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

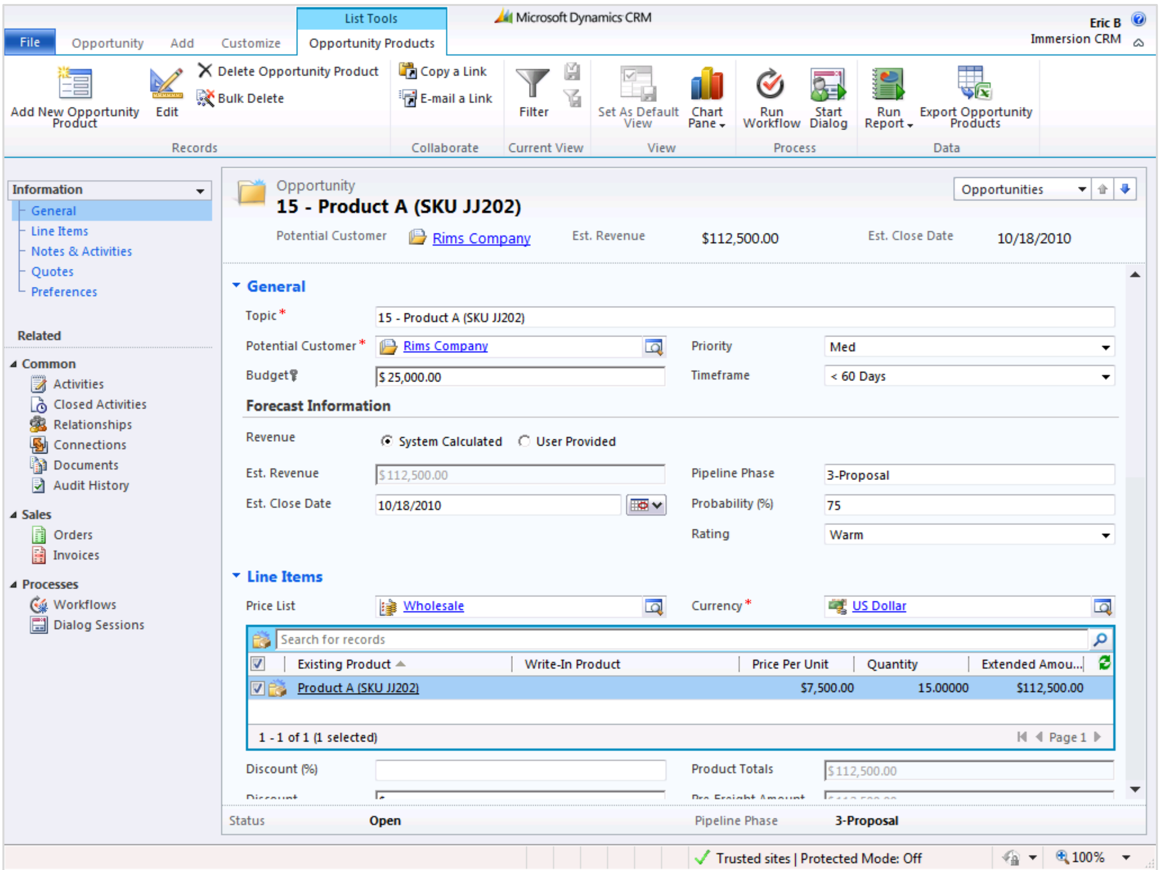
CONNECTED

Collaborative & Integrated

Familiar: Natural and Personal

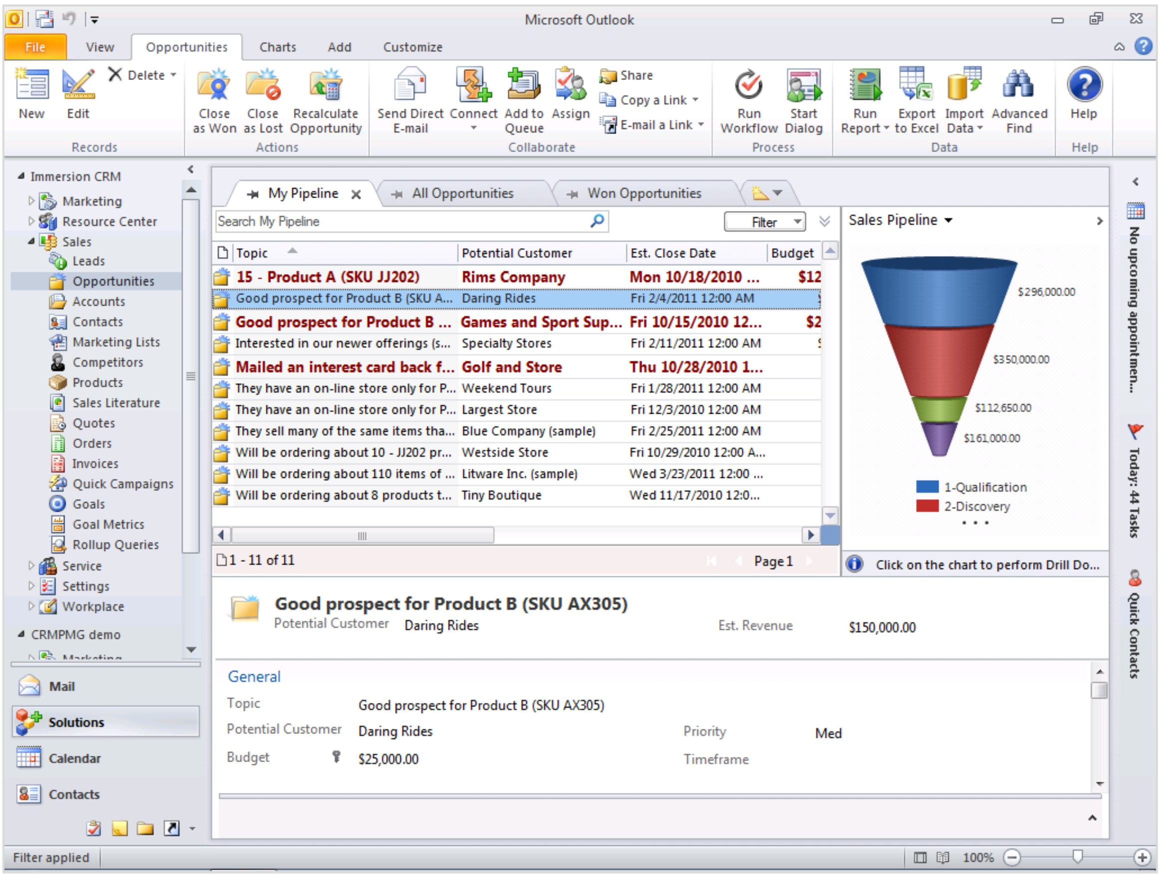
FAMILIAR	INTELLIGENT	CONNECTED
Office Fluent UI **Next-Gen Outlook** Client **Role-Tailored** Forms Enhanced **Navigation** Data **Import/Export** **Flexible Activities** **Products and Pricing** **Productivity** Enhancements		

Office Fluent UI



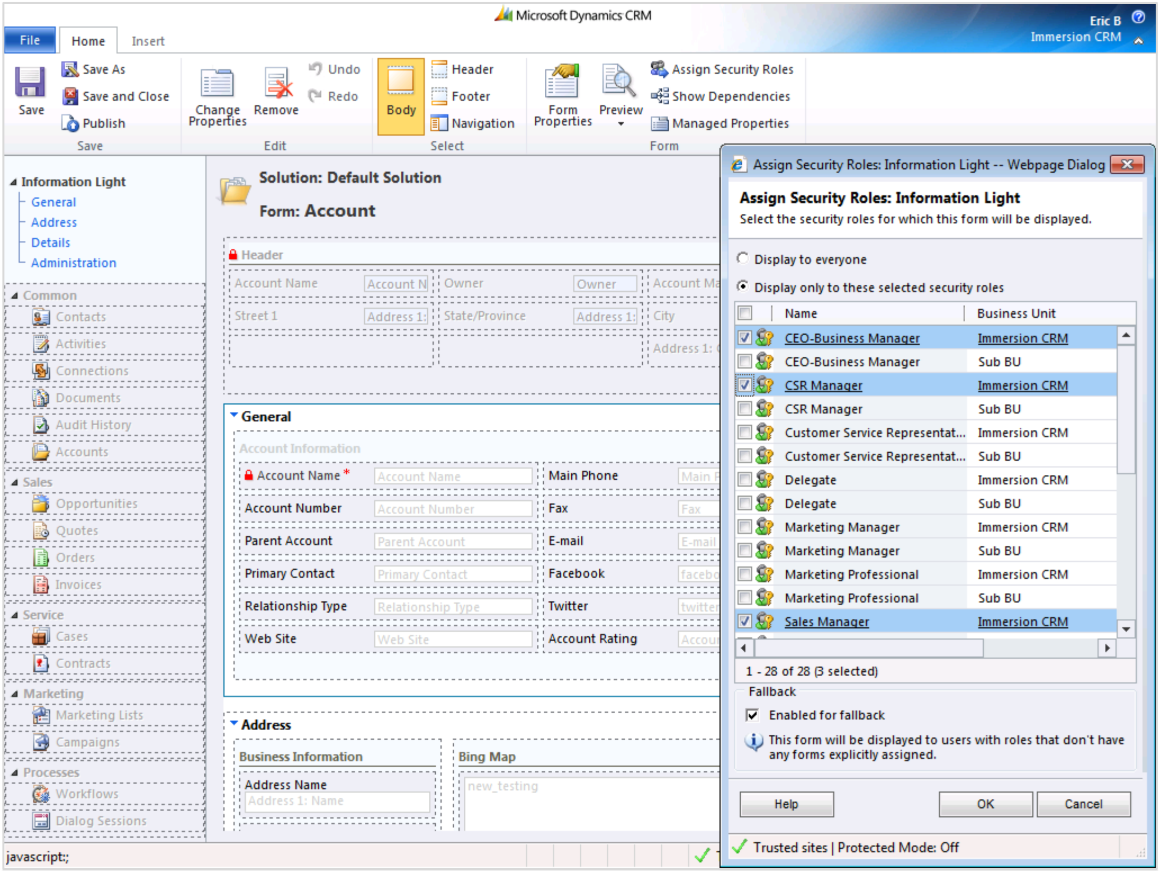
- **Streamlined** UI
- Expandable/**contractible forms**
- **Contextual** Ribbon
- Embedded **sub-grids**

