

Import Instructions for CRM Online Quick Start Template V2011.3

Prepared by



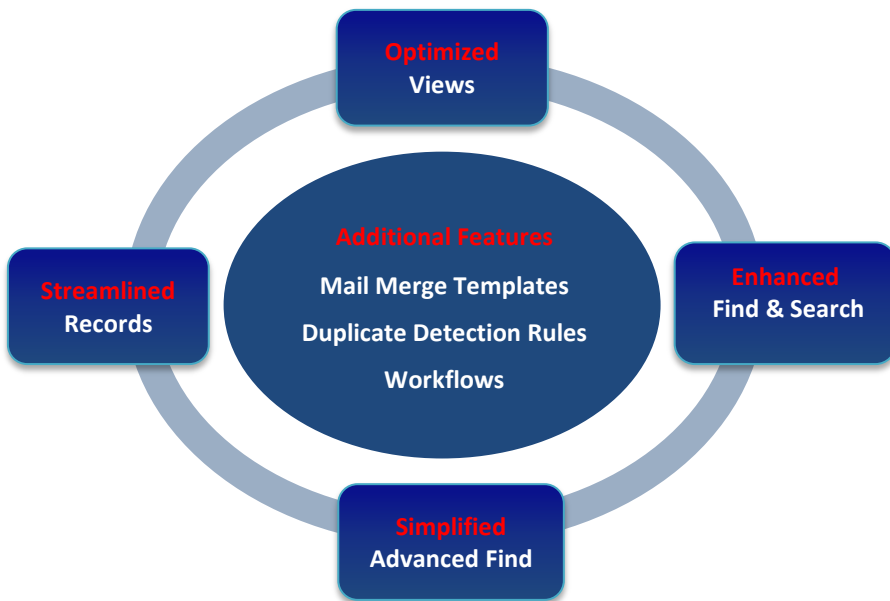
*Delivering higher user adoption
with*



May 2011

Document Overview

Zero2Ten provides this complimentary **CRM Online Quick Start Template** to our customers in order to jump start their Dynamics CRM Online implementation. The template is packed with 100s of configurations that optimize every key record type in CRM. Our template is the result of 100s of Dynamics CRM Online customer implementations and best practices in order to help simply and improve the user experience from Day 1.



KEY DESIGN PRINCIPLES

1. **Simplify** the user experience so that only the data that users need is presented to them
2. **Enhance** the speed and ease for users to find and search for the right information
3. **Streamline** the navigation in how data is presented
4. **Optimize** the way data is presented so it is consistent and easy to follow
5. **Add** new features and examples of functionality that customers regularly request

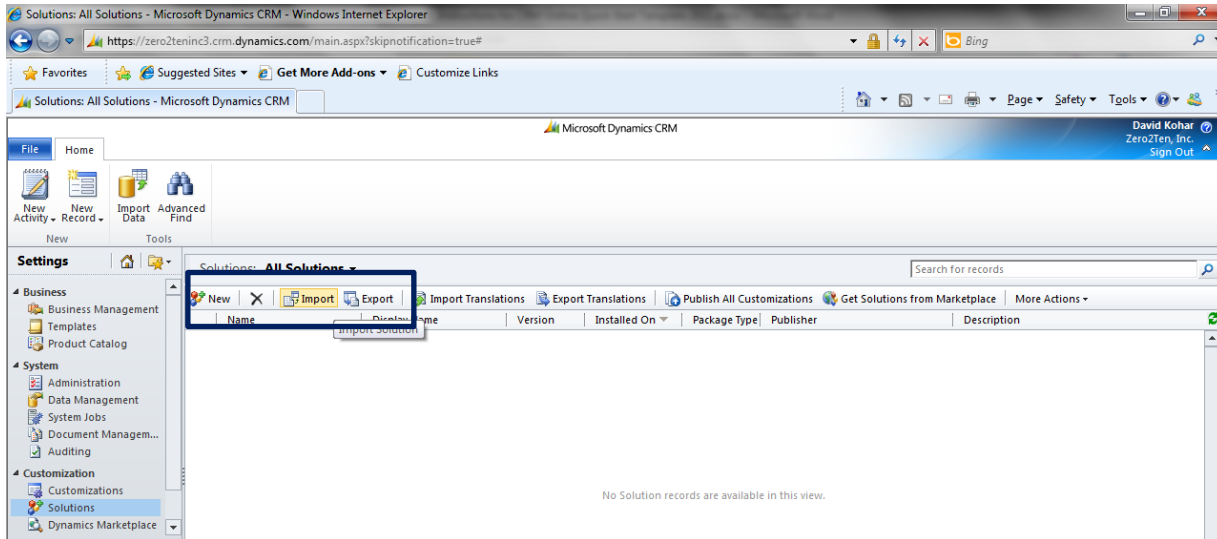
NOTE: By importing this file, you may overwrite some customizations you have already done.

