are a huge benefit to our organization. As we began to implement Microsoft Dynamics CRM in the spring of 2011, we talked process flows: the outside sales reps (OSR) process and the inside sales reps (ISR) process. We have worked hard at configuring our business processes to allow our OSRs and ISRs to be the most efficient at their jobs, and by upgrading to 2013, we just took leaps forward in accomplishing that goal. As the sales & marketing manager for our organization, my goal is to make available a business solution that is efficient and valuable to each member of our team. Managing and maintaining Microsoft Dynamics CRM 2013 is a collaborative effort between our sales, marketing, management, and IT teams, and we plan on continuing that in 2014, and well beyond.

Jason Lattimer

COMPANY
Ledgeview Partners

TITLE
CRM development consultant & Microsoft Dynamics CRM MVP

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Jason.lattimer@gmail.com

How many CRM Users does your organization have?
30

When did you join CRMUG?
July 2013

What's your favorite learning platform within CRMUG?
Webinars

What is your #1 goal for using Microsoft Dynamics CRM in 2014?
To help others in the various Microsoft Dynamics CRM-related communities overcome their challenges and use the product to its fullest potential

peers

MEET YOUR CRMUG PEERS

Lina Baumberger

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CGB Enterprises, Inc.

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CRM administrator

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Lina.baumberger@cgb.com

How many CRM Users does your organization have?
16

When did you join CRMUG?
2011 with the Carolinas Regional Chapter

What's your favorite learning platform within CRMUG?
While all the different options are great, I really enjoy the Regional Chapter meetings. I learned so much when I attended the Carolinas Regional Chapter meetings. When I moved to the New Orleans area a couple months ago and noticed that there wasn't a Louisiana Chapter, I contacted Onika Allen with CRMUG. The inaugural Louisiana Chapter meeting will be held on January 29, 2014.

What is your #1 goal for using Microsoft Dynamics CRM in 2014?
Updating our on-premise deployment to Microsoft Dynamics CRM 2013 and bringing on two new divisions

Paul Cielinski

COMPANY
Cancer Treatment Centers of America

TITLE
enterprise CRM architect

How many CRM Users does your organization have?
500+

When did you join CRMUG?
2011

What's your favorite learning platform within CRMUG?
Live events

What is your #1 goal for using Microsoft Dynamics CRM in 2014?
Planning our future use of Microsoft Dynamics CRM 2013

Steven Pride

COMPANY
AltaReturn

TITLE
CRM developer

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Spride@altareturn.com

How many CRM Users does your organization have?
50

When did you join CRMUG?
January 2013

What's your favorite learning platform within CRMUG?
My favorite learning platform within CRMUG is Collaborate. I find that talking with my peers is the best way to learn about new and unique ways to utilize Microsoft Dynamics CRM.

What is your #1 goal for using Microsoft Dynamics CRM in 2014?
My #1 goal is to expand my knowledge of the SDK and leverage its unique design and User-friendly solutions to end User problems.

COMPANY
ImageSoft, Inc.

HEADQUARTERS
Southfield, Michigan

INTERVIEWEE
Adam Rose

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WEBSITE
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ESTABLISHED
1996

NUMBER OF EMPLOYEES
65

MICROSOFT DYNAMICS CRM USER SINCE
November 2011

NUMBER OF USERS
68

CRMUG® MEMBER SINCE
July 2013

Automating and Streamlining Toward Less Paper Documents and Processes

Adam Rose has something very important in common with his employer. ImageSoft is committed to helping its customers, most of which are in the government, insurance, and healthcare sectors, reduce their reliance on paper documents and processes by strategically automating and streamlining. Adam is committed to helping his colleagues do the same thing by strategically leveraging the power of Microsoft Dynamics CRM.

At ImageSoft, Adam, who has a technical background, works with the sales team. His job is to streamline and integrate processes, such as contract development, and seamlessly transition sales leads, once they become customers, to ImageSoft's professional services team.

Adam's mandate to streamline and integrate was the beginning of the journey to Microsoft Dynamics CRM. "We'd gone from something that was basically an Access database to Salesforce," Adam recalls. "Then in 2011 we decided to switch over to Microsoft Dynamics CRM."

One of the drivers of the transition was the fact that ImageSoft was already using lots of Microsoft technology, including Project Server, SharePoint, and Outlook. "Our Users are always in Outlook, so being able to get CRM information directly was a big thing," Adam says. But another, equally important factor in the decision was the difficulty encountered when trying to make customizations to the previous solution.

To say their Microsoft Dynamics CRM customizations have been successful would be an understatement; Adam was invited to present one of them at CRMUG Summit 2013 in Tampa, Florida.

"Our contracts go to five or six people for review before we send them to the customer, so we built a customization to automate that process," he says. "We use Microsoft Dynamics CRM to route the contract to the appropriate people throughout the company who review it to make sure that it accurately reflects what we're going to do and to ensure that we can fulfill our promise. One of the most important parts of the customization is that, since it's in Microsoft Dynamics CRM, it links back to the data about the new client. The data, which is easily accessible, can be used by those reviewing the contract to make sure it's ready for the new client."

The result of the customization, Adam says, is that accurate contracts can now be sent to customers within days rather than weeks. "Before, it was e-mail city," Adam says. "It took more time to get things reviewed, and sometimes contracts would be misplaced in the process. But since this customization was implemented in January, we've substantially reduced the timeframe involved in turning around a contract, and people have actually thanked us for getting it out so quickly."

ImageSoft

Another customization was developed to automate a critical part of the marketing function. "We attend a significant number of trade shows each year at which our salespeople develop leads," Adam says. "We've put together automated processes to manage those leads and to ensure their follow-up in a timely manner." The customization addressed the challenges the marketing team was experiencing in managing lead follow-up and in determining which were the best-performing shows by providing an automated process and greater transparency. "A lot of account executives were using pen and paper or Excel spreadsheets to keep their own notes and lists," Adam explains. "Now, when they come back from a tradeshow, they hand their contact info to marketing, which inputs them into Microsoft Dynamics CRM linked to a specific campaign. That begins an automated process within Microsoft Dynamics CRM of updates and alerts to both the sales and marketing teams so that they can track and document lead progression."

The benefit is as dramatic as it was for customizing contracts. "The average time for lead follow up has greatly improved, and there is far more accountability and transparency into the process," Adam says.

Adam, who is categorized as a CRM super User, represents the sales team and works in a project management capacity to handle enhancements, updates, feedback, testing, and rollout. So far, he reports that User adoption of Microsoft Dynamics CRM has been good. "Outlook is ingrained," he says.

In terms of the future, he says that integration will continue to be a priority. "We've made big strides," he says. "With a few more integrations, we'll get even closer." First on the list is automating the synchronization of the product lists in Microsoft Dynamics SL with those in Microsoft Dynamics CRM so that the two systems speak the same language by pulling data from the same catalog.

First on the list is automating the synchronization of the product lists in Microsoft Dynamics SL with those in Microsoft Dynamics CRM so that the two systems speak the same language by pulling data from the same catalog.

And, based in large part on a management directive, Adam says all of ImageSoft is continuing to regard Microsoft Dynamics CRM as a holistic view of the customer and to use the technology accordingly. "Every interaction we have with our customers goes into CRM," he says. "We're a growing company, so when someone new comes in, it's important to be able to go into CRM and get an entire view."

For his part, to get the most complete view possible, Adam isn't limiting his quest for Microsoft Dynamics CRM knowledge to networking and presenting at CRMUG Summit. He's also signed up to help relaunch the CRM User Group in southeast Michigan that, much like its flagship city, is ripe for revival. ***CRMUG***

Making Microsoft Dynamics CRM for Tablets Your Own

by **Beth Steinke**

If you're looking for quick and easy tips for Microsoft Dynamics CRM for tablets, I have just the thing for you. Posted below are five tweaks that will take less time than getting a cup of coffee – and will likely provide more lasting benefits!

Pinning to the Dashboard

Although you're limited to six components on your dashboard, you can use as many tiles as you wish. Go ahead and pin the records and views you use all the time to extend your dashboard, giving you the opportunity to quickly see the things that you care about most…as well as the other stuff your administrator put there for you.

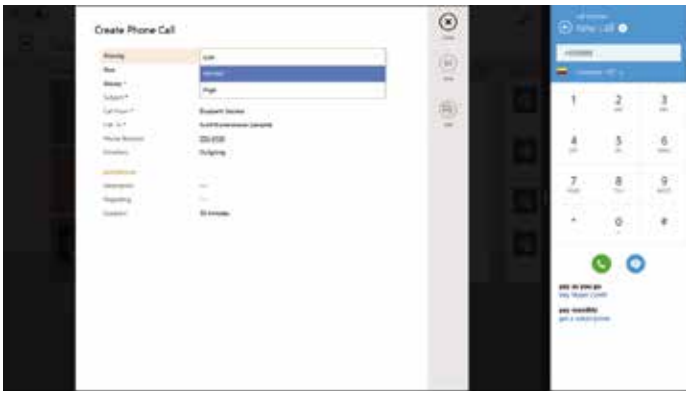
A Fan Favorite, the Communication Card

When I've asked people what their favorite feature is, most say that it's the Communication Card.

If you pin a User or Contact to the dashboard and make it bigger through the command tool, it will turn into a Communication Card, enabling you to contact that person with one touch instead of having to drill down into the record.

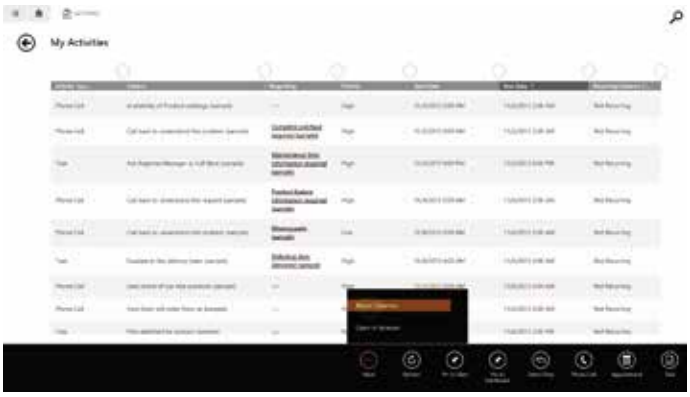
Less Work for Phone Calls

When you initiate a phone call, Microsoft Dynamics CRM for tablets automatically logs that phone call and pre-populates as much information about the person you're calling as possible. In Windows 8, you can snap the call card to half of the screen with Skype on the other side so that you can log details into Microsoft Dynamics CRM with both applications running at the same time. (By the way… you can't do that on an iPad, but you can on your Surface™. That's a favorite demo of ours.)



Resize Columns in a List

The list column widths in Microsoft Dynamics CRM for tablets are sticky per view, so you can have different column widths for each view, making it easy for you to view the data that matters most.



Drill Down Automatically on Your Charts

You can drill down into charts on your dashboard by tapping the header and then filtered by tapping a section of the chart.

You can combine those actions by tapping the chart section directly on the dashboard so that when you drill down, the information is automatically filtered on the chart.

Beth Steinke is a program manager on the Microsoft Dynamics CRM mobility team. She has a passion for making Microsoft Dynamics CRM intuitive for Users and can be reached at Esteinke@microsoft.com.

CRM 2013 Mobile Tips & Tricks

by **Jason Lattimer**

CRM for Tablets

- On-premise organizations are required to have an Internet Facing Deployment (IFD) configured in order to connect, and this cannot include the use of self-signed certificates.
- There is a maximum of 75 fields that will be displayed on a form, including any hidden fields.
- JavaScript, Business Rules, and Business Processes can still be used, but IFRAMEs and web resources embedded in the form will not be rendered.
- Not all JavaScript functions are available in the tablet client, so double check the Software Development Kit (SDK) to ensure it can be used.
- When offline, record access is limited to recently viewed records, and you will not be able to use charts.
- Cached data uses HTML5 local storage and is not encrypted; an alternative would be to use BitLocker to encrypt the entire drive if this is a concern as there is no ability to remotely wipe data.
- Multi-entity search is available by default for Account, Contact, Lead, Opportunity, User, Competitor, and Activity entities, but administrators can add additional entities up to a total of 10 from the Administration -> System Settings area.
- Not all system entities can be enabled for read-write access, but when using custom entities, you will be able to enable access.
- To quickly access specific records, you can pin them to the dashboard in the client itself or to the Windows 8+ Start screen.

