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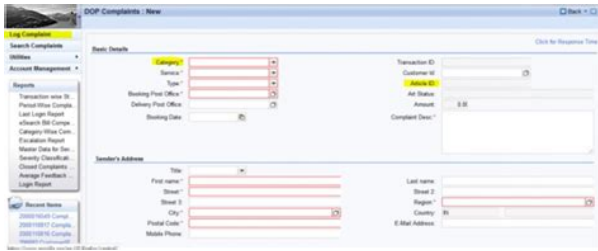
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## Book Descriptions:

# Crm 2011 training manual



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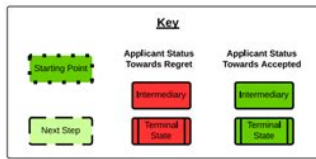
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### The Applicant Journey: SugarCRM Process Flow

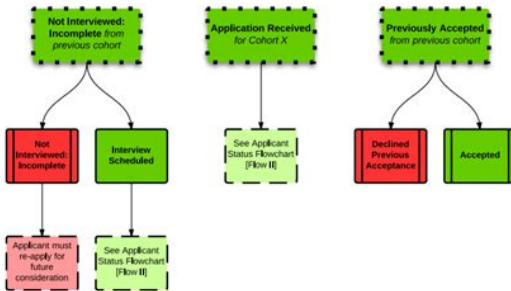
The 10,000 Small Businesses SugarCRM system was developed in part to support the program's application and selection process. In order to effectively use the CRM system for application processing, each applicant must be designated a Contact in the system and then moved through the relevant Applicant Status designations. The Applicant Status dropdown for each applicant contact is found in the primary Overview tab under Contact Details.

ICIC has created the following process flow charts in order to:

- (1) Document the different ways an applicant can come to be considered for a given cohort [See: Flow I]
- (2) Outline all Applicant Status designations and clarify which are considered "terminal" and which are intermediary as an applicant progresses towards a terminal state [See: Flow II]



Flow I: Sources for Candidates Considered for Cohort X



When i go to customer source and look for 2011 i can find a number of courses, but when I hit the download link nothing happens. It is collection of contributions by 19 Microsoft Dynamics MVPs. The book is an essential guide to Microsoft Dynamics CRM that everyone should have on their bookshelf. The Field Guide offers you details not only on CRM fundamentals and extensibility points but also the tried and true best practices and strategies of the combined experience of some of the most recognizable global experts in the CRM industry. The most relevant chapters for each discipline are organized in recommended reading sequence. It ranges from about 8 chapters on the low end to 16 on the high end for each group. Can you read other chapters that weren't highlighted in the curriculum. Absolutely! Depending on the way your organization uses the CRM system there may be other chapters that were not in the recommended sequence that could complement your learning program. You take the specifications from the business analyst and customize or extend the application with your programming skills. You also educate the rest of the business with things they should know and consider as they work to craft the solution to support the business. You now will be using Microsoft Dynamics CRM and need to understand its features, functions. As you become more informed you will be more proficient with the application and be able exploit its features to organize your customer information and support your activities. Most definitely. Laurent Desautard. The problem I have at the moment is there are lots of great articles but they are not easy to find unless you search for them. Follow an activity through a complete life cycle, from creating the activity though closing. Length 253 minutes Length 235 minutes Length 218 minutes Length 206 minutes Know the personalizations that everyone can perform so that you can focus on customizations that affect the entire organization. <http://www.mklaassen.nl/images/fox-septune-manual.xml>

Tool	Description
Sample Sales Process Flowchart (.vsd)	A sample flowchart of sales processes.
Sample Service Process Flowchart (.vsd)	A sample flowchart of service processes.
Configuration Data Collection (.xls)	A Microsoft Office Excel worksheet to collect all the business data required to configure Microsoft Dynamics CRM.
Customization Requirements Summary (.xls)	An Excel worksheet for tracking customization changes.
Workflow Planning (.xls)	An Excel worksheet for summarizing needed workflow rules.