Next-Generation Outlook Client



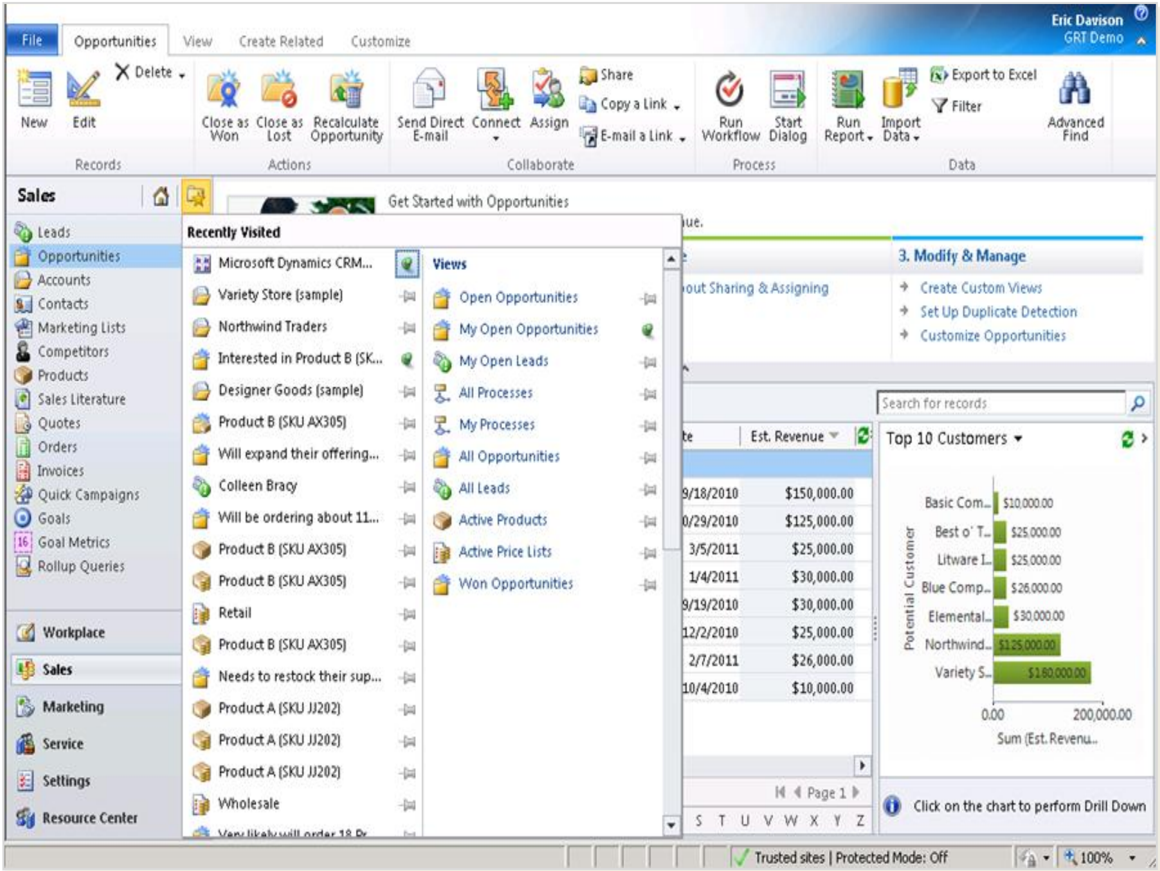
- True **native Outlook** experience
- Advanced **Personalization**
- **Preview** panes
- Outlook **reminders** on CRM records

Role Tailored Forms



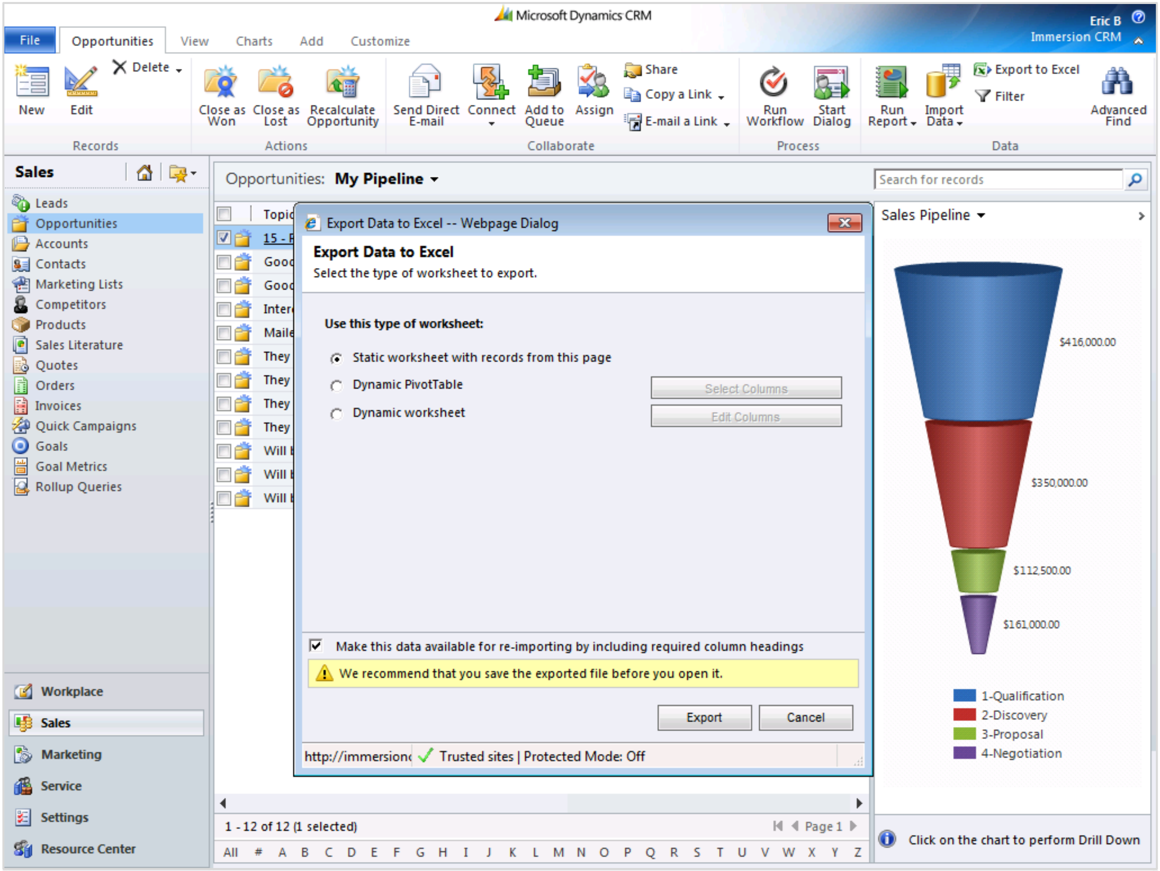
- **Role-based** forms
- **Multiple forms** per entity
- **Drag n' Drop** creation
- **Web** and Mobile support

Enhanced Navigation



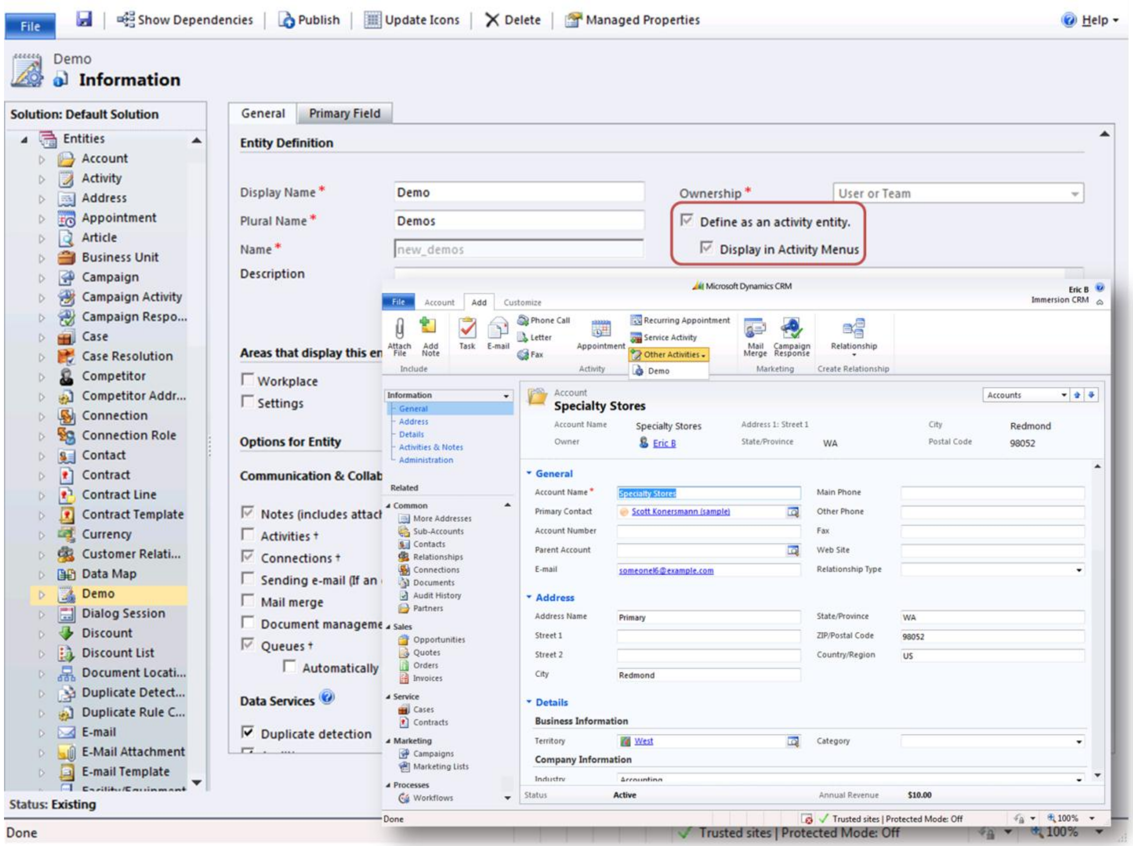
- **Personal** views
- **Record pinning**
- **Most-Recently Used** lists
- Real-time **record filtering**