CRM for Phones

- Native apps are available for Windows, iOS, and Android phones and can be convenient because they are able to retain login information.
- Without one of the native apps, you can still access the mobile formatted version of the CRM website through https://YourOrg.crm.dynamics.com/m through a mobile browser.
- Activities are more useful as you can now create new Phone Call records and complete Appointments, Phone Calls, and Tasks.
- If you use the CRM Outlook client to synchronize Contact data so it is available on your mobile, consider using one of the apps instead to quickly look up information. **CRMUG**

Jason Lattimer is a Microsoft Dynamics CRM MVP and you can often find him answering questions in the MSDN and Dynamics Community CRM forums, blogging, and occasionally putting out some helpful tools on CodePlex. You can email him at Jason.lattimer@outlook.com.

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Conference Portal
Sessions, Agendas, Registration, Surveys

Partner Portal
Channel & Opportunity Management

Retail Portal
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Company Portal
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The Road Warriors, the Dentists, and MOBILE CRM

If you follow your dentist's instructions, you come in contact with Benco Dental's wares every six months. They're not holding the drill, but you're likely sitting in their chair, under their lights, with some of their gauze in your mouth.

Based out of Pittston, Pennsylvania, Benco is the largest privately-owned, full-service supplier of dental supplies and equipment. Except for a pocket of the five northwestern-most states, Benco has made the rounds in their 83 years of existence.

To support their growing client base, Benco piloted Salesforce.com in 2009. After the pilot, Benco had a change of heart – some reading this might say for the better – and chose to move forward with Microsoft Dynamics CRM 2011.

At the time, BlackBerry ruled the mobile airspace, but iPhones and Androids were gaining traction. Even though Resco.net didn't support BlackBerry, Benco was impressed with their product, and in seeing a downward trend of BlackBerry users amongst their sales representatives, moved forward with Resco.net's mobile application.

ERIC LABASHOSKY

Almost five years later, sales representatives are taking care of their clients and keeping Microsoft Dynamics CRM up to date without much of an afterthought.

"Our sales representatives are on the road all day long, visiting eight to 15 customers a day," says Eric Labashosky, chief application architect for Benco. "Besides basic relationship management, they have access to their customers' purchase history, product back orders, and a place to track opportunities."

While the sales representatives have all of this information on their mobile devices, Eric's team was surprised to find that their metrics show that more people are using the web client than the mobile platform unless the representative has an iPhone or iPad. In that case, the mobile client usage has very high volume.

"Those findings were a surprise as we thought there would be more uses on mobile devices versus the web," says Eric. "We're thinking that they do their call planning before they leave for the day and also update information via laptops in their car, taking advantage of a larger screen. As long as they're getting information into Microsoft Dynamics CRM, we don't really mind which platform they use."

To push that along, Eric and his team plan to track more metrics to find out more about their heavy and light Users as well as create regional CRM champions to help light Users learn best practices from locally-based peers.

"We want to focus on getting everybody to be a heavy User," says Eric. "Some people pick up Microsoft Dynamics CRM more quickly than others, but having CRM champions available locally will be very helpful."

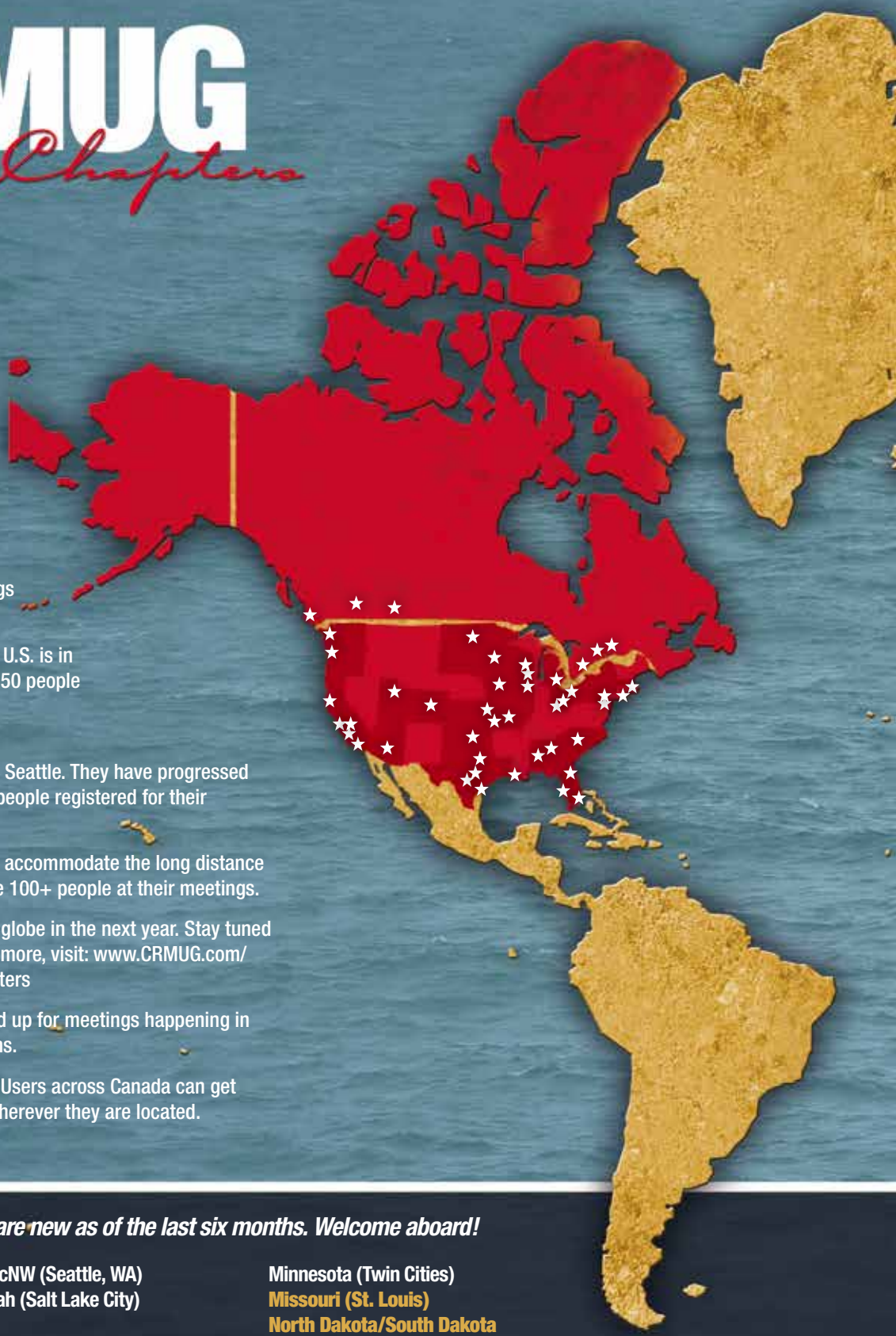
Software-wise, Benco's next innovation will include mapping functionality to show where their customers are located, which will help to alleviate some confusion amongst those out on the road.

"We have a security policy where we don't let sales reps see each other's customers," explains Eric. "One of the problems we have is that if they see a dental office they're not personally working with, they don't know if Benco is already working with that office. Mapping functionality will change that."

Eric is excited to see how the rollout of Microsoft Dynamics CRM 2013 will affect mobile CRM usage in the near future.

"My advice for fellow Users who are looking at mobile CRM is to jump in and try it out, as that's the only way to see if it will work for your organization," says Eric. "The mobile client for Microsoft Dynamics CRM 2013 is a good first product, but it still has a long way to go. I'm hoping that Microsoft continues to improve their mobile platform so that it's something that's viable for more people in the future." ***CRMUG***

CRMUG *Regional Chapters*



- The largest U.S. chapter is in Minneapolis, Minnesota, with 75 to 80 people attending meetings each quarter.
- The second largest chapter in the U.S. is in Milwaukee, Wisconsin, with 45 to 50 people attending meetings each quarter.
- An up-and-coming U.S. chapter is Seattle. They have progressed from 25 people on average to 40 people registered for their upcoming meeting.
- The U.K. has two-day meetings to accommodate the long distance required to travel. They often have 100+ people at their meetings.
- New sites will pop up all over the globe in the next year. Stay tuned or start one in your area. To learn more, visit: www.CRMUG.com/member-resources/regional-chapters
- More than 400 people have signed up for meetings happening in Australia over the past four months.
- Canada has a national call where Users across Canada can get access to four hours of content wherever they are located.

The chapters highlighted in gold are new as of the last six months. Welcome aboard!

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California (Los Angeles, CA)
California (San Diego)
California (San Francisco)
California (West Los Angeles)
Colorado (Denver)
PacNW (Portland, OR)
PacNW (Seattle, WA)
Utah (Salt Lake City)

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Louisiana (New Orleans)
Michigan (Detroit)
Midwest (Chicago, IL)
Minnesota (Twin Cities)
Missouri (St. Louis)
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Oklahoma (Tulsa/Oklahoma City)
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NAME THAT PHOTO CONTEST

Congratulations!

Congrats to **ADAM ROSE** from **IMAGESOFT, INC.** for his winning submission, “And the winner, eating 72 blazing hot wings is … Todd.” Adam – your prize is in the mail!

Jamie Fiorda of Microsoft got the crowd on their feet! What did he say to make this happen?

What would you name this photo? Simply email your submission to Captioncontest@CRMUG.com. The winning submission will be printed in the magazine’s next issue.

Beth Steinke

Beth Steinke, program manager

Beth Steinke, program manager on the mobility team, has been with Microsoft less than one year. Her interest in CRM came from a previous career in the realty industry, where she worked with many applications that left a lot to be desired. CRMUG® sat down with Beth to learn more about her passion for mobility, how her team approaches development for mobile devices, and how Users make the product better with each release.

CRMUG: ***You made a big change, moving from a real estate career to a development career. How are you enjoying the change?***
Beth Steinke (BS): It's a bit like drinking out of a firehouse. My favorite internal website when I first started was the Microsoft Glossary.

Joking aside, I do really like it here. I'm able to work on a product that I enjoy and care about. I also work with some of the most intelligent people around and get to do what I love. Who could ask for more?

CRMUG: ***In your opinion, what's the most important element of a mobile solution?***
BS: For me, the key is bringing people closer to their technology. A mobile device is in their pocket almost all the time, for both personal and business needs, and seems more like a friend than a piece of technology. People aren't intimidated by their mobile device like they may be by a computer, so our goal is to make their experience with a mobile application of Microsoft Dynamics CRM feel like an interaction with the real world.

I like to think about the Users, sitting there looking at the buttons, how they react to them, and what's intuitive for them.

CRMUG: ***How does Microsoft Dynamics CRM 2013 enhance mobility for a User?***
BS: We worked to update the phone client, giving it an improved User interface, as well as increasing support for mobile web browsers, working to utilize the smaller screen in a meaningful way.

We also have a new tablet client that uses the same form and ribbon definitions as the web client, allowing a seamless experience between mobile devices and the web client so Users can go between the two without having to relearn the same process, which is painful to the User, the admin, and the User's organization. Nobody benefits from having two different experiences.

CRMUG: ***What kind of feedback are you hearing from Users and Partners?***
BS: We've gotten a lot of positive feedback, which is great. We are still getting requests from Users who have scenarios that we haven't solved yet, but my favorite comment – that we hear on a fairly regular basis – is that we "made CRM sexy."

CRMUG: ***That's a pretty great thing to hear! How does your team approach mobile development? Do you look to popular mobile applications for inspiration?***
BS: Yes, we do look at other mobile applications. We also spend a good amount of time on the Windows design philosophy with the tiled interface, although we make some adjustments as we wanted a way to show more data on a small screen.

