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**

**CONNECTED**
Office Fluent UI

- Streamlined UI
- Expandable/contractible forms
- Contextual Ribbon
- Embedded sub-grids
Next-Generation Outlook Client

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

- Role-based forms
- Multiple forms per entity
- Drag n’ Drop creation
- Web and Mobile support
Enhanced Navigation

- Personal views
- Record pinning
- Most-Recently Used lists
- Real-time record filtering
Data Export/Import

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

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

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

- **Dynamic Marketing Lists**
- **Total** record count
- Bulk email attachments
- **Rich-text** emails
Intelligent: Insightful and Actionable

- 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

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

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

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

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

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

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

- Field Level Security for custom fields
- Profiles and rules
- Read/write/create
- Interactive override
Connected: Collaborative and Integrated

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

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

- 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

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

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

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

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

- **WCF and .NET 4.0**
- **Web Resources**
- **.NET data types**
- **Open Data Protocol (OData)**
Amplifying Productivity with Microsoft Dynamics CRM 2011

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**CONNECTED**
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And Many More 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

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

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

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

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

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

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

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

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

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

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