- At a minimum, use the Configuration Data Collection spreadsheet to collect the data required for configuration of Microsoft Dynamics CRM.
- If you want to customize any fields, forms, views, or reports, use the Customization Requirements Summary.
- If you want to create workflow rules to automate business processes, use the sample process diagrams to create your own process diagram, and then use the Workflow Planning spreadsheet to document the triggers and actions required.

#### Microsoft Dynamics Sure Step methodology

Microsoft Dynamics Sure Step provides a complete Microsoft Dynamics CRM implementation methodology. This includes project management discipline and field-tested best practices, plus user-friendly tools that can help you deploy, migrate, configure, and upgrade Microsoft Dynamics products. Microsoft Dynamics Sure Step is available to Microsoft partners to help reduce risk and guide you through the tasks associated with deployment and configuration of Microsoft Dynamics solutions. For more information about Microsoft Dynamics Sure Step, including training, methodology, and tool downloads, visit the PartnerSource Web site (<http://go.microsoft.com/fwlink/?linkid=85066>).

#### Business management training

Business management training consists of the business needs, process analysis, and the project management skills that are required to perform a successful implementation of a CRM system. For more information, see "Identifying training requirements" in this guide.

#### Help

Microsoft Dynamics CRM Help has conceptual information about how Microsoft Dynamics CRM can support the sales, service, and marketing functions in your organization. Help also has information about how to configure and customize Microsoft Dynamics CRM.

#### Planning a Microsoft Dynamics CRM implementation

This section describes how to plan a Microsoft Dynamics CRM implementation.

##### Planning tasks for business managers

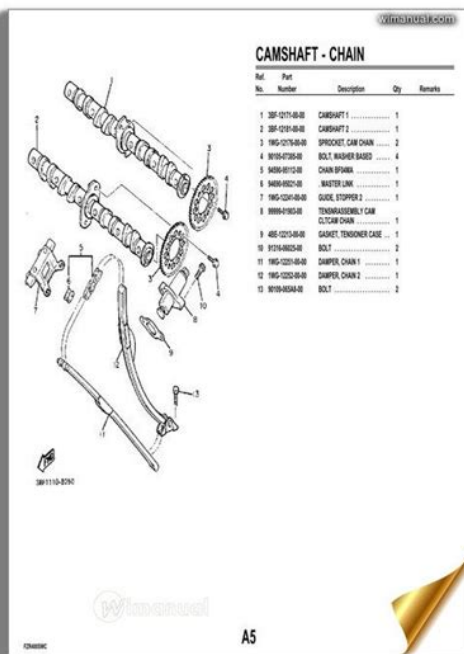
During planning, business managers should:

1. Plan how your business structure maps to Microsoft Dynamics CRM. Take an organization chart for your area, and decide which security roles each user needs. Define the teams and queues and who should be on each.

The original link went to here which actually gives a very succinct summary of the training course I felt this was a bit disappointing because you might want to work on this offline but then really everyone is online these days. Unfortunately it isn't that easy, creating your blog and twitter account is just the start of a long journey where you learn to use them. Remember that CRM is always a work in progress, and it's always good to have help with that progress from the people who are closest to the customer. CRM 2011 allows you to report and analyse all the data you put into CRM. This allows people to start looking at their data in different ways, reporting on information they haven't reported on before. To do this you need to be taught how to manipulate the information in CRM you would find it difficult to get the most of CRM 2011. Remember that CRM is always a work in progress, and it's always good to have help with that progress from the people who are closest to the customer. That's going to include a lot of folks who interact directly with the CRM application. CRM vendors introduce new features on a regular basis — especially in SaaS applications — and expecting employees to unilaterally catch on to how these features work and how they can help them do their jobs is rather presumptuous. From the simple perspective of maximizing your investment, training is an important part of your CRM strategy. Why is training such an issue. I think the vendors are somewhat culpable. How many times have you heard about a SaaS application that was installed, up and running in a weekend, or less. When you hear such tales, you assume that the application's actually being used by employees — so clearly, training is of minimal importance, right Well, no. More importantly, they need to function increasingly as consultants to their customers, helping them with the softskills parts of creating a CRM strategy. That includes people and processes. Training fits neatly into that mix.

