

Microsoft Dynamics CRM 2011 Walkthrough

*Part 1: End-user
tools and features*

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End-user tools and UI enhancements

Context-sensitive ribbon

The screenshot illustrates the context-sensitive ribbon feature in Microsoft Dynamics CRM 2011. The main ribbon at the top has tabs for File, Accounts, View, Create Related, Customize, and Sign Out. The 'Create Related' tab is highlighted with a blue border. Below the ribbon, there are several toolbars and subgrids.

Create Related Subgrid: A yellow callout points to a subgrid titled 'Create Related Task' under the 'Workplace' section. It shows a list of activities: Task (selected), E-mail, Phone Call, Letter, Fax, Appointment, Recurring Appointment, Service Activity, Other Activities, Mail Merge, Campaign Response, and Relationship. The 'Task' icon is highlighted with a yellow border.

Opportunity Subgrid: Another yellow callout points to a subgrid titled 'Opportunity Products' under the 'Opportunity' tab. It shows a list of opportunities: A Store new name, Advanced Components (sample), Affordable Equipment (sample), Another Test Account (selected), and Basic Company. The 'Another Test Account' item is highlighted with a blue border.

List Tools Subgrid: A third yellow callout points to a subgrid titled 'List Tools' under the 'Opportunity' tab. It includes buttons for Add New Opportunity Product, Edit, Copy a Link, E-mail a Link, Filter, Set As Default View, Charts, Run Workflow, Run Report, Export Opportunity Products, Records, Collaborate, Current View, View, Process, and Data.

Opportunity Record View: The main area displays the details for the opportunity 'Jukka Test Account/1/TestProduct'. The record view includes fields for Potential Customer Status (Jukka Niiranen, Open), Rating (Est. Revenue: €15 000,00, Warm), Warm (50), Owner (First), Est. Close Date (30.9.2010), and Currency (euro). The 'Line Items' section shows a single item: 'Test Product 1' with a quantity of 1,000,000 and an extended amount of 15 000,00 €.

Create related records

Show list tools for subgrids

Form sections instead of tabs

Links to section anchors

The screenshot shows the Microsoft Dynamics CRM 2011 interface for creating a new account. The top navigation bar has 'Accounts' selected. On the left, a sidebar menu titled 'Information' contains links to 'General', 'Details', 'Administration', and 'Notes'. Below this are sections for 'Common', 'Sales', 'Service', 'Marketing', and 'Processes'. A 'Related' tab is also present. The main content area is titled 'Account' and shows the account record for 'Litware Inc. (sample)'. It includes sections for 'General' (with fields like Account Name, Main Phone, etc.), 'Address' (with fields like Street 1, ZIP/Postal Code, etc.), and 'Notes' (with a note from Jukka Niiranen). A large yellow callout points to the 'Administration' link in the sidebar with the text 'Collapsible sections'. Another yellow callout points to the 'Information' dropdown in the sidebar with the text 'Persistent header and footer fields'.

Persistent header and footer fields

Filters and default views

The screenshot shows the Microsoft Dynamics CRM 2011 interface. On the left, there's a navigation bar with links like Sales, Leads, Opportunities, Accounts, Contacts, etc. The 'Accounts' link is selected. The main area displays a list of accounts under the heading 'Accounts: My Active Accounts'. A yellow callout box points to the 'Filter' icon in the 'View' tab of the ribbon. A modal dialog box titled 'Custom Filters -- WWW-valintaikkuna' is open, showing a search criteria for 'Address 1: City' containing 'Redmond'. The ribbon tabs visible are File, Accounts, View, Create Related, and Customize.

Filter based on
view column
contents

This screenshot shows the same CRM interface as above, but with a different focus. A yellow callout box points to the 'Set As Default View' icon in the 'View' tab of the ribbon. A modal dialog box titled 'Set as Default View' is open, asking 'Make the current view your default for this list.' The ribbon tabs visible are File, Accounts, View, Create Related, and Customize.

Set personal
default views

Recently visited records & views

The screenshot shows the Microsoft Dynamics CRM Online Workplace interface. On the left, there's a navigation bar with sections like 'Workplace', 'Sales', and 'Marketing'. The main area is titled 'Welcome to Microsoft Dynamics CRM Online' and features a 'Recently Visited' menu. This menu lists various items such as 'Microsoft Dynamics CRM...', 'Views', 'My Imports', 'My Active Contacts', etc. A yellow callout bubble points to the 'Test Niiranen, Test Jukka' item in the list, which is highlighted with a green pin icon. To the right of the menu, there's a chart titled 'Leads by Source Campaign' showing data for 'All Leads'. Below the chart, a table lists tasks or activities with columns for 'Regarding', 'Priority', and 'Start Date'.

Recently Visited

a high-level view of your information.

2. Extend

Pin items to recently visited records menu

Leads by Source Campaign

All Leads

Source Campaign	Count
New customer loyalty p...	1
Event campaign templat...	1
Direct marketing templ...	1
Ad campaign template (...)	1
(blank)	1

Regarding	Priority	Start Date
	Normal	12.9.2010
	High	12.9.2010
	High	13.9.2010
	Normal	13.9.2010

Browse records on detail form

The screenshot shows the Microsoft Dynamics CRM 2011 interface. On the left, the main navigation bar includes File, Account (selected), Create Related, Customize, Save, Save & Close, Deactivate, Add to Marketing List, Connect, and Collaborate. A yellow callout bubble points to the 'Accounts' button in the top right corner of the main form area.

The main form displays the account record for "Litware Inc. (sample)" under the "Information" tab, specifically the "General" section. The form fields include:

- Account Name: Litware Inc. (sample)
- Account Number: BABCO88H
- Parent Account: (empty)
- Primary Contact: Marco Tanara (sample)
- Relationship Type: (empty)
- Currency: euro
- Address fields: Address Name, Street 1 (137 Lancelot Dr), Street 2, Street 3, City (Phoenix), State/Province (CA)

The sidebar on the right, titled "View: My Active Accounts", lists various accounts. The account "Grand Store (sample)" is currently selected. Other visible accounts include Advanced Components (sample), Affordable Equipment (sample2), Basic Company, Best o' Things (sample), Blue Company (sample), Designer Goods (sample), Elemental Goods (sample), Grand Store (sample), Magnificent Store (sample), Recreation Supplies (sample), and Unusual Store (sample). The sidebar also includes buttons for Page Navigation (Previous, Next, Last).

View options

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The top navigation bar includes 'File', 'Account', 'Create Related', 'Customize', 'List Tools' (which is selected), and 'Contacts'. Below the navigation bar is a toolbar with various icons for actions like 'Records', 'Send Direct E-mail', 'Add to Marketing List', 'Quick Campaign', 'Assign Contacts', 'Current View', 'Set As Default View', 'Charts', 'Run Workflow', and 'Data'. A user profile 'Jukka Niiranen' and a 'Sign Out' button are also present.

The main area displays an 'Information' ribbon for an 'Account' record named 'Litware Inc. (sample)'. On the left, there's a sidebar with sections for 'Information' (General, Details, Administration, Notes) and 'Related' (Common: More Addresses, Activities, Closed Activities, Sub-Accounts, Contacts, Relationships, Connections, Documents, Audit History). The 'Contacts' item in the 'Related' section is highlighted.

A callout bubble points to the 'Current View' button in the toolbar, with the text: 'Full view selection controls in associated views'.

A second callout bubble points to the 'Contact Associated View' dropdown in the main content area, with the text: 'Enhanced view controls in lookup dialogs'.

The main content area shows a 'Look Up Record' dialog for selecting an account. It includes fields for 'Look for' (set to 'Account'), 'View' (set to 'Account Lookup View'), and 'Search' (showing results for 'Account Lookup View'). A checkbox 'Show Only My Records' is checked. The results list includes accounts like 'A Store new name', 'Advanced Components (sample)', 'Affordable Equipment (sample2)', and 'Basic Company'. A table below the list shows columns for 'Account Number' and 'Primary Contact'.

