



What's New in Microsoft Dynamics CRM 2011

The Road Ahead...

*“Adopting a productivity focus that changes the way we work is the **only path to lock in productivity gains** and earnings.*

*Achieving productivity gains requires **changing the way people work** so they work smarter, achieve more, deliver **greater quality** and realize the **value** of their efforts.”*

Gartner

New Conversations About Productivity

Uncover new connections

Focus on the right leads

Achieve true team selling



Simplify work management

Streamline problem resolution

Attain real-time performance management

Microsoft Dynamics CRM 2011

The Power of Productivity

FAMILIAR

*Natural &
Personal*



INTELLIGENT

*Insightful &
Actionable*



CONNECTED

*Collaborative &
Integrated*



Familiar: Natural and Personal

FAMILIAR

- Office Fluent UI
- Next-Gen Outlook Client
- Role-Tailored Forms
- Enhanced Navigation
- Data Import/Export
- Flexible Activities
- Products and Pricing
- Productivity Enhancements

INTELLIGENT

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Office Fluent UI

The screenshot displays the Office Fluent UI for Microsoft Dynamics CRM. The interface is organized into several key areas:

- Contextual Ribbon:** Located at the top, it features tabs for 'File', 'Opportunity', 'Add', and 'Customize'. The 'Opportunity' tab is active, showing a ribbon with groups like 'Records', 'Collaborate', 'Current View', 'View', 'Process', and 'Data'. Each group contains relevant actions such as 'Add New Opportunity Product', 'Delete Opportunity Product', 'Filter', and 'Run Workflow'.
- Information Pane:** On the left, it provides navigation options for 'General', 'Line Items', 'Notes & Activities', 'Quotes', and 'Preferences'. Below this are sections for 'Related' (Activities, Closed Activities, Relationships, Connections, Documents, Audit History) and 'Sales' (Orders, Invoices).
- Main Content Area:** Displays the details for 'Opportunity 15 - Product A (SKU JJ202)'. It includes fields for 'Potential Customer' (Rims Company), 'Est. Revenue' (\$112,500.00), and 'Est. Close Date' (10/18/2010). The 'General' section contains fields for 'Topic', 'Priority' (Med), 'Budget' (\$25,000.00), and 'Timeframe' (< 60 Days). The 'Forecast Information' section shows 'Revenue' (System Calculated), 'Est. Revenue' (\$112,500.00), 'Pipeline Phase' (3-Proposal), 'Probability (%)' (75), and 'Rating' (Warm). The 'Line Items' section includes a 'Price List' (Wholesale) and 'Currency' (US Dollar).
- Table:** A table with columns for 'Existing Product', 'Write-In Product', 'Price Per Unit', 'Quantity', and 'Extended Amou...'. It contains one row for 'Product A (SKU JJ202)' with a price of \$7,500.00, a quantity of 15.00000, and an extended amount of \$112,500.00.
- Footer:** Shows 'Status: Open', 'Product Totals: \$112,500.00', and 'Pipeline Phase: 3-Proposal'. It also includes system information like 'Trusted sites | Protected Mode: Off' and a zoom level of 100%.

- Streamlined UI
- Expandable/contractible forms
- Contextual Ribbon
- Embedded sub-grids

Next-Generation Outlook Client

The screenshot displays the Microsoft Outlook CRM interface. The top ribbon includes tabs for File, View, Opportunities, Charts, Add, and Customize. The main window is divided into several panes:

- Left Pane:** Navigation tree with categories like Immersion CRM, Marketing, Resource Center, Sales, Leads, Opportunities, Accounts, Contacts, Marketing Lists, Competitors, Products, Sales Literature, Quotes, Orders, Invoices, Quick Campaigns, Goals, Goal Metrics, Rollup Queries, Service, Settings, Workplace, CRMPMG demo, Mail, Solutions, Calendar, and Contacts.
- My Pipeline:** A table listing opportunities with columns for Topic, Potential Customer, Est. Close Date, and Budget. The table shows 11 records, with the first one being '15 - Product A (SKU JJ202) Rims Company' with a budget of \$12,000.00.
- Sales Pipeline:** A funnel chart showing the distribution of opportunities across stages. The chart is divided into four segments: 1-Qualification (blue, \$296,000.00), 2-Discovery (red, \$350,000.00), and two smaller segments (green and purple) with values of \$112,650.00 and \$161,000.00 respectively.
- Record Detail:** A detailed view of the selected opportunity 'Good prospect for Product B (SKU AX305)'. It shows the Potential Customer as 'Daring Rides', Est. Revenue as '\$150,000.00', and Priority as 'Med'. The General tab is active, showing fields for Topic, Potential Customer, Priority, Budget, and Timeframe.

- True native Outlook experience
- Advanced Personalization
- Preview panes
- Outlook reminders on CRM records

Role Tailored Forms

The screenshot shows the Microsoft Dynamics CRM interface with the 'Assign Security Roles: Information Light -- Webpage Dialog' open. The dialog is titled 'Assign Security Roles: Information Light' and contains the following elements:

- Assign Security Roles: Information Light**
Select the security roles for which this form will be displayed.
- Display to everyone
- Display only to these selected security roles
- | Name | Business Unit |
|--|---------------|
| <input checked="" type="checkbox"/> CEO-Business Manager | Immersion CRM |
| <input type="checkbox"/> CEO-Business Manager | Sub BU |
| <input checked="" type="checkbox"/> CSR Manager | Immersion CRM |
| <input type="checkbox"/> CSR Manager | Sub BU |
| <input type="checkbox"/> Customer Service Representat... | Immersion CRM |
| <input type="checkbox"/> Customer Service Representat... | Sub BU |
| <input type="checkbox"/> Delegate | Immersion CRM |
| <input type="checkbox"/> Delegate | Sub BU |
| <input type="checkbox"/> Marketing Manager | Immersion CRM |
| <input type="checkbox"/> Marketing Manager | Sub BU |
| <input type="checkbox"/> Marketing Professional | Immersion CRM |
| <input type="checkbox"/> Marketing Professional | Sub BU |
| <input checked="" type="checkbox"/> Sales Manager | Immersion CRM |
- 1 - 28 of 28 (3 selected)
- Fallback**
 Enabled for fallback
This form will be displayed to users with roles that don't have any forms explicitly assigned.
- Buttons: Help, OK, Cancel
- Trusted sites | Protected Mode: Off

