

**get ready...**

to quick start your Microsoft  
Dynamics CRM Rollout with



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# 1. CRM-Essentials for T-Suite®

## 1.1 What is CRM-Essentials for T-Suite®?

CRM-Essentials for T-Suite® delivers *YOUR* Microsoft Dynamics CRM solution tailored to your specific needs in the shortest possible timeframes. Delivering you peace of mind and budget certainly, CRM-Essentials for T-Suite® delivers value by offering a pre defined and costed implementation pack of consulting, training and customisations services for your Microsoft Dynamics CRM powered by **T-Suite® Applications from Telstra.**

## 1.2 Keys to CRM Success

**CRM The KIS Principle:** Simplicity is as true as ever for a CRM roll out: Our job is to keep the roll out simple and user friendly using basic customisation, basic workflows, reports and training.

**Solid Foundations:** Without them your house will not be very stable or extendable. The initial phase of your CRM deployment is critical to the long term strategy.

**mYcrm:** End user buy in is crucial. Engaging key users early in the planning stages is the best way to get buy in and generate the sense of 'mYcrm'.

## 1.3 What you get

CRM-Essentials for T-Suite® is designed to get you using *YOUR* CRM in the shortest possible timeframes. Most CRM customers want tangible benefits from their CRM and they want them yesterday. CRM-Essentials for T-Suite® offers a mixture of consulting, training and CRM technical services leveraging Orion's deep CRM expertise to deliver *YOUR* CRM when you need it.

| Service                                     | Quantity    | Deliverables             |
|---|-------------|--------------------------|
| Consulting                                  | Up to 1 day | Scope of Works           |
| Training: End user and System administrator | Up to 1 day | Instructor Lead Training |

| System Customisation                |  |
|-------------------------------------|--|
| CRM system configuration            | Business units, User Security Roles  |
| Customisations                      | Creating up to 50 custom fields  |
| Forms Design                        | Change up to 30 fields on Lead Account Contact Opportunity or Case form  |
| CRM Views and Previews              | Modify 'All' and 'My' and Associated 'views on Lead, Account, Contact, Opportunity, Case   |
| CRM Custom Views                    | Up to 2 each on Leads, Accounts, Contacts, Opportunity, Case   |
| Workflows                           | 3 basic workflows such as Sales Process  |
| Reports                             | 1 custom report  |
| Data Import                         | Import of your Accounts and Contacts   |
| Website Integration Contact Us Page | Creation of an ASPX page including a web form with up to 15 submission fields mapped to your CRM to create a Lead record and a basic notification workflow |

**You** fill in the spread sheets provided to you.  
**We** map the data import it into your CRM

**You** provide us with an HTML page template, access to your site to deploy the ASPX page, and a resource to update the links on your website. **We** provide you with a web form, passing data to CRM to create either a lead or case and a basic email notification workflow

## 1.4 Documentation Deliverables

Included in the CRM-Essentials for T-Suite® pack is a series of documents that are completed either by you or in conjunction with your project manager. These include:

- Scope of works, including the implementation plan
- Lead, Account, Contact, Opportunity and Case Screen Shots Tables
- Account and Contact Import Template
- CRM user Information Template
- Feedback Sheet

## 1.5 What you don't get

### **CRM Outlook Client**

Dynamics CRM can be run through Outlook. To achieve this software needs to be deployed to each user's desktop or laptop. This is available for download together with instructions for you to load on to each user's desktop or laptop. Full service implementation by Orion is available if required.

### **Data Migration**

Although you get a significant bundle of services in the Essentials pack, data migration is not included. This is because it can be so different from client to client and from system to system. Orion can provide advice and full migration services as required. As part of consulting Orion we explain the options and provide cost estimates.

### **XRM**

Microsoft Dynamics CRM is a fantastic platform to develop all kinds of business solutions and integrate with other systems such as Share Point This is achieved with custom entities, integration with third party systems, web services and all manner of custom code. In these circumstances you may elect to bypass the CRM-Essentials for T-Suite® pack and a different project based approach would be taken. Your CRM consultant will advise you if you have requirements like this and a project base proposal with a cost estimate will be provided.

## 1.6 Support for the customisations delivered by orion

As part of T-Suite's services your CRM database is regularly backed up and servers maintained to ensure quality of service and the highest level of service availability. Once your CRM is live we are here to help you get the most out of your CRM investment by supporting the customisations in your CRM.

