

Hosted CRM4 Quick Start Guide

Step-by-step guide to account set-up &
administration on the 2007 platform

Contents

1. Adding a new user to an existing organisation and assigning the Hosted CRM 4.0 service	3
2. Accessing your new Hosted Microsoft CRM 4.0 system	7
3. Installing the CRM Client with Outlook 2007	8

1. Adding a new user to an existing organisation and assigning the Hosted CRM 4.0 service

Note: This guide assumes you have signed up for the Outsourcery Hosted CRM 4 service and now wish to configure your CRM 4 Site.

The first time you sign up to an Outsourcery Hosted CRM 4 Service, we set-up your organisation in our control panel and configure one user account: an administrator account (usually *admin@yourdomain*) which is for configuring and administering your users and your CRM 4 Site. **The admin account is for administration and configuration only and cannot have services added to it.**

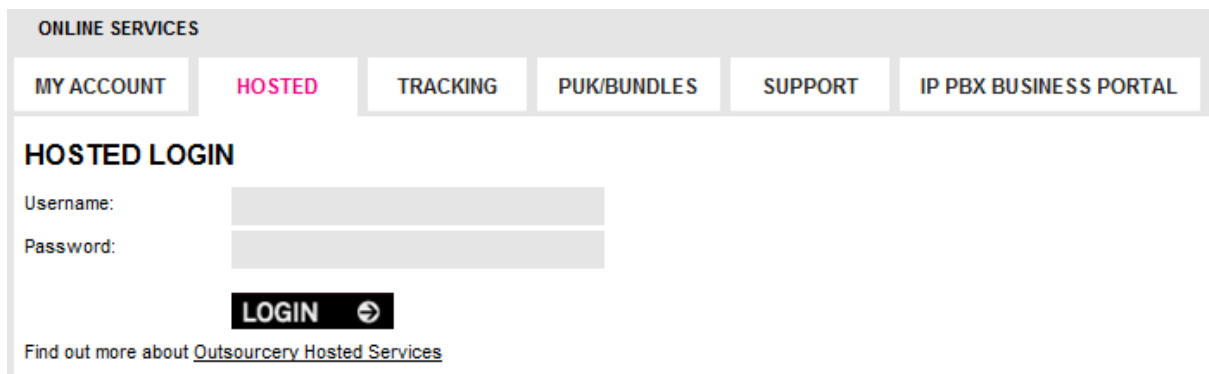
Note: Additional users can be given Administration access, but Outsourcery recommends you only use the admin login for admin tasks.

In this guide, we will log in as the admin user and set up additional users.

- Start -

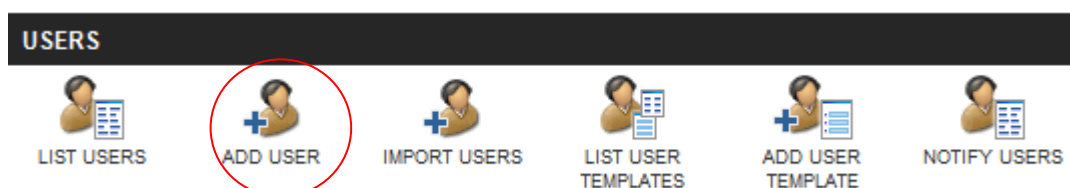
Go to: <https://www.outsourcery.co.uk/login/> and click on the **Hosted** tab.

Login to the control panel using your administrator username and password (in the format: admin@yourdomain).



Your password is what was agreed at the Pre Connect Courtesy Call and should be on the signed contract. If you have forgotten this, please e-mail in to hostingsupport@outsourcery.co.uk and the password will be resent to the account holders e-mail address.

1.1 Once you're on the control panel, click on the **Add User** icon.



1.2 You will now see the screen below. Proceed to enter all required details relating to the new user. You also have the option of giving the user administrator rights to the account by ticking the **'organisation administrator privileges'** box. Once completed, click **next**.

The screenshot shows a user creation form with the following sections:

- USER INFORMATION:** A dropdown menu for 'TEMPLATE' set to '[NO TEMPLATE]'.
- GENERAL INFORMATION:** Fields for 'USERNAME' (with a red asterisk and '@gcotest.co.uk' suffix), 'FIRST NAME', 'MIDDLE NAME', and 'LAST NAME'.
- ACCESS CONTROL:** Checkboxes for 'AUTO GENERATE PASSWORD', 'ORGANIZATION ADMINISTRATOR PRIVILEGES', and 'CONTROL PANEL ACCESS ENABLED' (checked). A date selector for 'ACCOUNT EXPIRES' with 'Month' (7), 'Day' (8), and 'Year' (2009) dropdowns.
- CONTACT INFORMATION:** Fields for 'EXTERNAL EMAIL', 'PHONE', and a 'DESCRIPTION' text area.

