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Nota di contenuto	Cover; Copyright; Credits; About the Author; Acknowledgement; About the Reviewers; www.packtpub.com; Table of Contents; Preface; Chapter 1: Microsoft Dynamics CRM 2011 Overview; Introduction to CRM 2011; Sales module; Business scenarios; Marketing module; Business scenarios; Customer service module; Business scenarios; Microsoft Dynamics CRM 2011 training and certifications; Training courses and examination; For users; For implementers and administrators; For developers; Certifications; Microsoft Certified Technology Specialist (MCTS); Microsoft Certified IT Professional (MCITP) Benefits of certificationExam MB2-868; How to study for the exam; Hands-on experience; How to register for your exam; Exam languages; Exam fees; Retaking the exam; What to expect at the test center; How to make the best use of your time; How to answer the questions; Summary; Chapter 2: Activities and Notes; Activities; Business scenario; Custom activities; Activity attributes; Common attributes; E-mail specific attributes; Phone call specific attributes; Letter specific attributes; Fax specific attributes; Appointment specific attributes; Creating activities; Completing activities Viewing activitiesViewing activities on a record; Activity roll-up; Activity views; E-mail templates; Creating e-mail templates; Direct e-mails

using e-mail templates; Notes; Creating notes; Test your knowledge; Summary; Chapter 3: Managing Marketing Automation Applications - Marketing Lists and Campaigns; Introduction to marketing list core records; Creating and managing marketing lists; Creating static marketing lists; Business scenario; Managing members dialog box; Updating static marketing lists; Creating dynamic marketing lists; Business scenario

Copying a dynamic marketing list to a static marketing list Copying marketing lists; Deleting and deactivating marketing lists; Dynamic versus static marketing lists; Creating and working with campaigns; Business scenario; Planning activities; Creating planning activities; Campaign activities; Creating campaign activities; Campaign responses; Targeted products; Adding targeted products; Sales literature; Adding sales literature; Target marketing lists; Adding marketing lists; Related campaigns; Adding related campaigns; Creating marketing campaigns; Campaign financial metrics

Creating and working with quick campaigns Creating quick campaigns; Scope of a quick campaign; Managing campaigns; Distributing campaign activities; Campaign responses; Creating a campaign response manually; Converting an activity to a campaign response; Converting a campaign response; Closing a campaign response; Campaign templates; Campaigns versus quick campaigns; Reporting and analysis; Views; Charts; Advanced find; Creating an advanced find; Export to Excel; Dashboards; Marketing dashboard; Creating a personal dashboard; System reports; Running marketing reports; Report wizard Creating reports

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## Sommario/riassunto

This Certification guide will follow a step-by-step approach to instruct the reader what they need to know to be able to become certified with Microsoft Dynamics CRM 2011. If you will implement Microsoft Dynamics CRM 2011, this book is for you. You should have a working knowledge of Microsoft Windows, Microsoft Internet Explorer, and Microsoft Office.

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