### **No cost support**

In the event users encountering system error messages that impact on the usage of your CRM this will be resolved at no cost. Support incidents must be logged using your assigned the support portal [http://www.orionopen.com.au/CRM\\_Case.aspx](http://www.orionopen.com.au/CRM_Case.aspx)

On receipt of a support incident request one of our support engineers will contact you to determine the nature if the incident and if it's a paid or no cost support incident. Typically no cost support is system error messages, errors in the in built CRM or errors caused by the hardware or platform.

## 2. Engagement

### 2.1 Engagement Summary

A successful CRM implementation requires careful planning in order to build a solution that benefits all stakeholders across the organisation. Success also requires 'buy in' from key stakeholders. This is best achieved by engaging key users early in the planning stages. Once the paper work is out of the way an implementation plan with project times lines will be created in conjunction with you.

### 2.2 Design workshop and the key user group

A design workshop is an interactive processes aimed at helping an organisation articulate their requirements. The session is up to half a day in length and has a clearly defined objective and agenda. Sessions include discussion and documentation of business processes, businesses rules, interface design workflows, and reporting outputs.

The output of these sessions allows us to design and build your CRM solution, so your input is crucial.

### 2.3 Scope of works revision and sign off

At the end of the design work shop a scope of works document will be created. This will include details of the functionality and deliverables for the CRM. When this document is signed off the CRM build will commence.

### 2.4 Review Customisations

Once the scope is signed the next milestone is for you to review the customisations and workflows. During this important feedback session revisions are noted for actioning.

### 2.5 Revisions, testing and acceptance

Once revisions are complete you will test the system and sign your CRM Acceptance Certificate. If additional works such as data migration or additional reports have been added to the scope of works they will be delivered at this stage.

### 2.6 Training

- End User
- System Administrator

## 3. Training

Once your CRM is complete your specially devised training plan and sessions will be undertaken.

Training is targeted at two audiences:

- End User
- System Administrator

### 3.1 Training Summary

Training sessions are tailored to your CRM. They can be delivered on premises or remotely. Sessions cover basic functionality through to more in depth CRM customisations for System Administrators.

### 3.2 End user training

**End User Training covers topics such as:**

- Introduction to CRM
- Navigation
- Activity Management: creating, tracking, viewing
- Creating and linking records: Accounts, Contacts
- Converting Leads
- Creating Opportunities
- Using 'Advanced Find'
- Creating Templates
- Email and Mail Merge
- Outlook Client

### 3.3 System administrator training

- Navigation of 'Settings' area of CRM
- System Settings in detail
- Security Roles
- Creating Users
- Customising CRM forms
- Publishing
- Creating Attributes
- Creating Entities
- Creating Views
- Relationships

## 4. Orion Overview

### Focusing on the outcomes

Orion provides highly trained consultants who work closely with its clients' businesses and any 3rd parties to identify needs and provide solutions based upon best practice. We use the Microsoft toolset and seek to transfer knowledge if/when appropriate. Orion is open with the process of knowledge transfer – this means that a customer can work alongside Orion's personnel to ensure that the appropriate knowledge is transferred during a project.

### Microsoft Partner Status

Orion is a Microsoft Gold Certified Partner. Gold certification is the highest level of Microsoft accreditation available worldwide and Orion is able to offer its customers a superior level of technical knowledge and support in its competency areas:

- Microsoft Dynamics CRM
- Microsoft Dynamics GP
- Custom Development (Web applications)

### Orion's Experience

Orion was one of the first Australian Microsoft partners to adopt MSCRM technologies. Orion was involved jointly with Microsoft in the beta testing of CRM in Australia. Orion is also active in providing financial accounting solutions and custom development solutions based on Microsoft technologies. Orion has been recognised by Microsoft Australia in 2006 and 2007 as one of the outstanding CRM solution providers in the Australian and New Zealand region

Orion has implemented Microsoft CRM solutions across a range of organisations from large federal government departments through to small private businesses.

We have worked with many organisations implementing CRM such as :

- Federal Department of Innovation, Industry Science and Research
- NSW Institute of Teachers
- Caesarstone Australia
- Jenkins Investment Management
- Teacher's Registration Board of South Australia
- DK Blue
- Sydney Point of Sale
- Mini-Tankers Australia
- Derwent Howard Publishing
- Tonkin Corporation
- Water Harvest Australia
- Tesa Tapes Australia
- AFA Insurance

Other Microsoft Dynamics Clients include:

- American Express
- Laing and Simmons
- Starlight Children's Foundation
- IBA Health
- Wagamama Restaurant Chain

### Industry Peer Recognition from Microsoft Australia

#### Department of Industry Tourism and Resources CRM Project

Orion's implementation of MSCRM to manage the multi billion dollar R&D Tax Concession program was recognised by Microsoft Australia as one of the top five outstanding CRM solutions in Australia in 2007