There are not a lot of enterprise apps that show you the amount of data we're able to display. We did a lot of experimentation and consulting with Users to figure out the best way to share the amount of information we have on the screen.

CRMUG: ***How do you gather that feedback from Users?***
BS: We use the Microsoft Connect tool for them to give us feedback, but most of the User feedback comes from our support team… unfortunately. We're working on the next great way to get feedback, something that is both more convenient for Users and more organized from our perspective, as Users are the lifeblood of the product.

CRMUG: ***With Microsoft Dynamics CRM 2013 released, what's up for your team now? I can't imagine that you have a lot of down time.***
BS: We're in full swing and working on what's next. No rest for the wicked! We've already released the first update to Microsoft Dynamics CRM 2013 and are working on the next update that will have a few more bug fixes as well as further language and OS support.

We're also working on a number of things beyond that, but I can't talk about that yet.

CRMUG: ***What type of release cadence are you working with these days?***
BS: We're aiming for online releases every six months and on-premise releases that roll out once a year. Having said that, we have six releases planned in the next year and a half, some of which are focused on Netbreeze and MarketingPilot. We're trying to get in a fast, regular cadence for product updates.

CRMUG: ***Speaking of MarketingPilot, are you planning for that application to have a mobile element?***
BS: That's still in the works. It's definitely something that we're looking at, but we don't have any firm plans.

CRMUG: ***Do you have goals as far as User adoption for Microsoft Dynamics CRM 2013?***
BS: It's a hard thing for us to track, but I just talked with a salesperson recently, and the feedback he's getting from Customers is that adoption for the Microsoft Dynamics CRM 2013 tablet app is higher so far than it was for other clients this early on. They're telling him that it seems more personal and easy to use, so that's great feedback to hear from the field and Users.

"We're working on the next great way to get feedback, something that is both more convenient for Users and more organized from our perspective, as Users are the lifeblood of the product."

CRMUG: ***So what do I need to do to get Microsoft Dynamics CRM 2013 on my phone as soon as we're upgraded to the new product?***
BS: Applications for the phone and tablet clients are available in your device's app store, and you install it in the same way you would any other app. For each, the admin of your system needs to turn on a specific setting before you can use it, using the same login as you do for your normal Microsoft Dynamics CRM implementation.

CRMUG: ***We enjoyed having you as a presenter at CRMUG Summit this fall. What has been the most beneficial aspect of being part of the User community?***
BS: It's so rare that I get face-to-face time with actual end Users. I have a few opportunities to do that with Partners, but it's pretty rare that the R&D team gets to talk with end Users. It is really, really powerful as it's not second-hand information or hearsay; it is real Users telling you what they think and what they want and what will help them.

There's nothing like it, seeing both the joy and the pain in their eyes and taking their feedback back to what we're working on as a team. ***CRMUG***

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When Microsoft Dynamics CRM Hands You Lemons...

A USER'S PERSEVERANCE THROUGH MOBILE CHALLENGES

Fabrikam, Inc.* knows a thing or two about logistics. The trucking company dispatches 2,800 trucks throughout North America, transporting the wares of Fortune 500 companies as well as the precious cargo of the mom-and-pop shops around the corner.

The company's sales managers are spread throughout North America, and up until 2012, its treasure trove of customer data was tucked into spreadsheets, folders, and business cards.

May 2012 marked the go-live date of Microsoft Dynamics CRM 2011 Online. Fabrikam purchased iPads for its 40 sales managers and five sales directors and anxiously awaited the day when its team could go out into the field and bring all that disparate data together courtesy of the product's mobile client.

"From day one of training, we realized the mobile platform wasn't what we thought it would be, as we thought there was a mobile-ready application for Microsoft Dynamics CRM 2011," says Aaron Fritz*, business analyst for Fabrikam.

Aaron's team found a third-party vendor that offered a mobile client that could bandage the wound, but not without a little additional damage since the organization was now paying for its Microsoft Dynamics CRM licenses as well as new mobile licenses for the mobile solution.

"The good side of the application was that it was simple to use, which was important since our sales managers were just learning this CRM system," says Aaron. "The mobile application provided a way for sales managers to access Microsoft Dynamics CRM, create appointments, and manage their contacts, which is what we were looking for."

Once up and running, Aaron's team anticipated the normal User questions but was thrown a bit of a curveball yet again with interface inconsistencies and major synchronization issues.

"The mobile app is a lot different than the online version of Microsoft Dynamics CRM," says Aaron. "Users accustomed to the mobile version found the product totally foreign when they went to their desktop, and on the flip side, somebody accustomed to accessing Microsoft Dynamics CRM on their PC couldn't remember how to find their contacts on the iPad."

"Something that caused even larger issues was the synchronization of the mobile client to Outlook," continues Aaron. "To get appointments on their iPad or other mobile device, our sales managers had to have their Outlook client open on their PCs. If they didn't have it running, the appointments they made on their iPad or mobile device weren't synched to their Outlook calendars. We discovered this when sales managers were looking in their calendars for appointments and within CRM itself to find data they had recorded."

To remedy the situation, Aaron's team worked with the sales managers to ensure they were using their laptops to open Outlook frequently, enabling their appointments to synch appropriately, but the problem is an ongoing issue and a source of frustration for the organization.

"While the sales managers have company-issued laptops, we weren't planning on reissuing new laptops moving forward as we thought we could go forward with iPads," says Aaron. "The synch issue made it apparent that wasn't going to work."

A blip of hope came in August 2013 when Fabrikam got the new roll-up of Microsoft Dynamics CRM 2011 Online.

"We were excited for the cross-browser functionality that was released, but it never really caught on for us as Microsoft

Dynamics CRM 2011 isn't really a touch-enabled browser application," says Aaron. "It was difficult for anybody to get the browser website to do anything with their iPads and other touch-enabled mobile devices. Because of that, we have to continue with the mobile app we purchased and keep licensing that today."

Despite that disappointment and contrary to what one may think, Aaron and his team are optimistic for their February 2014 upgrade to Microsoft Dynamics CRM 2013.

"We've started the trial version, and preliminary indications lead us to believe that we'll be able to use the mobile app from Microsoft Dynamics CRM 2013," shares Aaron. "Other issues we're having, such as the synchronization issues, will hopefully be resolved with the upgrade."

From behind the scenes, Aaron has a few words for fellow Users to hopefully avoid the same pain. Almost surprisingly, they don't include a caution against the product.

"I wish we would have understood the technology capabilities of our sales force a bit more," says Aaron. "Understanding what they can do from a mobile perspective would have led us to scale back on moving forward with a mobile application, the Outlook client, and the online version, and instead focus on training them on one system and open up the other option later. Those multiple entry points have created some difficulty with getting consistency across the group."

Aaron reiterates, "I am excited about Microsoft Dynamics CRM 2013. It will be a big User interface change for us, but I'm really hoping that the common interface between Microsoft Dynamics CRM and the mobile app will be able to drive higher adoption and better use for our sales team." ***CRMUG***

**Please note that the company and contact name have been changed at the request of the Microsoft Dynamics CRM User and CRMUG Member. While this information is normally published, it was held at the User's request due to the nature of the situation.*

5 MINUTES WITH CRMUG'S VOLUNTEER OF THE QUARTER

CRMUG® has selected Adam Rose as our Volunteer of the Quarter. Congratulations, Adam! Adam is the sales support manager for ImageSoft, Inc. in the United Kingdom, as well as an active Member of CRMUG and the Microsoft Dynamics CRM community. Let's learn a little about Adam…

My favorite person on social media these days is…
@Richardknudson – I met Richard at CRMUG Summit in Tampa, started following him on Twitter and YouTube, and haven't looked back since. He provides so many great tips and tricks and should definitely be followed by anyone involved with Microsoft Dynamics CRM!

On my desk right now is…
A copy of "Traction: Get a Grip on Your Business" by Gino Wickman, a book that contains the secrets of strengthening the six key components of your business, and "Microsoft Dynamics CRM 2011 Administration Bible" by Matthew Wittemann and Geoff Ables. I guess I might need to get the Microsoft Dynamics CRM 2013 edition soon!

My three goals for 2014 are…
1. Automate the synchronization of the sales product list for the company between Microsoft Dynamics SL and Microsoft Dynamics CRM.
2. Have a successful deployment of Microsoft Dynamics CRM 2013 so everyone at the company can use Microsoft Dynamics CRM as a holistic view of our customers.
3. Take my beautiful wife to San Francisco for a much needed getaway!

When I'm not at work…
I play trumpet in a local jazz group called The Woodward Avenue Jazz Orchestra.

The best advice I ever received was…
Proverbs 3:5-6 – "Trust in the Lord with all your heart and lean not on your own understanding; in all your ways submit to him, and he will make your paths straight."

wordfind

Congratulations to Kathleen Pfingsten from DFC Consultants, Ltd for winning the Fall 2013 Word Find. Your prize is in the mail, Kathleen! Below are 25 words that relate to the topics and theme in this issue of CRMUG® Magazine. These words can be found in the grid horizontally, vertically, diagonally, backwards, and forwards. Submit your completed Word Find for a chance to win a gift certificate; simply scan and email your entry to Wordfind@CRMUG.com.

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- Academy
- Adam Rose
- Beth Steinke
- Challenges
- Collaborate
- Connect
- CRMUG
- Customizations
- Dashboard
- Dentists
- Global Branch
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- Industry
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TOP COLLABORATE DISCUSSIONS

Conversations are always flying on CRMUG® Collaborate, and we thought it would be fun to look back at some of the top discussions from late summer and fall 2013. The most recent topics are posted first, and if you'd like more information on any of these topics, log on to CRMUG Collaborate (www.community.CRMUG.com) to read the full conversation.

Sequestering Data Using Teams

23 Replies | Posted by Glen Wolinsky on October 28 at 3:29 p.m.

I want to continue a conversation that originated at CRMUG Summit 2013 last week. I consulted a couple of Microsoft guru's and a couple of MVP's about this issue. While they seemed to agree on the solution, they all seemed to indicate that it was not an issue brought up before. So I thought it would be good to discuss it here for the benefit of all.

I work for a law firm where the culture allows access to our client, contact and matter (legal issue) data by all legal staff (lawyers, paralegals, secretaries, etc.). However, there are times when certain clients, matters or contacts must be secured from sight except for a select group of individuals. Since all instances of all our entities are owned by the default team, this was a quandry.

The only solution I could come up with was this:

- Using the example of a client that must be sequestered from view except for a couple of lawyers, a paralegal and a secretary.
- Create a team named for the client number (i.e. - Client Team 16685). The team would have no additional security roles assigned.
- Add the lawyers, paralegal and secretary mentioned above to that team.
- Make this new team the owner of the Client instance and all the related downstream data items as well.

My only real concern here was the scalability issue. We currently have 250+ of these "Ethical Walls" in our system and that could grow to thousands. Would this solution scale without performance or other issues?

Your input would be most welcome. Sincerely,

Glen Wolinsky | lead applications developer | Miller & Martin PLLC

SSRS Print Control Causing Internet Explorer to Crash

13 Replies | Posted by Nick Doelman on September 2 at 9:57 a.m.

Hi All, I have run into this in a few places lately (including my own machine right now).

I run a SSRS report from within CRM 2011 (all types, SQL based, Fetch based, Report wizard, etc) and the report renders fine on screen but when I hit "print" I sometimes get the message to install the SQL print control (sometimes not) and Internet Explorer crashes. (Internet Explorer has stopped working...)

I tried to replicate in Chrome but noticed no print button there... (another issue for another day). The workstations I have seen this on are Windows 7 and Windows 8. The only common thing is Internet Explorer 10 and SQL 2008 R2 backend. I have tried to run IE in administrator mode and get same results. These are also via IFD, so I can't run the report direct via SSRS.