Data Export/Import



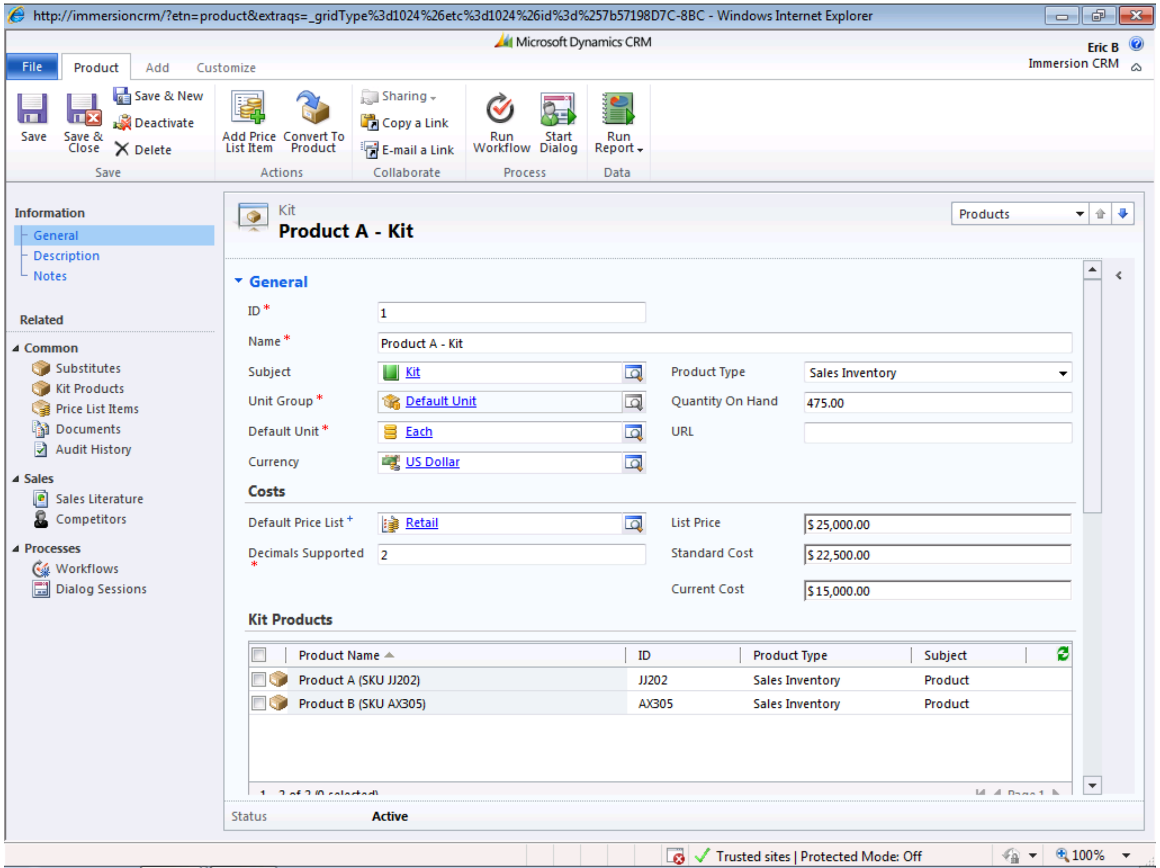
- **Data Import Wizard**
- **One-click export** to Excel
- **Re-import** data from Excel
- **PowerPivot** and Office Web applications support

Flexible Activities



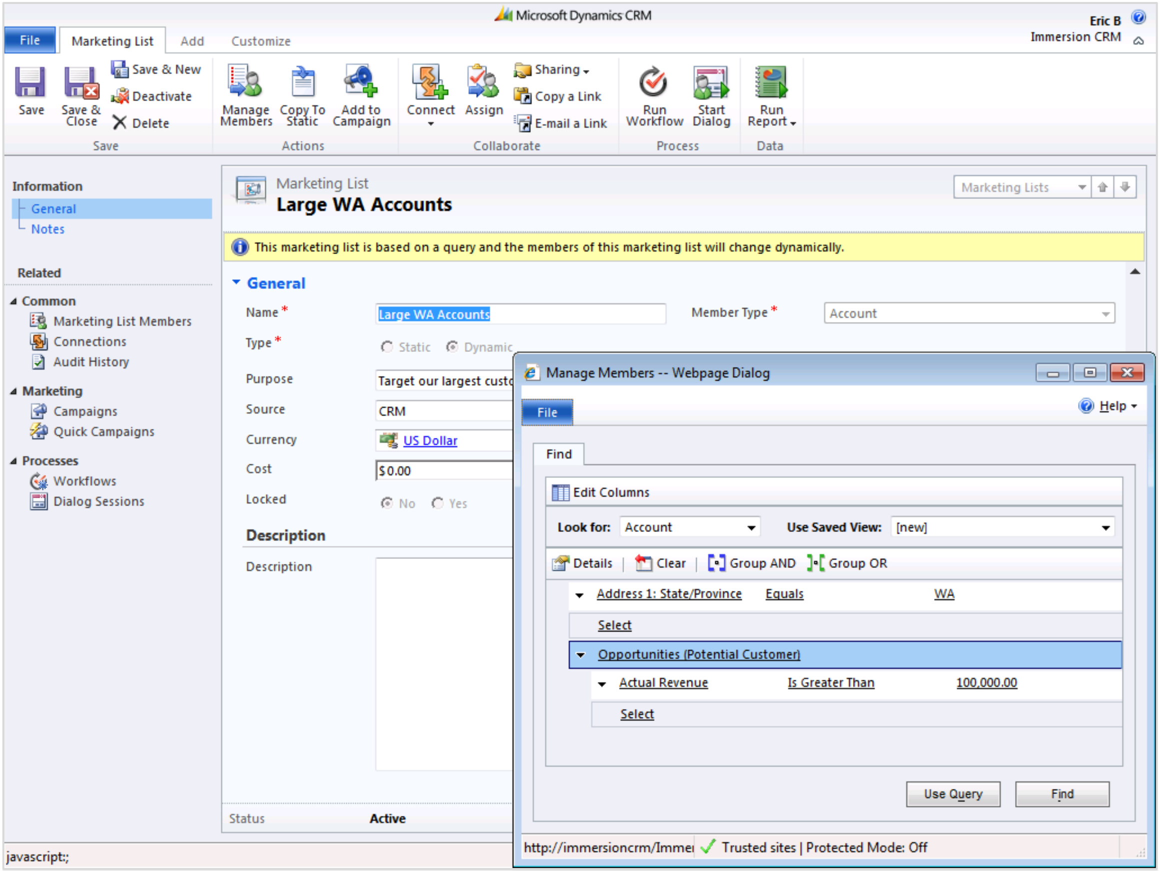
- **Custom activities** support
- **Bulk actions** (complete, cancel, Set Regarding)
- **Event driven** activities (i.e. case resolution)
- **Re-occurring** appointments

Products and Pricing Improvements



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

Productivity Enhancements

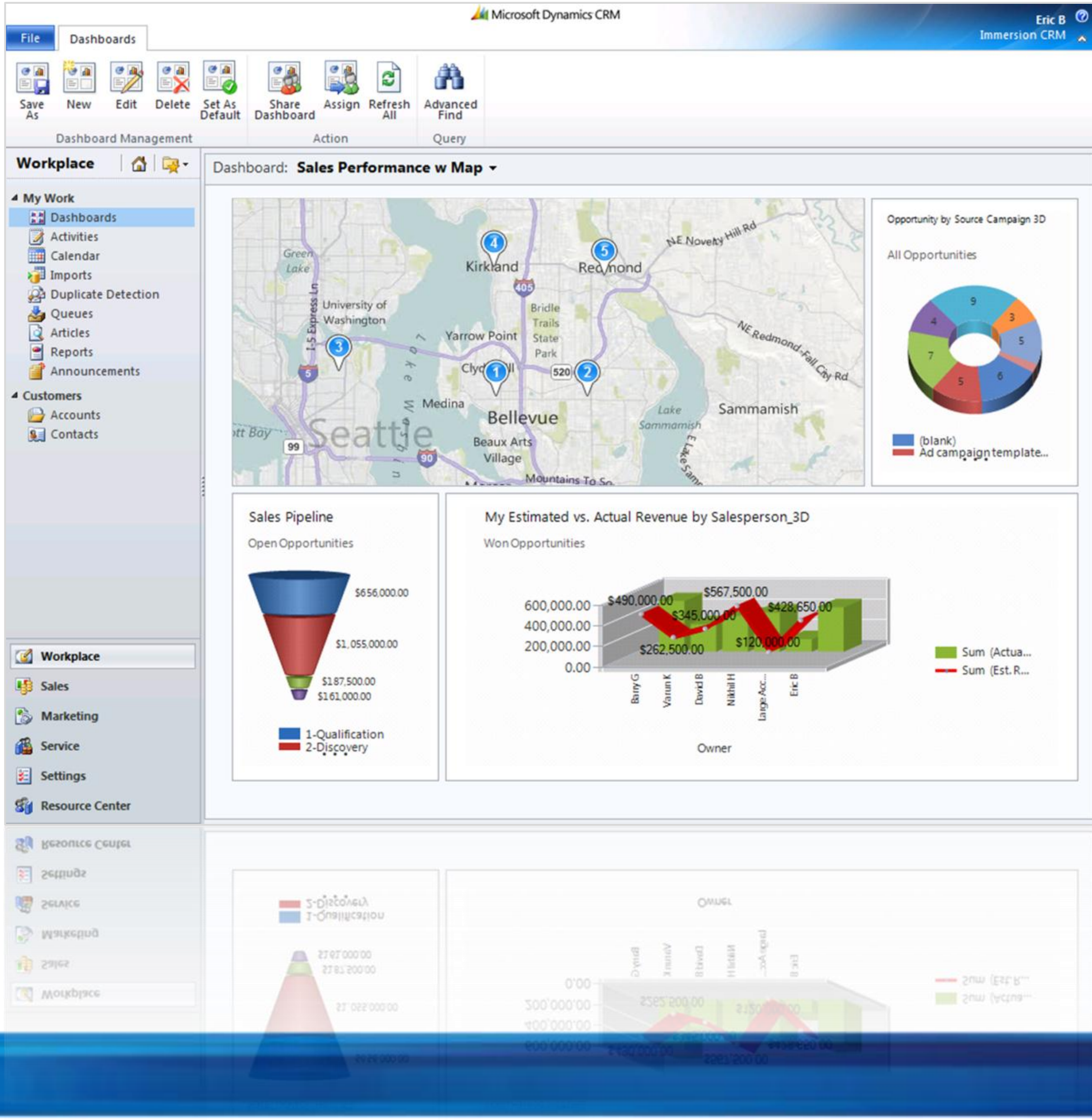


- **Dynamic** Marketing Lists
- **Total** record count
- Bulk email **attachments**
- **Rich-text** emails

