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Compare editions of Microsoft Dynamics CRM 3.0

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Microsoft Dynamics CRM 3.0 is available in two editions: Microsoft Dynamics CRM 3.0 Small Business Edition and Microsoft Dynamics CRM 3.0 Professional. Both editions provide organizations with a flexible and customizable platform that works the way you and your employees work.

The new Microsoft CRM 3.0 Small Business Edition is designed to operate on the Microsoft Windows Small Business Server. It can be installed in just 10 mouse clicks and configured through an easy-to-use wizard. This edition also offers easy migration of customer information stored in Microsoft Office Outlook with Business Contact Manager.

Microsoft CRM 3.0 Professional is a customer relationship management (CRM) system that gets used by employees. It is easy to operate, easy to deploy, and easy to adapt to the unique needs of any company. It also offers flexible deployment options. Microsoft CRM 3.0 Professional can be deployed at your business location or hosted by a third-party service provider.

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Key distinctions between Microsoft CRM Small Business Edition and Microsoft CRM Professional

Consider the following to help you determine what edition is right for your business:

- Microsoft CRM 3.0 Small Business Edition is deployed on the Microsoft Windows Small Business Server, and it can accommodate a maximum of 50 simultaneous users. An ideal solution for small businesses, this edition is simple to use and features click-through installation.

Screenshot



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- Microsoft CRM 3.0 Professional is designed for large enterprises using multiple servers in a distributed environment. When operating in this configuration, Microsoft CRM 3.0 Professional is readily scalable—the amount of users can be increased to meet the needs of a large organization.
- Both Microsoft CRM 3.0 editions can be acquired through licensing, but only Microsoft CRM 3.0 Professional is

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available through third-party service providers.

Apart from server usage and scalability, the two editions offer almost identical features and functionality. Both integrate easily with existing sales processes and workflows and with other Microsoft applications.

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Features that Microsoft CRM 3.0 editions have in common

Both editions of Microsoft CRM 3.0 provide a complete suite of powerful marketing, sales, and customer service capabilities, all with a familiar and consistent user experience based on Microsoft Office and the Microsoft Office Outlook messaging and collaboration client. Here's what these features can do for your business.

How Microsoft CRM 3.0 works: Sales

Among the rapid returns that flow from an investment in Microsoft CRM 3.0 is an increase in the number of qualified sales leads and opportunities, better coordination of sales activities (leading to a more focused sales effort), and a sales force more aware of customer needs and histories. Specific functionalities within the sales module include:

- **Opportunity management** makes it easier to convert leads to opportunities, and then track them throughout the sales cycle
- **Sales process management** enables the consistent tracking and closing of sales opportunities
- **Pipeline optimization** uses analytical tools to provide sales people with qualified leads and opportunities
- **Quotes** are generated using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts
- **Order management** converts quotes to orders that can be modified and saved until they are ready to be billed as invoices
- **Sales force management** makes it possible to measure sales performance against quotas
- **Sales literature** can be created, managed, and distributed
- **Direct e-mail** uses templates to send customized e-mail messages to customers sharing common characteristics

How Microsoft CRM 3.0 works: Customer service

Microsoft CRM 3.0 promotes more efficient and effective customer interactions by enabling users to respond more quickly to service issues, apply appropriate resources to service requests, and schedule and dispatch service resources in a timely fashion. The customer service module includes the following features:

- **Case management** enables customer service requests to be created, assigned, and managed from a central location
- **Complete view of customer information** promotes better understanding of specific customer needs and other account-related issues
- **Automated routing and queuing** of service requests is achieved using customizable workflow rules
- **Auto-response e-mail** generates automatic responses to customer requests
- **E-mail management** automatically records customer communications and associates e-mail messages with appropriate customer records
- **Service scheduling** makes it easy to manage service resources and to better understand resource and equipment allocation, usage, and effectiveness
- **Searchable knowledge base** is a repository for the publishing of support articles and information

- **Service contracts** can be created, maintained, and updated automatically

How Microsoft CRM 3.0 works: Marketing

Translating a wealth of available customer data into effective selling strategies is one of the great challenges in marketing. By creating a single view of every customer and storing it in a single, readily accessible location, Microsoft CRM 3.0 enables users to better understand what customers are telling them. This knowledge can then be used to focus the marketing effort and execute smarter campaigns. The marketing module can help you build effective marketing strategies via the following functionalities:

- **Marketing campaigns** can be planned based on budgets and expenses, promotion codes, target products, marketing collateral, and more
- **Create lists** for specific campaigns by using existing customer information or by importing contact information from various sources
- **Qualify lists** so they can be queried to locate accounts meeting specific criteria
- **Campaign templates** can be created and then used again in future campaigns
- **Campaign execution** can be tracked, and lead conversion and cost and performance data can be analyzed in this way
- **Track marketing information** to assess campaign success based on opportunities, cost versus payoff, and other criteria

Whatever edition you choose, Microsoft CRM 3.0 is a comprehensive and fully integrated solution for managing customer relationships. It is a cost-effective way to achieve more focused marketing and greater competitive advantage.

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