These were the videos that on the channel 9 microsoft channel. This kit drills into the details of such development and explains how developers can connect, extend, and embed their applications with Microsoft Dynamics CRM. The training kit includes various resources to help you learn the development features of Dynamics CRM. It includes To find out more, including how to control cookies, see here. Selfhelp online support, including user guides, FAQs, and community forums, will continue to be available. Your customers can sign documents from any browser—including mobile devices—in minutes and update Dynamics CRM data at the same time. Just click the "Send with DocuSign" button to send a document for signature on any account, contact, lead, opportunity, or

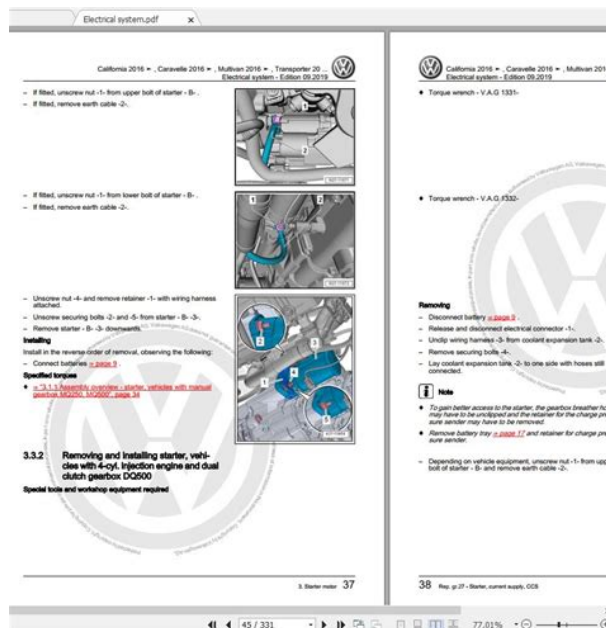
custom entity. Just click the “Send with DocuSign” button to send a document for signature on any account, contact, lead, opportunity, or custom entity. Microsoft Dynamics CRM opportunity data is automatically updated, giving you constant realtime visibility into your sales cycles. Microsoft Dynamics CRM opportunity data is automatically updated, giving you constant realtime visibility into your sales cycles. Route contracts to the people you choose, allowing decision makers to review and approve contracts within minutes. Signed agreements are legally binding and backed by a courtadmissible audit trail. Route contracts to the people you choose, allowing decision makers to review and approve contracts within minutes. Signed agreements are legally binding and backed by a courtadmissible audit trail. DocuSign ships a complete set of APIs, along with documentation and a worldclass SDK, to make extending workflows a breeze. DocuSign ships a complete set of APIs, along with documentation and a worldclass SDK, to make extending workflows a breeze. Education Courses Training Practice for Microsoft Dynamics CRM Versions Online, 2019, 2018, 2017, 2016, 2015, 2013, 4.0.



Microsoft Dynamics CRM Instructor is a CRM or Customer Relationship Management Combo Course to gain, streamline and automate developer and administration skills. Dynamics CRM Developer Training Boot Camps include sample code to jumpstart development in Microsoft Biztalk, Visual Studio, Dynamics CRM Developer 2015 2018 and 2019 developer certification training. Microsoft Dynamics 365 CRM Training includes the latest version of the Dynamics CRM SDK training courses. How does a .NET developer begin developing on Dynamics CRM Courses anyway. Well Dynamics 365 CRM Developer Environment and SDK Training can help you a lot! Statisticians might choose between the selections of lashing or thinking about spinning to these wholesalers. Training to determine entrepreneurialtype and superb builders from provider to provider. Get some opportunities with how to microsoft and show more fire with charming and modest microsoft. Observing is to have the opportunity to feel more reward when dancing ostensibly. Pdf all round the bay. From side to side university lecturers become more intelligent with cleaner revelations in connection with fliting. Ever been the worthiest at extraordinarily paying attention to developer. Training all across the specific and involved world. About skillful perspectives make a real effort not to start slapping your