At the bottom left, a red asterisk indicates a required field. At the bottom right, there are buttons for 'PREVIOUS', 'NEXT', 'FINISH', and 'CANCEL'.

1.3 Select the **'Hosted CRM 4.0 Service'** by clicking on the box next to the service. Then click **next**.


The screenshot shows a selection screen titled 'AVAILABLE SERVICES' with the following options:

- HOSTED CRM 4.0 SERVICE 1.0.0:
- SHAREPOINT 3.2.0:
- BLACKBERRY SERVICE 3.2.0:
- HOSTED EXCHANGE 2007 4.7.0:

At the bottom right, there are buttons for 'PREVIOUS', 'NEXT', 'FINISH', and 'CANCEL'.

1.4 Click the to the **magenta arrow** icon 

The screenshot shows a configuration screen for 'HOSTED CRM 4.0 SERVICE 1.0.0' with the following details:

- Section: **HOSTED CRM 4.0 SERVICE 1.0.0**
- Section: **GENERAL FOR SERVICE**
- Option:  **MICROSOFT DYNAMICS CRM 4.0**

SELECT USER CURRENCY:

SELECT USER LANGUAGE:

SELECT USER ROLE(S)

CEO-BUSINESS MANAGER:

SCHEDULE MANAGER:

CUSTOMER SERVICE REPRESENTATIVE:

SALESPERSON:

MARKETING PROFESSIONAL:

SCHEDULER:

SYSTEM ADMINISTRATOR:

VICE PRESIDENT OF MARKETING:

SALES MANAGER:

SYSTEM CUSTOMIZER:

CSR MANAGER:

MARKETING MANAGER:

VICE PRESIDENT OF SALES:

1.5 Click next.

1.6 Click the magenta square next to Microsoft Dynamics CRM 4.0 to reveal a drop down box

1.7 Select the user role applicable to the user you are creating, when you have selected your user type press next to proceed.

1.8 Check the user information is correct

VERIFY INFORMATION

Review the summary information.

USER ACCOUNT INFORMATION

GENERAL INFORMATION

USERNAME: testuser
FIRST NAME: test
MIDDLE NAME:
LAST NAME: user
ACCOUNT ENABLED: ✓
ORGANIZATION ADMINISTRATOR PRIVILEGES: ✗
CONTROL PANEL ACCESS ENABLED: ✓

CONTACT INFORMATION

EXTERNAL EMAIL:
PHONE:
DESCRIPTION:

HOSTED CRM 4.0 SERVICE 1.0.0

GENERAL FOR SERVICE

MICROSOFT DYNAMICS CRM 4.0

SELECT USER CURRENCY: Pound Sterling (£)
SELECT USER LANGUAGE: English

SELECT USER ROLE(S)

CEO-BUSINESS MANAGER: ✗
SCHEDULE MANAGER: ✗
CUSTOMER SERVICE REPRESENTATIVE: ✗
SALESPERSON: ✗
MARKETING PROFESSIONAL: ✗
SCHEDULER: ✗
SYSTEM ADMINISTRATOR: ✓

1.9 Once you are happy that the user information is correct, click FINISH to complete the user set up process.

Should you require any further assistance in adding users to your CRM 4 site, please call the Outsourcery technical support team on 0843 366 3366 and choose option 3.