#### NSW Institute of Teachers CRM Project

Orion's MSCRM project for the NSW government department NSW Institute of Teachers (NSWIT) was recognised by Microsoft as one of the top three outstanding CRM solutions for 2006 in the ANZ region and featured as a case study in the Sydney Morning Herald in March 2007

## 5. Pricing

All pricing excludes GST and is quoted in AUD

### CRM-Essentials for T-Suite® Package Pricing

| Package                          | Price   |
|----------------------------------|---------|
| CRM Users 1-5                    | \$5,995 |
| CRM Users 11-49                  | \$7,975 |
| CRM Users licences per month 50+ | \$9,985 |

### Outlook Client Installation

| Installation                        | Price |
|-------------------------------------|-------|
| Outlook Client install per computer | \$95  |

### Additional Training

| Service     | Price |
|-------------|-------|
| Per Session | \$650 |

### Managed SharePoint (MOSS) CRM Integration: Linked Documents

| Service                           | Price       |
|-----------------------------------|-------------|
| Installation one time set up      | \$ 995      |
| SharePoint-Essentials for T-Suite | Coming soon |

### Business Card Scanning from Card2Anywhere

| Service                              | Price |
|--------------------------------------|-------|
| Scanner: CardScan Executive          | \$329 |
| 5 user licence                       | \$399 |
| 10 user licence                      | \$749 |
| 10+ user licence                     | \$949 |
| One time set up (Leads and Contacts) | \$95  |

(User licence prices are to purchase outright)

### E Newsletter: Direct Marketing with Attachments

| Service                              | Price |
|--------------------------------------|-------|
| Installation one time set up         | \$650 |
| Monthly site licence 5-10 CRM users  | \$110 |
| Monthly site licence 11-49 CRM users | \$149 |
| Monthly site licence 50+             | \$199 |

### Sales Dashboard

| Service                      | Price       |
|------------------------------|-------------|
| Installation one time set up | Coming soon |

### Cast Iron Integration: Point to Point Commercial off the shelf System Integration

| Package                              | Price       |
|--------------------------------------|-------------|
| Installation one time set up         | Coming soon |
| Monthly site licence 5-10 CRM users  |             |
| Monthly site licence 11-49 CRM users |             |
| Monthly site licence 50+             |             |

### Additional Training

| Service     | Price |
|-------------|-------|
| Per Session | \$650 |

### CRM Marketing Collateral Design Services

| Service                          | Price |
|----------------------------------|-------|
| Email Templates                  | POA   |
| Newsletter Templates             | POA   |
| MS Word Merge Document Templates | POA   |

### Support Rates

| Rate/time | Price |
|-----------|-------|
| Hourly*   | \$170 |

\* (Min charge 15 minutes)

### Ad hoc Consulting Rates

| Rates/time | Price   |
|------------|---------|
| Daily      | \$1,300 |
| Hourly     | \$170   |

Normal hours  
 After hours  
 Weekend and public holidays

8am -6pm  
 Add 25% loading to the hourly rate  
 Add 75% loading to the hourly rate

## 6. Terms and conditions

### Introduction

The subscriber (Client) agrees to the terms and conditions as described below

### Termination with Cause

Either party may immediately terminate all or part (including any Service Schedule) of this Agreement at any time by giving notice in writing if:

- (a) the other party fails to make any payment which is not the subject of a bona fide dispute when due under this Agreement and which remains unpaid for 30 days after notice in writing from the first party requiring payment;
- (b) the other party commits a material breach of this Agreement which it fails to remedy within 30 days of written notice by the first party; or
- (c) the other party becomes Insolvent or wilfully defrauds the other party.
- (d) In the event of termination of this Agreement by Orion under the terms this Clause, such termination will incur a one-time charge equivalent to 50% of the monthly Base CRM User licence Fees multiplied by the number of months remaining to the expiration the Term (Termination Charge). The Termination Charge will be payable within not less than 30 days prior to the expiration of the Disengagement Period.

### Termination without Cause

Client's only rights of termination are as set out in Termination with Cause. Client may not terminate this Agreement without cause at any time.

- (a) Termination or expiry of all or part of this Agreement will not prejudice any rights or obligations accrued at the date of termination or expiry.
- (b) Upon termination, all Charges and other fees owed by Client become immediately due.
- (c) Despite any other provision of this Agreement, all Services terminate on the termination of this Agreement.