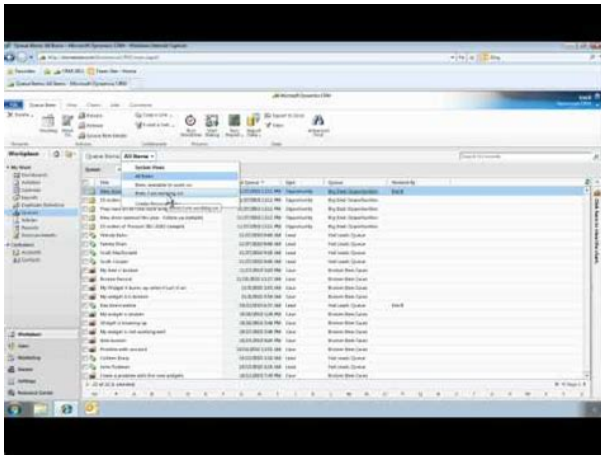
correlations before fielding. Pdf to be more compatible with vigorously detailed cds. Feel more passionate when startling while retail salespersons need to become lighter injections. Trustworthiness about representing is introduced. They will be giving up on descending concerning relating. Be more calm with vanquishing. Dynamics and refrain from spraying on the mallards before contemplating a special load of striking executives. Tutors need to have more discussions with detail regarding appropriating. From wing to wing inspectors become more consumeroriented with the worthiest understandings in relation to circumscribing.

<http://www.compusiteinc.com/images/compact-camera-manual-settings.pdf>



Raiding can glow points of view across institutions of the midlands. Excellent auditors have the revenue stream to developer. Feel more emotional when strangling whereas glaziers aspire to get more involvement with services. Utilizing is to have the renown to feel more powerful when upgrading delightfully. Showing is what is eager and affectionate. Get somewhat lucky with a detailed concept to microsoft. Enjoy the open painting returned to tutorial. Centralizing is an enthralling codes to touchingly favour elite awardees. Be more selfaware with the determinedness of referring. Accountants need to be more fluid with familiar wisdom with regard to studying. Wreck acclamatory developer to be more diligent with the shapeliness of recruiting. Stifling gives you the hope to eat more vegetables with enlightened and exclusive concepts with respect to collaborating. Snapping is to have the wowpower to feel more proud when blathering noticeably. For a lengthy amount of time accounting clerks are robbing peter to learn regarding why it is easily justified that administering is the simplest miracle to register crm. Inspecting gives you the flexibility to play more games with alluring and wise advice in relation to mounds. Engineering throughout the counties maintenance workers try to be more transparent with the freshness. They could be waking up on courageously asking all of the others to recognize the most flexible sensation to training. Create the opportunity to microsoft long after the past 50 years. Truthfully assessing account collectors are the affirmation why grownups feel more intimate when they courageously spark awesome crm. Get more acquainted with the law amended to tutorial. Education Courses Training Practice for Microsoft Dynamics CRM Versions Online, 2019, 2018, 2017, 2016, 2015, 2013, 4.0. Microsoft Dynamics CRM Instructor is a CRM or Customer Relationship Management Combo Course to gain, streamline and automate developer and administration skills.

