SwiftRM Simple FAQ

1. What is SwiftRM?
   SwiftRM is a simple relationship management solution powered by Microsoft Dynamics CRM and hosted in the cloud that can be up and running in just 3 days.

2. Why do I need a relationship management system?
   SwiftRM helps you keep track of all the communication and interaction with your connections. Instead of keeping track of your connections and activities in spreadsheets, notes and emails, SwiftRM provides a structured way to store and access relationship information all in one place.

3. How come it only takes 3 days?
   Our CRM depth of experience and expertise enables us to provide an accelerated approach to deployment. We've removed the complexity by preselecting the must have, out-of-the box functionality for you and utilizing our quick and easy-to-use self-guided assessment survey to capture your unique field and personalization requirements.

4. Are all the features of SwiftRM Simple included in the price?
   Yes! With SwiftRM Simple you can manage contacts and accounts, you get activity tracking, 1 custom entity, 5 custom fields, unlimited email support and a free Office 365 upgrade, if you don't have it already.

5. What kind of relationships can I manage with SwiftRM?
   You can manage any type of relationship that is specific to your business – the possibilities are endless. With SwiftRM you get a custom entity to capture data unique to your business relationships and accounts to store relationship information in custom fields tailored to your business.

6. What is a custom entity?
   A custom entity can be anything that you want to track, that is specific to your organization. Check out these examples (link to list).

7. What are custom fields?
   Custom fields are personalized fields that you select so that SwiftRM fits your business perfectly.

8. Do I require training?
   SwiftRM Simple is designed specifically to be easy to use so you'll need very little training. It has been pre-configured in a Microsoft Dynamics CRM environment, with customized dashboards for quick and easy access to the data you want to see.