Intelligent: Insightful and Actionable

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

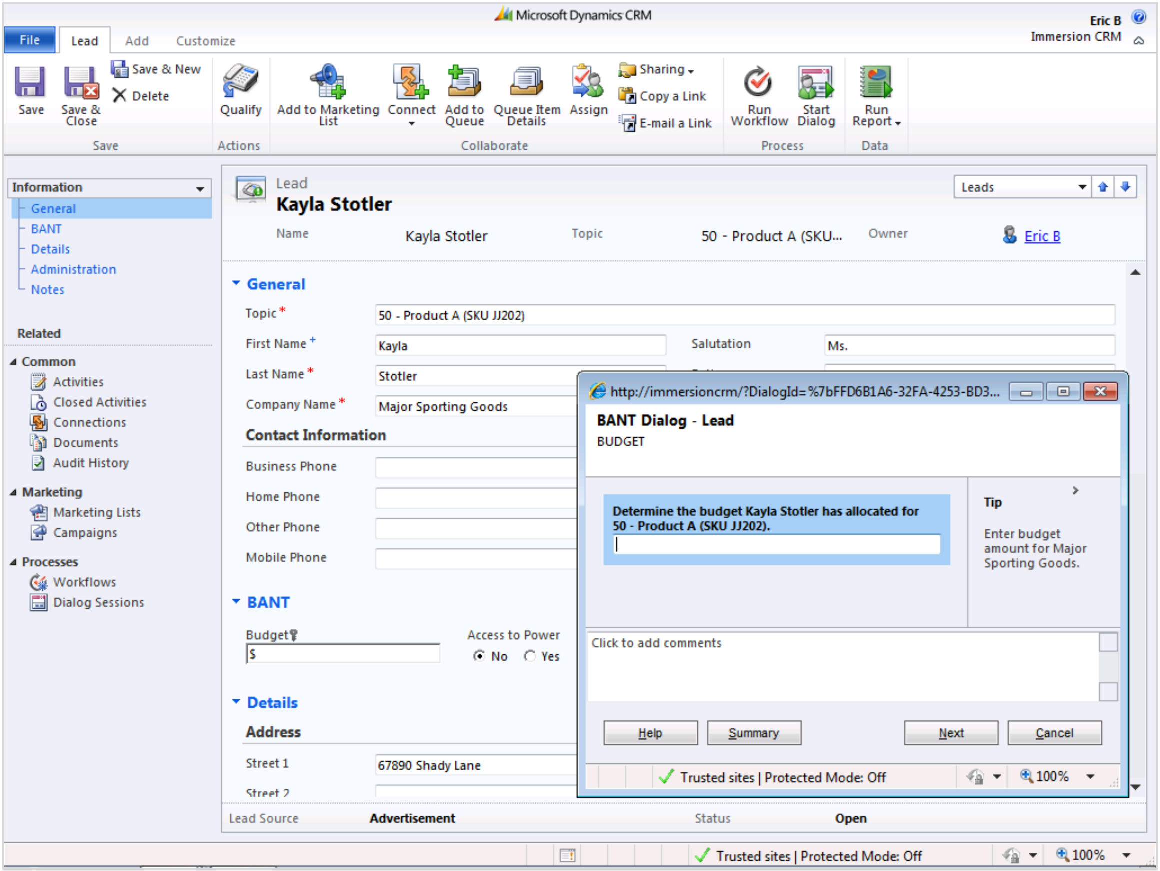
Real-Time Dashboards



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

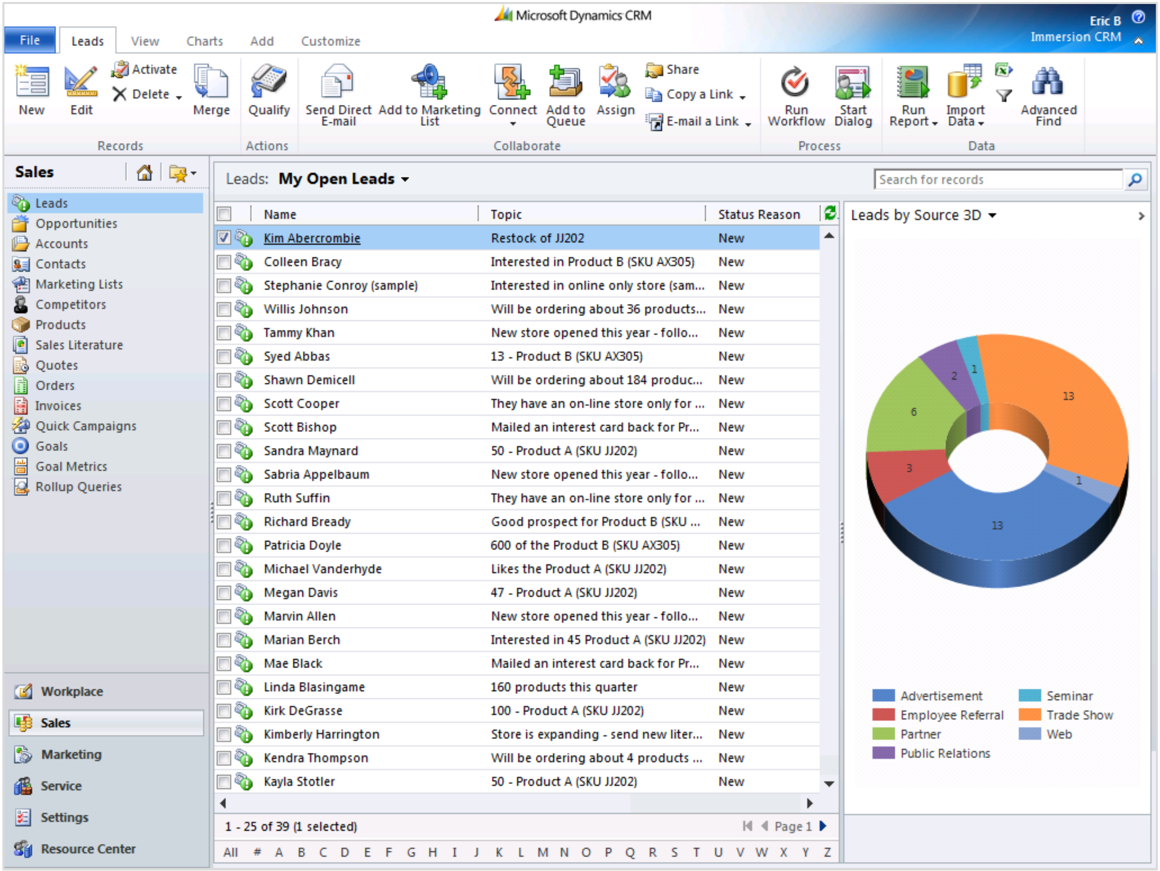
Microsoft Dynamics CRM

Guided Dialogs



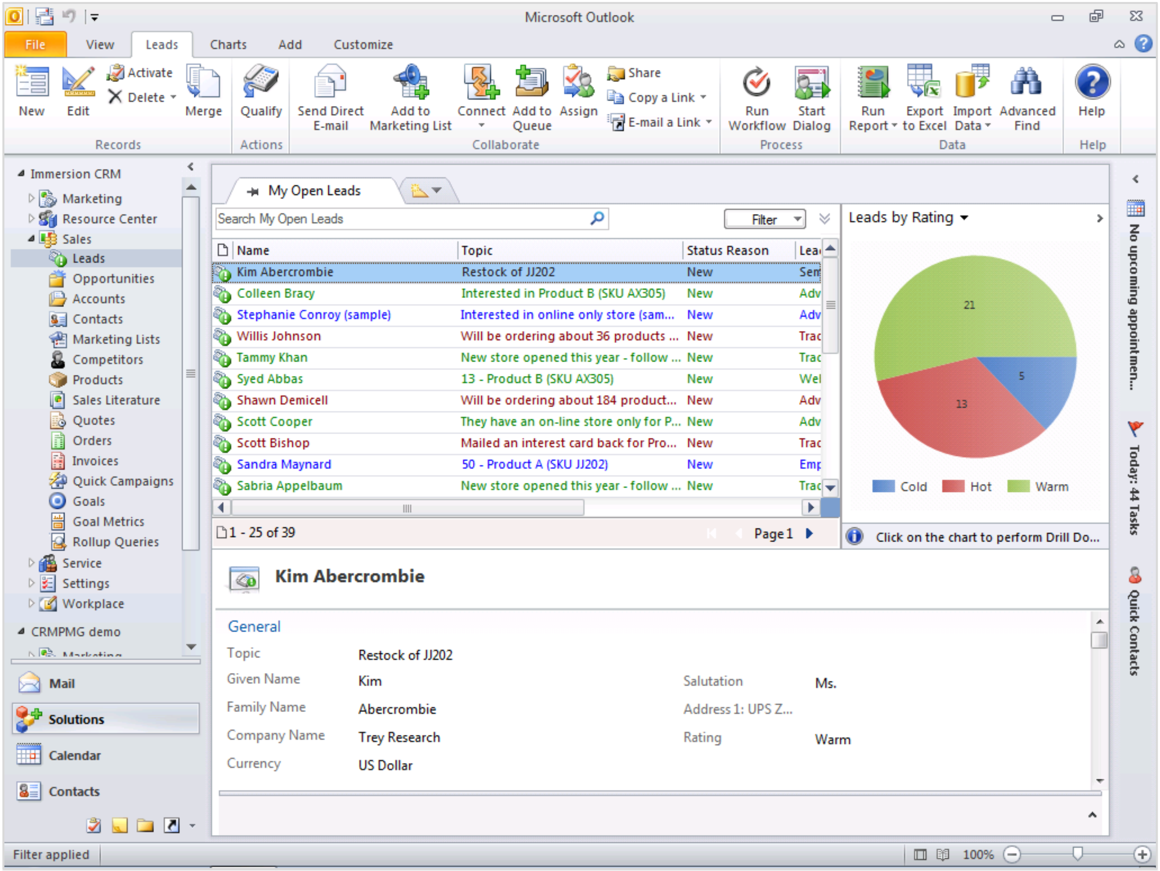
- **Guided** flow and prompts
- Embeddable **tips, queues** and **hyperlinks**
- **Dynamic** and static response support
- **Inline queries of** CRM data