- Role-based forms
- Multiple forms per entity
- Drag n' Drop creation
- Web and Mobile support

Enhanced Navigation

The screenshot displays the Microsoft Dynamics CRM interface with the following components:

- Navigation Pane (Left):** A sidebar with categories like Sales, Marketing, Service, and Settings. The 'Sales' category is expanded, showing a 'Recently Visited' list of accounts and products, and a 'Views' list of filters like 'Open Opportunities' and 'My Open Leads'.
- Command Bar (Top):** A ribbon with tabs for 'File', 'Opportunities', 'View', 'Create Related', and 'Customize'. It contains various icons for actions like 'New', 'Edit', 'Close as Won', 'Recalculate Opportunity', 'Send Direct E-mail', 'Connect', 'Assign', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Import Data', 'Export to Excel', 'Filter', and 'Advanced Find'.
- Main Content Area:** A table of records with columns for date and 'Est. Revenue'. A 'Top 10 Customers' chart is overlaid on the right, showing a bar chart of revenue for various customers. The chart data is as follows:

Potential Customer	Sum (Est. Revenue)
Basic Com...	\$10,000.00
Best o' T...	\$25,000.00
Litware L...	\$25,000.00
Blue Comp...	\$26,000.00
Elemental...	\$30,000.00
Northwind...	\$125,000.00
Variety S...	\$160,000.00
- Bottom Panel:** A secondary view showing a list of records with columns for date and 'Est. Revenue', mirroring the main content area.

- Personal views
- Record pinning
- Most-Recently Used lists
- Real-time record filtering

Data Export/Import

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows the 'Opportunities: My Pipeline' view. A dialog box titled 'Export Data to Excel -- Webpage Dialog' is open, prompting the user to 'Select the type of worksheet to export.' The dialog offers three options: 'Static worksheet with records from this page' (selected), 'Dynamic PivotTable', and 'Dynamic worksheet'. Below these options are 'Select Columns' and 'Edit Columns' buttons. A warning message states: 'We recommend that you save the exported file before you open it.' The dialog also includes an 'Export' button and a 'Cancel' button. In the background, a funnel chart titled 'Sales Pipeline' is visible, showing four stages: 1-Qualification (\$416,000.00), 2-Discovery (\$350,000.00), 3-Proposal (\$112,500.00), and 4-Negotiation (\$161,000.00). The interface also shows a table with 12 records selected and a search bar for records.

- Data Import Wizard
- One-click export to Excel
- Re-import data from Excel
- PowerPivot and Office Web applications support

