# Quick Start Guide for Business Users: Microsoft Dynamics CRM 2011

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| [**Personalize Microsoft Dynamics CRM**](http://go.microsoft.com/fwlink/?LinkID=227074&clcid=0x409)   1. Click the **File** tab, and then click **Options**. 2. On the **Set Personal Options** screen, you’ll see seven tabs. 3. Here, you can set what you see when you sign in, and adjust how data is displayed and how you work with records and e-mail.  *More details online:* http://go.microsoft.com/fwlink/?LinkID=227074 | **[Import data](http://go.microsoft.com/fwlink/?LinkID=227113&clcid=0x409)**   1. Group each type of data (such as sales leads) into separate files. 2. Format the data to fit into the system. 3. Save each file in one of the valid file types: txt, csv, xls, or xml. 4. Select the data import templates you need and input the data there. 5. Import the files.   *More details about formatting data:* http://go.microsoft.com/fwlink/?LinkID=227431  *More details about importing:* http://go.microsoft.com/fwlink/?LinkID=227113 |
| |  | | --- | | [Run a report](http://go.microsoft.com/fwlink/?LinkID=227112&clcid=0x409)  1. From the Reports area, under **Workplace**, under **My Work**, click **Reports**. 2. Type the first few letters of the report name, and click **Find**. 3. In the reports list, double-click the report that you want to run. 4. If the report has a default filter, the default filter will be displayed.   **Tip**: To run a report without seeing the default filter, select the report. On the **Reports** tab, in the **Actions** group, click **Run Report**.  *More details online:* http://go.microsoft.com/fwlink/?LinkID=227112 | | |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | [**Top keyboard shortcuts in Microsoft Dynamics CRM**](http://go.microsoft.com/fwlink/?LinkID=97354&clcid=0x409)   |  |  | | --- | --- | | **To do this** | **Press** | | Select all text in the current field or current list | CTRL+A | | Close an active form | ALT+F4 | | Move forward through a form's fields | TAB | | Move backward through a form's fields | SHIFT+TAB | | Save a form | CTRL+S or SHIFT+F12 |   *More details online:* http://go.microsoft.com/fwlink/?LinkID=227375 | |
| [**Filter a list**](http://go.microsoft.com/fwlink/?LinkID=227110&clcid=0x409)   1. Open the list you want to view (such as Accounts or Opportunities). 2. In the **Data** group, click **Filter** .   In each column header, a down arrow  appears.   1. Click the arrow and select how you want to sort the list.   You can sort the list alphabetically, numerically, on the basis of whether it contains data, or by using a custom filter you select—the custom filter selections appear based on what type of data you see in the column.  *More details online:* http://go.microsoft.com/fwlink/?LinkID=227110 |
| **[Assign a record](http://go.microsoft.com/fwlink/?LinkID=227115&clcid=0x409)**   1. In the list of records, select the record that you want. 2. In the **Collaborate** group, click **Assign**. 3. In the **Assign** dialog box, select an option. 4. Click **OK**.   *More details online:* http://go.microsoft.com/fwlink/?LinkID=227115 | [**Share a record**](http://go.microsoft.com/fwlink/?LinkID=227114)   1. In the list of records, select the record that you want. 2. In the **Collaborate** group, click **Share**. 3. In the sharing dialog box, under **Common Tasks**, click **Add User/Team**. 4. Find the user that you want, and click **OK**. 5. Assign the permission you want to grant the user, and click **OK**.   *More details online:* http://go.microsoft.com/fwlink/?LinkID=227114 |