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--For immediate release--

CRM Rules! V4.0 from Visionary Software Makes it Easy to Customize Microsoft Dynamics CRM 2011

Portland, OR –June 12, 2013 Microsoft Dynamics CRM 2011 is one of the fastest growing Customer Relationship Management solutions in businesses today. CRM Rules! V4.0 from Visionary Software is an add-on product that can help turn this powerful solution into a customizable powerhouse. CRM Rules! allows the developer or administrator to easily go above and beyond the out-of-the-box customizations and create dynamic business rules that change according to user needs – with absolutely no coding needed.

With most complex customizations, a developer would need to code dozens or hundreds of lines of JavaScript, shutting out less experienced administrators who would like to create specific business rules. CRM Rules! allows the criteria to be entered into simple forms instead of writing the actual code. It then generates and deploys the JavaScript code into CRM. This timesaving tool frees up the IT department to work on more complicated issues, allows consultants to develop demos and customize systems in a fraction of the time it would normally take, and eliminates the need for small businesses to outsource complex coding. It opens up many customizing opportunities in CRM 2011 to the Accidental Admin as well as to experienced programmers that may have previously been too complicated to attempt.

“This new version of CRM Rules! more than doubles the existing capabilities. The number and types of rules you can create are unlimited; the only limit, really, is your imagination.” says Robert Garfield, VP of Sales.

Not only does CRM Rules! V4.0 greatly expand the existing capabilities of earlier versions, it also includes some of the harder to do functions, even for experienced developers.

Some of these new capabilities include the following:

- “Was” variables: This allows rules to be written based on information that just changed on the form. For example, one rule may require an explanation field to pop up if an opportunity *was* hot and is changed to cold. This can give valuable insight into changes that affect the company.
- Return Value Functions: This allows rules to activate based on mathematical calculations. For example, a rule may set the value of a field based on the number of days between two dates. The result could trigger any number of different fields, sections, or tabs to appear on the users screen. Human Resources may use this to present the right information to clients depending on their age or number of days worked. Several functions are included out of the box to make starting right away easy.
- Filtered Lookups: Microsoft Dynamics CRM 2011 allows the user to filter results based on one field. With CRM Rules!, it is now possible to filter lookups based on complex queries without having to code a single line. This ability to drill down and segment customers is a marketing persons dream.
- Unlimited number of rules: With nearly sixty rule action types and 70+ operators, combined with any custom functions the user adds, the only limit to what can be created is your imagination.

CRM Rules! is intuitive and easy to use. A managed solution, it works seamlessly with your CRM 2011 implementation, both online and on-premise.

Visionary Software is located in Portland, OR. For a free trial or more information on CRM Rules!, contact Visionary at sales@crm-rules.com or 877-CRM-1942 . Visit CRM-Rules.com for more details.

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