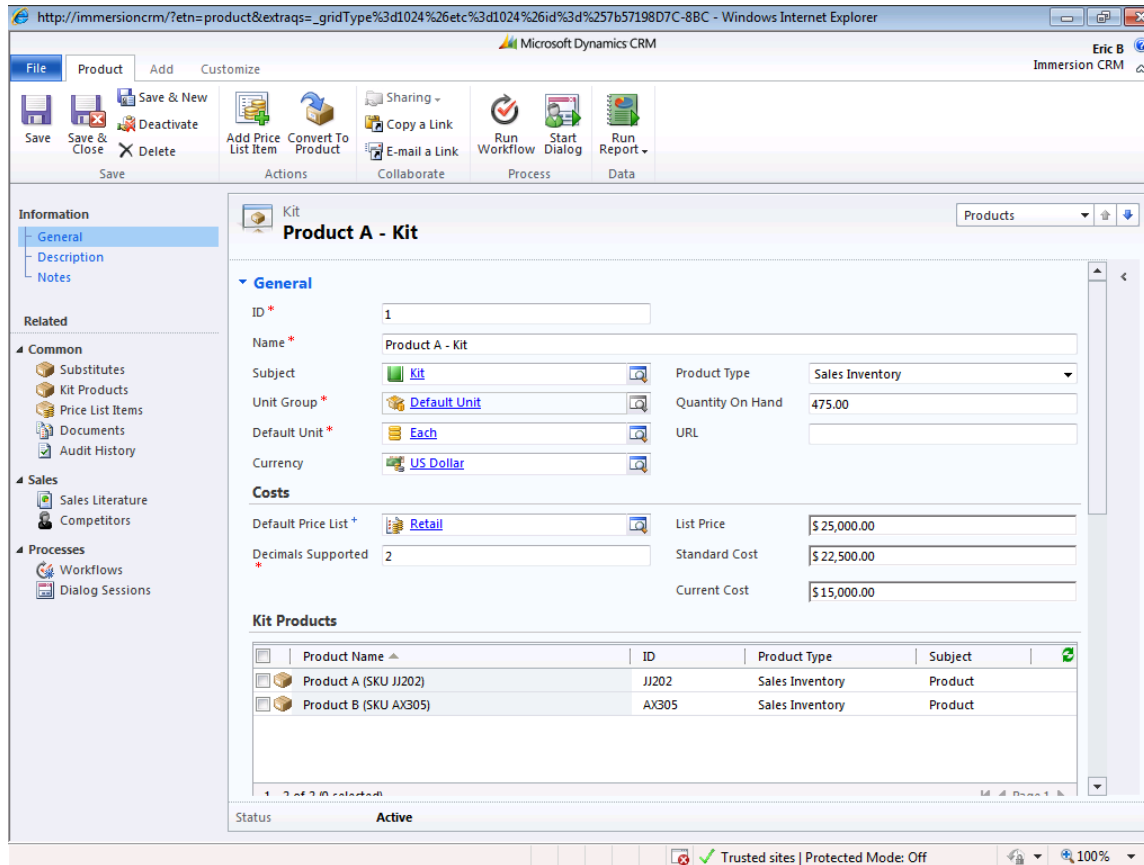
Flexible Activities

The screenshot shows the 'Entity Definition' configuration for a custom entity named 'Demo'. The 'General' tab is active, and the 'Primary Field' is set to 'Demo'. The 'Ownership' is set to 'User or Team'. Two checkboxes are checked and highlighted with a red box: 'Define as an activity entity.' and 'Display in Activity Menus'. The 'Areas that display this entity' section is expanded to show 'Workplace' and 'Settings'. The 'Options for Entity' section is also expanded, showing 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Data Services' section is expanded to show 'Duplicate detection'. The 'Communication & Collaboration' section is expanded to show 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Data Services' section is expanded to show 'Duplicate detection'. The 'Related' section is expanded to show 'Common', 'Sales', 'Marketing', and 'Processes'. The 'Account' entity is selected in the 'Information' dropdown. The 'Specialty Stores' account is selected in the 'Account' dropdown. The 'General' tab is active, and the 'Primary Field' is set to 'Demo'. The 'Ownership' is set to 'User or Team'. Two checkboxes are checked and highlighted with a red box: 'Define as an activity entity.' and 'Display in Activity Menus'. The 'Areas that display this entity' section is expanded to show 'Workplace' and 'Settings'. The 'Options for Entity' section is also expanded, showing 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Data Services' section is expanded to show 'Duplicate detection'. The 'Communication & Collaboration' section is expanded to show 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Related' section is expanded to show 'Common', 'Sales', 'Marketing', and 'Processes'. The 'Account' entity is selected in the 'Information' dropdown. The 'Specialty Stores' account is selected in the 'Account' dropdown. The 'General' tab is active, and the 'Primary Field' is set to 'Demo'. The 'Ownership' is set to 'User or Team'. Two checkboxes are checked and highlighted with a red box: 'Define as an activity entity.' and 'Display in Activity Menus'. The 'Areas that display this entity' section is expanded to show 'Workplace' and 'Settings'. The 'Options for Entity' section is also expanded, showing 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Data Services' section is expanded to show 'Duplicate detection'. The 'Communication & Collaboration' section is expanded to show 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Related' section is expanded to show 'Common', 'Sales', 'Marketing', and 'Processes'. The 'Account' entity is selected in the 'Information' dropdown. The 'Specialty Stores' account is selected in the 'Account' dropdown.

- Custom activities support
- Bulk actions (complete, cancel, Set Regarding)
- Event driven activities (i.e. case resolution)
- Re-occurring appointments

The screenshot shows the 'Activity' configuration for a custom activity named 'Demo'. The 'General' tab is active, and the 'Primary Field' is set to 'Demo'. The 'Ownership' is set to 'User or Team'. Two checkboxes are checked and highlighted with a red box: 'Define as an activity entity.' and 'Display in Activity Menus'. The 'Areas that display this entity' section is expanded to show 'Workplace' and 'Settings'. The 'Options for Entity' section is also expanded, showing 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Data Services' section is expanded to show 'Duplicate detection'. The 'Communication & Collaboration' section is expanded to show 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Related' section is expanded to show 'Common', 'Sales', 'Marketing', and 'Processes'. The 'Account' entity is selected in the 'Information' dropdown. The 'Specialty Stores' account is selected in the 'Account' dropdown. The 'General' tab is active, and the 'Primary Field' is set to 'Demo'. The 'Ownership' is set to 'User or Team'. Two checkboxes are checked and highlighted with a red box: 'Define as an activity entity.' and 'Display in Activity Menus'. The 'Areas that display this entity' section is expanded to show 'Workplace' and 'Settings'. The 'Options for Entity' section is also expanded, showing 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Data Services' section is expanded to show 'Duplicate detection'. The 'Communication & Collaboration' section is expanded to show 'Notes (includes attachments)', 'Activities +', 'Connections +', 'Sending e-mail (if an activity)', 'Mail merge', 'Document management', and 'Queues +'. The 'Related' section is expanded to show 'Common', 'Sales', 'Marketing', and 'Processes'. The 'Account' entity is selected in the 'Information' dropdown. The 'Specialty Stores' account is selected in the 'Account' dropdown.

Products and Pricing Improvements



The screenshot shows the Microsoft Dynamics CRM interface for a product named "Product A - Kit". The form is displayed in a Windows Internet Explorer browser window. The interface includes a menu bar with "File", "Product", "Add", and "Customize". The main content area is divided into sections: "General", "Costs", and "Kit Products".

General Section:

- ID: 1
- Name: Product A - Kit
- Subject: Kit
- Product Type: Sales Inventory
- Unit Group: Default Unit
- Quantity On Hand: 475.00
- Default Unit: Each
- Currency: US Dollar

Costs Section:

- Default Price List: Retail
- List Price: \$ 25,000.00
- Decimals Supported: 2
- Standard Cost: \$ 22,500.00
- Current Cost: \$ 15,000.00

Kit Products Section:

Product Name	ID	Product Type	Subject
Product A (SKU JJ202)	JJ202	Sales Inventory	Product
Product B (SKU AX305)	AX305	Sales Inventory	Product

- Product kits
- Write-in products
- Negative prices
- Custom currencies

Productivity Enhancements

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows a Marketing List named "Large WA Accounts" with a dynamic member type. A "Manage Members" dialog box is open, showing a query builder with the following criteria:

- Look for: Account
- Use Saved View: [new]
- Address 1: State/Province Equals WA
- Opportunities (Potential Customer)
- Actual Revenue Is Greater Than 100,000.00

The dialog box also includes buttons for "Use Query" and "Find".

- **Dynamic Marketing Lists**
- **Total record count**
- **Bulk email attachments**
- **Rich-text emails**