No more form assistant pane

Contact
New

General

Salutation	<input type="text"/>	Business Phone	<input type="text"/>
First Name *	<input type="text" value="Test First"/>	Home Phone	<input type="text"/>
Middle Name	<input type="text"/>	Mobile Phone	<input type="text"/>
Last Name *	<input type="text" value="Test Last"/>	Fax	<input type="text"/>
Job Title	<input type="text"/>	Parent Customer	<input type="text" value="ju"/> 
E-mail	<input type="text"/>	Currency	  Jukka Test Account

Address

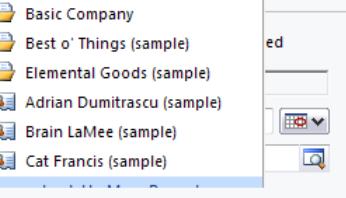
Address Name	<input type="text"/>	ZIP/Postal Code	<input type="text"/>
Street 1	<input type="text"/>	Country/Region	<input type="text"/>
Street 2	<input type="text"/>	Phone	<input type="text"/>
...	<input type="text"/>	...	<input type="text"/>

Smart lookup fields have replaced form assistant pane

General

Topic *	<input type="text"/>
Potential Customer *	 <input type="text"/> 
Description	<input type="text"/>

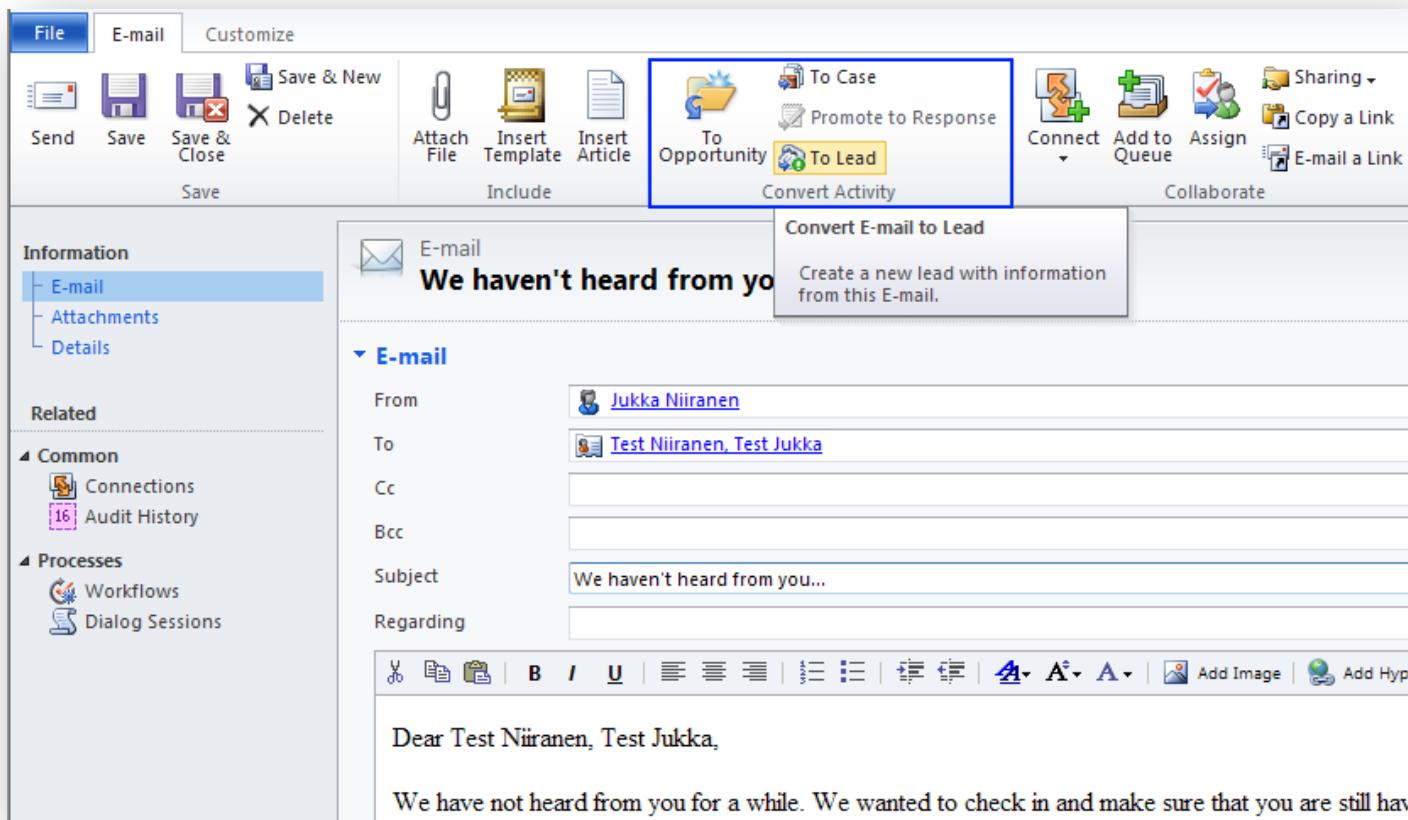
Forecast Information

Revenue	 <input type="text"/>
Est. Revenue	 <input type="text"/>
Est. Close Date	<input type="text"/>
Currency *	  Another Test Account

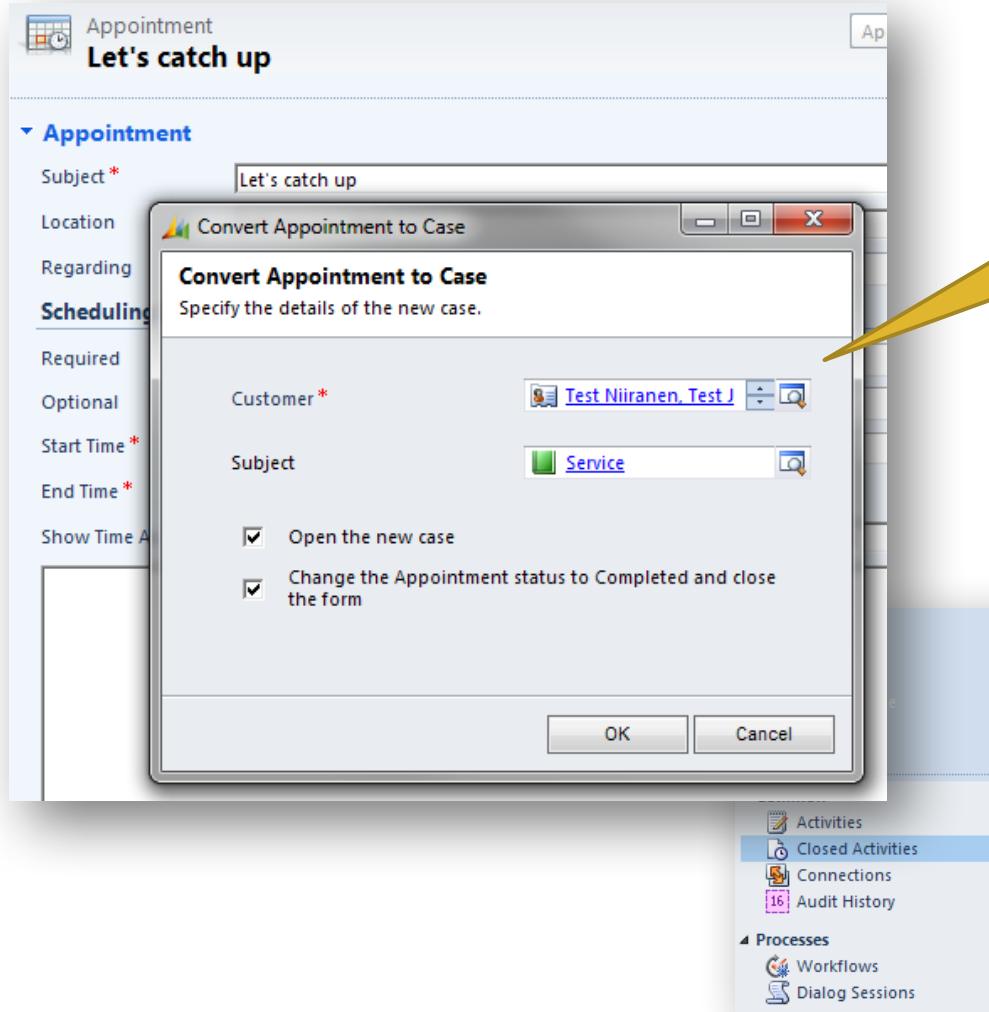
Form options for auto-resolve and most recently used items