Follow the instructions below to import and start leveraging the **CRM Online Quick Start Template**.

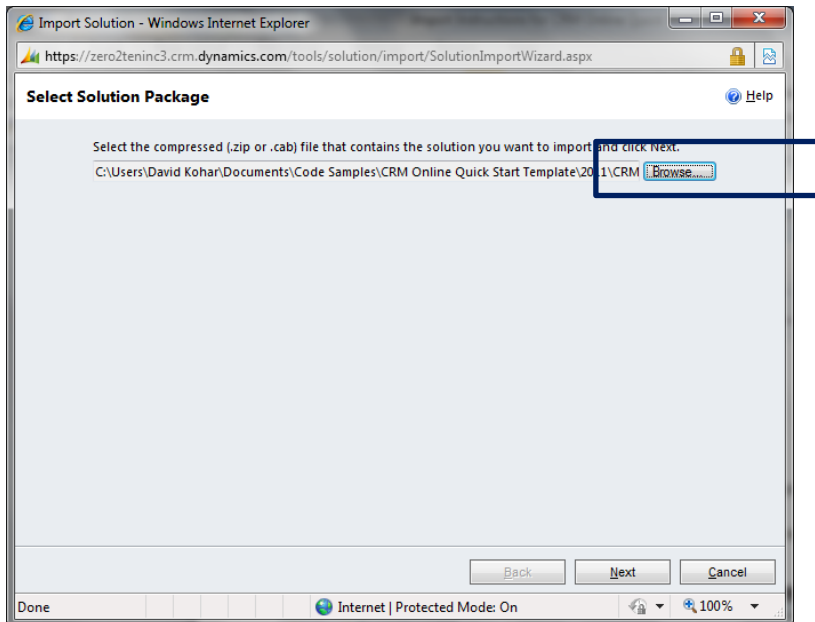
Import CRM Online Quick Start Template

To get started with your import:

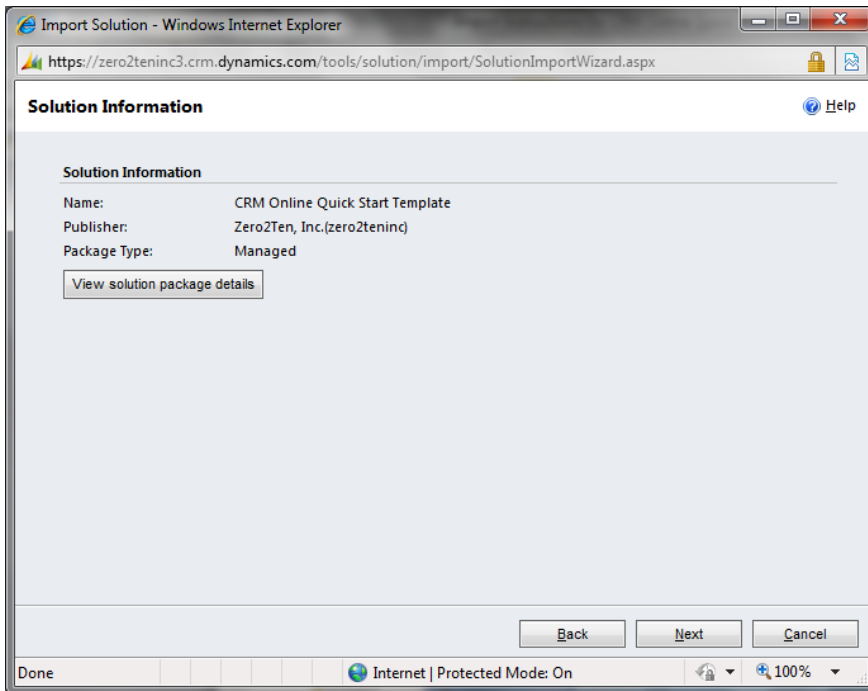
1. Save the Quick Start Template file to your desktop
2. Open up your Dynamics CRM Online site: <https://customername.crm.dynamics.com>
3. Go to **Settings -> Solutions-> Import**