The CRM orgs range from Rollup 11 to Rollup 14. Current workaround is to dump to PDF and print, but this is not quite ideal. Before I burn a ticket and precious time with whatever company MS has outsourced support to this week I thought I would post here. :) Cheers

Nick Doelman | Ready Business Management Systems Ltd

Automating XML Export

8 Replies | Posted by Brad Freeman on August 27 at 9:32 a.m.

Hi There, I have a requirement to create/email a daily export from CRM 2011 on-prem, but the output must be "available for re-importing" (ie XML format, all required picklist options/hidden GUID fields/etc.)

Ultimately, I would create a scheduled SSRS report with the attached file type as XML.

Anyone have any experience with this before I start coding :-) ?

Brad Freeman | CRM owner | Complete Innovations Inc

How to Make a "Required Field" not be Required for all Business Units

9 Replies | Posted by Ami Kennedy on August 9 at 3:38 p.m.

Hi all! We have a Joint DSR field that is required for most of the business. However, there is a small segment of users that don't do business this way and therefore the field should not be required. We have made a work around of "no contact", but I would like to actually just make it mandatory for all but this business unit. Is this possible?

Ami Kennedy | CRM & sales process analyst | Intertape Polymer group

Process Creates Record - "Created by" is Person who Owns Process

10 Replies | Posted by Karla Keeney on July 31 at 3:41 p.m.

We have dialogs and workflows that create records -- activities, connections, etc. There are only two of us who write processes. We create them for everyone in the firm.

Whenever one of these is run, the records created by the process show that they were created by the person who owns the dialog or workflow. We would like for it to be the person who ran the process (and therefore created the record).

We have the same issue with dialogs that modify records -- the "modified by" user shows the owner of the process, not the person who ran it.

Does anyone know a way around this?

Karla Keeney | IT specialist | Resource Consulting Group **CRMUG**

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Resco.net

Resco.net, founded in 1999, is one of the global leaders in developing cross-platform mobile software solutions. The team of Resco.net professionals embodies its knowledge of mobile device technology by designing products for corporate Customers, developers, integrators, and end Users. The purpose? Optimizing work and improving productivity.

CRMUG: ***How did Resco.net start out?***
Ivan Stano (IS): Resco.net was founded in 1999 by three people who had a vision to build mobile applications and solutions. In the first couple of years, the company was focused on Customer applications for prehistoric devices such as PalmPilots and pocket PCs, which evolved into the Windows mobile devices we use today. Then, we started creating mobile tools for developers to help companies create better functioning applications. For the past five years, we have focused on mobile enterprise solutions and our flagship product, Mobile CRM.

CRMUG: ***What type of products and services do you offer?***
IS: We provide companies with mobile enterprise solutions for Microsoft Dynamics CRM. We have been Microsoft-friendly since the very beginning, relying on their technology solutions to build our applications. We are a Microsoft Partner and a Microsoft Visual Studio Industry Partner (VSIP), and we received the Microsoft Industry Award in 2010.

CRMUG: ***What is one way you're different from other solutions that address the mobile need?***
IS: We are always actively extending and enriching our solutions as well as beefing up our Partner channel. We currently have more than 350 Partners all over the world, which gives our end Users the support they need. Our Partner ecosystem is very important to us, so we regularly organize events to make sure each of our Partners is familiar with our technologies. We have also created a new joint venture company, Resco Services (www.resco.net/services), to help Partners with customization work. (Note: Resco.net has a new release scheduled for November 2013; see www.resco.net/news.aspx for more info.)

CRMUG: ***What type of companies benefit most from your mobile software?***
IS: It's hard to pick a specific industry that benefits most, but essentially any company that has employees who regularly work outside the offices and need access to CRM data can benefit immensely…traveling insurance agents, sales agents visiting their clients, professional services with technicians on the road…you name it. Our clients also range from private to public. For example, one of our clients is a fire department in Norway that uses our application software to make inspections for ensuring fire safety in businesses and homes.

CRMUG: ***What do Users like most about Resco.net?***
IS: Our Customers really appreciate the ease of use; it's extremely simple to operate and navigate. With no servers involved, it's also very easy to deploy and customize. A standard configuration with Microsoft Dynamics CRM takes literally one to two minutes. Prospects can try it out for free to see how this basic application works or to find out if they need more customization to fit their needs.

Resco.net solutions are also fully accessible, regardless of Internet connection, so Users can work with their data when a connection isn't available; this has been a vital component for our

resco.net
technology on the move

Users. For example, we have a Customer with service technicians in the oil industry out in the middle of the sea with no connection, but they can access everything they need while conducting their inspections with Resco.net.

CRMUG: ***What do you like most about Microsoft Dynamics CRM and the overall community?***
IS: We use Microsoft Dynamics CRM internally and really love the system. Without it, we would be lost. We tried using our own CMS in the past, and it was messy. With Microsoft Dynamics CRM, we can stay on top of daily tasks with a complete view of opportunities, projects, and more.

The Microsoft Dynamics CRM Partner channel is also a great and loyal group with which to work. Microsoft is paying a lot of attention to its CRM solution with strong enhancements against competitors such as Salesforce.com, Oracle, and SAP. There are also a number of great conferences, such as CRMUG Summit, where we can meet Users and Partners face-to-face, which helps us improve our solutions and services. ***CRMUG***

CRMUG Academy Corner

CRMUG® Academy strives to be the premier learning destination for all Microsoft Dynamics CRM professionals. We are very excited to continue to bring you incredibly rich content in 2014 that will include both distance learning and pre-conference training options. Below we have included just a few of the planned 2014 classes. If you have recommendations or feedback as we plan for the 2014 CRMUG Academy lineup, please contact us at Academy@CRMUG.com.

Preliminary H1 2014 classes include:

- Microsoft Dynamics CRM 2011 Management and Troubleshooting
- Building Microsoft Dynamics CRM Workflows in the Real World
- Dashboards and Reporting for the Everyday User

Additionally, CRMUG Academy is developing a new CRM administrator certificate series. This is a four (4) part training series designed to provide your CRM administrator/super User with the capabilities needed to maintain and evolve your solution. This series will focus on proven best practices and include topics such as:

- Organization & User Management
- View, Chart, & Dashboard Management
- Custom Entities & Relationships
- Data Replication
- Automated Process Management
- Introduction to xRM Capabilities ***CRMUG***

FIND THE logo CONTEST

Congratulations to our Fall 2013 contest winner, **David Goff** from **O'Neal Steel, Inc.!** David found the logo on page 23 of the Fall 2013 issue of CRMUG® Magazine. Let's play again. Hidden somewhere between the covers of this magazine is our CRMUG logo. **Can you find it?**

MEMBER IN action

started moving data into Microsoft Dynamics CRM," she recalls. "CRM administrator was added to my roles, and in May 2012, we began our move toward using Microsoft Dynamics CRM to provide reliable business intelligence."

The processes and systems at the heart of the business intelligence Clarissa is after are what led her to a commitment to becoming a more environmentally responsible organization. "Green initiatives are directly linked to quality processes," she says. "One of my roles here is quality systems management, so I'm very involved in our go-green initiative. Brooke Hamilton, our president and founder's granddaughter, is passionate about establishing a sustainability action plan for our Go-Green Initiative at NPI."

Under the initiative, NPI reduces not only its own carbon footprint, but also the carbon footprint of its customers as well. In the digital printing division, for example, the company now uses a line of printers that are more energy efficient and that use latex ink, which is non-combustible, requires no ventilation, and reduces overall storage, handling, and waste disposal challenges. And, since the graphics printed with latex ink are odorless, they can be used in medical settings or by companies in the food service industry.

Simpson sees what she's doing as part of a move toward greater sustainability. "We've made an intentional investment to become more energy efficient," she says. "It is all part of working toward a sustainability recognition award from SGIA (Specialty Graphics and Imaging Association), which we hope to attain in 2014."

Another way that Nameplates has reduced energy consumption is by switching from five days of operation to four. "The reduction in energy consumption made possible by switching to four 10-hour days has been significant," Simpson says.

In the future, she plans to harness the power of Microsoft Dynamics CRM even more as NPI's initiatives expand. "All of our practices – including the green initiative – tie together, and they all tie into our CRM system," she says. "We're customizing Microsoft Dynamics CRM so that we can use it to manage quality processes such as auditing energy and sustainability. It will be a system of checks and balances, and it will provide a source of even greater business intelligence."

Simpson feels good on a human level about her company's commitment to more environmentally-friendly practices. At the same time, she thinks it's good for business. "It's about serving our customers in an eco-friendly way," she says. "Many companies – especially local businesses and events – mandate sustainability in their purchasing requirements."

And, like almost all aspects of business, the green initiative at NPI transcends local and is in fact global. "We're all part of the supply chain for our respective customer base, and we're all a part of the circle of life for manufacturing," she says. "We're becoming a much more global community, and in the global supply chain priorities tend to revolve around long-term sustainability for business growth."

CRMUG

While our logo shows up throughout the magazine in conventional spots, it's hidden in only one place.

When you've found it, send an email to **Logocontest@CRMUG.com** with an explanation of where and on what page it's at. We'll choose a winner at random and will ***highlight him/her in the next issue*** of the magazine.

Transportation and Logistics:

Make Way for the Movers and Shakers

Whether they're operating planes, trains, and automobiles or selling them to their own customers, here are a few Premium Members who could help get things from point A to point B in their sleep!

ARC
Arlington, Virginia

ARC powers the U.S.-based travel industry with travel agency accreditation services, process and financial management tools, and powerful data analytics. In 2012, ARC settled $84 billion worth of carrier ticket transactions for more than 9,400 travel agencies with 15,000 points of sale. That's a lot of tickets!

CSX CORPORATION
Jacksonville, Florida

Not one to toot their own horn, but CSX Corporation is a leading supplier of rail-based freight transportation in North America. They've received numerous accolades for initiatives from environmental safeguards to railroad safety to software innovation, including recognition as the Dynamic Business Award: Enterprise winner in the Customer Excellence Awards at Convergence 2013.

MHC KENWORTH (MURPHY-HOFFMAN COMPANY)
Leawood, Kansas

MHC is a locally-owned company that has been serving the trucking industry for more than 35 years with full-service dealerships across 11 states. The company's 2,900+ employees are committed to doing "whatever it takes" to support its customers and community.

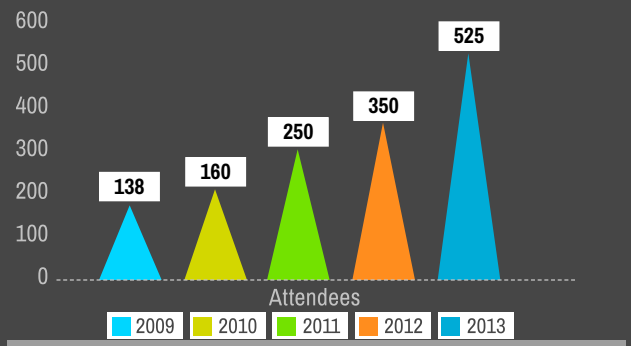
YRC FREIGHT
Overland Park, Kansas

More than 160 combined years of service can't be wrong! YRC Freight has racked up awards and kudos from customers who rely on their ability to move industrial, commercial, and retail goods around the world.

ELEVATE. Knowledge. Network. Team.

CRMUG summit 2013 tampa

CRMUG Summit 2013 Tampa at a Glance



CRMUG Summit Attendance

"I met others with similar challenges as my organization and picked up new ideas on how to solve the issues."

118

Engaging Interactive Microsoft Dynamics CRM sessions

80

Awesome (Volunteer!) Presenters

525

Participants in CRMUG Summit 2013

176 Sponsors & Exhibitors

10 Academy Training Classes

95 Collaborate Discussions

1 **INSPIRING KEYNOTE ADDRESS**
NFL Super Bowl–winning coach Tony Dungy

2 **LUCKY WINNERS**
Autographed football, book, and prize package

3 **KEYS TO HIS SUCCESS**
Hard work. Accountability. Teamwork.

"I am fairly new to Microsoft Dynamics CRM, and I learned a TON! Thank you so much!"