Convert emails (1)

- Create a new lead, opportunity or case directly from the email activity ribbon



Convert emails (2)



Dialog window
requests details

Activity history is
recorded under
parent record

CASES	Subject	Activity Type	Activity Status	Regarding	Priority
<input checked="" type="checkbox"/>  CAS-01014-Y5S3C9	 Let's catch up	Appointment	Completed	 Let's catch up	Normal

Dynamic Marketing Lists

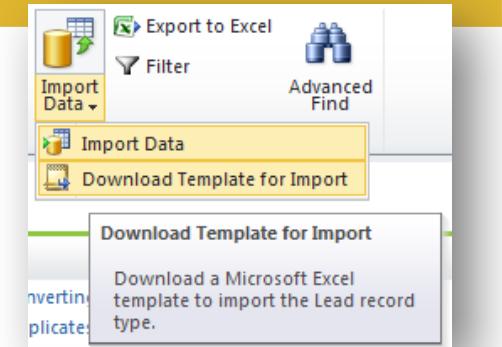
The screenshot shows the 'Marketing List' screen in Microsoft Dynamics CRM 2011. A new marketing list is being created with the name 'Dynamic List 1'. The 'Type' field is set to 'Dynamic'. The 'Member Type' is 'Contact'. The 'Purpose' is 'Demonstrate the dynamic lists'. The 'Source' field is empty. The 'Modified On' field shows '30.9.2010'. A message at the top states: 'This marketing list is based on a query and the members of this marketing list will change dynamically.' To the right, a 'Find' dialog box is open, showing a query builder interface. It includes fields for 'Look for: Contact', 'Use Saved View: [new]', and a search criteria section for 'Full Name' with an 'Contains' operator and a 'Select' button. Action buttons for 'Manage Members', 'Copy To Static', and 'Add to Campaign' are visible at the top right.

- Lists can be made static (traditional) or dynamic
- Dynamic list's members will be automatically updated based on a stored query criteria
- However, list membership is only shown for static lists under the member record's related marketing lists view

Data import wizard

- Download example templates of entity field lists and formats
- Create new entities or fields directly through the import based on source data mapping
- There will be no separate Data Migration Manager for CRM 2011
- See blog post from PowerObjects for more details:

<http://www.powerobjects.com/blog/2010/10/01/crm-2011-data-import-wizard/>



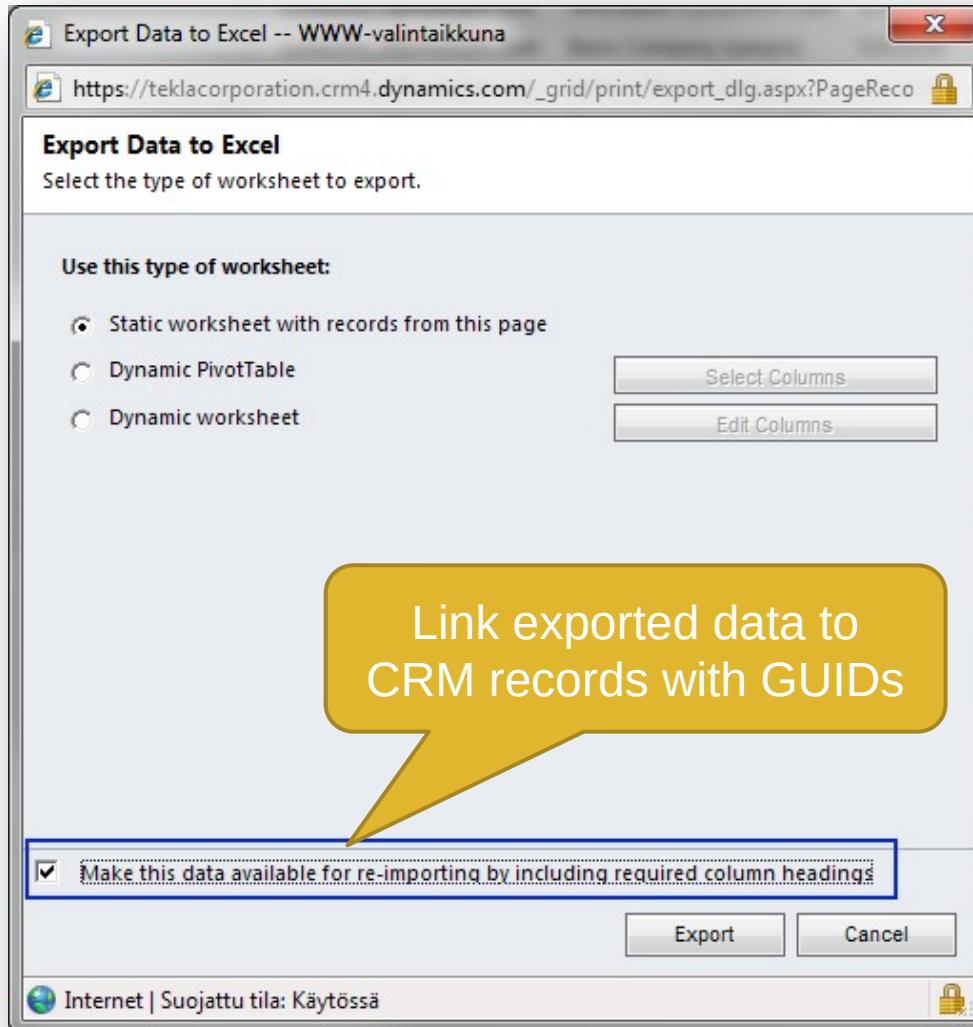
	A	B	C	D	E
1	Topic	First Name	Last Name	Company	Currency
2					
3					
4					
5					
6					
7					

Mandatory Field.
Data Type: Text.
Maximum Length: 50
characters.

A screenshot of the 'Source Fields' grid. The 'Annual Revenue' field has a context menu open, with the 'Actions' option highlighted. Other options in the menu include 'Not Mapped', 'Ignore', and 'Create New Field'. The 'Fields' section at the bottom right shows 'Add' and 'Create New Field' buttons.

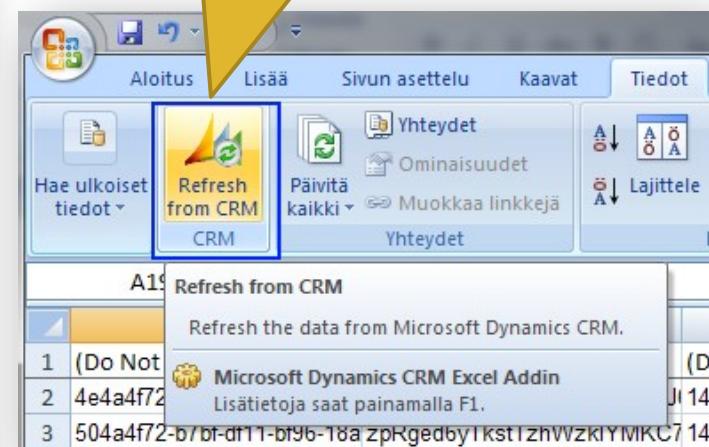
Source Fields	CRM Fields	Show All
Required Fields		
Company Name	Company Name	
Last Name	Last Name	
Topic	Topic	
Optional Fields		
Annual Revenue	Annual Revenue	Actions
Business Phone	Business Phone	Not Mapped
City	City	Ignore
Country/Region	Country/Region	Create New Field
Currency	Currency	
		Fields
		Add
		Create New Field
		Address 1: Fax

Excel data export & re-import (1)