Inline Visualization



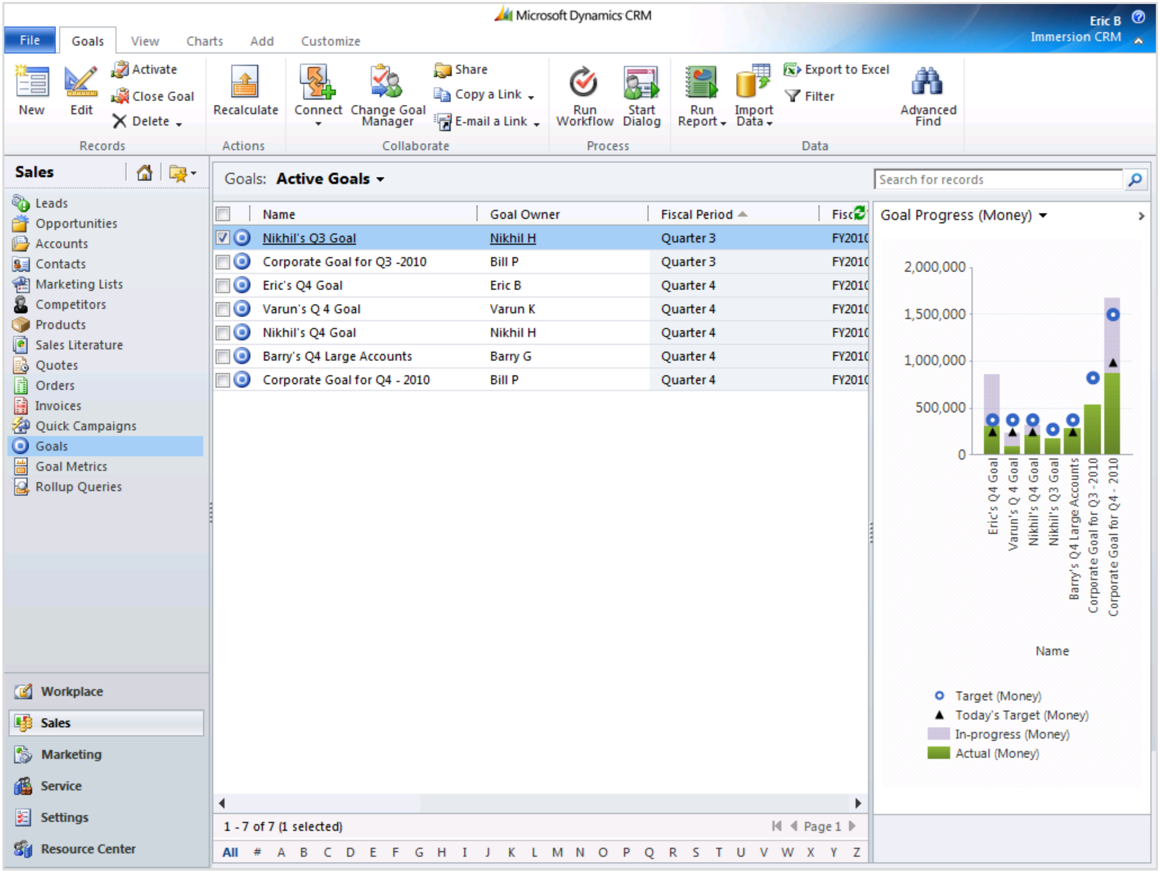
- **Contextual** analytics
- **Drill-down** capability
- **Pre-built** visualizations
- **Wizard-driven** custom visualizations

Conditional Formatting



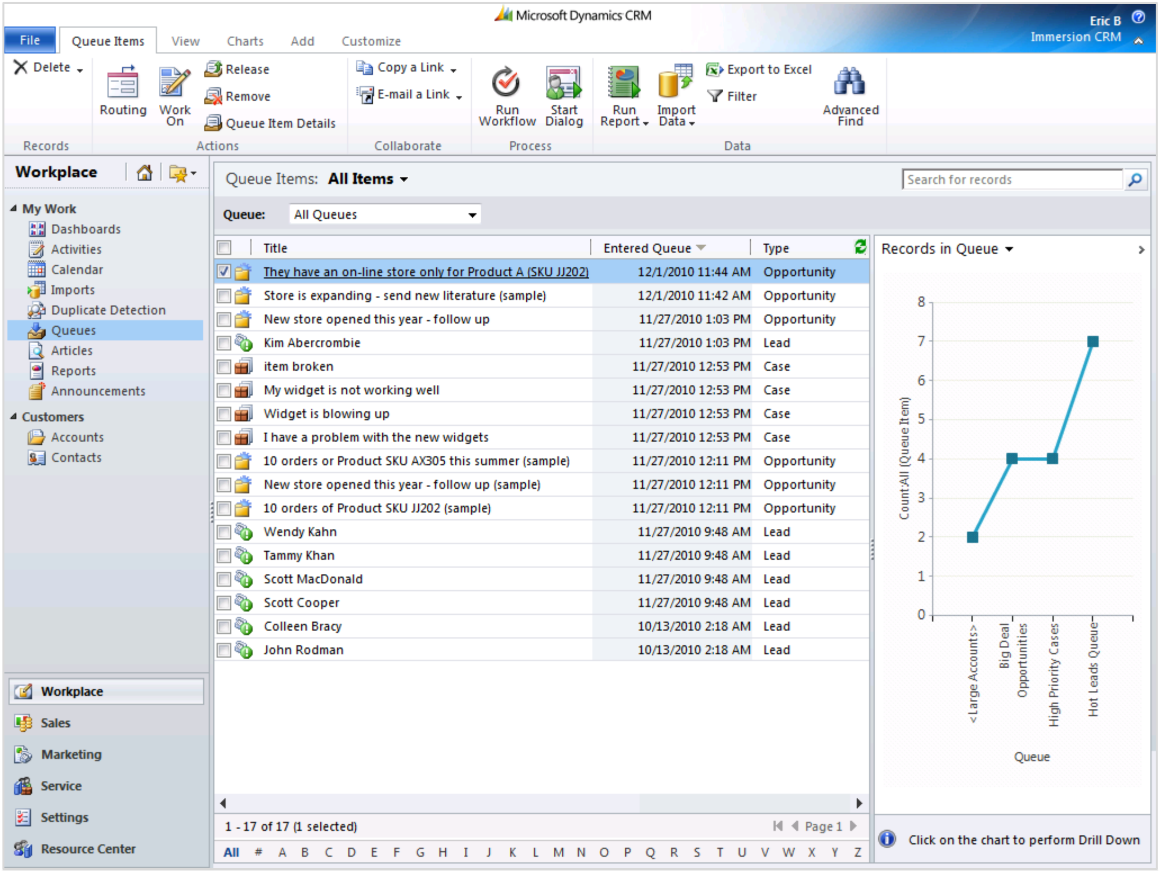
- **User-defined formatting** rules
- **Guided** configuration
- **Multiple formats** per view
- Against **any entity** in DB

Goal Management



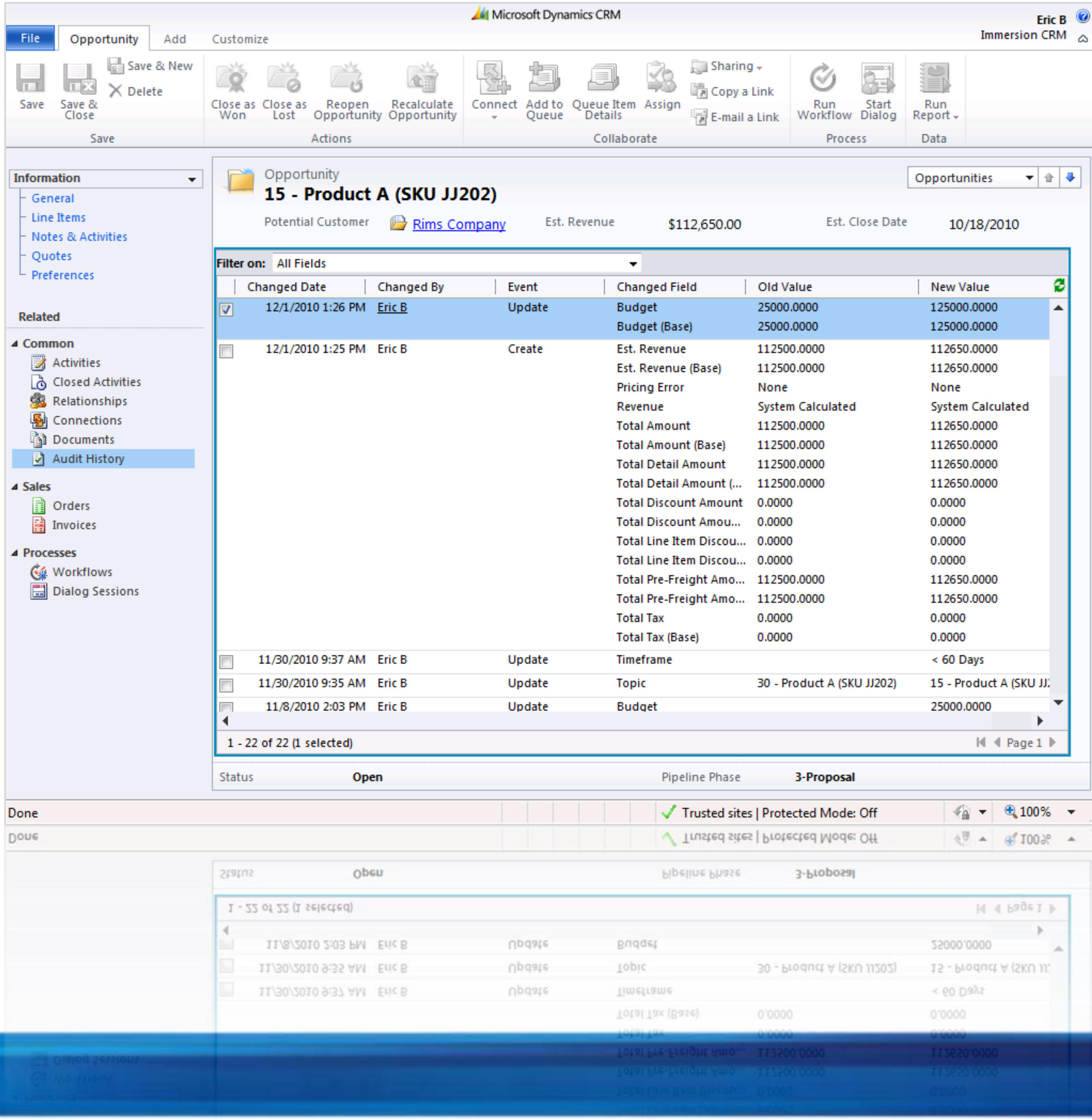
- Fiscal or **custom time period**
- User and **team** goals
- **Amount, count or stretch** based goals
- Hierarchical with **roll-up**