Get Social #CRMUGsummit

LIKE-MINDED MEMBER CONNECTIONS

Regional Chapter networking with others who live nearby

Learning from folks in similar roles and industries

3,000+

Session slides shared via CRMUG Summit 2013 Tampa community on Collaborate

CRMUG Dynamics CRM User Group Collaborate

http://community.CRMUG.com

Want to see the event in motion? Scan the QR code or visit www.CRMUGsummit.com

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to meet us in St. Louis!

The Week of October 13, 2014

CRMUG® summit

DYNAMICS CRM USER GROUP CONFERENCE

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Take a new approach towards business—go mobile with your Microsoft Dynamics CRM and get closer to the real action. You can now work with your data everywhere you happen to be. The possibility to access the desired information online & offline will greatly ease your job.

Work with your data effortlessly, astonishingly quickly, and take advantage of delightful features, such as interactive maps or photo capturing. That's not all. You can also fully customize the app and bring in the features you want.

Supported mobile platforms: iPhone, iPad Android Windows (All versions)

Get more info at www.resco.net/mobilecrm

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technology on the move

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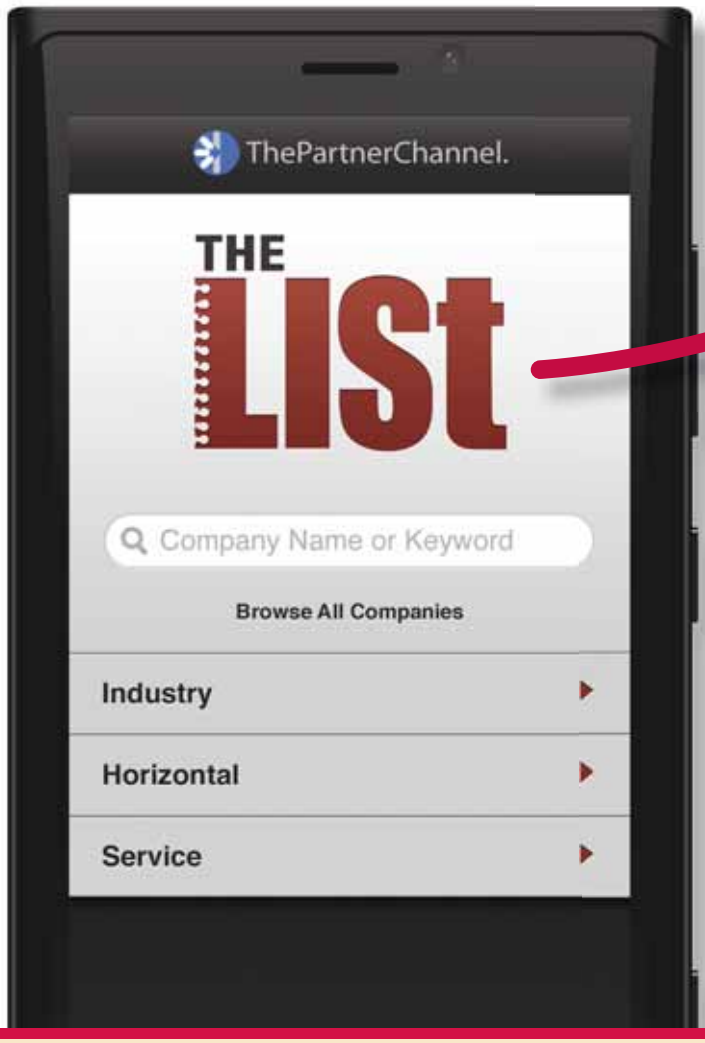

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The List from The Partner Channel® is your tool for finding the solutions available from Microsoft Dynamics® Partners. Review the various industry, horizontal, and service offerings available and you may just find exactly what you've been looking for! The List is unique in that it shares only those solutions and services that work with the Microsoft Dynamics product line. We want you to spend time using the solution, not looking for it. If you have a product or service that you would like included on The List, please contact Jane@thepartnerchannel.com.

NOTE: The Partner Channel and Dynamic Communities offers no expressed or implied warranty or guarantee for any of the products included in this directory. Support and quality assurance of these software products and services are solely the responsibility of each Microsoft Dynamics Partner.

*Due to the nature of the "classified" format used for The List, Microsoft Dynamics brand guidelines may not have been followed. We encourage Partners NOT to follow the example we are setting!

Industry

Agriculture

Joesoftware Inc. CRM
http://www.joesoftware.com • 780-990-0220
Livestock Accelerator
Producer Management and Livestock Movement/Quality Tracking accelerator for Dynamics CRM.

Condominium Developers

Rimrock Corporation CRM GP
http://www.corerealestatesoftware.com
416-644-1456
CORE Real Estate Software
From marketing and sales to décor and warranty tracking, manage all aspects of condominium development within the Microsoft Dynamics platform.

Construction

Hitachi Solutions America AX CRM
http://us.dynamics.hitachi-solutions.com
888-254-7242
Hitachi Solutions America CfMD
Hitachi Solutions helps businesses complete with the largest global enterprises by delivering proven business and IT strategies using powerful and easy to use industry solutions based on Microsoft Dynamics AX and CRM.

WennSoft, Inc. CRM GP
http://www.wennsoft.com
262-821-4100
NEW: Signature CfMD
Manage installation process. Bid, estimate & track project costs.

Consumer Packaged Goods

Flintfox International Limited
NAV AX CRM
http://www.flintfox.com • 404-245-5116
TPM for Dynamics Suite CfMD
Integrating Trade Promotion Management processes into Dynamics. Sell-side and Buy-side, advanced pricing, planning and execution of deals, promotions, rebates and fees, plus settlement (deductions, claims, payments).

Cross Industry Solution

AssureSign LLC
NAV GP SL CRM AX
http://www.assuresign.com • 407-670-0400
AssureSign Electronic Signature Software
Integrated cloud or on-premise enterprise class Electronic Signatures.

Bottomline Technologies
CRM AX GP
http://www.bottomline.com/Transform_Filer_for_Sharepoint • 866-551-6934
Transform Filer for SharePoint
A powerful, easy-to-use and cost-effective filing and finding solution for document management on SharePoint® that manages transactional content by linking documents/records with business applications.

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

kCentric Technologies Inc
CRM NAV GP AX
http://www.k-ecommerce.com
514-973-2510 ext. 2
k-eCommerce ecommerce solution
B2C, B2B, Customer service, SEO, CMS, Seamless real time integration to Dynamics AX, GP, NAV, SL, CRM, Cloud based, International.

Liaison Software Corp GP
CRM NAV SL AX
http://www.liaisonsc.com
800-811-4618 ext. 201
Liaison Messenger EDD
Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).

PaperSavePro CRM GP SL AX
http://www.PaperSavePro.com • 877-727-3799
PaperSavePro CfMD
PaperSavePro™ is a Certified for Microsoft Dynamics document management and electronic workflow solution that eliminates inherent risks and inefficiencies associated with paper.

Solver RM POS SL
NAV GP CRM AX
http://www.solverusa.com • 310-691-5300
Solver - BI360 Suite
Both Excel & Web-based Financial & Operational Reporting, Budgeting, Dashboards, & a pre-configured Data Warehouse w/ direct integration to Microsoft Dynamics.

Finance / Banking

AssureSign LLC NAV
GP SL CRM AX
http://www.assuresign.com • 407-670-0400
AssureSign Electronic Signature Software
Integrated cloud or on-premise enterprise class Electronic Signatures.

T3 Information Systems CRM
http://www.t3infosystems.com • 202-419-5105
PECast
PECast is a Private Equity Management software built on the Microsoft Dynamics CRM platform. Captures all data elements, processes and relationships required by private equity firms.

Food and Beverage

Flintfox International Limited
NAV AX CRM
http://www.flintfox.com • 404-245-5116
TPM for Dynamics Suite CfMD
Integrating Trade Promotion Management processes into Dynamics. Sell-side and Buy-side, advanced pricing, planning and execution of deals, promotions, rebates and fees, plus settlement (deductions, claims, payments).

Government

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NAV GP CRM AX
http://www.solverusa.com/government/
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Solver BI360 Suite for Government
As federal, state and local governments look for powerful BI solutions to drive performance and reduce costs, Solver's dashboards, scorecards, reporting and forecasting are proving to be invaluable tools.

Thomson Reuters, Tax and Accounting - Government CRM GP
http://ExperienceAumentum.com
866-471-2900
Thomson Reuters Aumentum
GRM® is now Aumentum. Providing government revenue management solutions.

Tribridge CRM
http://www.tribridge.com/crm311
877-744-1360
Tribridge CRM311®
Tribridge CRM311® helps state & local government call centers manage caller inquiries, capture new constituent records, and leverage automated workflows to process requests as efficiently as possible.

Tribridge CRM
http://www.tribridge.com/offendermgt
877-977-8458
NEW: Tribridge Offender Management
Offender Management, built on Microsoft CRM, provides correctional and public safety institutions a scalable, cost-effective tool for managing offenders. Robust reporting and dashboards set this solution apart.

Healthcare

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NAV GP CRM AX
http://www.solverusa.com/healthcare/
310-691-5300
Solver BI360 Suite for Healthcare
Solver's BI360 helps healthcare providers better manage their performance through user-friendly planning, budgeting, reporting, dashboard and data warehouse tools running on a cost-efficient Microsoft platform.

Tribridge CRM
http://www.tribridge.com/carecoordination
877-744-1360
Tribridge Care Coordination
Tribridge Care Coordination leverages Caradigm, Microsoft CRM, and HealthVault as a closed-loop Care Coordination platform, providing proactive patient engagement and care coordination outside of care facilities.

High Tech and Electronics

Cincom Systems, Inc CRM AX GP
http://acquire.cincom.com • 877-244-2308
Cincom Acquire
Smart Configure, Price, Quote + Seamless Integration w/ Dynamics. Close deals up to 80% faster! See us at Convergence! Outsmart. Outsell.

Experlogix, Inc. GP CRM AX NAV
http://www.experlogix.com
805-504-9729 ext. 712
Experlogix Configurator for Microsoft Dynamics CRM & ERP
Experlogix Configurators meets the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

Hitachi Solutions America AX CRM
http://us.dynamics.hitachi-solutions.com/
888-254-7242
Field Service Automation CfMD
Hitachi Solutions field service automation solution connects your office and field service staff with the information and processes needed to improve field operations productivity and deliver service excellence.

Industrial Equipment

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KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

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Field Service Automation CfMD
Hitachi Solutions field service automation solution connects your office and field service staff with the information and processes needed to improve field operations productivity and deliver service excellence.

Insurance

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GP SL CRM AX
http://www.assuresign.com • 407-670-0400
AssureSign Electronic Signature Software
Integrated cloud or on-premise enterprise class Electronic Signatures.

Life Sciences

Armanino AX GP CRM
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Media and Entertainment

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KORE MediaPitch™
KORE MediaPitch™ is the media industry's leading platform for transforming a generic CRM into a media sales powerhouse.

KORE Software AX CRM GP
http://www.KOREsoftware.com • 480-240-5662
KORE ProSports™
More teams in the NFL, MLB, NBA & NHL use KORE than any other software. CRM for sponsorships, ticket sales, premium seating & media trafficking.

Oil and Gas

Hitachi Solutions America AX CRM
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http://www.jovaco.com • 888-988-3535 ext. 122
JOVACO Project Suite
Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & inter-departmental capabilities.

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http://www.templetonsolutions.com
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CRM solutions that provide the ability to track and leverage client interactions and maximize revenue opportunities. Additional features include: Time & Billing, Analytics, Document Mgmt and Project Mgmt.

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http://www.concertocloud.com/psa
877-744-1360
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Concerto PSA extends Microsoft solutions via the cloud to bridge the gap between projects, prospects, and P & L. Manages the entire life-cycle including relationships, resources, timecards, billing, and analytics.

Retail

Avalara, Inc. CRM GP NAV
POS RM SL AX
http://www.avalara.com • 877-780-4848
Avalara for Sales Tax Automation CfMD
Automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filling and remittance solution for Microsoft Dynamics.

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B2C, B2B, Customer service, SEO, CMS, Seamless real time integration to Dynamics AX, GP, NAV, SL, CRM, Cloud based, International.