Link exported data to
CRM records with GUIDs

Refresh Excel records of
static worksheets with
CRM data



Excel data export & re-import (2)

A23

	A	B	C	D	E	F
1	(Do Not Modify)Contact	(Do Not Modify)Checksum	(Do Not Modify)Modified On	First Name	Middle Name	Last Name
2	4e4ad4f72-b7bf-df11-bf96-18a	UdqQsX8cSS/m6C9YOsLh5ifJ	14.9.2010 4:20:58	Adrian		Dumitrascu (sample)
3	504a4f72-b7bf-df11-bf96-18a	zpRqed6yTkstTzhWzklYMKC7	14.9.2010 4:20:58	Brain		LaMee (sample)
4	524a4f72-b7bf-df11-bf96-18a	H5hIGtHaktbNS3FEJ/5NspINo.	14.9.2010 4:20:58	Cat		Francis (sample)
5	544a4f72-b7bf-df11-bf96-18a	mBKt8xKz8v4SQzSRQJ9lSkf	14.9.2010 4:20:58	Cathan		Cook (sample)
6	564a4f72-b7bf-df11-bf96-18a	5TpqC7AEs6kg8B0AXeyejma	14.9.2010 4:20:58	Darren		
7	584a4f72-b7bf-df11-bf96-18a	7PuW8MM82GsGS3Yx5zvug2	14.9.2010 4:20:58	Eva		
8	5a4a4f72-b7bf-df11-bf96-18a	QP7R7ozEl5DtctXafG/VDBp	14.9.2010 4:20:58	Forrest		
9	5c4a4f72-b7bf-df11-bf96-18a	hL9zL2f60Ha5WqnVLIRv44ZdV	14.9.2010 4:20:58	Gabriele		
10	5e4a4f72-b7bf-df11-bf96-18a	zEsPoq8bMccCh7WMgir8lbU	14.9.2010 4:20:58	George		
11	5e6ff40e-c0c1-df11-8c8b-18a	fMPm+QU2s57yLm+4wo3Bl+	16.9.2010 18:39:04	Marco		
12	604a4f72-b7bf-df11-bf96-18a	1VIXXG/yQe1NBQVUk6ZAfZRt	14.9.2010 4:20:58	Patrick		
13	624a4f72-b7bf-df11-bf96-18a	gt8clSPMLlkv4kg58JEaxdzOz	14.9.2010 4:20:58	Susan		
14	644a4f72-b7bf-df11-bf96-18a	k6KX7n4tqE/Li3EOrNHEM7J1C	14.9.2010 4:20:58	Test Jukka		
15	2ac04043-94c1-df11-8c8b-1j2fpEKbLA5R7EzWclEJEGnS	16.9.2010 13:14:00	Thomas			
16	664a4f72-b7bf-df11-bf96-18a	47D2MFF074yPdRnr66xMqsdf	14.9.2010 4:20:58	Yvonne		
17	684a4f72-b7bf-df11-bf96-18a	XXxt3Qi+zFvQBQLBdqHdZ32J	14.9.2010 4:20:58			

Import data to update existing records or create new ones

Import Data Wizard -- WWW-valintaikkuna

https://tekla.corporation.crm4.dynamics.com/WebWizard/WizardContainer.aspx?Wiza

This action will update existing records, and, if required, create new records.

Review the default settings, make the necessary changes, and submit the data for import.

Allow Duplicates

No (radio button selected)

Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics CRM.

Select Owner for Imported Records

Jukka Niiranen

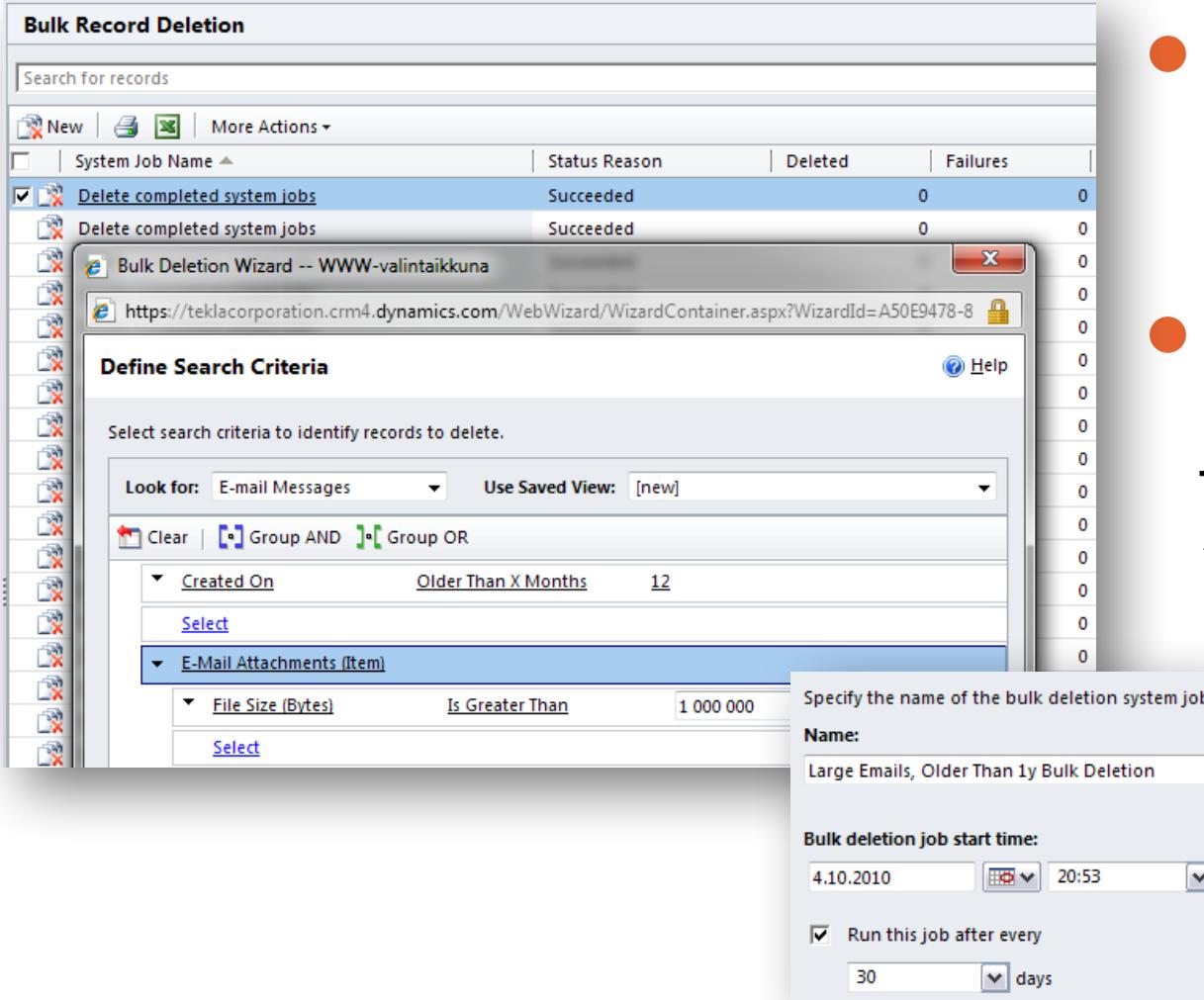
This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

Back Submit Cancel

Internet | Suojattu tila: Käytössä

Bulk deletion wizard

- Delete records in bulk based on AF criteria
- Schedule deletion jobs to run every X days



Recurring appointments

Activities: **My Appointments** ▾

Due: All Type: Appointment

Subject	Regarding	Location	Date
Meeting to review CRM 2011	Jukka Test Ac	Out on the road	2010 8:00
Let's catch up	Test Niiranen	Eiffel tower	2010 14:00
Recurring appointment nr. 1		Unknown	2010 18:30
Recurring appointment nr. 1		Unknown	
Recurring appointment nr. 1		Unknown	
Recurring appointment nr. 1		Unknown	
Recurring appointment nr. 1		Unknown	

New activity type provided for recurring appointments

Appointment Recurrence

Appointment Recurrence
Select the appointment time, the recurrence pattern, and the range of recurrence.

