

RG Connect 2009
Extend Your Reach



 **The Resource Group**
2009 **INNERCIRCLE**
for Microsoft Dynamics

Customizations and Workflow for CRM

Presented by:
Mike Smith

Microsoft
GOLD CERTIFIED
Partner



Easy to Use

- No more out of the box use, customize CRM for your needs.
- User friendly tools.
- Add your own custom fields and entities
- Create your own custom workflows for sales process automation and reporting along with ticklers/alerts.
- All without custom code!!!



RG Connect 2009



Customizations

- Create Entity “Memberships”
- Create Attributes for “Memberships”
- Create Workflow to streamline business processes around “Memberships”



RG Connect 2009



Q and A

Questions and Answers



RG Connect 2009



Done!

Mike Smith
mikes@resgroup.com



RG Connect 2009