Solver GP RM POS
SL NAV CRM AX
http://www.solverusa.com/retail/
310-691-5300
Solver BI360 Suite for Retail
BI360 gives retailers the ability to forecast, track and analyze product and store sales, plan more effective promotions, purchase merchandise that matches customer regional buying preferences, and improve staffing.

Software

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

Staffing / Recruiting

Joesoftware Inc. CRM
http://www.joesoftware.com • 780-990-0220
Recruitment Accelerator
Web-based recruiting mgmt, resume collection & on-boarding accelerator.

Professional Advantage CRM GP
http://www.profad.com • 877-897-1209
1Staff Staffing & Recruiting Software
1Staff provides an Front-to-Back solution for the unique needs of the staffing industry. 1Staff allows Sales Staff, Recruiters, Payroll and Billing Specialists to all work on the Microsoft Dynamics Platform.

Warehouse Management

2B Solutions, Inc CRM
http://2bsolutions.net/wimscrm/
866-408-9991
Warehouse Information Management Solution for CRM
Mobile Scanning. Web Based. Track products, customers, orders and more!

Wholesale Trade: Durable Goods

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KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

Horizontal

Analytics

TARGIT GP SL RM POS NAV CRM AX
http://www.targit.com • 813-933-4600
TARGIT Decision Suite
TARGIT is the world's largest Business Intelligence vendor for companies using Microsoft Dynamics NAV or AX, and is recognized by Gartner and BARC for user-friendliness, visualization, and innovation.

Total Dynamics Solutions, LLC AX GP NAV CRM
http://www.totaldynamicssolutions.com
612-276-5075
Enterprise Business Management
Providing value-added analytical capabilities for Microsoft Dynamics.

Application Lifecycle Management

Adxstudio Inc. CRM
http://www.adxstudio.com • 800-508-7811
Adxstudio ALM Toolkit
ALM Toolkit is a suite of tools that help automate change management for Microsoft Dynamics CRM projects using TFS or other source control apps. Manage solution files, CRM data and multiple deployment environments.

Asset Maintenance/MRO/EAM

WennSoft, Inc. CRM GP
http://www.wennsoft.com
262-821-4100
NEW: Signature CfMD
Manage asset maintenance, distribution and scheduling for profitable utilization.

Banking

T3 Information Systems CRM
http://www.t3infosystems.com • 202-419-5105
PECast
PECast is a Private Equity Management software built on the Microsoft Dynamics CRM platform. Captures all data elements, processes and relationships required by private equity firms.

Budgeting

Solver GP RM POS SL NAV CRM AX
http://www.solverusa.com/retail/
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Solver BI360 Suite for Retail
BI360 gives retailers the ability to forecast, track and analyze product and store sales, plan more effective promotions, purchase merchandise that matches customer regional buying preferences, and improve staffing.

Solver RM POS SL NAV GP CRM AX
http://www.solverusa.com/healthcare/
310-691-5300
Solver BI360 Suite for Healthcare
Solver's BI360 helps healthcare providers better manage their performance through user-friendly planning, budgeting, reporting, dashboard and data warehouse tools running on a cost-efficient Microsoft platform.

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http://www.solverusa.com/government/
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Solver BI360 Suite for Government
As federal, state and local governments look for powerful BI solutions to drive performance and reduce costs, Solver's dashboards, scorecards, reporting and forecasting are proving to be invaluable tools.

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http://www.solverusa.com • 310-691-5300
Solver - BI360 Suite
Both Excel & Web-based Financial & Operational Reporting, Budgeting, Dashboards, & a pre-configured Data Warehouse w/ direct integration to Microsoft Dynamics.

Total Dynamics Solutions, LLC AX GP NAV CRM
http://www.totaldynamicssolutions.com
612-276-5075
Enterprise Business Management
Web based, interactive, & integrated planning/budgeting for MS Dynamics.

Business Intelligence

Accountable Software AX NAV SL GP CRM
http://www.accountable.com • 610-983-3100
Dynamics Reporting
LIVE Dynamics Data in Excel, SSRS, SharePoint, Business Portal & the Web.

Corporate Renaissance Group CRM
http://www.crgroup.com • 613-232-4295
Trend Miner
An out of the box BI visualization tool for CRM. Trend Miner empowers the user to gain insight into their historical information and visually see data trends. It provides access to all of the users custom entities.

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

Halo Business Intelligence GP NAV SL CRM AX
http://www.halobi.com • 888-300-0219
Halo Business Intelligence
Any source, data quality, rapidly deploy, predict, collaborate & mobile.

SMB Suite CRM GP
http://www.smbsuite.com • 888-525-6398
NEW: SMB Intelligence
Grow smarter and improve efficiency by integrating all functions of your business, with role-based dashboards, reporting, and forecasting.

Solver GP RM POS SL NAV CRM AX
http://www.solverusa.com/retail/
310-691-5300
Solver BI360 Suite for Retail
BI360 gives retailers the ability to forecast, track and analyze product and store sales, plan more effective promotions, purchase merchandise that matches customer regional buying preferences, and improve staffing.

Solver RM POS SL NAV GP CRM AX
http://www.solverusa.com/healthcare/
310-691-5300
Solver BI360 Suite for Healthcare
Solver's BI360 helps healthcare providers better manage their performance through user-friendly planning, budgeting, reporting, dashboard and data warehouse tools running on a cost-efficient Microsoft platform.

Solver RM POS SL NAV GP CRM AX
http://www.solverusa.com/government/
310-691-5300
Solver BI360 Suite for Government
As federal, state and local governments look for powerful BI solutions to drive performance and reduce costs, Solver's dashboards, scorecards, reporting and forecasting are proving to be invaluable tools.

Solver RM POS SL NAV GP CRM AX
http://www.solverusa.com • 310-691-5300
Solver - BI360 Suite
Both Excel & Web-based Financial & Operational Reporting, Budgeting, Dashboards, & a pre-configured Data Warehouse w/ direct integration to Microsoft Dynamics.

TARGIT GP SL RM POS NAV CRM AX
http://www.targit.com • 813-933-4600
TARGIT Decision Suite
TARGIT is the world's largest Business Intelligence vendor for companies using Microsoft Dynamics NAV or AX, and is recognized by Gartner and BARC for user-friendliness, visualization, and innovation.

Total Dynamics Solutions, LLC CRM AX GP NAV
http://www.totaldynamicssolutions.com
612-276-5075
Enterprise Business Management
Providing value-added analytical capabilities for Microsoft Dynamics.

Business Process Management

Bottomline Technologies CRM AX GP
http://www.bottomline.com/Transform_Filer_for_Sharepoint • 866-551-6934
Transform Filer for SharePoint
A powerful, easy-to-use and cost-effective filing and finding solution for document management on SharePoint® that manages transactional content by linking documents/records with business applications.

Tribridge NAV SL CRM GP AX
http://www.concertocloud.com • 877-977-8458
Tribridge Concerto Cloud Services
Concerto Cloud offers Dynamics Solutions as a Service in a private cloud environment. Subscription pricing, dedicated resources, no shared components, and a complete solution customized to fit unique needs.

Compliance

Fastpath Solutions, Inc CRM AX GP NAV SL
http://www.gofastpath.com
515-276-1779 ext. 410
Fastpath Assure
Sarbanes-Oxley segregation of duties solution with built-in audit intelligence from certified Auditors. Get the data your Auditors want - Fast!

Credit Card/Check Processing

Nodus Technologies, Inc. CRM
http://www.nodus.com • 909-482-4701
NEW: CRM Charge
Our secure ePayment solution will simplify credit card and eCheck processing, reduce credit card fees & help fulfill PCI requirements for CRM online and on premise.

KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

▸▸Customer Relationship Management

Armanino AX GP CRM
http://www.amllp.com/microsoft-dynamics
925-790-2600
Armanino CfMD
A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

eBridge Connections SL
NAV GP CRM AX
http://www.ebridgeconnections.com
800-755-6921
eBridge for CRM
eBridge platform to seamlessly integrate customer and opportunity data.

Experlogix, Inc. GP CRM AX NAV
http://www.experlogix.com
805-504-9729 ext. 712
Experlogix Configurator for Microsoft Dynamics CRM & ERP
Experlogix Configurators meets the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

SMB Suite GP CRM
http://www.smbsuite.com • 888-525-6398
NEW: SMB Sales
Improve the productivity of your sales team with SMB Sales. Manage all of your accounts, contacts, & forecasting with powerful dashboards that are fully integrated with Microsoft Outlook.

Tribridge NAV SL CRM GP AX
http://www.concertocloud.com • 877-977-8458
Tribridge Concerto Cloud Services
Concerto Cloud offers Dynamics Solutions as a Service in a private cloud environment. Subscription pricing, dedicated resources, no shared components, and a complete solution customized to fit unique needs.

Visionary Software Consulting, Inc. CRM
http://www.crm-rules.com • 877-276-1942
CRM Rules! for Microsoft Dynamics CRM 2011
Easily customize complex CRM dynamic forms without knowing JavaScript.

▸▸Data Integration

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

eBridge Connections AX
CRM GP NAV SL
http://www.ebridgeconnections.com
800-755-6921
eBridge Integration Solution
The leading cloud integration platform for EDI, webstore, CRM systems.

▸▸Data Management

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

▸▸Document Management

Bottomline Technologies
CRM AX GP
http://www.bottomline.com/Transform_Filer_for_Sharepoint • 866-551-6934
Transform Filer for SharePoint
A powerful, easy-to-use and cost-effective filing and finding solution for document management on SharePoint® that manages transactional content by linking documents/records with business applications.

Liaison Software Corp GP
CRM NAV SL AX
http://www.liaisonsc.com
800-811-4618 ext. 201
Liaison Messenger EDD
Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).

PaperSavePro CRM GP SL AX
http://www.PaperSavePro.com • 877-727-3799
PaperSavePro CfMD
PaperSavePro™ is a Certified for Microsoft Dynamics document management and electronic workflow solution that eliminates inherent risks and inefficiencies associated with paper.

▸▸E-commerce

Avalara, Inc. CRM GP NAV
POS RM SL AX
http://www.avalara.com • 877-780-4848
Avalara for Sales Tax Automation CfMD
Automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filling and remittance solution for Microsoft Dynamics.

Computer Pundits Corporation
GP AX CRM
http://www.eCommerce21.com • 888-786-3487
eCommerce21®
Patented B2B and B2C database driven eCommerce, fully integrated with Dynamics, for automated production of Web Storefront with intuitive navigation, SEO and full Shopping Cart for easier sales from your website.

eBridge Connections AX
CRM GP SL NAV
http://www.ebridgeconnections.com
800-755-6921
eBridge for eCommerce
Integration with all webstores incl. Amazon, Magento, BigCommerce, eBay+

kCentric Technologies Inc
CRM NAV GP AX
http://www.k-ecommerce.com
514-973-2510 ext. 2
k-eCommerce ecommerce solution
B2C, B2B, Customer service, SEO, CMS, Seamless real time integration to Dynamics AX, GP, NAV, SL, CRM, Cloud based, International.

SMB Suite CRM GP
http://www.smbsuite.com • 888-525-6398
NEW: SMB eCommerce
Take your business online with SMB e-Commerce. Create web storefronts, track and manage the customer buying experience, and accurately process transactions, which are fully integrated with SMB Suite solutions.

▸▸EDI

eBridge Connections AX
CRM GP NAV SL
http://www.ebridgeconnections.com
800-755-6921
eBridge for EDI
Web EDI solution eliminates transaction fees – over 1000 trading partners.

▸▸Electronic Document Delivery (Email)/Faxing

Liaison Software Corp
GP CRM NAV SL AX
http://www.liaisonsc.com
800-811-4618 ext. 201
Liaison Messenger EDD
Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).

▸▸Electronic Signatures

AssureSign LLC
NAV GP SL CRM AX
http://www.assuresign.com • 407-670-0400
AssureSign Electronic Signature Software
Integrated cloud or on-premise enterprise class Electronic Signatures.

