



## CRM Tips 'n' Tricks from Altico



There are dozens of little tips and tricks for using your Microsoft Dynamics CRM application that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your January 2009 CRM tip:

### Microsoft Dynamics CRM 4.0 Bookshelf

There were just a handful of books available for Dynamics CRM 3. Since the 4.0 release many more have become available. In this article you'll find an overview of several books as well as subjective commentary provided by a popular CRM blogger.

Distributor	Name	Author (s)	Available	Audience	Pages	List
Microsoft Press	Working with Microsoft Dynamics CRM 4.0 SE	Mike Snyder, Jim Steger	Yes	Developers, Power Users	624	\$49.99
SAMS	Microsoft Dynamics CRM 4.0 Unleashed	Marc J. Wolenik, Damian Sinay	Yes	Developers, s Consultants	813	\$59.99
Redware	Microsoft CRM 4.0 User Handbook	Stamati Crook	Yes	End users	118	\$39.95
Wiley	Microsoft Dynamics CRM 4 For Dummies	Joel Scott, David Lee, Scott Weiss	Yes	Information Managers, Business Consultants	408	\$24.99
We Speak You Learn, LLC	XRM as a rapid development platform"	Dave Yack	Yes	Developers, Architects	645	\$99.00
Course Technology PTR	Maximizing Your Sales with Microsoft Dynamics CRM	Edward Kachinske, Timothy Kachinske	Yes	Sales Managers	251	\$24.99
Microsoft Press	Microsoft Dynamics® CRM 4.0 Step by Step	Snyder, Steger, O'Brien, Landers	Yes	End users	477	\$29.99
Microsoft Press	Programming Microsoft Dynamics® CRM 4.0	Mike Snyder, Jim Steger, Brad Bosak, Corey O'Brien, Phil Richardson	Yes	Developers and Technical Architects	608	\$59.99
Apress	Success with Microsoft Dynamics CRM 4.0: Implementing Customer Relationship Management	Justin Mathena, Aaron Yetter, Hoss Hostetler	Yes	Business Consultants, Technical Architects	235	\$59.99
Wiley	Professional Microsoft Dynamics CRM 4.0	Rituraj Singh	June 2009	TBD	500	\$59.99
SAMS	Microsoft Dynamics CRM 4 Integration Unleashed	Marc J. Wolenik, Rajya Bhaiya	July 2009	TBD	640	\$59.99

## **Working with Microsoft Dynamics CRM 4.0 SE**

Jim Steger and Mike Snyder did write one of the best books for Dynamics CRM 3.0. It discussed the customization points of Dynamics CRM like Entity Customization, Reporting, Workflow, Form Scripting and Extensions. This book is its successor. Developers of solutions based on Dynamics CRM will use this book as a reference because of the clear explanation of how to use each extensibility point.

## **Microsoft Dynamics CRM 4.0 Unleashed**

Un-leash (ŭn-lēsh'): turn loose or free from restraint. The authors have indeed used the right word for it. This book looks at Dynamics CRM from a business perspective, a user perspective as well as a developer perspective. Because of these different perspectives it will offer a full insight in the capabilities of the application, both for end users as well as developers. Regardless of the broad setup of the book, I would especially recommend it to developers. As a Dynamics CRM developer it is not only important to understand how to develop against the application, but also how to make the right decisions by understanding the CRM process and how end users will use the application.

## **Microsoft CRM 4.0 User Handbook**

The author is passing almost all out of the box functionality of Dynamics CRM for an end user. First the reader will be introduced with the usage of the application followed by the modules of the application. Extension points are not discussed due to the intended audience. The book is easy to read and understand. Anybody who is interested in knowing what the application can do, even users who did not have any training or experience with Dynamics CRM, will find this book very useful. New users might also use this book as a quick reference guide.

## **Microsoft Dynamics CRM 4 for Dummies**

I didn't receive a copy of this book, but according to the table of contents I expect that it aims at people interested in learning the basics of the application. These could be information managers, power users or business analysts. As most of the "For dummies" series, this is most likely a very easy to read book. However people with a focus on developing solutions against Dynamics CRM would be more satisfied with one of the other books.

## **XRM as a rapid development platform**

Developers and Technical Architects will find this book most useful at the moment. It is looking at Dynamics CRM as an application development platform for business applications. This approach is marketed at Microsoft as XRM: Any relationship management application. The book comes with a CD containing a lot of sample code which can be used directly in your projects. A chapter in this book which I really like is showing how to use Silverlight with CRM. Also, this book does have a lot of advanced information on tracking down problems and tuning the performance.

## **Maximizing Your Sales with Microsoft Dynamics CRM**

I didn't receive a copy of this book, but according to the table of contents I expect that it aims at people interested in using the Sales Module from Dynamics CRM. There are a lot of chapters about how to use the Sales Force Automation feature and just a single chapter on Service Management. It is interesting that the authors wrote books on other CRM systems as well. That

is why I would expect that they do focus on the differences and similarities between the different CRM systems.

### **Microsoft Dynamics® CRM 4.0 Step by Step**

All the elements of the Dynamics CRM application as it comes out of the box are discussed in this book. It can be used to learn how to work with Dynamics CRM, but due to the nature of this book, it will most likely be used often as a reference. It has a lot of similarities with the table of contents of the "Microsoft CRM 4.0 User Handbook". However, this book is focusing more on using the features instead of showing which features do exist.

### **Programming Microsoft Dynamics® CRM 4.0**

The main audience of this book is developers who do have experience with Dynamics CRM already, although it starts with an overview of Dynamics CRM. The next part is about the regular extensions of CRM and it finishes with advanced customizations. There are many real-world scenarios described which give the reader a good visualization of the described customization possibilities. A specific feature of this book I really like is the chapter on how to develop custom controls which you can use in your own application. This also includes a piece about how to create an editable grid.

### **Success with Microsoft Dynamics CRM 4.0: Implementing CRM**

This book focuses on the process of implementing Dynamics CRM instead of discussing the functionality of the Dynamics CRM application. This approach makes it a unique book. It is very easy to read this book and by using many examples and tips it directly proves its value. Professionals who got into the world of Dynamics CRM from a technical background will learn a lot from the background information as described in this book.

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I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

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