



# CRM Rules!

## crm-rules.com

*Expand your CRM System Admin's Toolkit!  
Easily Create Javascript  
to implement custom CRM business rules  
without (your) coding*

# Agenda

- *Who* Am I? (About Visionary)
- *What* is CRM Rules?
- *Why* would Clients want to Buy it? (Benefits)
- *What* are the Benefits to VARs? (Many!)
- *When* is he going to get to the... (Demo)
- *How* Much will this cost? (Pricing and Packaging)
- *Where* can I get it? (Summary)
- Q&A (Anytime)

# Visionary Software Consulting

*Dave Carr, President and Founder*

- VAR since 2003 (CRM 1.0)
- ISV since 2004
  - VAST, the only auditing tool for CRM 3.0
  - IP Sold to c360 and sold as c360 Audit
- Team of 4 very experienced CRM designers and .Net developers
- Scores of CRM implementations
- > 1000's of trained CRM users
- > 1000's of ISV product users

# CRM Rules! Elevator Pitch (Business)

- CRM Rules! lets you implement custom logic without coding, using a CRM UI to create rules:
  - If Account Type = "Customer" Then Require Email Address
- In minutes, you can change the behavior and appearance of your CRM system
- Using your CRM metadata, you define actions to take if conditions are true, or if they are false.
- CRM Rules! Generates the Jscript code and attaches it to your CRM system.

# *If you can you use CRM, then you can use CRM Rules!*

- Create a CRM Rule! by creating:
  - **Conditions** using your CRM fields
  - **Then Actions** to take when conditions are true
  - **Else Actions** to take when conditions are false
- Specify when that rule is to run
- And Auto-Generate and Auto-Deploy!

# What's in it for me, a Microsoft CRM VAR?

Quite a lot!

- FREE copy for your internal CRM system
  - Implement all those pending enhancement requests
- FREE copies for all of your DEMO CRM orgs
  - Build better demos faster, without coding!
- Up to 30% MARGIN
  - When selling CRM Rules! to your self-service customers
- DEVELOPER site license
  - So you can save time in all of your CRM projects
- Visionary SUPPORT for you and your clients

# CRM Rules! Can Help you Sell CRM!

- By enabling you to build killer demos (for \$0!)
- By improving your processes in your internal CRM system
- By giving your self-service clients more control over CRM enhancements
  - One CRM Rules! client was not going to buy CRM because they couldn't maintain customizations
- By increasing your margin, or creating a more competitive proposal for CRM prospects

# Visionary VAR Partnership Benefits

- \$0 FEES to join our Partnership Program in 2012
- Entitles you to commission on each sale of CRM Rules! to each of your clients regardless of effort
- FREE demo and internal copies
- We'll help you sell CRM Rules!, too:
  - With on-demand private Webinars for your staff and/or your clients
  - We'll send you CRM Rules! brochures to hand out
  - With YouTube videos, pricing info on our web site



# VAR Developer Partnership Benefits

- An additional agreement
  - \$5,000 purchase price
  - Plus \$75 per developer per month
  - Minus \$75 per customer you sold to
- Entitles you to use CRM Rules! everywhere!
  - Perpetual (named) Organizational License
    - Specify Org name, you get a year-long license
  - Monthly Unlimited License
    - Can place onto any org, good for 1 month, so you can begin building rules while you get the perpetual license

# Benefits to Development License

These two license types enable VARs to:

- Create one license for the duration of a client project, and not have to re-apply a license key
- Shift developers across projects without requiring new license keys from Visionary
- Quickly implement CRM Rules! on any org
  - without having to contact Visionary for a new license key,
  - This license is good for the next 30 days, so you have time to get a perpetual license for the org.

# CRM Rules Elevator Pitch (4Geeks)

- Using your CRM's metadata, create rules that affect the target CRM's form behavior
- At your direction, CRM Rules! will
  - auto-generate Jscript
  - auto-deploy web resources
  - add event handlers to forms
  - And publish the code to your CRM system
- Revealing your new CRM system in minutes

# Offerings and Architecture

- CRM Rules! Live
  - Import solution into your Live CRM DB
- CRM Rules! On Premise
  - Install against DEV environment (integrated)
- CRM Rules! Solution consist of:
  - Jscript (generated by CRM Rules!),
  - .Net DLLs,
  - Workflow rules,
  - Reports (Rules by Event)
  - and data in CRM Rules! reference tables
- Standard, Professional, and Enterprise Editions

# CRM Rules! Action Types

## Standard Edition

- Change UI appearance based on your conditions:
  - Show/Hide Fields, Sections, or Tabs
  - Collapse Tab/Expand Tab
  - Disable/Enable Fields
  - Set Field Required level (required, recommended, none)
  - Set Option Set List
    - Alter options available based on other field values
    - Hierarchical option sets without coding!
  - Format Phone Number

# Professional Edition

## Standard, plus:

- Data Validation, with alerts
- Set a field value to:
  - A Constant Value, based on field's data type
    - enter date, select option, enter text, decimal, etc.
  - Another field value (Set String = Lookup)
  - A field value from a related (parental) entity
  - Derived String, e.g. opportunity name =  
Status/Expected Amt/Expected Close Date)
  - Mathematical Derivation (Total = Qty\*Price)
- Run Rule! (Nest rules for complex conditions)
- Run Workflow! (Only when conditions will result in action)
- Invoke Process Dialogs (based on data, not user click!)
- Custom JScript

# Enterprise Edition

## Professional, plus:

- Sum Across Children
  - Sum up total value of all opportunities, store value on account, use in charts
- Count Children
  - Count the number of Contacts linked to each Account, and update that value on the account, for “NOT IN” queries!
- Clone Record
  - Specify fields to copy from current record to a new one
  - (Requires ribbon configuration outside of CRM Rules!)
- Upgrade protection: you’ll always receive all functionality we offer
  - For example: Loop Through Records! (coming Q4)
    - Run Child Workflow (looping workflow!) (cascade addr.)



# Demo



# CRM Rules! Pricing

	Standard	Professional	Enterprise
Online (per year, per named user)	\$360.00	\$895.00	\$1,795.00
OnPremise (one time)	\$995.00	\$2,995.00	\$4,995.00
On Premise Maintenance per year	\$179.10	\$539.10	\$899.10
OnPremise Additional Users	\$495.00	\$1,495.00	\$2,495.00

For less than \$1 per day, online users can reap the benefits of using CRM Rules!  
All prices are per named rule designer. We now only charge for those that directly use our product, regardless of the number of CRM users in your org!

# Key Features (Technical)

- Uses your CRM metadata to make specifying conditions and actions that create Jscript EASY!
- Auto-deploy, at your direction
  - Automatically generates Jscript code you can see in plain text
  - Automatically deploys web resources to your default solution
  - Automatically creates event handlers on your CRM forms
  - Automatically publishes all changes
- Works online or on-premise
- Can upgrade at any time; just requires new license file

# CRM Rules! is Easy to Try

## *Free Trial to all!*

- Solution listed on the Microsoft Dynamics Marketplace, links to our website  
<http://www.crm-rules.com>
- Rule Builder Assistance
  - Trial includes documentation that will have you building rules the same day
  - Downloadable User Manual
  - Building Web community for peer support
  - Email support direct to/from developers

# VAR Market Opportunity: Use CRM Rules To:

- Build better demos faster
- Close deals with self-service clients
- Reduce the grunt work; build internal career paths for your developers
- Smaller VARs can reduce outsourcing
- Improve your internal processes
- Decreased Dev Costs = Increased margin = more pricing flexibility = MORE WINS!