### Charges

- (a) Client agrees to pay to Orion the Upfront or Establishment Charges outlined in the Schedules immediately following the date of execution of this Agreement.
- (b) Client agrees to pay to Orion any (if applicable) ongoing monthly Charges outlined in the Schedules as of the Commencement Date, in accordance with this Agreement

### Payment

- (a) Client must pay the Base CRM implementation services package fees (together with any taxes) via Direct Debit on execution of this agreement.
- (b) Client must pay any Additional Charges (together with any Taxes) to Orion within 14 days of the date of receipt of each tax invoice.
- (c) Timely payment of each invoice is an essential term of this Agreement.

### Billing Start Date

Orion invoices for set up upon execution of this agreement. Whilst the CRM solution may not be adapted yet, we engage, provision assets and set to work the day the signed agreement is reached. The CRM server is typically available the same business day.

### Interest on Overdue Payments

Without limiting any other right Orion may have, Client must pay Orion interest on all overdue payments, excluding any invoices that are subject to a bona fide dispute, under this Agreement at the rate of 2% above the Commonwealth Bank of Australia's prime rate for 90 day prime commercial bills calculated daily, from and including the due date to and including the date of payment. If the interest rate specified is not quoted during the particular period, Orion acting reasonably may nominate an equivalent alternative interest rate.

### Taxes

The Charges are exclusive of Taxes. Client must pay any Taxes (including any Taxes imposed subsequent to the date of this Agreement) in respect of any goods or services supplied or payments made or to be made under this Agreement.

### GST invoices

Without limiting this Clause, to the extent that a taxable supply is made under this Agreement, the party:

- (a) making the supply will provide the recipient with a tax invoice; and
- (b) receiving the supply must pay the GST inclusive amount for that taxable supply at the time of payment.

### Suspension of Services

Subject to conditions in Charges and Payments clauses in this Agreement, and without limiting any other right Orion may have, if Client does not make a payment by its due date or otherwise breaches this Agreement then Orion may, in its absolute discretion, and after giving Client at least 21 days notice in writing to an authorised representative, and provided that the breach is not rectified in the meantime, forthwith suspend the supply of all or part of one or more of the Services until the relevant breach is rectified to Orion's satisfaction. All applicable Charges in relation to the Services will continue to accrue while suspended and will be payable by Client.

### Project Delays

Orion shall not be responsible for project delays caused by the Client. The Client shall have 30 days to complete the project documentation or forfeit any balance of work owed.

### Excusing Events

Without limiting any other provision of this Agreement, Orion will have no responsibility for any failure or delay in the provision of the Services or part of the Services which results from or is contributed to by an Excusing Event to the extent that the Excusing Event causes such failure or delay.

### Working in a Production Environment

For an additional fee, Orion will create a development environment (DE) for the client where all software modifications can be made and tested without impacting the production environment (PE) (the Client's live Microsoft Dynamics CRM implementation). If the Client authorises Orion to make changes to the PE, Orion will not be liable for any impacts these changes have on the PE and the Client will pay Orion hourly rates to repair and/or restore the PE. It is strongly recommended that the Client invest in a DE top mitigate the risk of development on the PE, and to supplement the Client's disaster recovery and contingency plans.

### Data Migration

Should the client wish to import standard basic data such as accounts and contacts and these records are basic CSV in the correct format, there will be no charge for data migration. Data migration is not covered by this agreement and is specifically excluded from the services contained herein. Should the client have complex data to migrate into Microsoft Dynamics CRM 4.0, the Client shall provide a complete description of the data and a map from the source file to Microsoft Dynamics CRM 4.0. At that time Orion will provide client with a cost estimate to complete the data migration.

### Moving your CRM Solution In House

If the Client ever decides to move their Microsoft Dynamics CRM solution on premise or to another provider, Orion and its hosting partner will be committed to making the move a successful one. Hourly rates may apply if the Client requires services to accommodate the transfer of CRM functionality from the hosted server to Client servers on-site.

#### Minimum Requirements – Microsoft Dynamics CRM 4.0 Outlook Client

Orion will provide software and documentation to enable the client to install the Microsoft Dynamics CRM Outlook Client on its employees computers. If there are any errors during installation, the Client may contact Orion via Customer Support ([http://www.orionopen.com.au/CRM\\_Case.aspx](http://www.orionopen.com.au/CRM_Case.aspx)) Client computers to have Outlook Client installed must meet the minimum operations system requirement of Windows XP 2 Professional SP2 (Windows Vista Professional is recommended) and Microsoft Office 2003 SP3 (Office 2007 SP 1 is recommended) Windows Vista home is not supported.