Intelligent: Insightful and Actionable

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Real-Time Dashboards

Guided Dialogs

Inline Visualization

Conditional Formatting

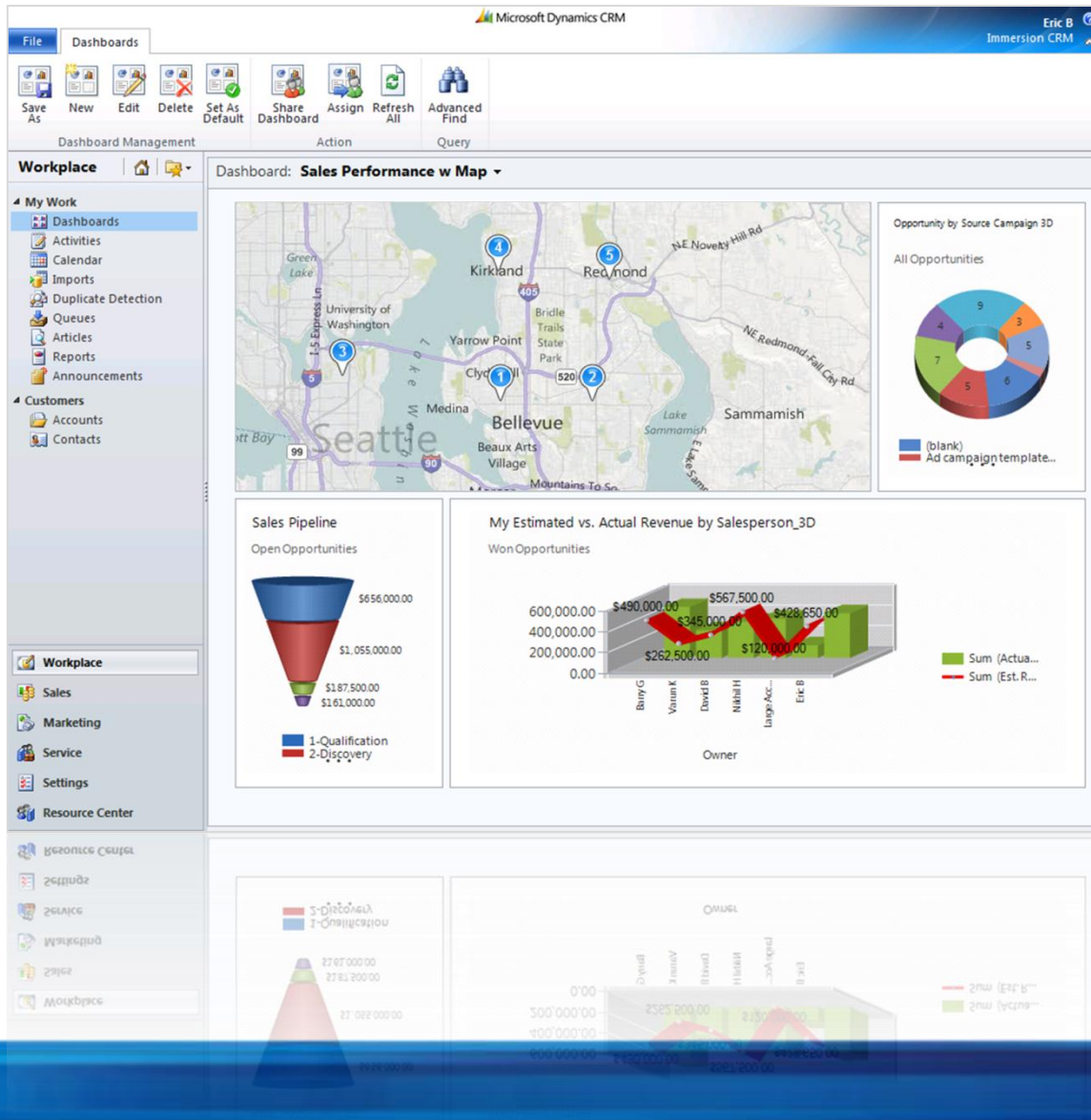
Goal Management

Enhanced Queues

Business Auditing

Field Level Security

Real-Time Dashboards



- Real-time data
- Personal or system dashboards
- Point-and-click creation
- External data integration

Guided Dialogs

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows a lead record for Kayla Stotler. A guided dialog titled "BANT Dialog - Lead" is overlaid on the form. The dialog contains a prompt: "Determine the budget Kayla Stotler has allocated for 50 - Product A (SKU JJ202)." Below the prompt is a text input field. To the right of the input field is a "Tip" box that says: "Enter budget amount for Major Sporting Goods." The dialog also includes a "Click to add comments" section, a "Help" button, a "Summary" button, a "Next" button, and a "Cancel" button. The background shows the CRM form with fields for Name, Topic, First Name, Last Name, Company Name, Contact Information, and BANT details.

- **Guided** flow and prompts
- Embeddable **tips**, **queues** and **hyperlinks**
- **Dynamic** and static response support
- **Inline queries** of CRM data

Inline Visualization

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows a list of leads under the 'My Open Leads' view. The table columns are Name, Topic, and Status Reason. The first lead, Kim Abercrombie, is selected. To the right of the table, an inline donut chart titled 'Leads by Source 3D' is displayed, showing the distribution of leads by source. The chart is a donut chart with six segments: Advertisement (blue, 13), Seminar (orange, 13), Employee Referral (red, 3), Partner (green, 6), Public Relations (purple, 2), and Web (light blue, 1). A legend below the chart identifies the colors with their respective source categories.

Name	Topic	Status Reason
Kim Abercrombie	Restock of JJ202	New
Colleen Bracy	Interested in Product B (SKU AX305)	New
Stephanie Conroy (sample)	Interested in online only store (sam...	New
Willis Johnson	Will be ordering about 36 products...	New
Tammy Khan	New store opened this year - follo...	New
Syed Abbas	13 - Product B (SKU AX305)	New
Shawn Demicell	Will be ordering about 184 produc...	New
Scott Cooper	They have an on-line store only for ...	New
Scott Bishop	Mailed an interest card back for Pr...	New
Sandra Maynard	50 - Product A (SKU JJ202)	New
Sabria Appelbaum	New store opened this year - follo...	New
Ruth Suffin	They have an on-line store only for ...	New
Richard Bready	Good prospect for Product B (SKU ...	New
Patricia Doyle	600 of the Product B (SKU AX305)	New
Michael Vanderhyde	Likes the Product A (SKU JJ202)	New
Megan Davis	47 - Product A (SKU JJ202)	New
Marvin Allen	New store opened this year - follo...	New
Marian Berch	Interested in 45 Product A (SKU JJ202)	New
Mae Black	Mailed an interest card back for Pr...	New
Linda Blasingame	160 products this quarter	New
Kirk DeGrasse	100 - Product A (SKU JJ202)	New
Kimberly Harrington	Store is expanding - send new liter...	New
Kendra Thompson	Will be ordering about 4 products ...	New
Kayla Stotler	50 - Product A (SKU JJ202)	New

- Contextual analytics
- Drill-down capability
- Pre-built visualizations
- Wizard-driven custom visualizations

Conditional Formatting

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows a table of 'My Open Leads' with columns for Name, Topic, Status Reason, and Rating. The leads are color-coded based on their rating: Green for 'Warm', Red for 'Hot', and Blue for 'Cold'. A pie chart titled 'Leads by Rating' shows the distribution: 21 Warm (green), 13 Hot (red), and 5 Cold (blue). Below the table, the details for 'Kim Abercrombie' are shown, including fields for Topic, Given Name, Family Name, Company Name, Currency, Salutation, Address, and Rating.