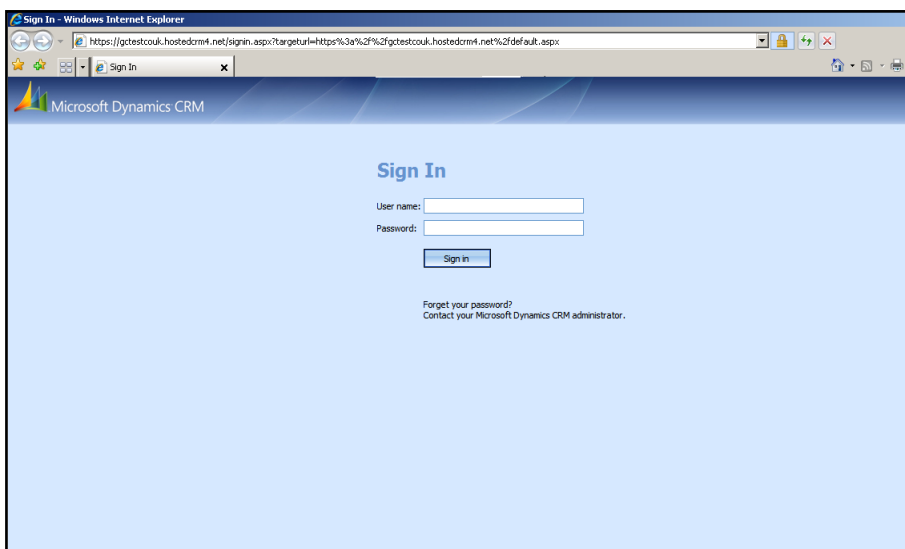
2. Accessing your new Hosted Microsoft CRM 4.0 system

Note: This guide assumes you have signed up for the Outsourcery Hosted CRM4 service.

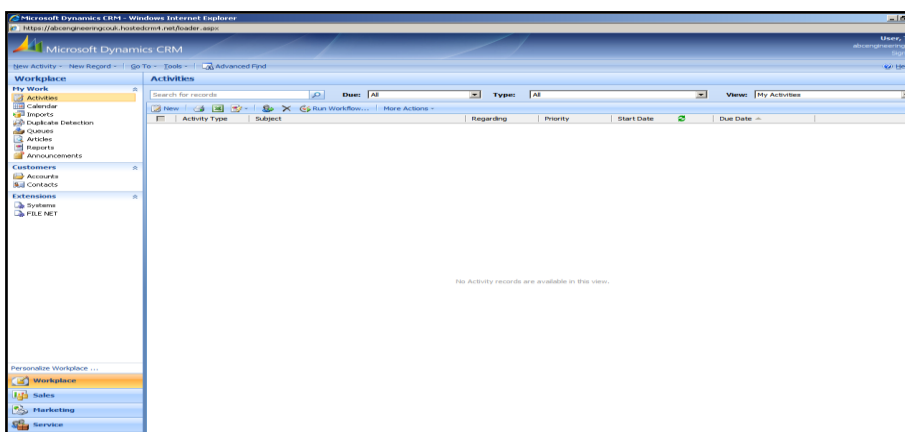
Go to <https://uniquename.hostedcrm4.net> (example *outsourcery.hostedcrm4.net*)

The address will be the name given to the CRM site when the CRM service was created in the Outsourcery control panel, to find this out speak to the system administrator of the CRM system

Enter your user name and password which will have been created in the Outsourcery control panel.



This is the home screen of your Hosted CRM 4 service.



4. From here you can use your CRM system for tracking sales, managing customer or running marketing campaigns.

5. For more details on how you can customise your CRM 4.0 system please email websales@outsourcery.co.uk or call the pre-sales technical team 0843 366 3366.

3. Installing the CRM Client with Outlook 2007

Note: This guide assumes you have signed up for the Outsourcery Hosted CRM4 service.

Download the CRM 4 outlook client application from our website

<http://www.outsourcery.co.uk/login/?redirect=/members/downloads.cfm#tab-6> log in with the account number and postcode.

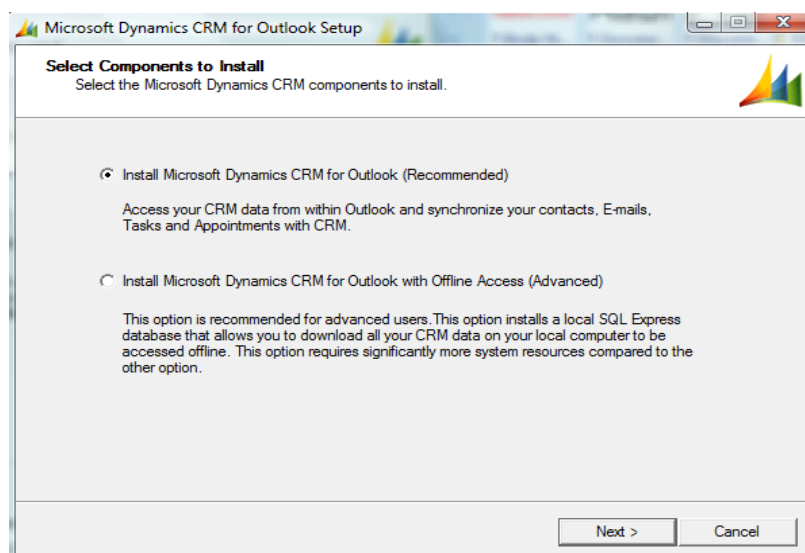
Download: CRM Client for Outlook and Rollup11