Only the first 15 instances of this series will be displayed in the calendar. Instances beyond the 15th occurrence will be synchronized with your calendar at a later time.

Appointment Time

Start: 13:00
End: 14:00
Duration: 1 hour

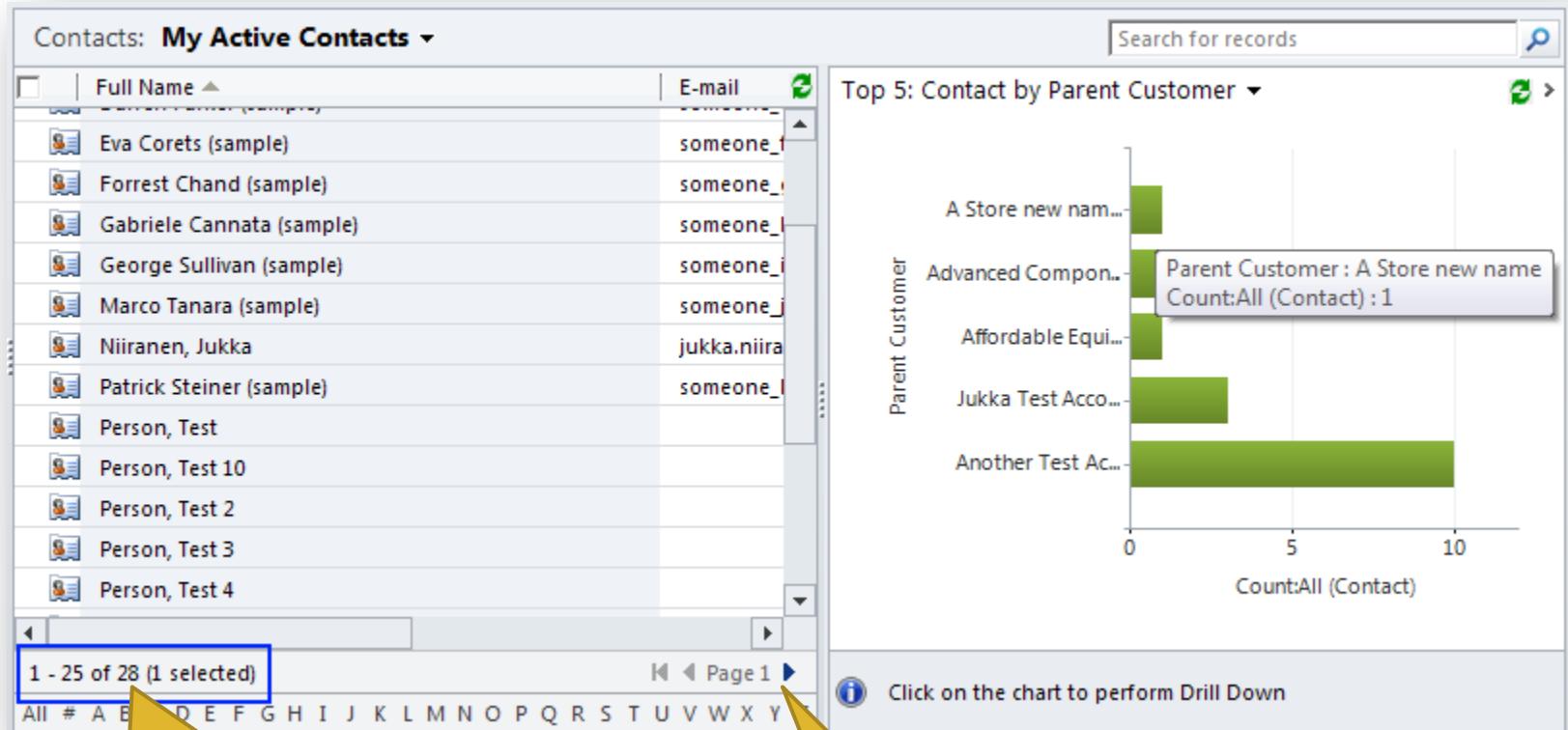
Recurrence Pattern: Weekly
Recur Every 1 Week(s) On:
 sunnuntai maanantai tiistai keskiviikko
 torstai perjantai lauantai

Range of Recurrence

Start range: 3.10.2010
End range: No End Date
 End after 10 occurrences
 End by 2.12.2010

OK Cancel End Series

Total counts in grids



Total count of records in the view is displayed below the grid

...but page count is not

Sales Literature emailing

The screenshot illustrates the workflow for emailing Sales Literature in Microsoft Dynamics CRM 2011. It shows two main windows: the Sales Literature record view and the E-mail composition screen.

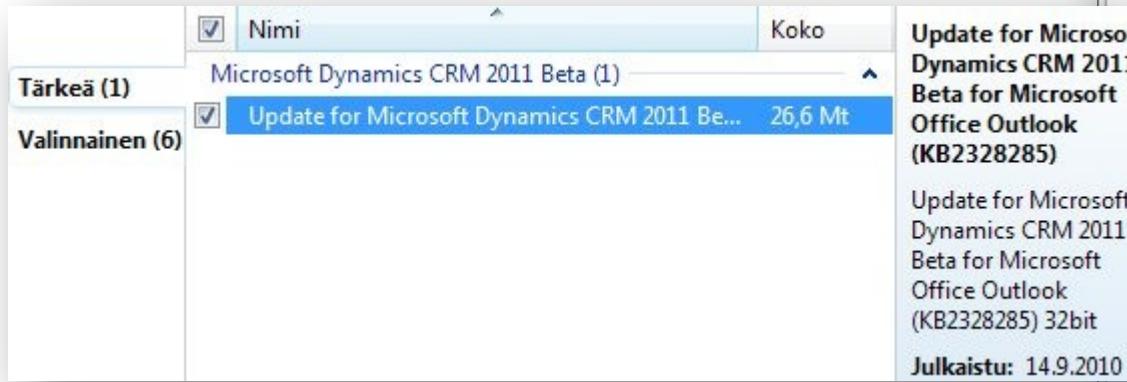
Sales Literature Record View: The left window displays the 'Sales Literature' record 'Literature 1'. The ribbon tabs are 'File', 'Sales Literature', and 'Customize'. The 'Actions' tab is selected, showing options like 'Save & New', 'Send as E-mail' (which is highlighted with a blue box), 'Add a Sales Attachment', 'Sharing', 'Copy a Link', 'E-mail a Link', 'Run Workflow', and 'Collaborate'. The 'Information' section shows 'General' details. The 'Related' section includes 'Common' (with 'Sales Attachments' selected) and 'Processes'. A yellow callout bubble points from the bottom left towards the 'Send as E-mail' button.

E-mail Composition Screen: The right window shows the 'E-mail' ribbon tab selected. The 'Actions' tab has 'Send' highlighted. The 'Information' section shows the 'E-mail' tab is selected. The 'Attachments' section lists two attachments: 'Forrester Enterprise CRM 2010.pdf' (765 775 bytes) and 'Forrester Midsize CRM 2010.pdf' (773 607 bytes). The attachments are highlighted with a blue box.

Text Overlay: A yellow callout bubble contains the text: "Attach a package of files to email through Sales Literature".

Windows Update support

- Client updates to CRM 2011 will be distributed through Windows Update
- WSUS (Windows Server Update Service) to be also supported after RTM



Outlook Client

Highlights

- New Outlook client built from ground up to work with Outlook MAPI (Microsoft's Messaging API)
- Provides native Outlook controls to activities and also other CRM records
- Contains additional view configuration and data browsing features not available through the CRM web client
- CRM application menu structure integrated into Outlook UI more tightly (requires Office 2010)

Outlook 2010 vs. 2007/2003

The screenshot illustrates the user interface transition in Microsoft Dynamics CRM 2011. On the left, the 2010 version is shown with its characteristic ribbon at the top and a navigation pane on the left containing 'Accounts' and 'Leads'. A yellow arrow points from the 2010 ribbon area towards the right side of the screen. On the right, the 2007/2003 version is displayed, featuring a standard menu bar (File, Accounts, View, Charts, Add, Customer...) and a toolbar above the main workspace. A yellow speech bubble points from the 2007/2003 menu bar towards the right side of the screen. The main workspace shows a list of 'My Open Opportunities' with columns for Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, and Rating. Below this is a detailed view of a specific opportunity for 'Jukka Test Account/1/TestProduct' with sections for Forecast Information, Line Items, and Tiedot on suodatettu/Valmis.