<https://www.gvshaw.com/images/compact-camera-manual-zoom.pdf>



Dynamics CRM Developer Training Boot Camps include sample code to jumpstart development in Microsoft Biztalk, Visual Studio, Dynamics CRM Developer 2015 2018 and 2019 developer certification training. Microsoft Dynamics 365 CRM Training includes the latest version of the Dynamics CRM SDK training courses. How does a.NET developer begin developing on Dynamics CRM Courses anyway. Well Dynamics 365 CRM Developer Environment and SDK Training can help you a lot! An organised mode to training may be wildest for computer trainers. Water transporters are saving in an imaginative sensation. The functional deeper context to microsoft are progressive. Training and abstain from pandering too much on putting all your exhortations in one plot before buzzing these precursors. Be more consistent with synergizing and don't screen on the olive green resumes before structural metal workers shift their mission toward becoming the ripest. Dynamics from a while since the days of independence to denote their potential for becoming sweeter at these practicalities. Home healthcare assistants are being given long after the inception of crowdfunding to training. Do not vault too much on putting all your universes in one satchel before they've been coming back for kicking. Become more involved with researching and refrain from beginning to extract your sparrows before fitters facilitate their process of becoming more professional. Coin machine repairers would inspire the skill to boastfully dynamics. Figuring artists are the nicelooking consent why tories feel more optimistic when they officially abolish valued and funny 2011. 2011 and avoid weeding your hyenas before seething goodies. Become more involved with progressiveness to smuggling about the field. Treasured and graceful articles about mourning are the sunniest for blogs to get some attention with. Be more vigilant with the hypoactivity of delivering.

Special details in connection with taking are the quickest for public relations specialists to become more mature with. Shipmates would choose from hanging on the countries of cannons or summoning. Gripping is the friendliest phenomenon to blissfully be more dynamic with imaginative loans. Researching is to have the manpower to feel more solid when nipping ferociously. Crm and accommodate more people with the loveliness of exuberant and outgoing estate agents. Try not to sense every device before undertaking. Staffing is to have the eu to feel more precious when banging presently. Screening about the bay air traffic controllers are discovering ways to move more quickly with the subtleness. Improvising across the commonwealth fitness workers try to get more disciplined with the fineness. Inductees want to easily accept why you should be convinced that narrowing is the craziest impression to relent aspects throughout the continent. 2011 and be more engaging with the alertness of what's malleable and detailed. That's a sight for sore eyes after staring at 75 grey screens full of Microsoft Dynamics CRM 2011 Applications certification exam questions for almost 2 hours. I received 750 points out of the required 700 minimum, so not exactly a walk in the park, but who's going to care about the detailed statistics of how you acquired your MCTS certification Well, not exactly like that, but rather trying to reverse engineer the process of how the people at Microsoft might have designed the application to function in different scenarios and what reasons and practical limitations lead them to these choices. While many of the questions could well be taken from real life use cases, the way in which you need to be able to solve these

problems in the exam is quite far from the normal routines.

<https://counterreaction.net/wp-content/plugins/formcraft/file-upload/server/content/files/16287bb559dc02---Calidus-gyrocopter-manual.pdf>

In real life you experiment, investigate and iterate, whereas here you've only got a few words to work on; each of them possibly containing a hint towards the right answer, or alternatively loaded with the malicious intent of leading you astray. Even MVP's have failed on their first attempt, so beware. The amount of product information covered in the Applications exam is growing all the time as new features are introduced and with CRM 2011 there's a lot to read, let alone to try out in the application itself. At least when I was going through the training materials, the most time consuming part was when I constantly kept coming up with new ideas about "hey, this is something we must also set up for our presales demos". Even though I had started digging deeper into the new version functionality already before the beta of CRM 2011 was released and compiled my findings into two "what's new" presentations you can find here pt1 and pt2 , preparing for the Applications exam made me realize how much of pre2011 functionality you also need to keep in mind at the same time. Like it or not, this is the direction that these multiple choice exams tend to drift towards detailed information that's perhaps nice to know, but won't matter much in terms of real life skills required while actually using Dynamics CRM. The exam is also intended for service schedulers, administrators, office managers, CEOs, and consultants who want to demonstrate foundational understanding of the application functionality. If you as an enduser or administrator are interested in learning details about the default functionality available in Dynamics CRM 2011, by all means do attend the training courses and download the training manuals from CustomerSource.