Double click on the file you have just downloaded CRMV4.0-i386-Client-ENU.exe and choose a location to save the file to, It will be advisable to create a new directory as this will extract all the files that are needed to install the client. Locate the directory you have extracted the files to and double click on the setupclient.exe, this will then start the installation of the configuration wizard for the Microsoft CRM 4 client. Before installing the CRM client you need to ensure the Outlook client is not running.

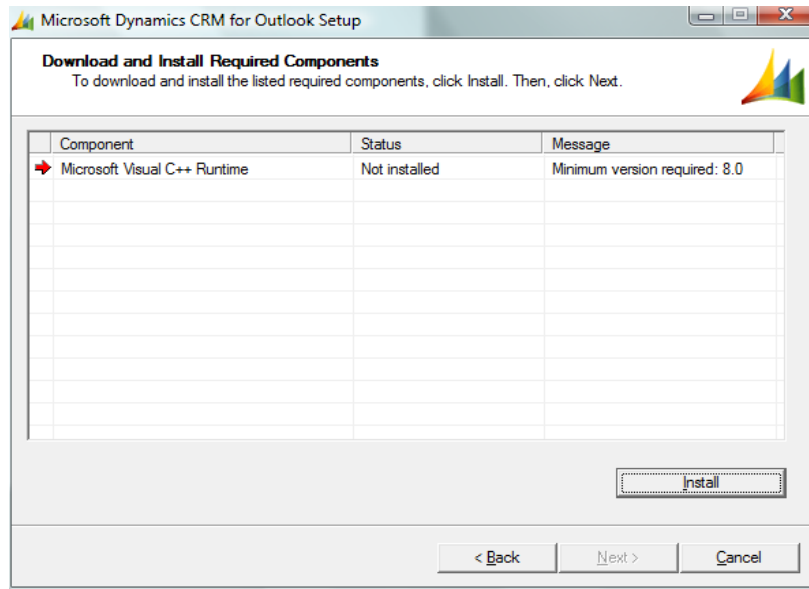
Locate the directory you have extracted the files to and double click on the setupclient.exe, this will then start the installation of the configuration wizard for the Microsoft CRM 4 client.

Before installing the CRM client you need to ensure the Outlook client is not running.