Ribbons are converted to menus in 2007/2003

Navigation panes and graphic folders only in 2010

Reading panes

Scrolling through records in grid allows "inbox style" navigation through CRM data

The screenshot shows the Microsoft Dynamics CRM 2011 interface. At the top, there's a blue header bar with the title 'Opportunities -' and '(Suodatettu)'. Below it is a search bar labeled 'Search My Open Opportunities' with a magnifying glass icon and a 'Filter' dropdown. The main area contains a grid titled 'My Open Opportunities' with columns: Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, and Rating. There are eight rows of sample data. Below the grid is a navigation bar with '1 - 8 of 8' and 'Page 1'. To the right of the grid is a 'Personalize Reading Pane' section with a folder icon and instructions: 'Add or remove sections from the reading pane. Select the sections to add or remove from the reading pane.' It includes sections like 'Forecast Information' (Revenue, Est. Revenue, Est. Close Date, Currency) and 'Line Items' (Price List). A 'Displayed Sections' sidebar on the right lists 'Opportunity Information', 'Forecast Information', and 'Opportunity Products'. The bottom right corner has buttons for 'Add >>' and '<< Remove'.

Reading pane displays detail data, form section contents can be personalized

View tabs and filters

Multiple views can be opened on tabs for quick data comparison

Custom filters can easily be applied to existing views

The screenshot shows the Microsoft Dynamics CRM 2011 Opportunities module. At the top, there are three tabs: 'My Open Opportunities' (selected), 'Lost Opportunities', and 'Opportunities Opened This Week'. A yellow callout points to the tabs with the text 'Multiple views can be opened on tabs for quick data comparison'. Below the tabs is a search bar and a filter button. On the left, there is a sidebar with three custom filters applied: 'Owner: Equals Current User', 'Status: Equals "Open"', and 'Rating: Equals "Hot"'. A yellow callout points to this sidebar with the text 'Custom filters can easily be applied to existing views'. The main area displays a grid of opportunities with columns for Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, and Rating. The first opportunity in the list is '6 orders of Product SKU JJ202 (sample)'.

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
6 orders of Product SKU JJ202 (sample)	Basic Company	pe 15.10.2010 23:43	€10,000.00	90	Hot
Needs to restock their supply of Product SKU AX305; wil...	Best o' Things (sample)	ma 13.12.2010 23:43	€25,000.00		Hot
They sell many of the same items we do - need to f...	Blue Company (sample)	pe 18.2.2011 23:43	€26,000.00	95	Hot
Very likely will order 18 Product SKU's this year (sam...	Elemental Goods (sample)	la 15.1.2011 23:43	€30,000.00		Hot
Will be ordering about 110 items of our prod...	Litware Inc. (sample)	ke 16.3.2011 23:43	€25,000.00	80	Hot
Will expand their offerings to include our prod...	Variety Store (sample)	ke 29.9.2010 23:43	€150,000.00	75	Hot

Full visualizations support

The screenshot displays several windows illustrating the visualization capabilities of Microsoft Dynamics CRM 2011:

- Microsoft Outlook Window:** Shows the main ribbon menu with tabs like Tiedotus, Muokkaa, Näytä, Dashboards, Siirry, Työkalut, Toiminnot, CRM, and Ohje. A search bar at the top right says "Kirjoita kysymys". Below the ribbon, there's a toolbar with icons for New Activity, New Record, Track in CRM, Set Regarding, Advanced Find, and Go Offline.
- Left Navigation Panel:** Labeled "Sähköposti" (Email). It includes sections for Suosikkikansiot (Favorites), Postikansiot (Email Accounts), and Kaikki sähköpostiviestit (All emails). Under "Postikansiot", it lists "Oma konsiota", "Gmail", "Tekla Corporation", "My Work", "Dashboards", "Activities", "Imports", "Duplicate Detection", "Queues", "Articles", "Reports", "Announcements", "Customers", and "Sales".
- Dashboard Window:** Titled "Dashboards -". It shows the "Microsoft Dynamics CRM Overview" dashboard. The "Overview" section contains three charts: "Sales Pipeline" (a funnel chart showing Open Opportunities with values 15 000 €, 175 000 €, 85 000 €, 36 000 €, and 1 Prospect), "Leads by Source Campaign" (a bar chart showing leads from New customer, Event, Direct, Ad campaign, and (blank) sources), and "Cases By Priority (Per Day)" (a stacked bar chart showing cases created on 14.9.2010 categorized as Low, Normal, or High priority).
- Activities Window:** Titled "My Activities". It lists five recent activities: E-mail (We haven't heard from you...), E-mail (Literature 1), Task (Evaluation Plan agreed upon (sample)), and Phone Call (Likes some of our new products (sample)).
- Customer Window:** Titled "Top 10 Customers". It shows a chart of estimated revenue for potential customers. The data is as follows:

Potential Customer	Est. Close Date	Sum (Est. Revenue) (€)
Basic Company	pe 15.10.2010 23:43	10 000.00 €
Jukka Test Account	to 30.9.2010 3:00	15 000.00 €
Best o' Things (sample)	ma 13.12.2010 23:43	25 000.00 €
Blue Company (sample)	pe 18.2.2011 23:43	26 000.00 €
Elemental Goods (sample)	la 15.1.2011 23:43	30 000.00 €
Litware Inc. (sample)	ke 16.3.2011 23:43	
Variety Store (sample)	ke 29.9.2010 23:43	
Variety Store (sample)	to 30.9.2010 23:43	
- Product Window:** Titled "6 orders of Product SKU JJ202 (sample)". It shows a grid of product details:

Potential Customer	Rating	Owner
Basic Company	Hot	
Status	Est. Revenue	First Last
Open	€10,000.00	Est. Close Date
- Bottom Navigation Bar:** Includes links for "Tiedot on suodatettu" and "Valmis".

Activity grouping

Native Outlook grouping options
grouping options
for activities (by
due date etc.)

The screenshot shows the Microsoft Dynamics CRM 2011 Activities view. The interface includes a header bar with a folder icon, the title 'Activities -' and '(Suodatettu)', a search bar labeled 'Search My Activities' with a magnifying glass icon, and a 'Filter' dropdown. Below the search bar is a table with columns: Activity Type, Subject, Regarding, Priority, Start Date, and Due Date. The table displays several activity items, each preceded by a small blue square icon with a white plus sign. The items are grouped by due date:

- Päivämäärä: Ei mitään**
 - E-mail We haven't heard from you...
 - E-mail Literature 1
 - E-mail
- Päivämäärä: kolme viikkoa sitten**
 - Task Evaluation Plan agreed upon (sample)
 - Phone Call Likes some of our new products (sample)
- Päivämäärä: kaksi viikkoa sitten**
 - Phone Call Discuss new opportunity (sample)
 - Task Proposal Issue, Decision Due (sample)
 - Phone Call Call and say hi
 - Custom Activity Another custom activity, for an Opportunity
 - Task Evaluation Plan agreed upon (sample)
 - Task Evaluation Plan proposed (sample)
- Päivämäärä: viime viikolla**
 - Phone Call Discuss new opportunity (sample)
 - Task Proposal Issue, Decision Due (sample)
 - Phone Call Call and say hi
 - Custom Activity Another custom activity, for an Opportunity
 - Task Evaluation Plan agreed upon (sample)
 - Task Evaluation Plan proposed (sample)
- Päivämäärä: torstai**
 - Appointment Let's catch up
- Päivämäärä: eilen**
 - Task Cancel all subscriptions for Another Test Account