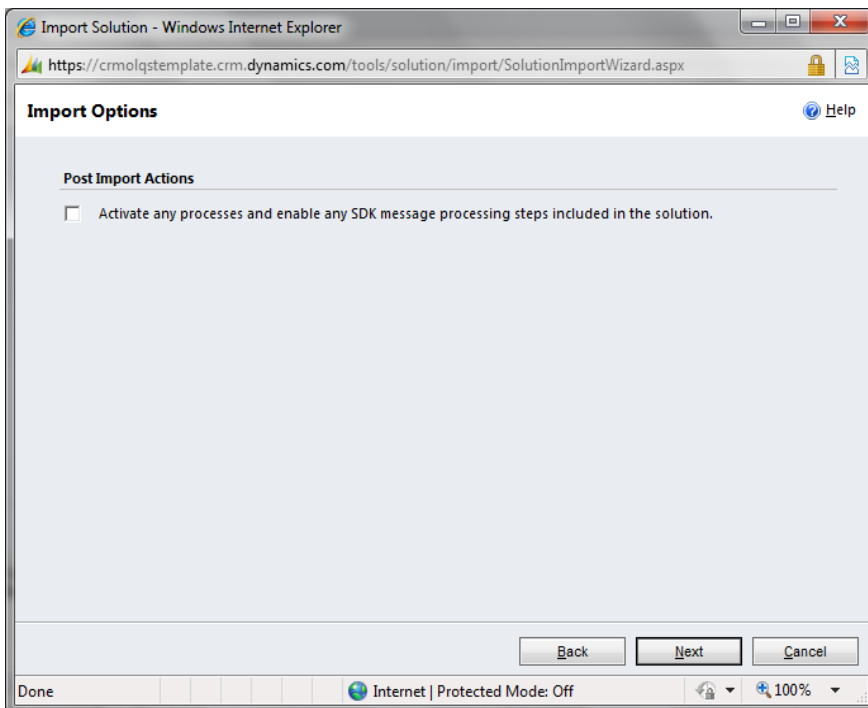
4. Select **Browse** and select **CRM Online Quick Start Template** from your desktop