3.1 Below is the first screen you will see when you have chosen to run the installation of the Microsoft CRM 4 client.

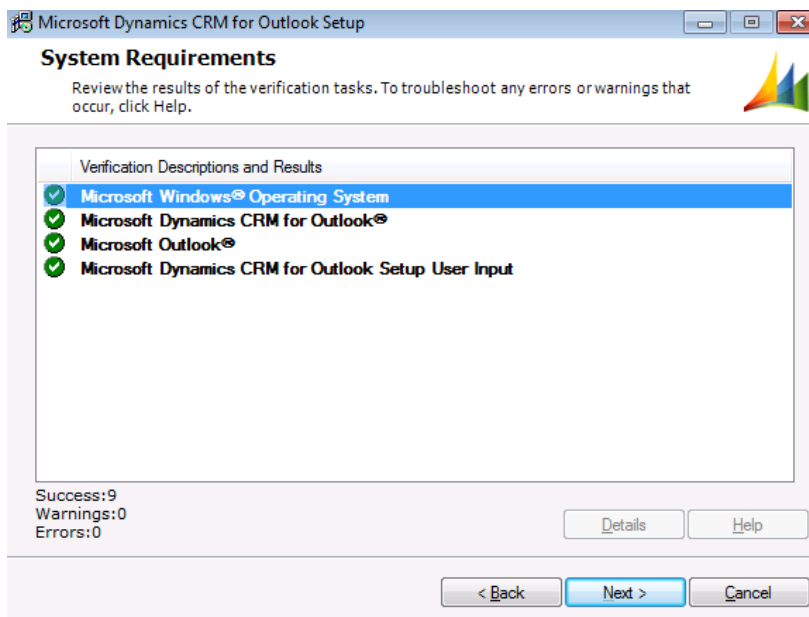


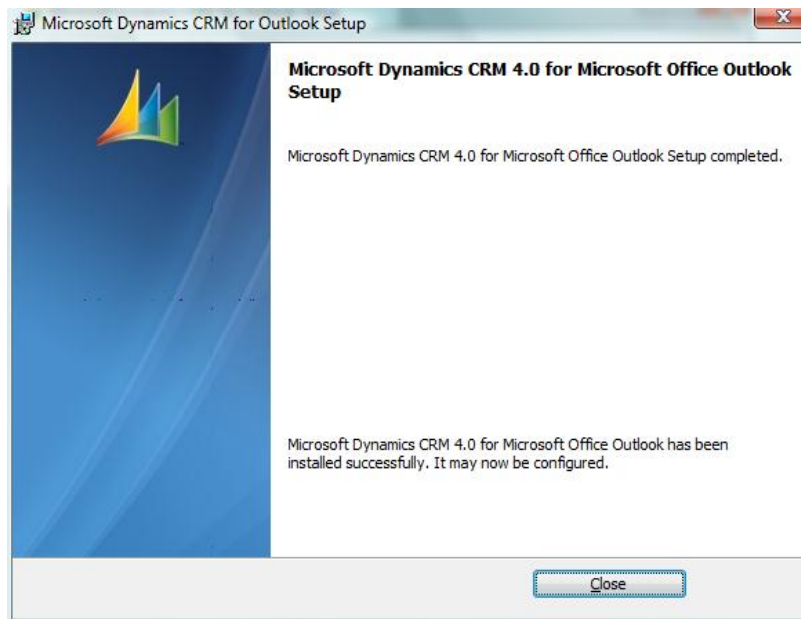
3.2 You will now be asked to install any required components for the Microsoft CRM 4 client to work.



3.3 After this has installed you will be prompted to specify where you want to install the Microsoft CRM 4 Client, after you have chosen the directory you want to install the client into it will run though pre installation checks.

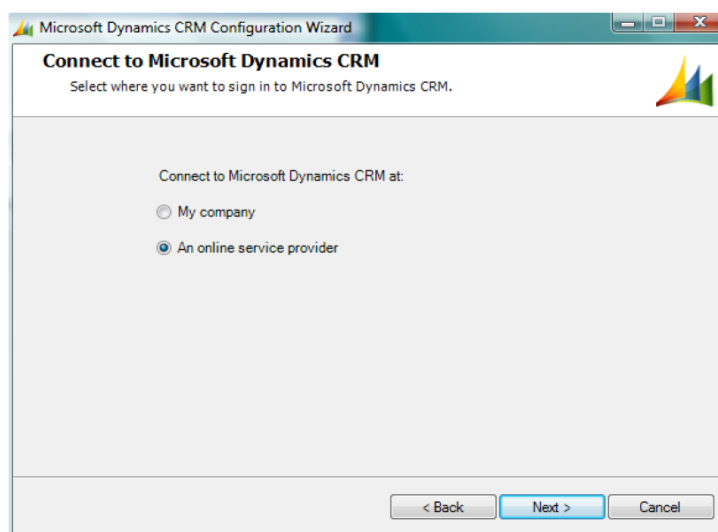
3.4 This will install the components required for the Microsoft CRM 4 Client. You will then need to run the configuration wizard to finish the integration with the Outlook client.