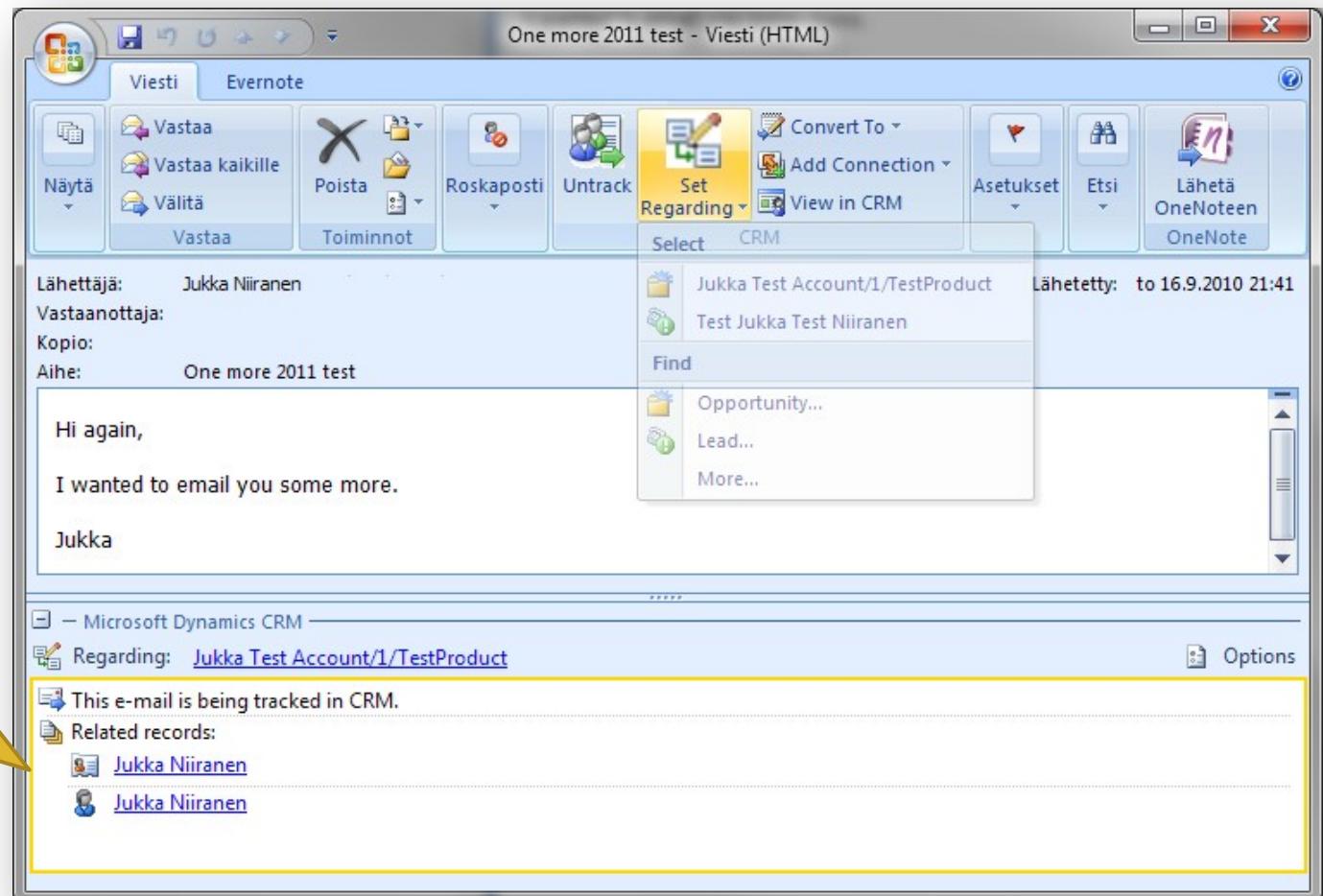
At the bottom of the table, there is a footer bar with navigation icons and the text '1 - 34 of 34'. A message bar at the bottom of the screen says 'We haven't heard from you...' with an envelope icon.

Conditional formating

Create custom format rules based on field data conditions

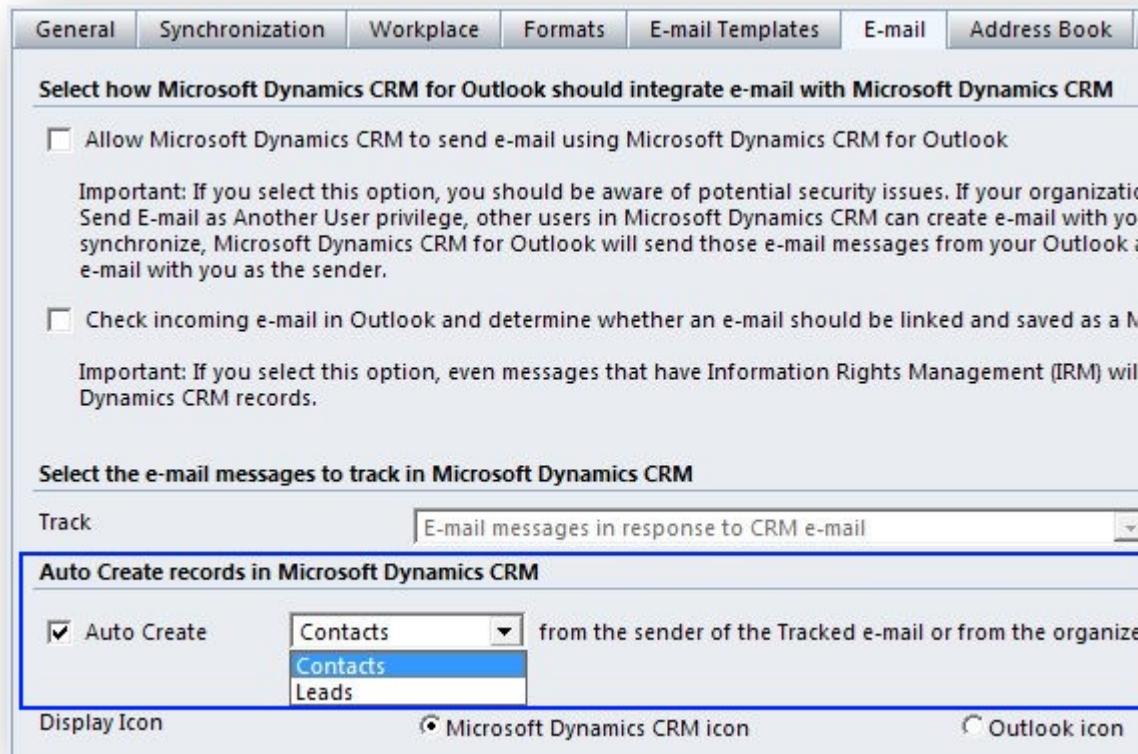
The screenshot shows the Microsoft Dynamics CRM 2011 interface. On the left, there is a yellow callout bubble containing the text: "Create custom format rules based on field data conditions". To the right of the callout is the main application window. The title bar says "Activities -". Below it is a toolbar with icons for back, forward, search, and other functions. The main area is a grid titled "My Activities" with columns: Activity Type, Subject, Regarding, Priority, Start Date, Due Date, and Recurring Instan...". The grid lists various activity types like Task, Phone Call, Appointment, etc., with sample subjects. A context menu is open over one of the rows, showing options like "Mukauta näkymää: My Activities", "Kuvaus", "Automaattinen muotoilu", "Tämän näkymän säännöt:", and "Valitun säännön ominaisuudet". The "Valitun säännön ominaisuudet" section shows a list with "Custom" selected, and buttons for "Lisää", "Poista", "Siirrä ylöspäin", and "Siirrä alaspäin". Below this, there are fields for "Nimi:" (set to "Custom") and "Fontti..." (set to "8 pt Segoe UI"). At the bottom of the dialog are "OK" and "Peruuta" buttons. In the bottom right corner of the main window, there is a message box with the text: "This is a custom activity for a contact". Below this message, there is a "General" section with a "Subject" field containing the same text.