▸▸Field Service Management

FieldOne Systems GP SL
NAV RM AX CRM
http://www.fieldone.com • 201-252-8900
FieldOne Sky
An end-to-end platform supporting all phases of field service management including routing and scheduling, work process automation, communications, and business intelligence with support for any mobile device.

Hitachi Solutions America AX CRM
http://us.dynamics.hitachi-solutions.com/
888-254-7242
Field Service Automation CfMD
Hitachi Solutions field service automation solution connects your office and field service staff with the information and processes needed to improve field operations productivity and deliver service excellence.

Rimrock Corporation CRM GP
http://www.fieldboss.com
416-256-4995 ext. 221
FieldBoss - Field Service. Simplified.
Automates workflow for field service companies. Increase efficiency and reduce operating costs while improving the level of customer service.

WennSoft, Inc. CRM GP
http://www.wennsoft.com
262-821-4100
NEW: Signature CfMD
Innovative field service solutions streamline operations from sales to the field to accounting.

▸▸HR Management

Professional Advantage CRM GP
http://www.profad.com • 877-897-1209
1Staff Staffing & Recruiting Software
1Staff provides an Front-to-Back solution for the unique needs of the staffing industry. 1Staff allows Sales Staff, Recruiters, Payroll and Billing Specialists to all work on the Microsoft Dynamics Platform.

KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

HORIZONTAL

SMB Suite GP CRM
http://www.smbsuite.com • 888-525-6398
NEW: SMB HR & Payroll
Consolidate all HR information and systems with SMB HR & Payroll, including employee and benefits administration, employee self- service, payroll, and tax compliance.

Inventory Management

2B Solutions, Inc CRM
http://2bsolutions.net/wimscrm/
866-408-9991
Warehouse Information Management Solution for CRM
Mobile Scanning. Web Based. Track products, customers, orders and more!

Armanino AX GP CRM
http://www.amllp.com/microsoft-dynamics
925-790-2600
Armanino CfMD
A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

Job Costing

JOVACO Solutions Inc. CRM GP
http://www.jovaco.com • 888-988-3535 ext. 122
JOVACO Project Suite
Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & inter-departmental capabilities.

WennSoft, Inc. CRM GP
http://www.wennsoft.com
262-821-4100
NEW: Signature CfMD
Manage costs by closely tracking all components of a project - labor, materials, equipment, etc.

Manufacturing Enhancement

Cincom Systems, Inc CRM AX GP
http://acquire.cincom.com • 877-244-2308
Cincom Acquire
Smart Configure, Price, Quote + Seamless Integration w/ Dynamics. Close deals up to 80% faster! See us at Convergence! Outsmart. Outsell.

Marketing Automation

CoreMotives, a Silverpop company CRM
http://www.coremotives.com • 770-916-6485
CoreMotives Marketing Suite
Marketing power for 1,600+ companies using Microsoft Dynamics CRM: Email marketing, Lead scoring, Web tracking, Event management, Web forms, Surveys, and Nurture marketing – all native within your CRM.

SalesFUSION, Inc. NAV CRM
http://www.salesfusion.com • 800-558-1760
SalesFUSION360
SalesFUSION360 is a marketing software that provides email, web tracking, lead management & landing pages and lead nurturing for Dynamics CRM.

Mobility

2B Solutions, Inc CRM
http://2bsolutions.net/mobilecrm/
866-408-9991
Mobile CRM
Field Sales/Service, Camera/Barcoding, Quotes, WMS, Inventory/Order Mngt.

NAV and CRM Integration

SalesFUSION, Inc. NAV CRM
http://www.salesfusion.com • 800-558-1760
SalesFUSION360
SalesFUSION360 is a marketing software that provides email, web tracking, lead management & landing pages and lead nurturing for Dynamics CRM.

Portals

Adxstudio Inc. CRM
http://www.adxstudio.com • 800-508-7811
Adxstudio Portals CfMD
Supercharge Dynamics CRM into a web-based sales, service, support and social platform with configurable, mobile-ready portal apps perfect for retail customer care & government 311 solutions. For CRM 2013 & 2011.

DynamicPoint GP NAV CRM
http://www.dynamicpoint.com • 562-726-4396
Employee, Vendor & Customer Portals Integrated with Microsoft Dynamics
Extend crucial Microsoft Dynamics data with custom SharePoint Portals.

Experlogix, Inc. GP CRM AX NAV
http://www.experlogix.com
805-504-9729 ext. 712
Experlogix Configurator for Microsoft Dynamics CRM & ERP
Experlogix Configurators meets the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

Project Accounting

JOVACO Solutions Inc. CRM GP
http://www.jovaco.com • 888-988-3535 ext. 122
JOVACO Project Suite
Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & inter-departmental capabilities.

Reporting

Accountable Software AX
NAV SL GP CRM
http://www.accountable.com • 610-983-3100
Dynamics Reporting
LIVE Dynamics Data in Excel, SSRS, SharePoint, Business Portal & the Web.

Solver GP RM POS
SL NAV CRM AX
http://www.solverusa.com/retail/
310-691-5300
Solver BI360 Suite for Retail
BI360 gives retailers the ability to forecast, track and analyze product and store sales, plan more effective promotions, purchase merchandise that matches customer regional buying preferences, and improve staffing.

Solver RM POS SL
NAV GP CRM AX
http://www.solverusa.com/healthcare/
310-691-5300
Solver BI360 Suite for Healthcare
Solver's BI360 helps healthcare providers better manage their performance through user-friendly planning, budgeting, reporting, dashboard and data warehouse tools running on a cost-efficient Microsoft platform.

Solver RM POS SL
NAV GP CRM AX
http://www.solverusa.com/government/
310-691-5300
Solver BI360 Suite for Government
As federal, state and local governments look for powerful BI solutions to drive performance and reduce costs, Solver's dashboards, scorecards, reporting and forecasting are proving to be invaluable tools.

Solver RM POS SL
NAV GP CRM AX
http://www.solverusa.com • 310-691-5300
Solver - BI360 Suite
Both Excel & Web-based Financial & Operational Reporting, Budgeting, Dashboards, & a pre-configured Data Warehouse w/ direct integration to Microsoft Dynamics.

TARGIT GP SL RM
POS NAV CRM AX
http://www.targit.com • 813-933-4600
TARGIT Decision Suite
TARGIT is the world's largest Business Intelligence vendor for companies using Microsoft Dynamics NAV or AX, and is recognized by Gartner and BARC for user-friendliness, visualization, and innovation.

Total Dynamics Solutions, LLC
AX GP NAV CRM
http://www.totaldynamicssolutions.com
612-276-5075
Enterprise Business Management
Providing value-added analytical capabilities for Microsoft Dynamics.

Sales Order Processing Enhancement

Cincom Systems, Inc CRM AX GP
http://acquire.cincom.com • 877-244-2308
Cincom Acquire
Smart Configure, Price, Quote + Seamless Integration w/ Dynamics. Close deals up to 80% faster! See us at Convergence! Outsmart. Outsell.

Experlogix, Inc. GP CRM AX NAV
http://www.experlogix.com
805-504-9729 ext. 712
Experlogix Configurator for Microsoft Dynamics CRM & ERP
Experlogix Configurators meets the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

Liaison Software Corp GP
CRM NAV SL AX
http://www.liaisonsc.com
800-811-4618 ext. 201
Liaison Messenger EDD
Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).

Security

Fastpath Solutions, Inc AX
SL NAV GP CRM
http://www.gofastpath.com
515-276-1779 ext. 410
Fastpath Audit Trail
An agile auditing tool that records changes to all Dynamics databases for easy analysis and reporting. You can know what changed, who changed it and the before and after values. Real information, real results.

Fastpath Solutions, Inc
CRM GP AX
http://www.gofastpath.com
515-276-1779 ext. 410
Fastpath Config AD - Active Directory integration tool
Simplify Dynamics GP, AX or CRM user provisioning with Active Directory. Single interface for managing Dynamics users improving security, saving time and money. GP solution offers Single Sign on functionality.

KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

▸▸Supply Chain Management

Armanino AX GP CRM
http://www.amllp.com/microsoft-dynamics
925-790-2600
Armanino CfMD
A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

▸▸System Enhancement

DynamicsDownloads
NAV SL GP CRM
http://www.DynamicsDownloads.com
419-581-2300
DynamicsDownloads
Looking for a Dynamics Add-On Solution? Search, Buy and Sell here!

▸▸Tax

Avalara, Inc. CRM GP NAV
POS RM SL AX
http://www.avalara.com • 877-780-4848
Avalara for Sales Tax Automation CfMD
Automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filling and remittance solution for Microsoft Dynamics.

▸▸Time and Attendance

JOVACO Solutions Inc. CRM GP
http://www.jovaco.com
888-988-3535 ext. 122
JOVACO Project Suite
Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & inter-departmental capabilities.

▸▸Trade Promotion Management

Flintfox International Limited
NAV AX CRM
http://www.flintfox.com • 404-245-5116
TPM for Dynamics Suite CfMD
Integrating Trade Promotion Management processes into Dynamics. Sell-side and Buy-side, advanced pricing, planning and execution of deals, promotions, rebates and fees, plus settlement (deductions, claims, payments).

Total Dynamics Solutions, LLC
AX GP NAV CRM
http://www.totaldynamicssolutions.com
612-276-5075
Enterprise Business Management
Web based, integrated trade management for Microsoft Dynamics.

▸▸Workflow / Notifications

DynamicPoint CRM GP NAV
http://www.dynamicpoint.com • 562-726-4396
SharePoint Workflow Solutions that Integrate with Microsoft Dynamics
Custom SharePoint workflows integrated with Dynamics GP, NAV and CRM.

Integrity Data AX NAV
SL GP CRM
http://www.u-linc.com
217-732-3737 ext. 0203
U-LINC®, Powered By Integrity Data
Workflow and notifications anytime, anywhere in Microsoft Dynamics. Works seamlessly within and across your existing system, is flexible and easy to use, improving organizational performance.

PaperSavePro CRM GP SL AX
http://www.PaperSavePro.com • 877-727-3799
PaperSavePro CfMD
PaperSavePro™ is a Certified for Microsoft Dynamics document management and electronic workflow solution that eliminates inherent risks and inefficiencies associated with paper.

Services

▸▸.NET Development

Isis, Inc. RM POS SL GP CRM
http://www.isisinc.com • 804-762-4200
Isis .NET Development
Isis provides cost effective outsourced .NET development (C#, VB.NET, ASP.NET, C++) to our partners and customers worldwide at reduced rates as low as $20 per hour depending on project size and skill set required!

▸▸Application Service Provider/Hosting

Myappsanywhere by NetStandard
AX SL NAV GP CRM
http://www.myappsanywhere.com
888-636-HOST
Premier Cloud Computing Provider
Myappsanywhere provides a complete go-to-market integrated cloud solution delivering 99.999% uptime, customizations, no minimums and secure storage in its privately-owned SSAE 16 Type 2 data center facilities.

Njevity, Inc. SL CRM GP
http://www.njevitytogo.com/partner
720-870-9700
NjevityToGo White Label "Cloud Business in a Box™" Cloud & Hosting Services for Dynamics Partners
Don't sell THEIR ERP Cloud, sell YOUR ERP Cloud, YOUR Brand. With our Cloud Services Program—YOU own the customer, YOU handle the billing, YOU make BIG $ for the entire contract. WE make YOU look like a Cloud Expert!

Rose Business Solutions, Inc
NAV SL AX GP CRM
http://www.roseasp.com • 858-794-9403
RoseASP
RoseASP has been hosting Microsoft Dynamics applications since 2000. We host AX, SL, NAV, GP and CRM along with a host of ISV solutions. Great commissions for the life of the contract. We guarantee 99.5% uptime.

WatServ NAV GP CRM AX SL
http://www.watserv.com
866-531-2598 ext. 2311
Hosting and Cloud Computing for Microsoft Dynamics ERP and CRM
WatServ is one of North America's largest, most experienced providers of Cloud Computing services for Dynamics AX, Nav, GP, SL & CRM.