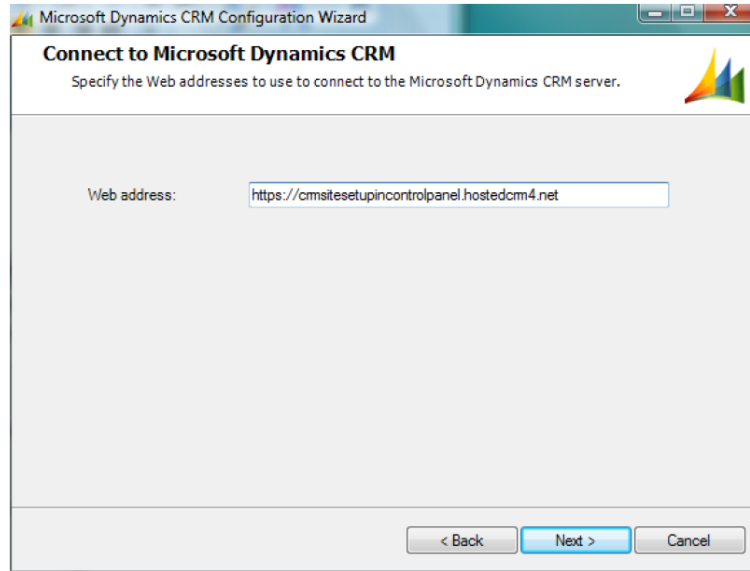


To find the configuration wizard application you will need to access the Microsoft Dynamics CRM 4.0 folder in your programs folders that you access through the start menu if you are running Windows XP or the Windows logo if you are running Windows Vista.

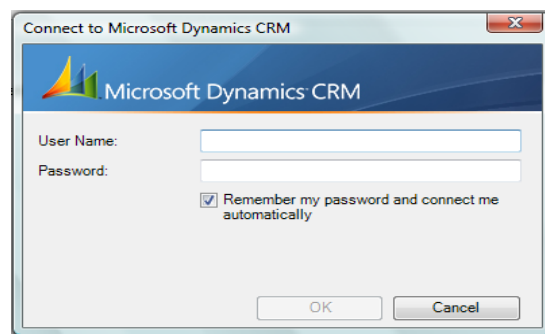
3.5 When you run the CRM client Configuration wizard you will need to select the option: **An online service provider**



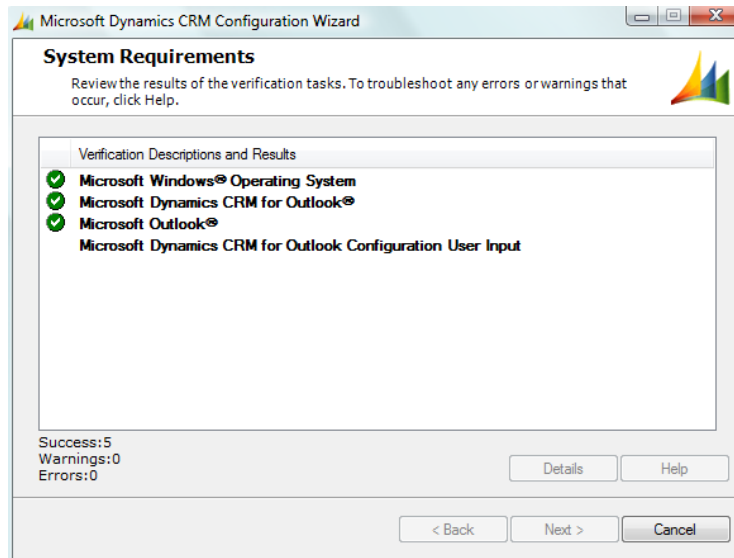
3.6 You will be then asked to enter your CRM address in to the web address bar, make sure your address is prefixed with **https://** otherwise your configuration will not work.



3.7 After the CRM address has been recognised you will get a logon box for your CRM site, enter your CRM username and password.

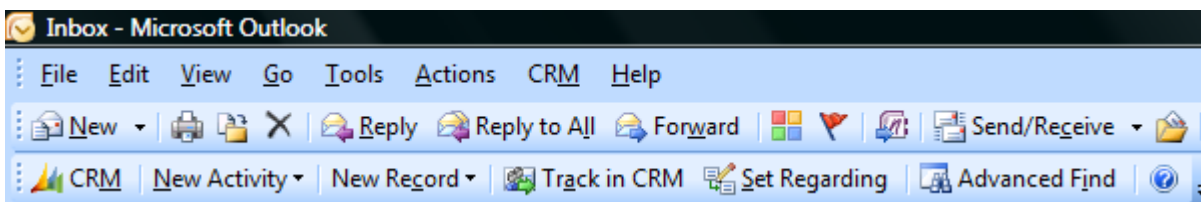


3.8 When the username and password have been verified the next screen will be the screen below:



3.9 After the CRM components have been installed, you will have finished installing the CRM client.

When you open outlook for the first time after installing the CRM client, the CRM client will synchronise with your CRM data, when it begins to synchronise you will be asked for your username and password, once it has finished synchronising you will see a CRM menu bar similar to the one below.



You have now completed the configuration of the Microsoft CRM 4 client.