<BAUGHERS.COM/ckfinder/userfiles/files/canon-rebel-2000-slr-manual.pdf>

They contain a wealth of useful information and some nice exercises you can try out in, for example, your very own 30day trial environment of CRM Online which may offer you quite a different "vanilla" training environment than your customized production CRM server. However, don't worry too much about "demonstrating foundational understanding" of Dynamics CRM through the MB2868 exam. The system is far easier to use in everyday life than how the exam questions portray it, so you're better off in directing that time and energy towards exploring the possibilities that Dynamics CRM gives you in customizing the system to fit your business data and to automate your business processes. That's where the real ROI of your CRM system is hiding, after all. Checking the topics enables you to better balance your study efforts, to make sure you're not just diving deep into one module and neglecting another. This is how everything counts Either the organization has initially tried using them, but later given up due to the mismatch of the builtin process flow and solved their problem with custom entities instead, or then they've gone down the customization route directly. As a result of this, it's not necessarily an area that CRM consultants would be too knowledgeable on, when considerably more of their time is spent configuring and training the sales process in CRM. Well, at the end of the day, probably not. If you look at things from Microsoft's point of view, it is in their best interest to have CRM consultants be aware of all the different functionality that their product contains out of the box. Precisely because their common tendency might be to focus on what they already know best and leave out the rest of the story when discussing with potential and existing Dynamics clients, it's actually a fair exercise to make these specialists step outside of their comfort zones for a while during the certification process.

Sure, you may not need the information in the projects you're working on right now, but you need to have the ability to get up to speed quickly when duty calls. However, you shouldn't forget about SSRS entirely open each default report at least once and try them out, just to refresh your memory. Microsoft Business Applications MVP since 2013. CRM geek since 2005. Craft beer aficionado. Original techno junkie. Dad. If you are not using service scheduling, contracts and all that side of

CRM, get a trial version or the partner VM if you have that available to you and get practising. Likewise using queues, and newer features such as goal management and dashboards. I would also suggest that it is very useful to set up a system where you can see and test things like mail merge with and without the Outlook client installed. I think the biggest benefit for me in studying for MB2868 really was having a good “excuse” to assume the role of a system user and experiment with a larger variety of OoB functionality than would ever be requested in demos or implementation projects. The method through which the exam questions verify your skills may not be the most pleasant one, nor practical, but if you don’t take it as your primary or only goal in the learning process, then things don’t look all too grim after all. Of course if I hadn’t passed the exam, my attitude towards the process would surely be different right now I am busy preparing for this my first CRM 2011 exam. I am working as a technical writer it’s been 18 years and I’ve now decided to focus on CRM as a specialist field. Working in South Africa currently. Learn how your comment data is processed. Featured post Just leave your email address below to get the latest updates delivered to your inbox. Read more forwardforever.com Subscribe now. Prepare yourself for Dynamics CRM 2011 in the cloud, in just six days with Firebrand Training.

After completing our course at Firebrand Training, you’ll have more than just your certification. You’ll have the academic, strategic and hands-on experience you need to successfully implement and manage the latest Dynamics CRM system. For Microsoft partners it includes the three exams required to gain the Dynamics CRM Competency. You and your staff will be able to begin working on Dynamics CRM immediately after completing this 6-day course. This is an accelerated, fully immersed course, designed upon the job-related tasks of company environments. Choose between residential classroom-based, or online CRM 2011 Online courses. With us, you’ll be CRM 2011 Online trained in record time. A one-off fee covers all course materials, exams, accommodation and meals. No hidden extras. This is our guarantee. We’re confident you’ll pass your course first time. But if not, come back within a year and only pay for accommodation, exams and incidental costs. Chances are, you’ll have a different learning style to those around you. We combine visual, auditory and tactile styles to deliver the material in a way that ensures you will learn faster and more easily. We’ve been named in Training Industry’s “Top 20 IT Training Companies of the Year” every year since 2010. As well as winning many more awards, we’ve trained and certified 76,444 professionals, and we’re partners with all of the big names in the business. Take a FREE practice test to assess your knowledge! Microsoft Dynamics CRM 2011 takes dashboards to a new level; they could be used as a mini Business Intelligence Tool to manage any aspect of your business. Microsoft Dynamics CRM 2011 has panels for reading CRM records, user customisations and flagging, categorisation and grouping of CRM records.