Enhanced Queues



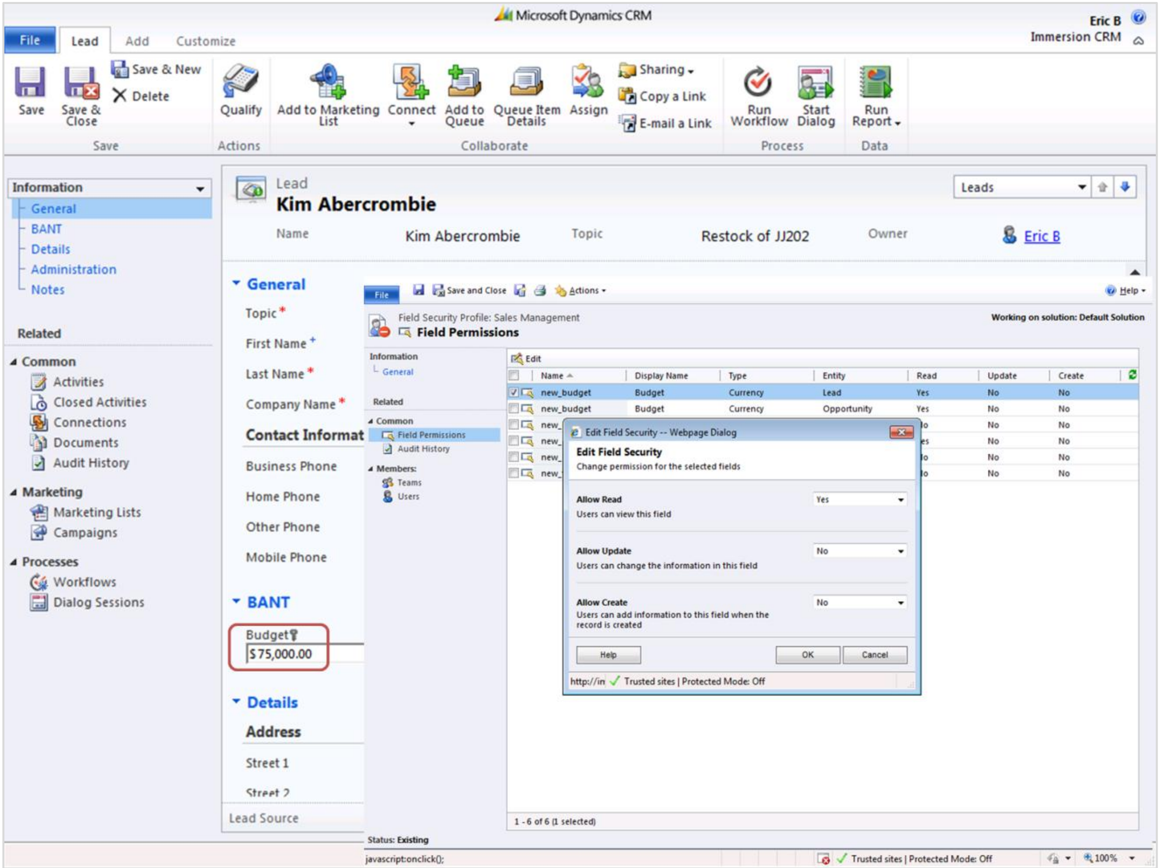
- Queues against **any entity**
- **User and team** queues
- **Check-in/Check-out**
- Queue **routing**

Business Auditing



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

Field Level Security (FLS)



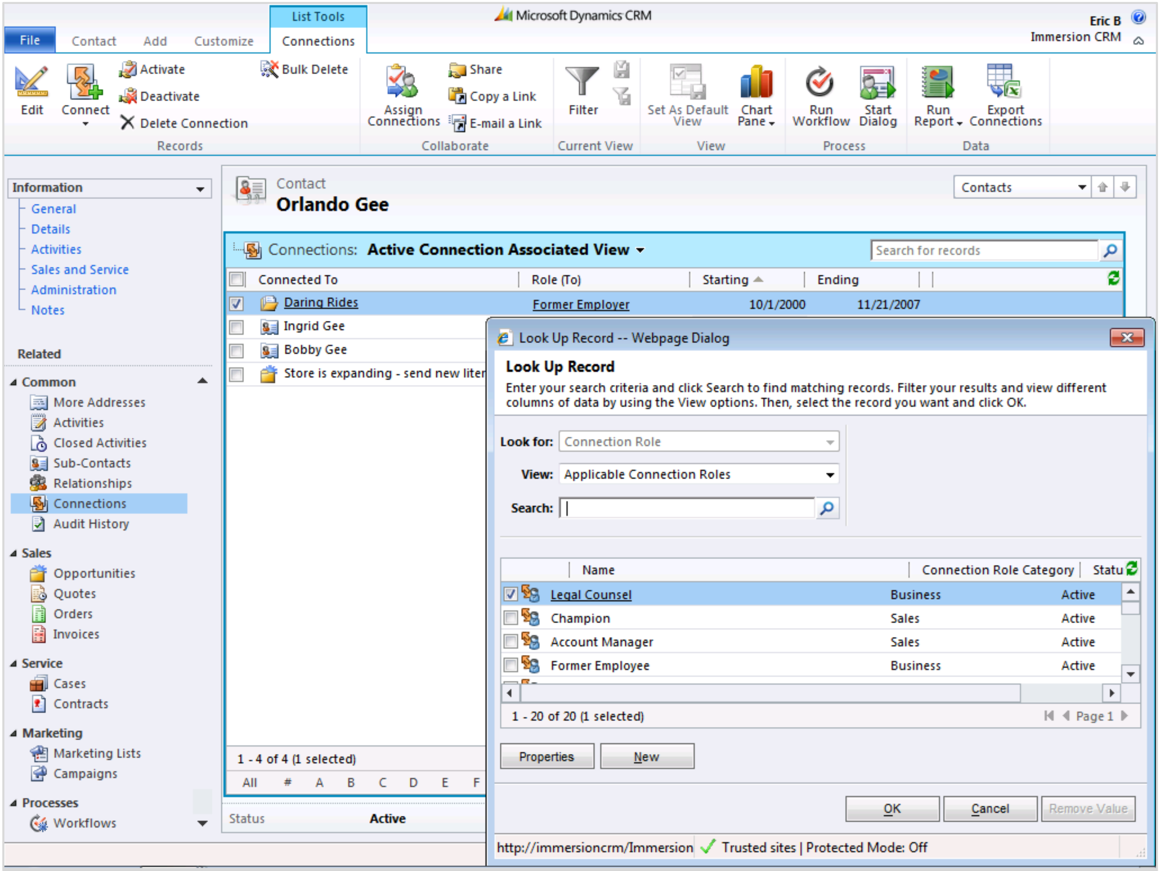
- **Field Level Security** for custom fields
- **Profiles** and **rules**
- Read/write/create
- Interactive **override**

Microsoft Dynamics CRM

Connected: Collaborative and Integrated

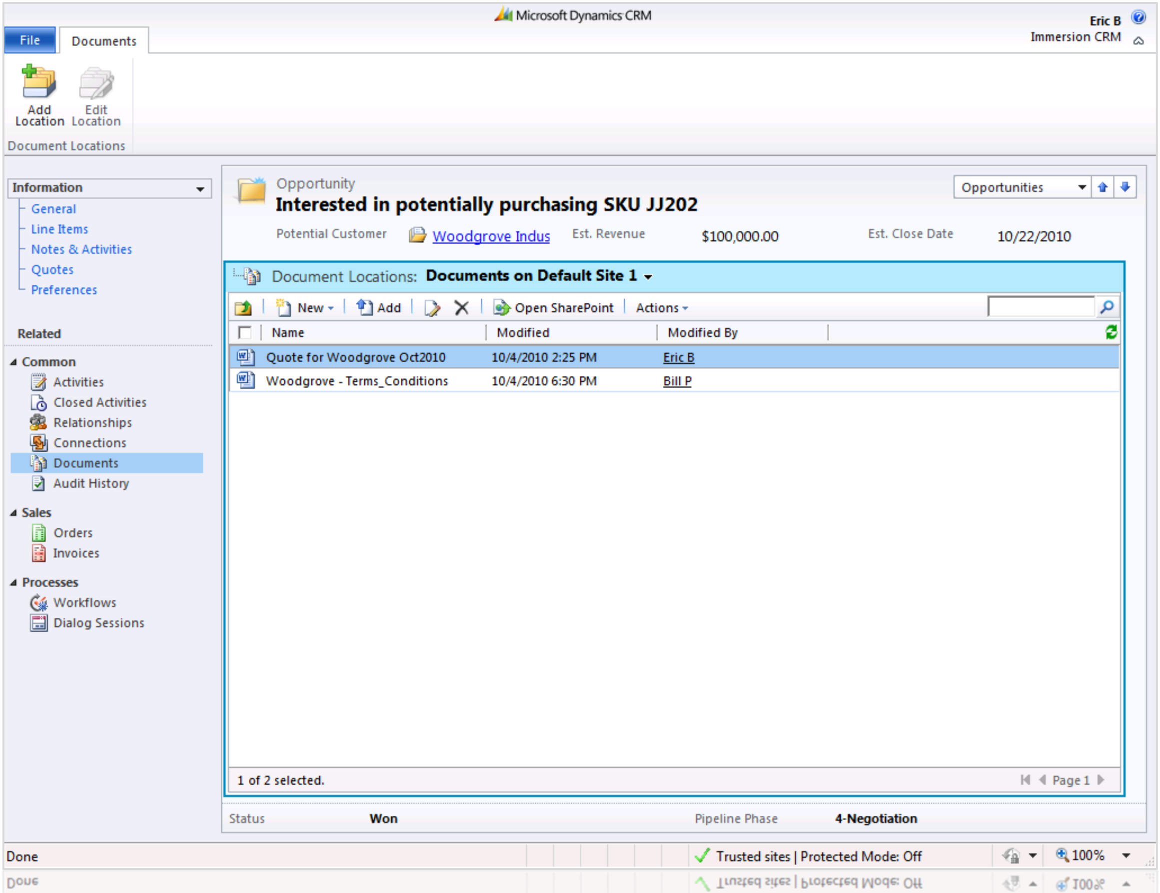
FAMILIAR	INTELLIGENT	CONNECTED
		Connections **Contextual Document** Mgmt **Social Media** **Team** Management **Declarative Design** **Dynamics Marketplace** **Solutions Management** **Developer Tools**