Name	Topic	Status Reason	Rating
Kim Abercrombie	Restock of JJ202	New	Warm
Colleen Bracy	Interested in Product B (SKU AX305)	New	Warm
Stephanie Conroy (sample)	Interested in online only store (sam...	New	Warm
Willis Johnson	Will be ordering about 36 products ...	New	Hot
Tammy Khan	New store opened this year - follow ...	New	Cold
Syed Abbas	13 - Product B (SKU AX305)	New	Hot
Shawn Demicell	Will be ordering about 184 product...	New	Hot
Scott Cooper	They have an on-line store only for P...	New	Cold
Scott Bishop	Mailed an interest card back for Pro...	New	Hot
Sandra Maynard	50 - Product A (SKU JJ202)	New	Cold
Sabria Appelbaum	New store opened this year - follow ...	New	Cold

Rating	Count
Warm	21
Hot	13
Cold	5

Field	Value
Topic	Restock of JJ202
Given Name	Kim
Family Name	Abercrombie
Company Name	Trey Research
Currency	US Dollar
Salutation	Ms.
Address 1	UPS Z...
Rating	Warm

- User-defined formatting rules
- Guided configuration
- Multiple formats per view
- Against any entity in DB

Goal Management

The screenshot displays the Microsoft Dynamics CRM interface for Goal Management. The top navigation bar includes 'File', 'Goals', 'View', 'Charts', 'Add', and 'Customize'. The ribbon contains various actions like 'New', 'Edit', 'Delete', 'Recalculate', 'Connect', 'Change Goal Manager', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Import Data', 'Export to Excel', 'Filter', and 'Advanced Find'. The left sidebar shows the 'Sales' workspace with a navigation pane including Leads, Opportunities, Accounts, Contacts, Marketing Lists, Competitors, Products, Sales Literature, Quotes, Orders, Invoices, Quick Campaigns, Goals, Goal Metrics, and Rollup Queries. The main area shows a table of 'Active Goals' and a 'Goal Progress (Money)' chart.

Name	Goal Owner	Fiscal Period	Fisc
Nikhil's Q3 Goal	Nikhil H	Quarter 3	FY2010
Corporate Goal for Q3 -2010	Bill P	Quarter 3	FY2010
Eric's Q4 Goal	Eric B	Quarter 4	FY2010
Varun's Q 4 Goal	Varun K	Quarter 4	FY2010
Nikhil's Q4 Goal	Nikhil H	Quarter 4	FY2010
Barry's Q4 Large Accounts	Barry G	Quarter 4	FY2010
Corporate Goal for Q4 - 2010	Bill P	Quarter 4	FY2010

The 'Goal Progress (Money)' chart shows progress for several goals. The legend indicates: Target (Money) (blue circle), Today's Target (Money) (black triangle), In-progress (Money) (purple square), and Actual (Money) (green square). The chart shows that the 'Corporate Goal for Q4 - 2010' has the highest actual value, exceeding 1,500,000.

- Fiscal or **custom time period**
- User and **team goals**
- **Amount, count or stretch** based goals
- Hierarchical with **roll-up**

Enhanced Queues

The screenshot displays the Microsoft Dynamics CRM interface for managing Queue Items. The main area shows a list of queue items with columns for Title, Entered Queue, and Type. A line chart on the right, titled 'Records in Queue', plots the count of queue items for various categories. The chart shows a significant increase in the 'Hot Leads Queue' category.

Title	Entered Queue	Type
They have an on-line store only for Product A (SKU JJ202)	12/1/2010 11:44 AM	Opportunity
Store is expanding - send new literature (sample)	12/1/2010 11:42 AM	Opportunity
New store opened this year - follow up	11/27/2010 1:03 PM	Opportunity
Kim Abercrombie	11/27/2010 1:03 PM	Lead
item broken	11/27/2010 12:53 PM	Case
My widget is not working well	11/27/2010 12:53 PM	Case
Widget is blowing up	11/27/2010 12:53 PM	Case
I have a problem with the new widgets	11/27/2010 12:53 PM	Case
10 orders or Product SKU AX305 this summer (sample)	11/27/2010 12:11 PM	Opportunity
New store opened this year - follow up (sample)	11/27/2010 12:11 PM	Opportunity
10 orders of Product SKU JJ202 (sample)	11/27/2010 12:11 PM	Opportunity
Wendy Kahn	11/27/2010 9:48 AM	Lead
Tammy Khan	11/27/2010 9:48 AM	Lead
Scott MacDonald	11/27/2010 9:48 AM	Lead
Scott Cooper	11/27/2010 9:48 AM	Lead
Colleen Bracy	10/13/2010 2:18 AM	Lead
John Rodman	10/13/2010 2:18 AM	Lead

Queue	Count: All (Queue Item)
< Large Accounts >	2
Big Deal Opportunities	4
High Priority Cases	4
Hot Leads Queue	7

- Queues against any entity
- User and team queues
- Check-in/Check-out
- Queue routing

Business Auditing

The screenshot displays the Microsoft Dynamics CRM interface for an Opportunity record titled "15 - Product A (SKU JJ202)". The record is associated with the potential customer "Rims Company" and has an estimated revenue of \$112,650.00 and an estimated close date of 10/18/2010. The "Audit History" tab is selected, showing a table of changes:

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
12/1/2010 1:26 PM	Eric B	Update	Budget	25000.0000	125000.0000
12/1/2010 1:25 PM	Eric B	Create	Budget (Base)	25000.0000	125000.0000
11/30/2010 9:37 AM	Eric B	Update	Est. Revenue	112500.0000	112650.0000
11/30/2010 9:35 AM	Eric B	Update	Est. Revenue (Base)	112500.0000	112650.0000
11/8/2010 2:03 PM	Eric B	Update	Pricing Error	None	None
			Revenue	System Calculated	System Calculated
			Total Amount	112500.0000	112650.0000
			Total Amount (Base)	112500.0000	112650.0000
			Total Detail Amount	112500.0000	112650.0000
			Total Detail Amount (...)	112500.0000	112650.0000
			Total Discount Amount	0.0000	0.0000
			Total Discount Amou...	0.0000	0.0000
			Total Line Item Discou...	0.0000	0.0000
			Total Line Item Discou...	0.0000	0.0000
			Total Pre-Freight Amo...	112500.0000	112650.0000
			Total Pre-Freight Amo...	112500.0000	112650.0000
			Total Tax	0.0000	0.0000
			Total Tax (Base)	0.0000	0.0000
			Timeframe		< 60 Days
			Topic	30 - Product A (SKU JJ202)	15 - Product A (SKU JJ...
			Budget		25000.0000

The interface also shows a navigation pane on the left with "Audit History" selected, and a status bar at the bottom indicating the record is "Open" and in the "3-Proposal" pipeline phase.

- **System-wide** auditing (including custom entities)
- **Automatic** audit trail
- **Record or field level**
- **Pre-configured** audit rules

Field Level Security (FLS)

The screenshot displays the Microsoft Dynamics CRM interface. The main window shows a record for 'Kim Abercrombie' with a 'Budget' field highlighted. A dialog box titled 'Edit Field Security' is open, showing a table of permissions for the 'new_budget' field. The table has columns for Name, Display Name, Type, Entity, Read, Update, and Create. The 'Allow Read' checkbox is checked, and the 'Allow Update' and 'Allow Create' checkboxes are unchecked. The dialog also includes a 'Help' button and a status bar at the bottom indicating 'Trusted sites | Protected Mode: Off'.

Name	Display Name	Type	Entity	Read	Update	Create
new_budget	Budget	Currency	Lead	Yes	No	No
new_budget	Budget	Currency	Opportunity	Yes	No	No
new_				No	No	No
new_				No	No	No
new_				No	No	No
new_				No	No	No

- **Field Level Security** for custom fields
- **Profiles and rules**
- Read/write/create
- Interactive **override**

Connected: Collaborative and Integrated

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Connections

Contextual Document Mgmt

Social Media

Team Management

Declarative Design

Dynamics Marketplace

Solutions Management

Developer Tools

Connections

The screenshot shows the Microsoft Dynamics CRM interface. The main window displays the 'Connections' tab for a contact named Orlando Gee. The 'Look Up Record' dialog box is open, showing a search for 'Connection Role'. The results table is as follows:

Name	Connection Role Category	Status
<input checked="" type="checkbox"/> Legal Counsel	Business	Active
<input type="checkbox"/> Champion	Sales	Active
<input type="checkbox"/> Account Manager	Sales	Active
<input type="checkbox"/> Former Employee	Business	Active

- Connect any entity
- Definable roles
- Easy association of roles to individuals
- Time based queries

Contextual Document Management

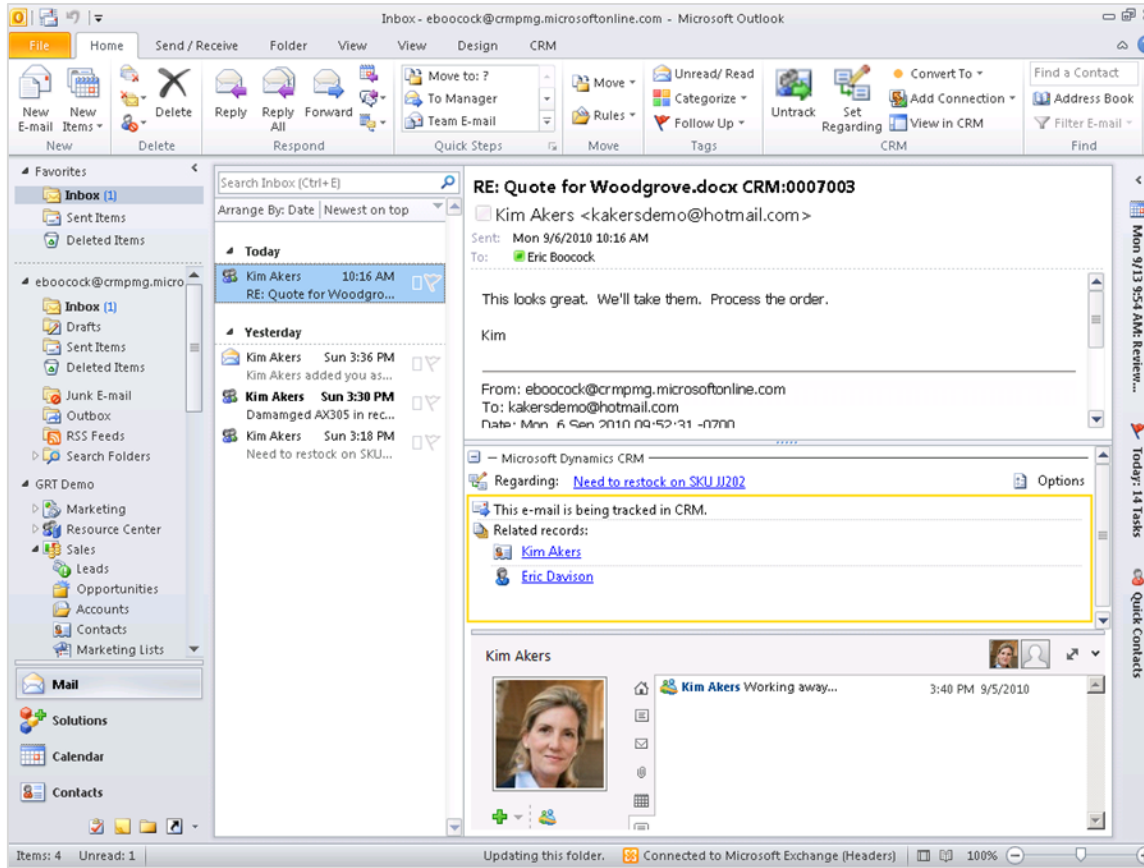
The screenshot displays the Microsoft Dynamics CRM interface. At the top, the title bar reads "Microsoft Dynamics CRM" and the user is identified as "Eric B" in "Immersion CRM". The main window is titled "Documents" and shows a "File" menu with "Add Location" and "Edit Location" options. The left sidebar contains a navigation pane with "Information" (General, Line Items, Notes & Activities, Quotes, Preferences) and "Related" (Common, Sales, Processes). The main content area shows an "Opportunity" record for "Interested in potentially purchasing SKU JJ202" with details: Potential Customer "Woodgrove Indus", Est. Revenue "\$100,000.00", and Est. Close Date "10/22/2010". Below this, a "Document Locations: Documents on Default Site 1" window is open, displaying a table of documents:

