



CRM 2011 Implementation Accelerator

Companies

- Simplified the form
- Track last contact
- Update views including prospects, customers, neglected customers
- Cleanup navigation
- Phone number formatting – USA and Canada
- State and Province option sets for North America with auto selection of country
- Alert
- Auditing field changes
- Last Contact at the company
- Duplicate detection rules
- Customer Since
- Common Industry Code Option Set
- Charts (Customers added by month, Prospects added by Month, Company Adoption, Neglected Customers)
- Updated Views with Prospects, customers and Neglected Customers
- Messages updated
- Document Management
- Hide fields from Advanced Find
- Updated Mobile Express form

Contacts

- Updated form
- Updated views
- Permission Marketing
- Phone number formatting for USA and Canada
- State and Province Option Sets for North America with auto selection of country
- Alert
- Auditing field changes
- Last Contact at the company
- Duplicate detection rules
- Copy Name to Nickname
- My Referral Sources view
- Updated messages
- Updated Mobile Express form

Leads

- Updated form
- Updated views including view for lead follow-up
- Permission Marketing added
- Phone number formatting for USA and Canada
- State and Province Option Sets for North America with auto selection of country
- Alert
- Last Contact
- Last E-mail
- Follow-up
- Duplicate detection rules
- Updated messages
- Common Industry Code Option Set
- Referrals by Source view
- Charts (Leads Qualified by Month)
- Updated Mobile Express form
- Qualification dialog (Future)

Opportunity

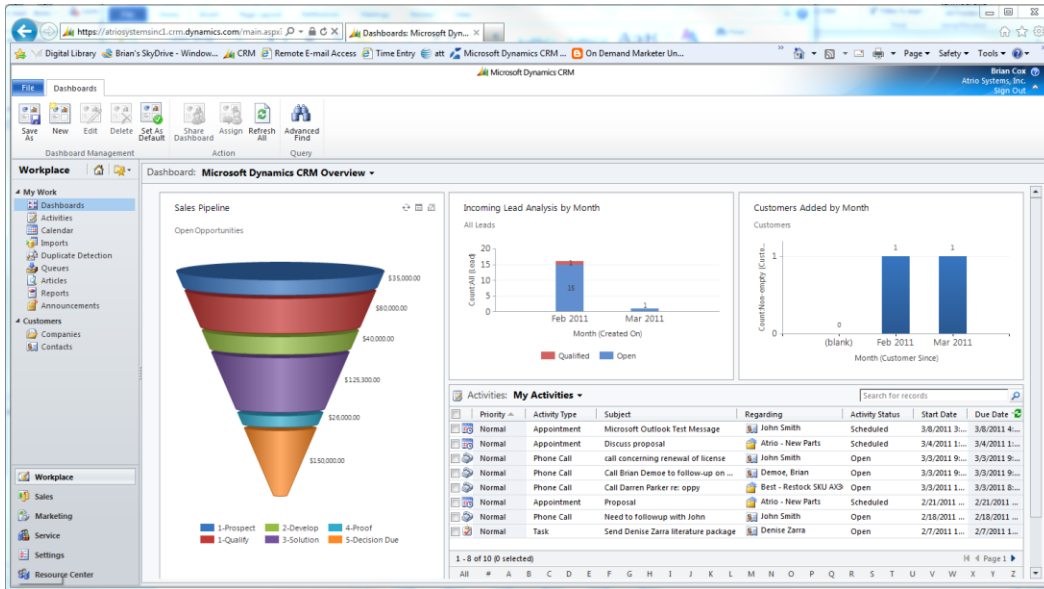
- Updated form
- Updated views
- Buying Influences
- Alert
- Auditing field changes
- Last Contact
- Duplicate detection rules
- Solution Selling sales process, automated forecasting
- Days in Sales Stage
- Stalled Opportunity Notification
- Documents

Activities (Appointments, Tasks, Phone Calls, E-mail)

- Simplified with fields removed
- Added default date to Phone Call
- Added default date to Appointment
- Charts (future)

Dashboard

- Updated default Dashboard to show pipeline, Incoming Lead Analysis by Month, Customers Added by Month, My Activities



Users

- Form simplified
- Updated views

General

- Default Company Security Roles created (3 levels)
- Default Price List added