



Welcome to MyCRM *Making CRM work for business*

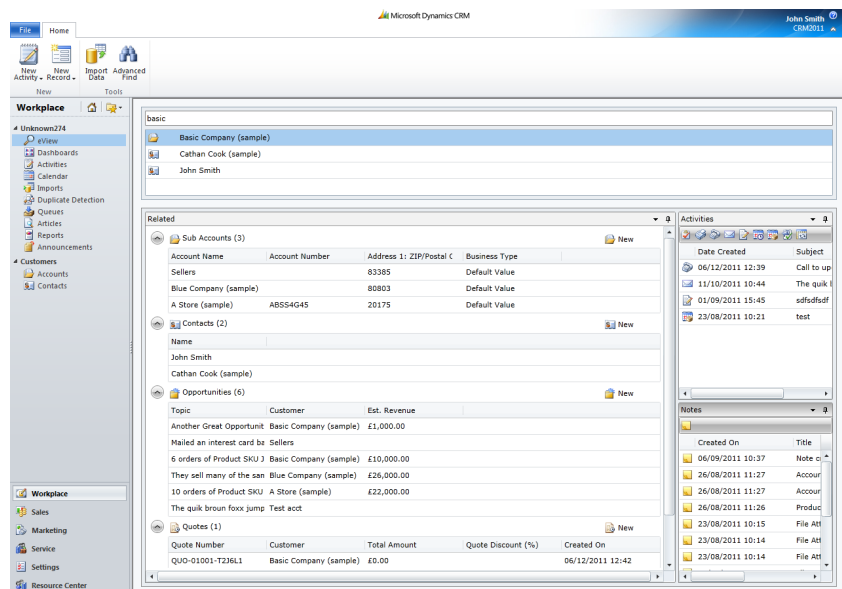
eView for Microsoft CRM 2011

The all new! eView solution for Microsoft CRM 2011 empowers and enhances productivity for CRM end users, by delivering a full 360 degree view of a customer on a single page

FACTSHEET

Product Name MyCRM eView
Version 2011
Owner MyCRM

Available For
MyCRM Hosted ✓
Microsoft CRM Online ✓
CRM On-Premise ✓



This great new eView gives an end user a snap shot of what is happening with a customer allowing easy access to all related records and activities for the customer on one screen, and is available from the main navigation or from inside the records left navigation menu.

With eView you can even create new records for all configured entities in the display along with all activity types and separate notes, keeping all your activity in one window.

eView incorporates the rollup functionality in CRM 2011 so you can easily see all related records for sub accounts and contacts, including all related activities for all records.



For Additional Information

Contact : [Alistair Dickinson](#)
Email : sales@mycrmgroup.com
Phone : [01983 245245](tel:01983 245245)
Web : www.mycrmgroup.com



Welcome to MyCRM *Making CRM work for business*

eView—inside

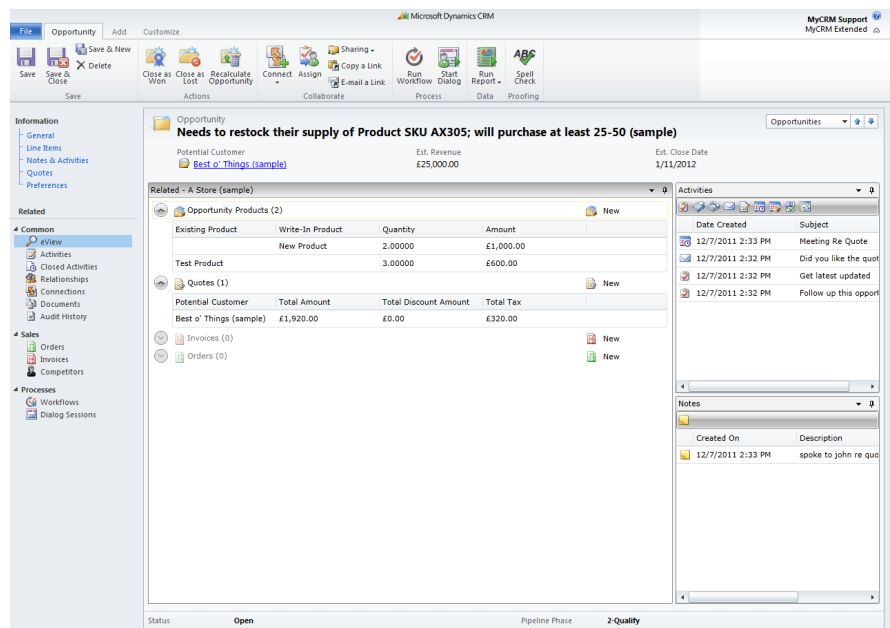
One of the great features of eView is that it can also be accessed at record level, you can open up an opportunity record and get an instant snapshot of what is happening on the open opportunity get a view of products, quotes and any orders that have been created.

FACTSHEET

Product Name MyCRM eView
 Version 2011
 Owner MyCRM

Available For

- MyCRM Hosted ✓
- Microsoft CRM Online ✓
- CRM On-Premise ✓



As eView is fully configurable and can support custom record types you could easily build an eView to incorporate any additional information that is required.