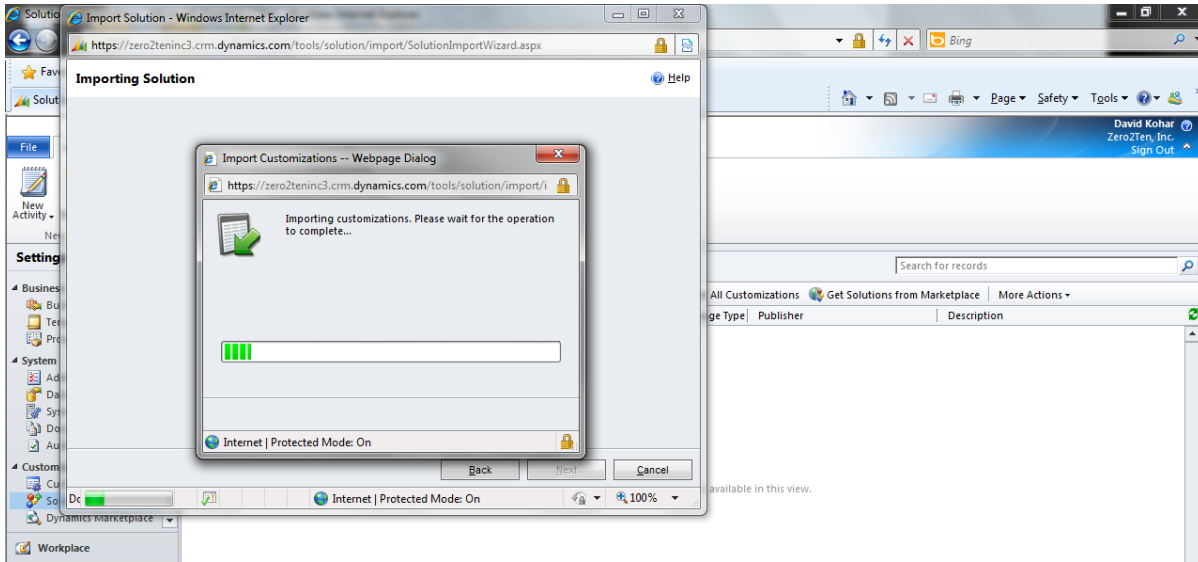
5. Select **Next**



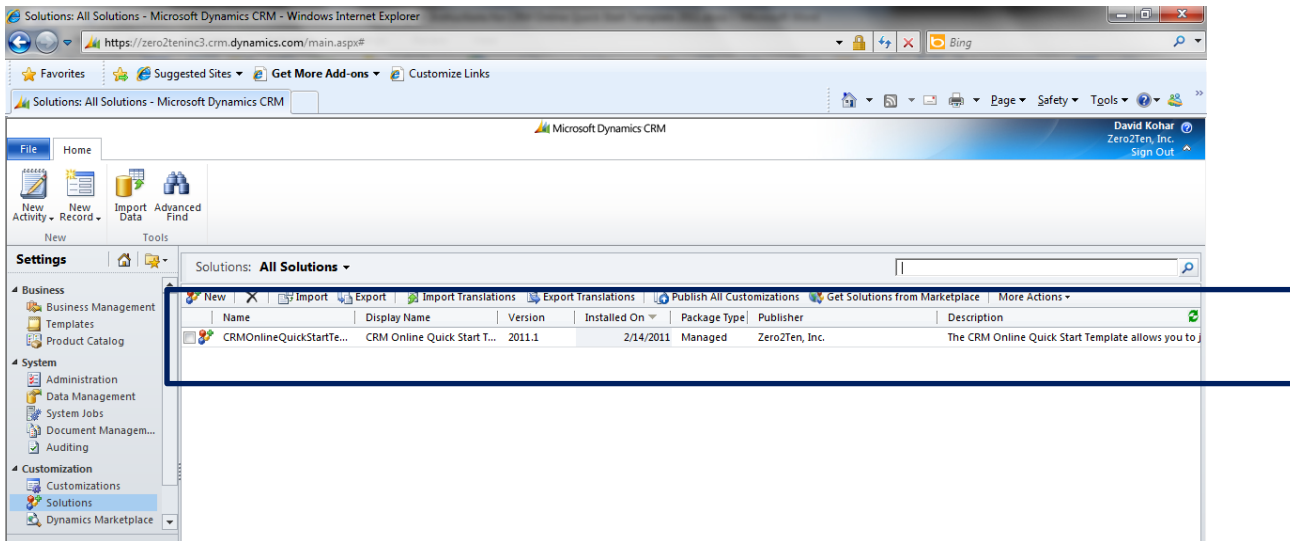
6. Leave Post Import Actions box **unchecked**



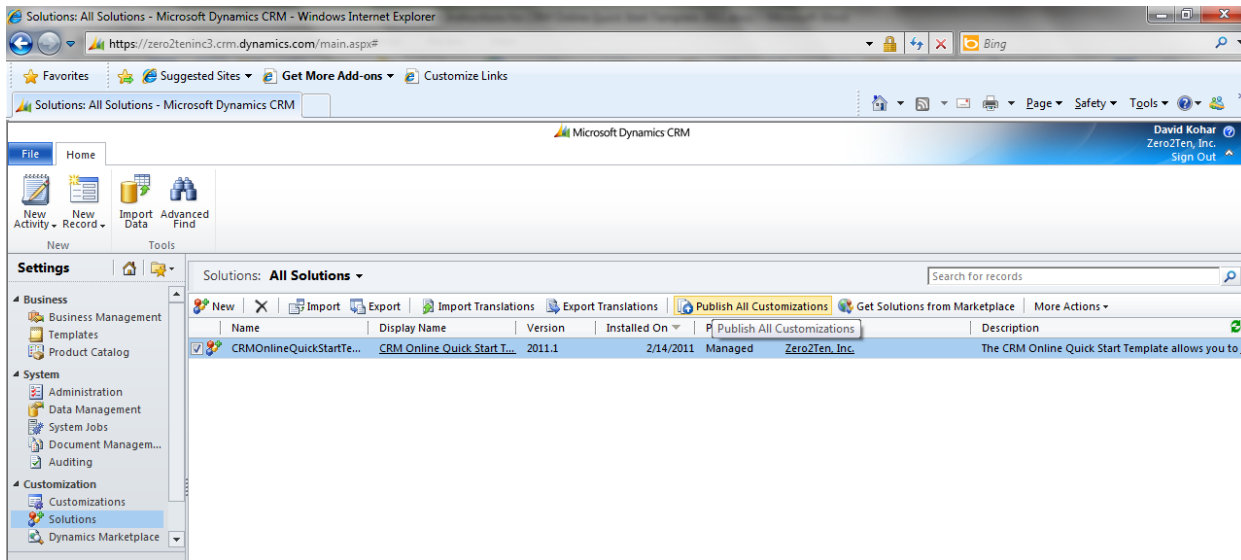
7. Select **Next** and the solution will start to import



8. When the Solution has finished importing Select **Close**



9. Highlight the CRM Online Quick Start Template by checking the box beside it and Select ***Publish All Customizations***



Go back to Workplace and check out the new customizations.