#### Project Go Live Acceptance and Warranty Services

Go live acceptance is defined as the delivered software providing all functionality as documented in the scope of works. Warranty services will commence for a period of 30 days from the Actual Go Live Date. Warranty services expressly exclude Software Support Services. Any bugs, errors or fixes that do not prevent Go live will be covered by the warranty.

#### Intellectual Property

Except as otherwise expressly provided in a Schedule Orion will own all Intellectual Property Rights in all new material (including software, documentation and data) created or developed or otherwise brought into existence by or on behalf of Orion, in the course of performing the Services. Client must do all things necessary to assign to Orion all Intellectual Property Rights in such material. For the avoidance of doubt, items such as IP addressing schemes, systems documentation, system configuration and user information are specifically not new material within the meaning of this clause

#### Client acquires no title or interest

Client acquires no right, title or interest in any materials or software (including hardware or licensed Software) supplied to Client pursuant to this Agreement.

#### Non-solicitation

Each party must not during the term of this Agreement and for a period of twelve 12 months after its expiry or termination, unless the other party agrees in writing, solicit employment, or independently contract for the services of, any employee of the other party or its related Bodies Corporate.

#### Limitation of liability for consequential loss

Save as otherwise provided in this clause, to the maximum extent permitted by law, Orion or the hosting provider will not be liable in any circumstances for any special or punitive damages, or indirect, incidental, economic or consequential loss (including but not limited to loss of profits, revenue, opportunity, data or goodwill) suffered or incurred by Client, arising out of or in connection with this Agreement or the Services, whether in an action for tort (including negligence), product liability, or under statute or contract, and whether or not such loss or damage was foreseeable or even if advised of the possibility of the loss or damage

#### Force Majeure

Orion shall not be responsible for failure to perform in a timely manner under this agreement when its failure results from any of the following causes; Acts of God or public enemies, civil war, insurrection or riot, fire, flood, explosion, earthquake or serious accident, strike, labour trouble or work interruption or any cause beyond its reasonable control.

#### Lost Data

Reconstruction of data lost due to the hosting providers acts or omissions in the course of supplying Services will be at the hosting providers cost, provided that hosting provider sole liability to the extent permitted by law will be to restore that data from the most recent back-up copy of that data.

#### Assignment with consent

Neither party may assign nor attempt to assign this Agreement or any right under this Agreement without the other party's prior written consent which may not be unreasonably withheld, provided that Orion may assign this Agreement to a Related Body Corporate by giving written notice to Client.

#### Subcontracting

Orion may subcontract such of its obligations under this Agreement as it reasonably determines.

#### Travel

For travel outside of a 20km radius of Sydney CBD, travel time will be charged at 50% of the quoted hourly rate. There are no additional charges for travel expenses within 20km radius of Sydney CBD. For interstate or international travel fares, accommodation and transfers and living expenses will be charged at cost.

#### Orion Warranty

Orion warrants its services conform to generally accepted industry standards. Should this not be the case with any particular item of service Orion will re-perform the service at no cost to the client. If Orion supplies software written by indirect, consequential or incidental loss or damage and whether for loss of profits, loss of savings or loss of data or otherwise) suffered or incurred by the Customer or anybody else because of a failure of any products or software supplied, or services performed, or any act, omission, delay or non performance by the Contractor. Orion, that software will be subject to an Orion warranty which will accompany the software upon delivery. Orion does not warrant other software not written by it, such as software developed by Orion's principals, Microsoft, NT, Novell Netware etc. Any faults in such software will be covered by the respective manufacturers warranty. Any services rendered by Orion in respect of such software will be chargeable in the normal way. This warranty will be available from the commencement of the implementation project and continue for a period of 30 (thirty) days from the agreed live run date. The Contractor excludes all liability, in contract, tort (including negligence) or otherwise for all claims, actions, loss, liability or damage (whether direct,



**SERVICE DETAILS**

Number of Microsoft Dynamics CRM Users   
 Dynamics CRM Test Environment (Optional)  Number of Microsoft SharePoint Users (Optional)

**OPTIONS**

Microsoft Dynamics Outlook Client Installation  Additional Training Sessions   
 E Newsletters for Microsoft Dynamics CRM  Pre Paid Support Contract   
 CRM Marketing Collateral Design Services

**AUTHORISATION**

I understand the full extent of the offering contained herein   
 I agree to the Terms and Conditions contained herein   
 I am authorised to act on behalf on my employer   
 I agree that billing commences on execution of this document

 **Signature:**

**Date (DD/MM/YYYY)**

Job title:

Execution Date

**WHEN COMPLETED FAX BACK ACCOUNT SET UP AND AUTHORISATIONS TO 02 9212 3588**

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