Name	Modified	Modified By
Quote for Woodgrove Oct2010	10/4/2010 2:25 PM	Eric B
Woodgrove - Terms_Conditions	10/4/2010 6:30 PM	BILL P

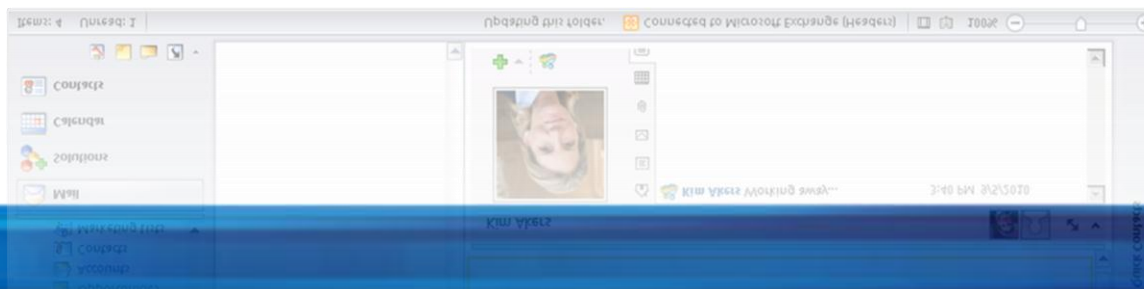
The status bar at the bottom indicates "Status: Won" and "Pipeline Phase: 4-Negotiation". The interface also shows a "Done" bar with "Trusted sites | Protected Mode: Off" and a zoom level of "100%".

- Wizard-driven **SharePoint** configuration
- Contextual document **libraries**
- **Check-in/check-out**
- Track changes and **version control**

Social Media Capabilities



- Outlook **Social Connector** (LinkedIn, Facebook and Windows Live integration)
- **Updated** Social Networking Accelerator
- Tracking of **Social identities** and **Online conversations**



Team Management

The screenshot displays the Microsoft Dynamics CRM interface for an account named "Accessories and Kits". The interface includes a ribbon with tabs for File, Account, Add, and Customize. The ribbon contains various action buttons such as Save, Save & Close, Deactivate, Add to Marketing List, Connect, Assign, Copy a Link, E-mail a Link, Run Workflow, Start Dialog, and Run Report. The left sidebar shows a navigation pane with categories like Information, Related, Common, Sales, Service, Marketing, and Processes. The main content area shows the account details, including the account name, address (71890 Main Street, Spokane, WA 20955), owner (Large Accounts), and currency (US Dollar). The "Administration" section shows the owner as Margaret Adams. The "Contact Methods" section has radio buttons for "Allow" or "Do Not Allow" for E-mail, Bulk E-mail, Phone, Fax, and Mail. The "Marketing Information" section shows the last date included in a campaign and the option to send marketing materials. The "Service Preferences" section shows the preferred day and time. The bottom of the screen shows a table with columns for Status, Active, and Annual Revenue, with a value of \$30,000.00.

- Team ownership of records
- Team security roles
- Roll-up reporting
- Team based workflows

Declarative Design

The screenshot displays the Microsoft Dynamics CRM Form Designer interface. The top ribbon includes tabs for File, Home, and Insert, with various toolbars for editing, saving, and previewing forms. The main workspace shows a form titled "Form: Account" with sections for "General" and "Address". The "General" section contains fields for Account Name, Primary Contact, Account Number, Parent Account, E-mail, Main Phone, Other Phone, Fax, Web Site, and Relationship Type. The "Address" section contains fields for Address Name, Street 1, Street 2, State/Province, ZIP/Postal Code, and Country/Region. A "Field Explorer" pane on the right lists available fields, with "Account Rating" selected. The interface is designed for declarative design, allowing users to build forms without writing code.

- Drag-and-Drop UI
- Add fields & relationships within Form
- Navigation Editor
- Entity header and footer

Dynamics Marketplace

The screenshot shows the Microsoft Dynamics Marketplace interface. At the top, there are navigation links for 'All Marketplaces', 'Microsoft Dynamics', 'System Center', 'Windows Azure Platform', 'Microsoft Online', and 'more'. The current location is set to 'United States'. The main header features the Microsoft Dynamics Marketplace logo and navigation buttons for 'Sign in or Register', 'Get Listed', 'Help', and 'About'. Below the header, there is a search bar with the text 'Lease Management' and a dropdown menu set to 'Microsoft Dynamics CRM'. A 'Search' button is to the right of the search bar. The main content area displays the search results for 'Lease Management', showing 76 solutions found. The results are listed in a grid format, each with a company logo, name, and a brief description. The first result is 'ARGUS Lease CRM' with a 4.5-star rating and 05 reviews. The second is 'Commercial Property Management for Microsoft Dynamics CRM' with a 5-star rating and 13 reviews. The third is 'Real Estate Advantage for Microsoft Dynamics CRM' with a 4.5-star rating and 22 reviews. The fourth is 'SalesMetrix - Microsoft CRM for the Oil and Gas Industry' with a 4.5-star rating and 03 reviews. Below the solutions list, there is a 'View All Solutions >' button. The bottom section of the screenshot shows 'Service Providers found: 340' and 'Local Results: On 8 Service Providers within 25 miles of: Washington, DC'. A map is visible on the left side of this section, showing the location of the service providers. The 'Key Features' section on the left side of the screenshot lists various categories such as 'Media (82)', 'Education (14)', 'Hospitality & Entertainment (52)', 'Retail (109)', 'Health & Social Services (69)', 'Healthcare Providers (51)', 'Professional Services (380)', 'Manufacturing (58)', 'Financial Services (210)', and 'Government (89)'. The 'Key Features' section also includes a '4 & 5 Star Reviews (298)' filter and a 'Local Results (0)' filter.

