



## Hitting the road with Microsoft CRM laptop client for Outlook

### Use personal local data groups to speed up synchronizing critical data

As a salesperson, you probably spend a great deal of your time on the road, in different cities with different customers. It's critical to keep your customers' information available to you and up-to-date on these business trips. By synchronizing your data with the head office, you can keep the information on your laptop current, and keep your managers and co-workers up-to-date, as well. However, synchronizing all of your business's Microsoft CRM data can mean long synchronization times and eat up memory on your laptop. Using the Microsoft CRM 3.0 laptop client for Microsoft Office Outlook, you can set up and activate a local data group. Using criteria similar to Advanced Find, you can select which Microsoft CRM records will be available offline. You can activate and deactivate these local data groups when you synchronize so you can change the data that you want to have available.

You can see what data filters are being applied to your offline synchronization by clicking **Local Data** on the CRM menu in Outlook. All of the data groups on the **Data Groups** tab are applied. Data groups are additive, so you can have more than one active at a time to take larger, combined sets of data offline.



### Select the data you need with local data groups

How can you use local data groups? For example, you have a week-long business trip to the Northwest United States to visit Washington and Oregon. You want to be able to work with and update only the information in the Microsoft CRM database that applies to your customers in these two states.

First, a good strategy is to create a local data group that defines all of the data that you want available to you for a record type, for example, your active accounts. Save this local data group as your "master," and call it "My Active Accounts", for example. Second, you can then modify this master local data group to create different versions for specific business needs.

- To edit an existing data group, double-click on the item in the list. Keep the original data group on the **Inactive Data Groups** tab, make a copy using **Save As**, and add additional criteria, such as "Address 1: State/Province equals WA". Save it with a new name such as "My Accounts in Washington."

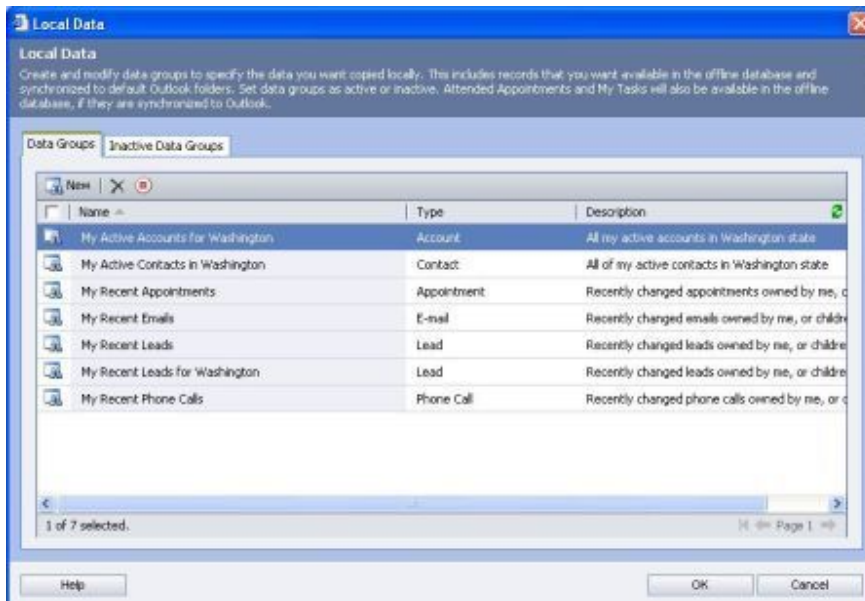


- Using **Save As** again, change the criteria to “Address 1: State/Province equals OR”, and name your new data group “My Accounts in Oregon.”

Before your trip, deactivate all of the data groups except the ones that apply to the customers in the first area you are visiting.

### Deactivate or activate data groups

- To deactivate a data group, on the **Data Groups** tab, select one or more data groups. On the tool bar, click the **Deactivate** button (a red circle with a red square). This deactivates all of the data groups and moves them to the **Inactive Data Groups** tab.
- To activate a data group, on the **Local Data dialog** box, on the **Inactive Data Groups** tab, select one or more data groups and then click the **Activate** button (a green circle with a green triangle). All active data groups appear on the **Data Groups** tab.



Now you are ready to go offline. Your data will be synchronized automatically every time you go offline and again when you go online. If this is the first time that you have changed your local data groups' settings, this may take a while. Future synchronizations will be faster, because you are synchronizing less data.

### Take your data offline and synchronize your data

- In Outlook, on the **CRM Menu**, click **Go Offline**.

While you are offline, you will be able to add new contacts and accounts or update the existing accounts and contacts you have on your laptop. When you are able to connect to your company again and go online, for example, from your hotel room, you can synchronize your data.

### **Go back online and synchronize your data**

- In Outlook, on the **CRM** Menu, click **Go Online**.

Any updated data from your laptop will be synchronized with your company's Microsoft CRM database. You can now deactivate and activate a new set of local data groups for your next visits, using the procedures explained earlier in this article.

## **Combine local data groups to take more information with you**

Because local data groups are additive, you can have more than one active data group at a time. For example, if you are going to a conference in the Northwest United States, you can activate both the Washington and the Oregon data groups you created and take both sets of data offline with you.