Connections



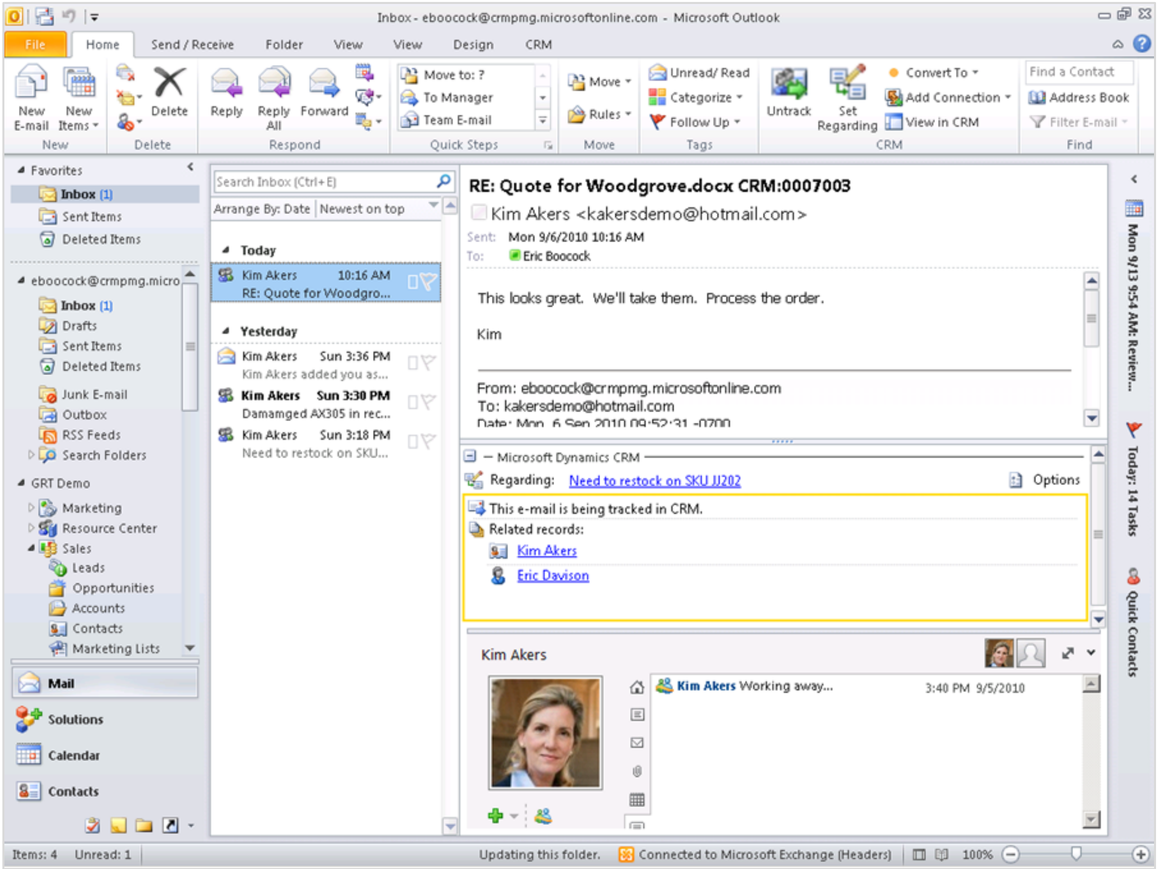
- Connect **any entity**
- Definable **roles**
- **Easy association** of roles to individuals
- **Time** based queries

Contextual Document Management



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

Social Media Capabilities



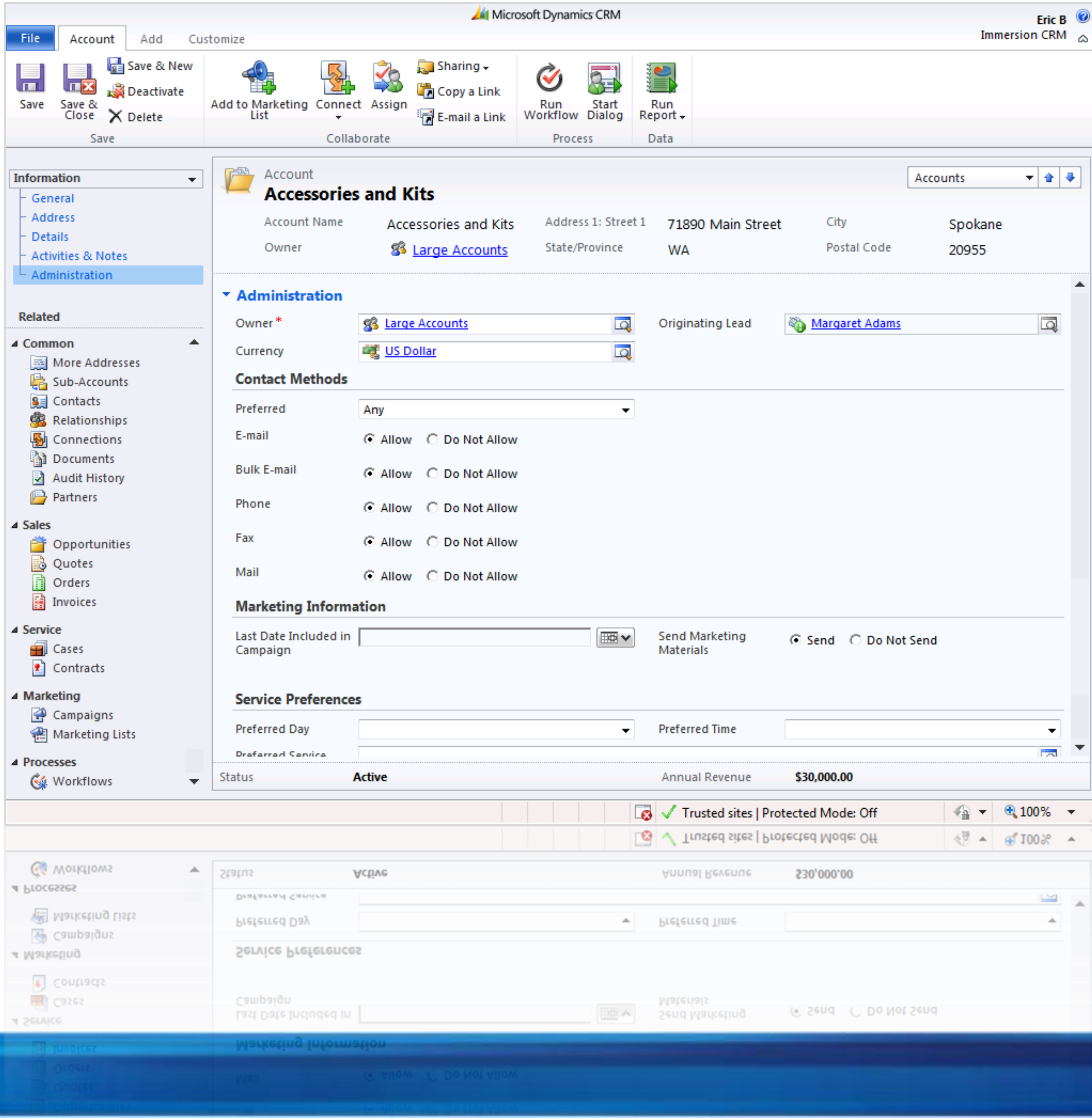
- Outlook **Social Connector**

  LinkedIn, Facebook and Windows Live **integration)**

- **Updated** Social Networking Accelerator

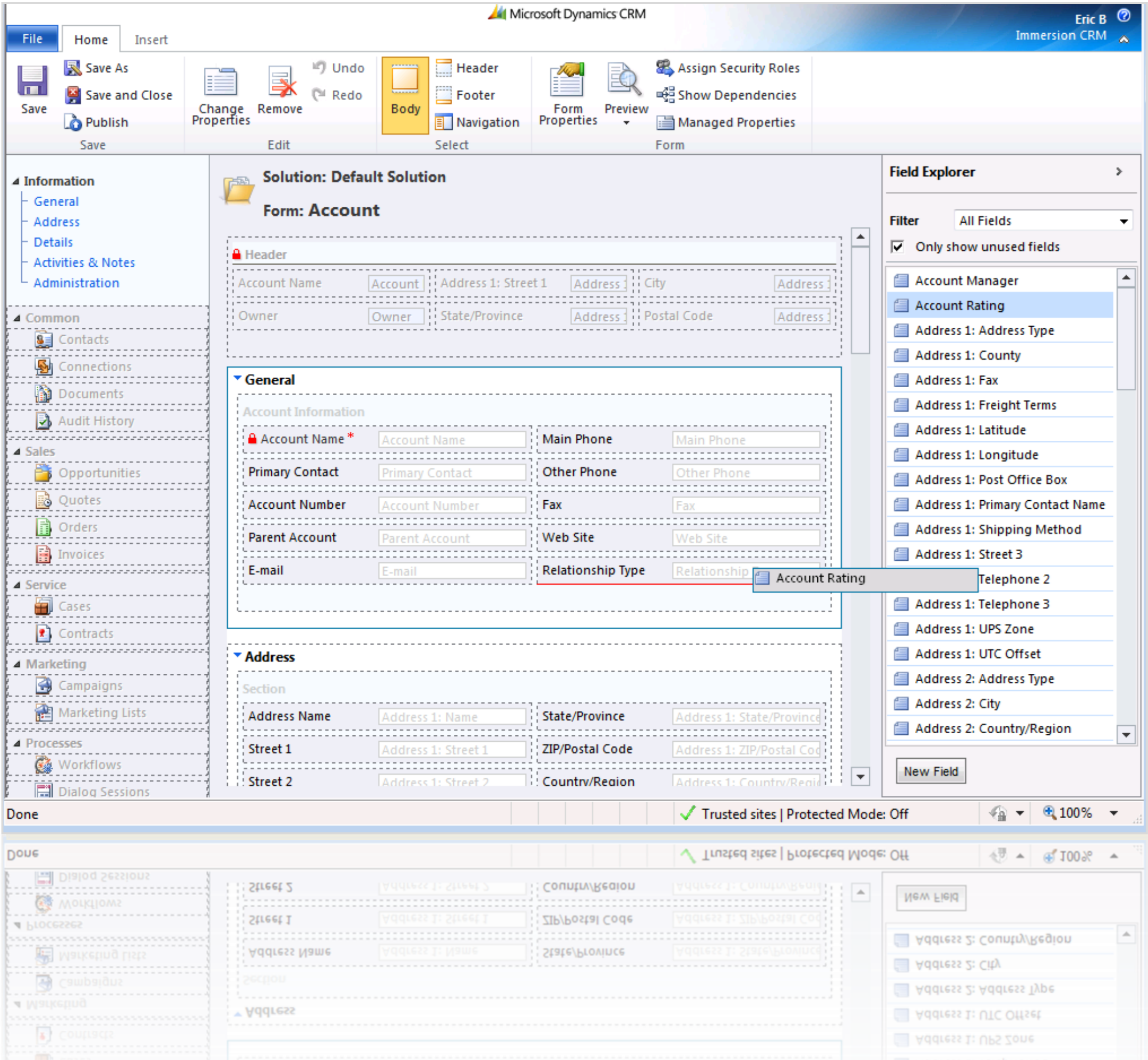
  Tracking of **Social identities** and **Online conversations**