- Centralized Dynamics solution repository
- In-app experience
- Click & Try
- Community reviews and rankings

This screenshot is a duplicate of the one above, showing the Microsoft Dynamics Marketplace search results for 'Lease Management'. It displays the same search bar, navigation links, and list of solutions and service providers. The 'Key Features' section on the left is more visible in this view, showing categories like 'Media (82)', 'Education (14)', 'Hospitality & Entertainment (52)', 'Retail (109)', 'Health & Social Services (69)', 'Healthcare Providers (51)', 'Professional Services (380)', 'Manufacturing (58)', 'Financial Services (210)', and 'Government (89)'. The '4 & 5 Star Reviews (298)' and 'Local Results (0)' filters are also clearly visible.

Solutions Management

The screenshot displays the Microsoft Dynamics CRM interface for Solutions Management. The left-hand navigation pane includes categories such as Business, System, Customization, Process Center, Workplace, Sales, Marketing, Service, Settings, and Resource Center. The 'Solutions' option under Customization is selected. The main content area shows a table of installed solutions with the following data:

Name	Display Name	Version	Installed On	Package Type	Publisher
<input checked="" type="checkbox"/> AccountBrowserApp	AccountBrowserApp	1.0	10/25/2010	Managed	Default Publisher for testorg01
<input type="checkbox"/> DemoSolution	Demo Solution	0.1	10/11/2010	Unmanaged	NikhilH
<input type="checkbox"/> CustomerCare	Customer Care	1.0.0.0	10/1/2010	Unmanaged	ReubenK
<input type="checkbox"/> SalesProductivity	Sales Productivity	1.0.0.0	10/1/2010	Unmanaged	EricB

- Solution lifecycle management
- Solution layering
- **Managed** or unmanaged solutions
- **Cloud** or on-premises support

Developer Tools

The screenshot displays the Microsoft Dynamics CRM Developer Tools interface. The main window shows the 'Web Resource: AccountBrowser' configuration. The 'Edit Content' dialog is open, showing the 'Source' tab with the following HTML code:

```
<HTML xmlns="http://www.w3.org/1999/xhtml"><HEAD><TITLE>SampleData</TITLE><!-- saved from url=(0014)about:internet --><STYLE type="text/css">html, body { height: 100%; overflow: auto; } body { padding: 0; margin: 0; } #silverlightControlHost { height: 100%; text-align:center; } .style1 { text-align: left; } .style2 { color: #000099; font-size: xx-large; } .style3
```

The dialog also includes a link to the Microsoft Dynamics CRM SDK for more information on interacting with entities and fields programmatically.

- **WCF** and **.NET 4.0**
- **Web Resources**
- **.NET** data types
- **Open Data Protocol (OData)**

Amplifying Productivity with Microsoft Dynamics CRM 2011

FAMILIAR

- Office Fluent UI
- Next-Gen Outlook Client
- Role-Tailored Forms
- Enhanced Navigation
- Data Import/Export
- Flexible Activities
- Products and Pricing
- Productivity Enhancements

INTELLIGENT

- Real-Time Dashboards
- Guided Dialogs
- Inline Visualization
- Conditional Formatting
- Goal Management
- Enhanced Queues
- Business Auditing
- Field Level Security

CONNECTED

- Connections
- Contextual Document Mgmt
- Social Media
- Team Management
- Declarative Design
- Dynamics Marketplace
- Solutions Management
- Developer Tools

And Many More Enhancements...



Over 500
enhancements

Business Process Management

- Business org. modeling
- Tree based designer
- Hyperlink support in prompts
- Static & dynamic response types for prompts
- Custom workflow activity
- Import/export process definition
- AppFabric integration
- Interactive workflow

Content Management

- Track changes
- Version control
- Automatic folder creation
- Secure file sharing
- Quick preview
- Simultaneous editing
- Single sign-in
- Text search with documents

User Experience

- Native Outlook search experience
- Column filters
- eMail template support
- Outlook Social Connector
- Record counts
- Re-occurring meetings
- Meetings bi-directional synch
- Context menus
- Accessibility compliance
- Outlook follow-up/reminders
- Outlook categories on CRM records
- Data cleansing enhancements
- Data mapping

Personalization

- Multiple application use/switching
- Intelligent choice controls
- Dynamic forms
- Navigation shortcuts
- Flexible filtering and search
- View selection persistence
- Personalized synch folders
- Personalized reading pane

Customer Care

- Custom activities
- Customer care dashboard
- Case modeling
- KB article customization
- Workload management
- Flexible queues
- Business/contact center goals
- System-wide auditing

Sales

- Quota management
- Team selling capabilities
- Connections
- Custom currency
- Sales dashboard
- Write-in products
- Negative price support

Marketing

- Marketing dashboard
- Dynamic Marketing Lists
- Bulk update
- Rich CRM eMails
- Improved Data Import Wizard

Customization and Extensibility

- Forms designer
- System views
- Visualization Designer
- Customizable dashboards
- “Any to Any” relationships
- Multi-factor authentication
- Interactive override for Field Level Security
- Global Jscript libraries
- HIPAA certifiable

Management and Administration

- Multi-nation setup
- Claims based set-up configuration
- Server admin automation
- Organization management automation
- Simple Internet-facing deployment
- MUI upgrades
- Org. update/upgrade
- Tenant by tenant upgrade migration
- Server farm updates
- Deployment Web-Services

Integration

- Azure Service Bus integration
- Firewall tunneling
- Bulk data load

Solution Management

- Solutions hosting
- Solution lifecycle management
- Managed properties
- Community rankings
- Listings details and management
- Search and navigation

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