For Additional Information

Contact : Alistair Dickinson
 Email : sales@mycrmgroup.com
 Phone : 01983 245245
 Web : www.mycrmgroup.com

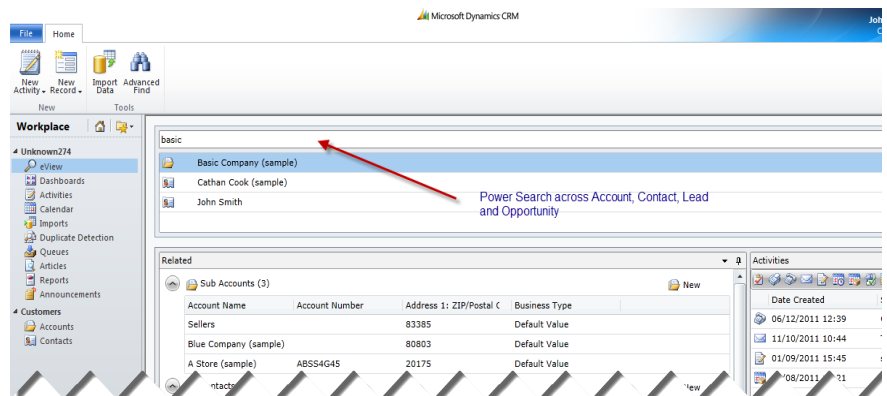


Welcome to MyCRM *Making CRM work for business*

eView—Searching

FACTSHEET

eView comes with a built in power search that enables searching across Account, Contact, Lead and Opportunity simultaneously returning results with records that meet the search criteria.



You can see from the example above that the word “basic” was used in the search and what was returned was an account and related contacts for that company record.

eView adds a new level of value as you can quickly find and start working on a record with all the relevant information on one screen.

The hierarchy view pain can be fully configuration for different end users giving them the right access to the right data.

From each of the eView panes you can quickly add new records and each eView is configurable to show relevant data.

For Additional Information

Contact : [Alistair Dickinson](mailto:Alistair.Dickinson@mycrmgroup.com)
 Email : sales@mycrmgroup.com
 Phone : 01983 245245
 Web : www.mycrmgroup.com

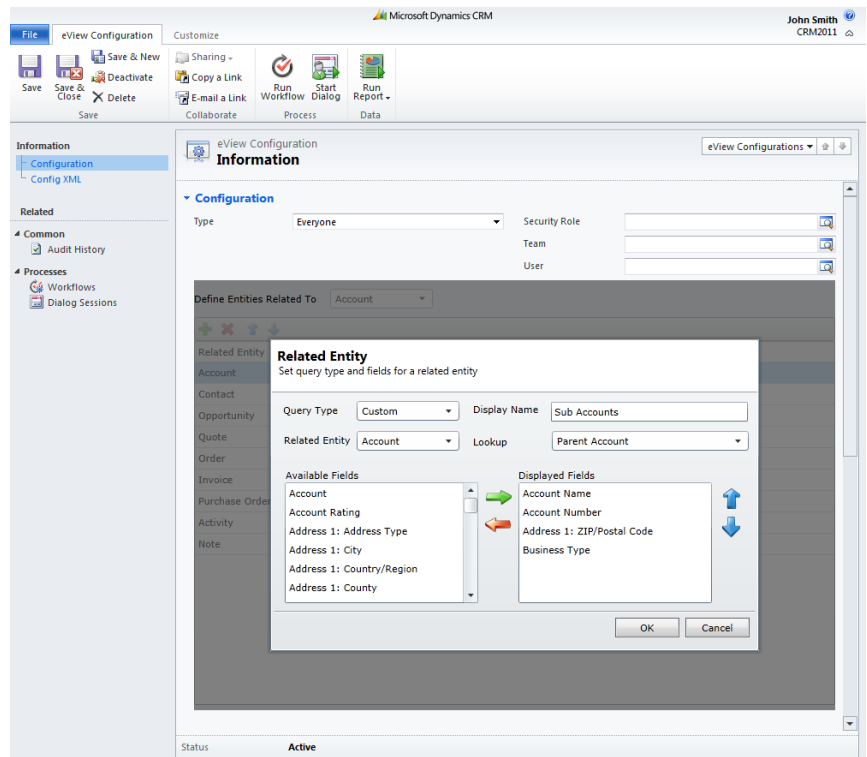


Welcome to MyCRM *Making CRM work for business*

eView—Configuration

The eView solution is fully configurable and enables configuration types to be created for a range of different users

FACTSHEET



Within the eView configuration you can create configuration types for All users, users of a certain security role, users within a team and individual users on the CRM system.

eView by default comes with a pre-configured everyone configuration type to get you started, As part of the eView configuration individual mappings of entity data can also be done presenting related record data to the end user

For more information on configuration review the user guide.

For Additional Information

Contact : [Alistair Dickinson](mailto:Alistair.Dickinson@mycrmgroup.com)
Email : sales@mycrmgroup.com
Phone : 01983 245245
Web : www.mycrmgroup.com



Welcome to MyCRM *Making CRM work for business*

For more information please contact our sales team on :
+44 (0) 1983 245245

or email
sales@mycrmgroup.com

or visit
<http://www.mycrmgroup.com>

or visit
<http://downloads.mycrmgroup.com>

FACTSHEET



For Additional Information

Contact : Alistair Dickinson
Email : sales@mycrmgroup.com
Phone : 01983 245245
Web : www.mycrmgroup.com