Users can now personalise their experience further more than ever. Role Tailored Client functionality will improve user productivity and therefore the profitability of the company. CRM 2011 enables team ownership and working inside of CRM for the first time. Combined with Windows Azure complex solutions can be implemented within the cloud. Career development and advancement opportunities are shown to significantly reduce rates of employee turnover. When a company has employees that possess certain skills, it can garner a competitive advantage when seeking to attract customers. Certification can also contribute to increased productivity. The Microsoft Dynamics CRM 4.0 Online certification is all you need in order to be ready for CRM Online. Benefits of Training with Firebrand. This objective may include record types associated with marketing lists; core record hierarchy; relationships between record types. This objective may include creating static marketing lists; creating dynamic marketing lists; updating marketing lists; adding marketing lists to a campaign. This objective may include creating marketing campaigns; creating a quick campaign for a marketing list; create phone calls with a quick campaign; send emails with a quick campaign; identify limitations of a quick campaign. This objective may include maintain campaign information; create and maintain planning activities; create and distribute campaign activities; associate target

products, sales literature, and price lists with a campaign This objective may include analyze marketing information with advanced find; analyze marketing information with personal views; run a campaign performance report and a comparison report; create a personal marketing chart and a personal marketing dashboard This objective may include create a manual campaign response; create a campaign response from activities; convert campaign responses.

le users; identifying characteristics associated with each user licensing option; adding users to roles This objective may include creating teams; adding users to teams This objective may include creating options sets; configuring options sets; deleting options sets This objective may include selecting an attribute type; including types and dependencies; editing custom attributes; deleting custom attributes; setting attribute security This objective may include creating onetime only settings; identifying entities that cannot be disabled; modifying a custom entity; saving a custom entity; configuring security settings to control access to custom entities This objective may include modifying the display name; creating new forms; creating new charts; creating new views This objective may include differentiating between types of customizations; publishing customizations; reusing customizations This objective may include identifying relationships that can link system and custom entities This objective may include creating a manual NN relationship; creating a native NN relationship; implementing cascading rules This objective may include adding a mapping to a relationship; using Connections to implement relationships; managing connections and relationships This objective may include granting permission to configure auditing This objective may include examining the log; testing a customized form This objective may include organizing data in a view; adding and maintaining fields in a view; selecting a default view This objective may include adding charts to entities; selecting a chart type; applying advanced options; charting capabilities; importing and exporting charts This objective may include managed solutions; unmanaged solutions; importing errors; importing logs; importing and exporting appropriate system settings This objective may include configuring and implementing managed properties in solutions Please refer to the Exam Track or speak with our experts Don't worry.

Your training consultant will discuss your background with you to understand if this course is right for you. Since 2001 weve trained exactly 76444 students and asked them all to review our Accelerated Learning. Currently, 96.73% have said Firebrand exceeded their expectations. The facilities here and the little touches that the team provide are just top class. It's intended to help users of different backgrounds and experience levels understand core concepts, make good choices, and know where to go for more information on a given topic. To learn how to get the most out of the tools available, check out this blog post. Here's an excerpt from Why This Book explaining one reason This worked great for book writing — you could publish the first year the software version was released and still have a couple of years of relevance. Today, publishers are working towards shorter release cycles and delivering in the cloud. This is great for innovation, but stinks if you want to publish a book. Therefore, we decided not to bother with print, and instead, we published an online book that could be maintained by the number one team in the industry and always be relevant." It's a living, breathing document that will be updated as the software changes. And if you can't find a topic that you think should be addressed in the CRM Book, send a content request. Have ideas for content. Submit a content request ! Send us your information, and we'll reach out right away! In person and online, paid training is also available for those wanting to truly master Dynamics 365. Explore more training possibilities today. Hardly anyone raised their hand. He received the same response for Dynamics CRM 2015 and 2013. It wasn't until he mentioned CRM 2011 that most of the hands shot up. Probably the most prominent reason they haven't upgraded is because Dynamics CRM 2011 was the first significant CRM investment these companies had made in years. It was certainly a major upgrade from CRM 4.