Team Management



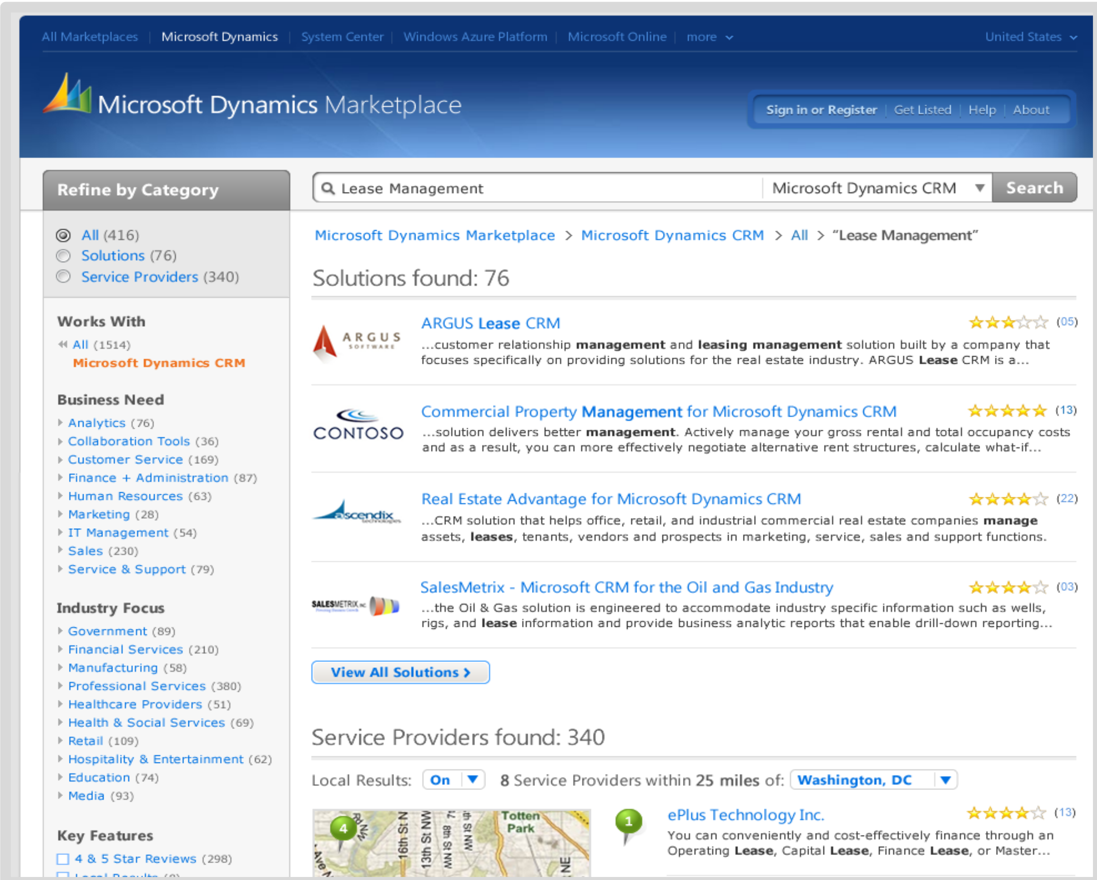
- **Team ownership** of records
- Team **security roles**
- **Roll-up reporting**
- Team based **workflows**

Declarative Design



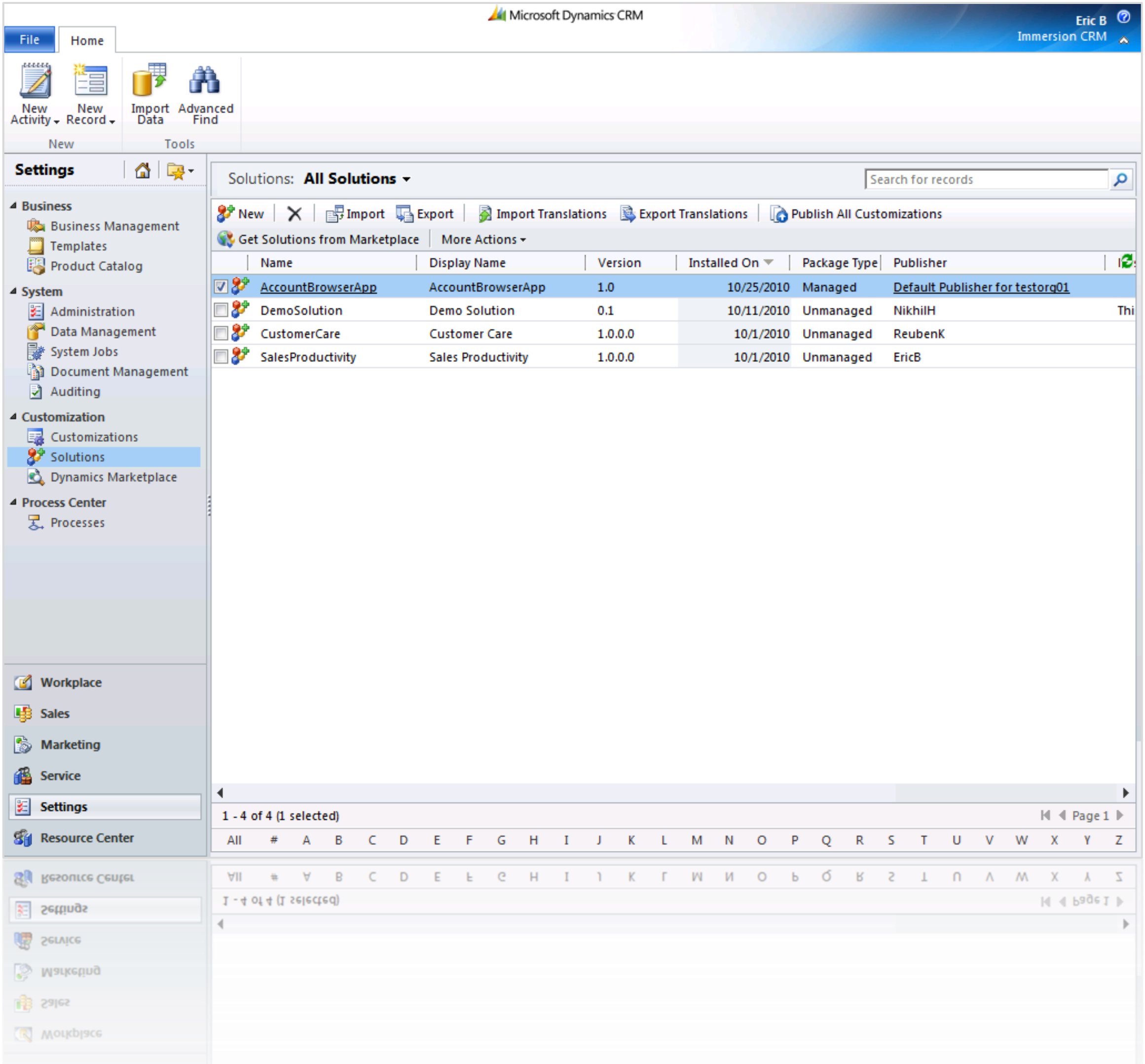
- **Drag-and-Drop** UI
- Add fields & relationships **within Form**
- **Navigation Editor**
- Entity **header and footer**

Dynamics Marketplace



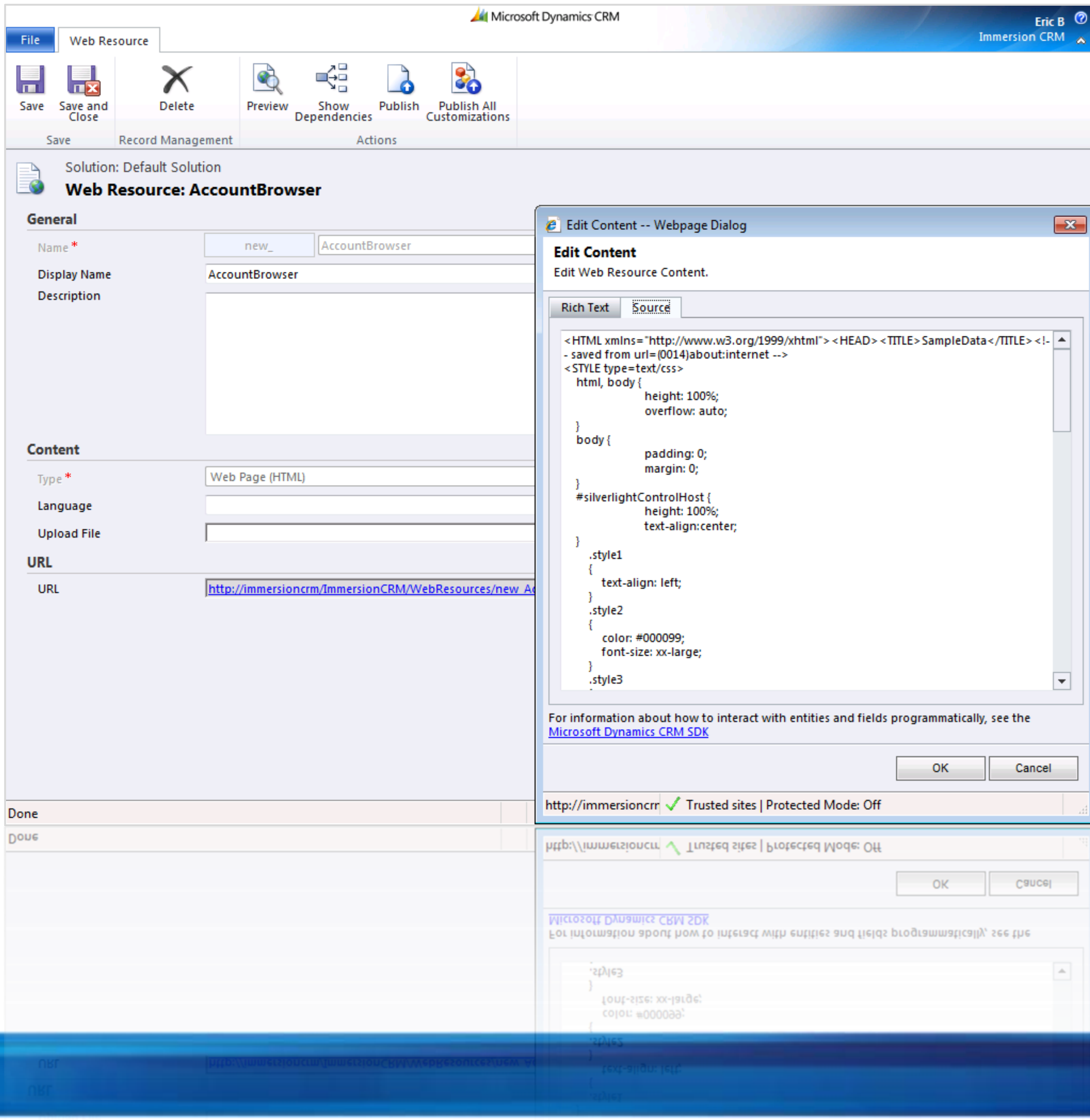
- Centralized Dynamics **solution repository**
- **In-app** experience
- **Click & Try**
- **Community** reviews and rankings

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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Office Fluent UI	Real-Time **Dashboards**	**Connections**
Next-Gen Outlook Client	**Guided Dialogs**	**Contextual Document** Mgmt
Role-Tailored Forms	Inline **Visualization**	**Social Media**
Enhanced **Navigation**	**Conditional Formatting**	**Team** Management
Data **Import/Export**	**Goal Management**	**Declarative Design**
Flexible Activities	Enhanced **Queues**	**Dynamics Marketplace**
Products and Pricing	**Business Auditing**	**Solutions Management**
Productivity Enhancements	**Field Level Security**	**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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