▸▸Closing Sales

InsideView CRM
http://www.insideview.com/microsoft
415-728-9300
InsideView CfMD
InsideView: 2013 CODiE™ for Best Sales & Marketing Intelligence Solution.

▸▸Cloud Computing

Data Resolution, LLC GP
NAV SL AX CRM
http://www.dataresolution.net • 877-878-9108
ERP Clouds
Data Resolution is dedicated to delivering private ERP cloud services branded as the partners brand. We keep all of our cloud customers optimized & working 24 hours a day, worldwide for the last 11 years.

GoIWx, Inc. CRM SL GP NAV AX
http://www.goiwx.com
952-258-6329
Cloud Hosting Services for Dynamics ERP and CRM
Simplify your business in the Cloud. 30 day free trials available.

Njevity, Inc. SL CRM GP
http://www.njevitytogo.com/partner
720-870-9700
NjevityToGo White Label "Cloud Business in a Box™" Cloud & Hosting Services for Dynamics Partners
Don't sell THEIR ERP Cloud, sell YOUR ERP Cloud, YOUR Brand. With our Cloud Services Program—YOU own the customer, YOU handle the billing, YOU make BIG $ for the entire contract. WE make YOU look like a Cloud Expert!

Reviora NAV GP CRM SL AX
http://www.reviora.com • 813-344-1600
Cloud ERP hosting
Cloud hosting for Dynamics ERP/CRM. Enterprise-class delivery

SMB Suite CRM GP
http://www.smbsuite.com • 888-525-6398
NEW: SMB Suite
Grow smarter with SMB Suite's fully-integrated Microsoft Cloud ERP, CRM, and eCommerce solutions for small and mid-sized businesses.

KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

Tribridge NAV SL CRM GP AX
http://www.concertocloud.com • 877-977-8458
Tribridge Concerto Cloud Services
Concerto Cloud offers Dynamics Solutions as a Service in a private cloud environment. Subscription pricing, dedicated resources, no shared components, and a complete solution customized to fit unique needs.

WatServ NAV GP CRM AX SL
http://www.watserv.com
866-531-2598 ext. 2311
Hosting and Cloud Computing for Microsoft Dynamics ERP and CRM
WatServ is one of North America's largest, most experienced providers of Cloud Computing services for Dynamics AX, Nav, GP, SL & CRM.

Custom Development

Isis, Inc. GP CRM SL POS RM
http://www.isisinc.com • 804-762-4200
Isis Custom Development
Isis provides cost effective outsourced custom development (C#, VB.NET, ASP.NET, C++) to our partners and customers worldwide at reduced rates as low as $20 per hour depending on project size and skill set required!

KTL Solutions, Inc. SL GP CRM
http://www.ktlsolutions.com • 866-960-0001
Custom Development
We are a certified .Net and Dexterity development group with over 15 years experience. Provide us with your requirements for a free estimate.

Data Services

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

Demand Generation

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D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

Email Marketing

The Partner Marketing Group
CRM AX SL RM NAV GP
http://www.thepartnermarketinggroup.com
605-574-9432
E-Mail Content and Services
Get access 24x7 to an online library full of unique newsletter content or elect the full-service options to nurture your pipeline of leads.

Implementation Services

Armanino AX GP CRM
http://www.amllp.com/microsoft-dynamics
925-790-2600
Armanino CfMD
A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

Market Research

D&B (Dun & Bradstreet) CRM
http://www.dnb.com/crmug • 952-393-3773
D&B360 for Microsoft Dynamics
D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 215M+ companies and 100M+ professional contacts, and includes real-time feeds from LinkedIn, Twitter, and others.

Marketing Planning & Services

Looking Glass Marketing
SL NAV RM AX GP CRM
http://www.lookingglassmarketing.com
614-453-5927
Cost-effective Marketing Solutions for Microsoft Dynamics Partners
Award-winning outsourced marketing services including lead generation, nurture marketing, email marketing, web design/SEO, content development.

The Partner Marketing Group
SL RM NAV GP CRM AX
http://www.thepartnermarketinggroup.com
605-574-9432
Microsoft Approved Vendor for Dynamics Marketing Consulting
From strategic marketing plan development to the critical daily execution, this Microsoft experienced team can help fill your sales pipeline.

Tornado Marketing, Inc.
GP CRM AX
http://www.tornado-marketing.com
608-213-0377
Marketing Consulting
Tornado Marketing offers high-impact, highly effective marketing consulting. 10+ years in the channel. Websites. SEO. Copywriting.

Member Organizations

Dynamic Communities
CRM AX GP NAV
http://www.dynamiccommunities.com
877-324-8880
Microsoft Dynamics User Groups - AXUG, CRMUG, GPUG, NAVUG
The User Groups are independent communities that empower Microsoft Dynamics users to connect, learn and share experiences to improve their use of and ROI on their solution. User & Partner memberships are available.

OnDemand Trials

Rose Business Solutions, Inc
AX NAV GP CRM
http://www.goERPcloud.com • 855-ERP-CLOUD
ERP Cloud Trials
Test drive preconfigured Microsoft Dynamics AX, GP, NAV, and CRM demo environments with integrated ISV solutions built for the web. goERPcloud trials help users understand the power of Dynamics and the cloud.

Partner Support Service

Plumbline Consulting, LLC.
CRM AX SL GP
http://www.PlumblineConsulting.com
419-581-2300
Partner Support Services
Leverage our Partner Support Services, including Support, Custom Development & Implementation Assistance to expand your offerings. 25+ yrs.

Sales Tax Management Service

Avalara, Inc. CRM GP NAV
POS RM SL AX
http://www.avalara.com • 877-780-4848
Avalara for Sales Tax Automation CfMD
Automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filling and remittance solution for Microsoft Dynamics.

SharePoint Development

Armanino AX GP CRM
http://www.amllp.com/microsoft-dynamics
925-790-2600
Armanino CfMD
A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

DynamicPoint CRM GP NAV
http://www.dynamicpoint.com • 562-726-4396
Your Source Exclusively for Microsoft Dynamics & SharePoint Integration
Portals, Business Automation & Custom Products integrated with Dynamics.

Social Media

The Partner Marketing Group
AX GP CRM NAV SL
http://www.thepartnermarketinggroup.com
732-237-8795
Butterfly Publisher
Join Dynamics partners on Butterfly, a publishing & lead capture platform that makes your social, blog & newsletter marketing more effective!

Software Development Consulting

Isis, Inc. RM POS SL GP CRM
http://www.isisinc.com • 804-762-4200
Isis Consulting
Isis provides cost effective outsourced software consulting to design, build, & test the software your clients need worldwide at reduced rates as low as $20 per hour depending on project size and skill set required!

Training

Accolade Publications, Inc.
SL NAV GP CRM AX
http://www.accoladepublications.com
321-206-4690
Training Manuals
User and Training Manuals for MS Dynamics GP, AX, SL, NAV, and CRM. Professionally Written--User Readable from Your Dynamics Education Experts.

Martin & Associates GP CRM
http://www.martinandassoc.com
513-772-7284 ext. 118
GP, CRM, and Management Reporter Training
Hands on training at our Cincinnati location. GP classes include Financials & Supply Chain. CRM classes are Sales Management & Marketing Automation. We also offer Management Reporter classes. See website for details.

Upgrades

Armanino AX GP CRM
http://www.amllp.com/microsoft-dynamics
925-790-2600
Armanino CfMD
A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

Writing/Documentation Services

The Partner Marketing Group
NAV SL RM GP CRM AX
http://www.thepartnermarketinggroup.com
605-574-9432
Blogs, Case Studies, Infographics, Websites
Use 'content marketing' to build your brand and drive prospects into your sales pipeline.

KEY: AX Axapta GP Great Plains NAV Navision SL Solomon CRM Customer Relationship Management RMS Retail Management System POS Point of Sale

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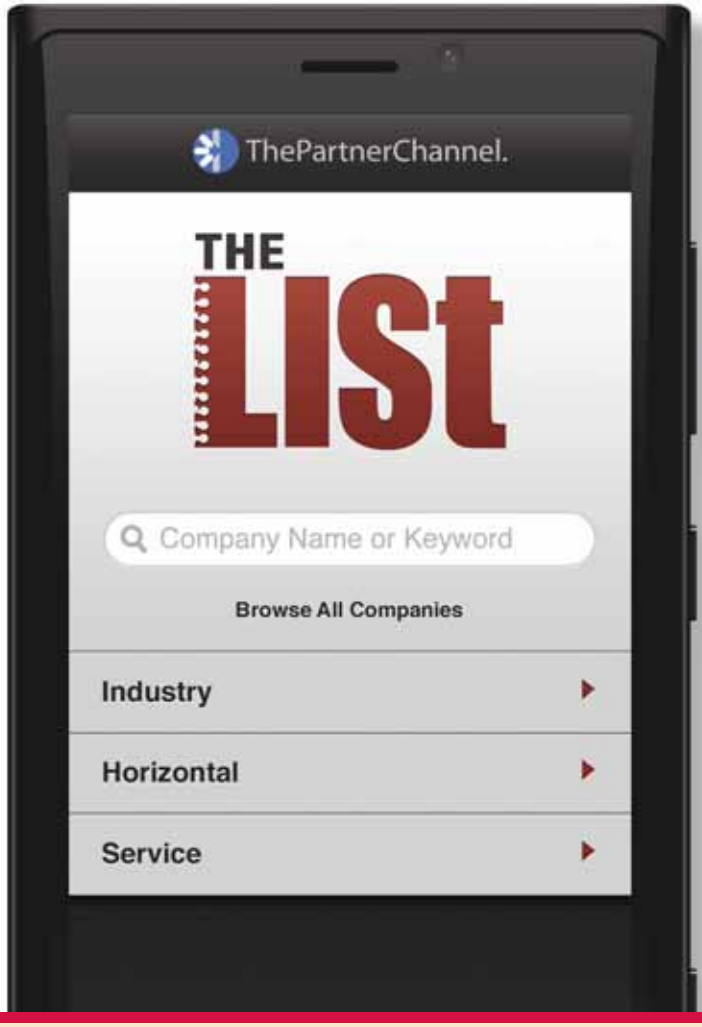

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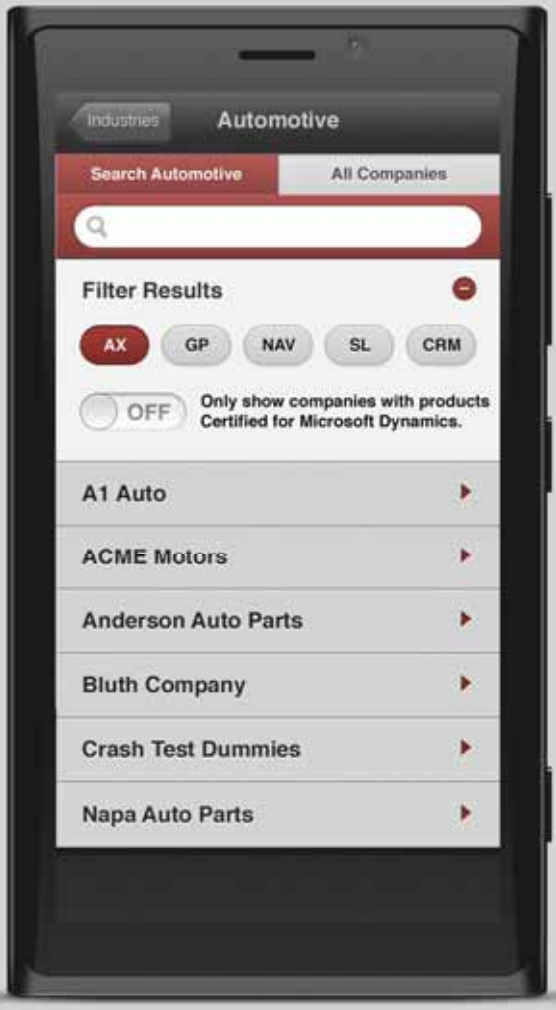

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