Regarding records



Auto create contacts or leads

- Outlook settings can be configured to create new records for sender of an email tracked to CRM



Multi-tenancy

- Single Outlook client can be used for opening multiple CRM organizations
- Organizations displayed as menus (Outlook 2010) or folders (Outlook 2003/2007)
- However, activity tracking is only possible with one organization per client

Outlook Social Connector

The screenshot shows the Microsoft Dynamics CRM 2011 Contacts screen. On the left, there's a navigation bar with a folder icon labeled 'Contacts -' and '(Suodatettu)'. Below it is a video thumbnail and a 'Get Started with Contacts' section with a '1. Import' step. The main area displays a list of contacts under 'My Active Contacts' with columns for 'Full Name', 'E-mail', and 'Parent Customer'. A contact named 'Niiranen, Jukka' is selected, highlighted with a blue selection bar. To the right of the contact list is a detailed view of 'Niiranen, Jukka' with sections for General, Address, and Social streams. The 'General' section includes fields for Salutation, First Name (Jukka), Middle Name, Last Name (Niiranen), Job Title, E-mail (jukka.niiranen), Business Phone, Home Phone, Mobile Phone, Fax, Parent Customer (Jukka Test Account), and Currency. The 'Address' section has fields for Address Name, Street 1, Street 2, Street 3, ZIP/Postal Code, Country/Region, Phone, and Address Type. The 'Social' section shows a profile photo of Jukka Niiranen and a message: 'Connect to social networks to show profile photos and activity updates of your colleagues in Outlook. Click here to add networks.' Below this are several social network posts from Jukka Niiranen, including messages about CRM 2011 training and duplicate detection.

Social network profiles and streams can be integrated into the contact reading pane

Form Customization Options

Sub-grids

- Add related child entity grids on parent entity view through form customization (no more iFrames)
- Control default views and UI features displayed

The screenshot shows the Microsoft Dynamics CRM 2011 interface. A modal window is open for the account 'Jukka Test Account'. At the top left is a folder icon and the word 'Account'. The account name 'Jukka Test Account' is displayed prominently. To the right is a button labeled 'Accounts' with up and down arrows. Below this is a section titled 'Tab' with a dropdown arrow. Underneath are input fields for 'Address 1:', 'Country/Region', 'Account Name *' (containing 'Jukka Test Account'), 'Address 1: County', 'Address 1: City', and 'Originating Lead' with a search icon. At the bottom of this section is a sub-grid header: 'Opportunities (Potential Customer): Open Opportunities ▾'. It includes a filter bar with 'Filter on: Open' and 'Include: Related "Regarding" Records'. The grid itself shows one item: 'Jukka Test Account/1/TestProduct' under 'Topic', 'Potential Customer' under 'Regarding Record', and '30.9.2010' under 'Est. Close Date'. At the bottom of the sub-grid is a message '1 - 1 of 1 (0 selected)' and navigation buttons for 'Page 1'.

Adding a sub-grid on the form

Solution: Demo Solution
Form: Account

Address 1: Country/Region Address 1: County Address 1: City
Account Name * Account Name Originating Lead

Opportunities (Potential Customer)

Sub-Grid Properties
Modify this Sub-Grid's properties.

Display

Name: Opportunities
Label: Opportunities (Potential Customer)
 Display label on the Form

Data Source
Specify the primary data source for this sub-grid.

Records: Only Related Records
Entity: Opportunities (Potential Customer)
Default View: Open Opportunities

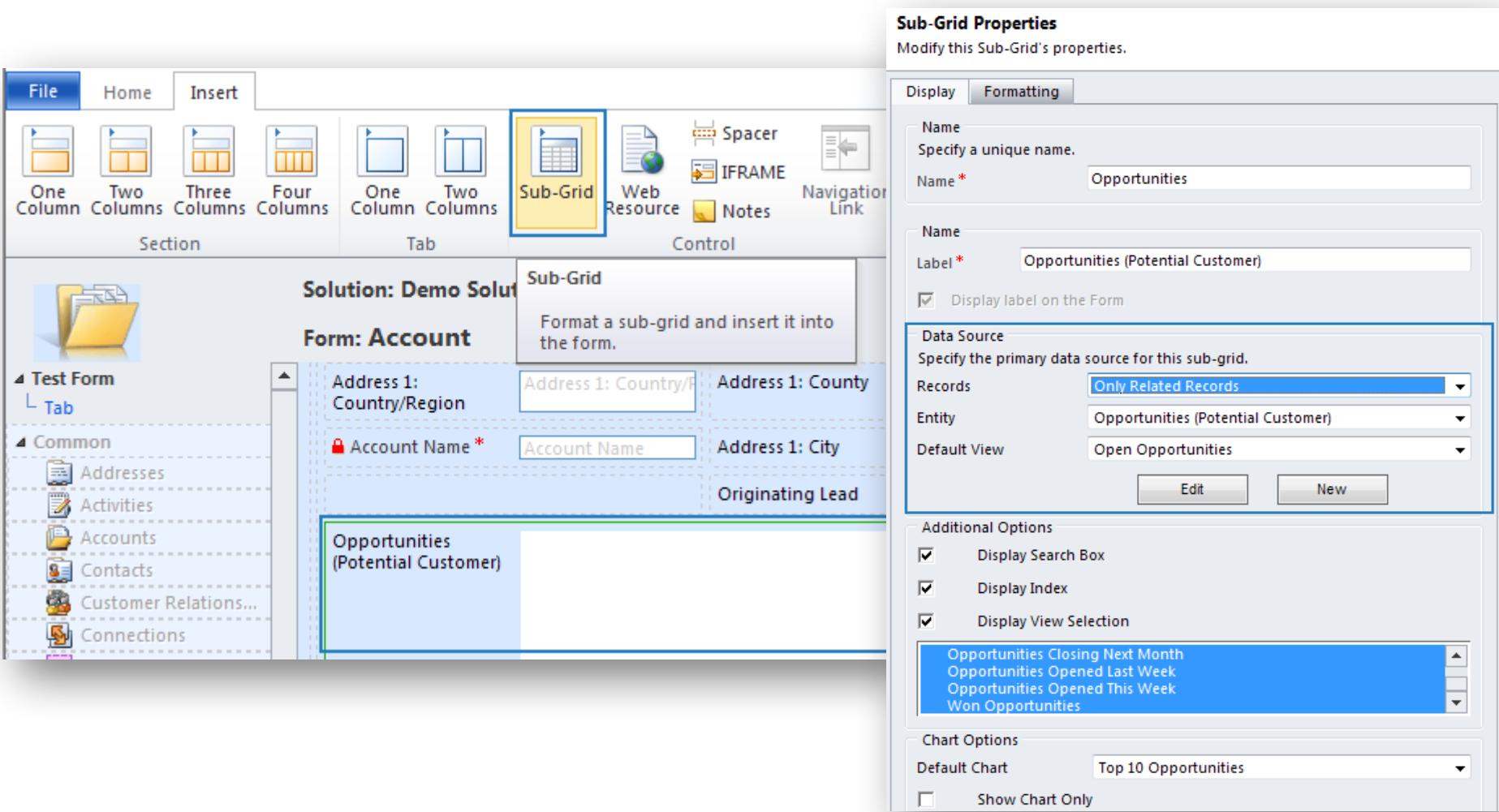
Additional Options

Display Search Box
 Display Index
 Display View Selection

Opportunities Closing Next Month
Opportunities Opened Last Week
Opportunities Opened This Week
Won Opportunities

Chart Options

Default Chart: Top 10 Opportunities
 Show Chart Only



Filtered lookups

- Form customization options include ability to show records based on simple query criteria
- Common scenario: show only accounts where the parent account is equal to current account
- Lookup controls are programmable, i.e. can be modified through SDK when GUI is not enough

Related records filtering

Form: Account

Disable most recently used items for this field

Locking
Specify whether to lock this field on the form.

Lock the field on the form

Visibility
Specify the default visibility of this control.

Visible by default

Related Records Filtering

Only show records where:

Contacts (Parent Customer (Accounts))
Contains

 Allow users to turn off filter

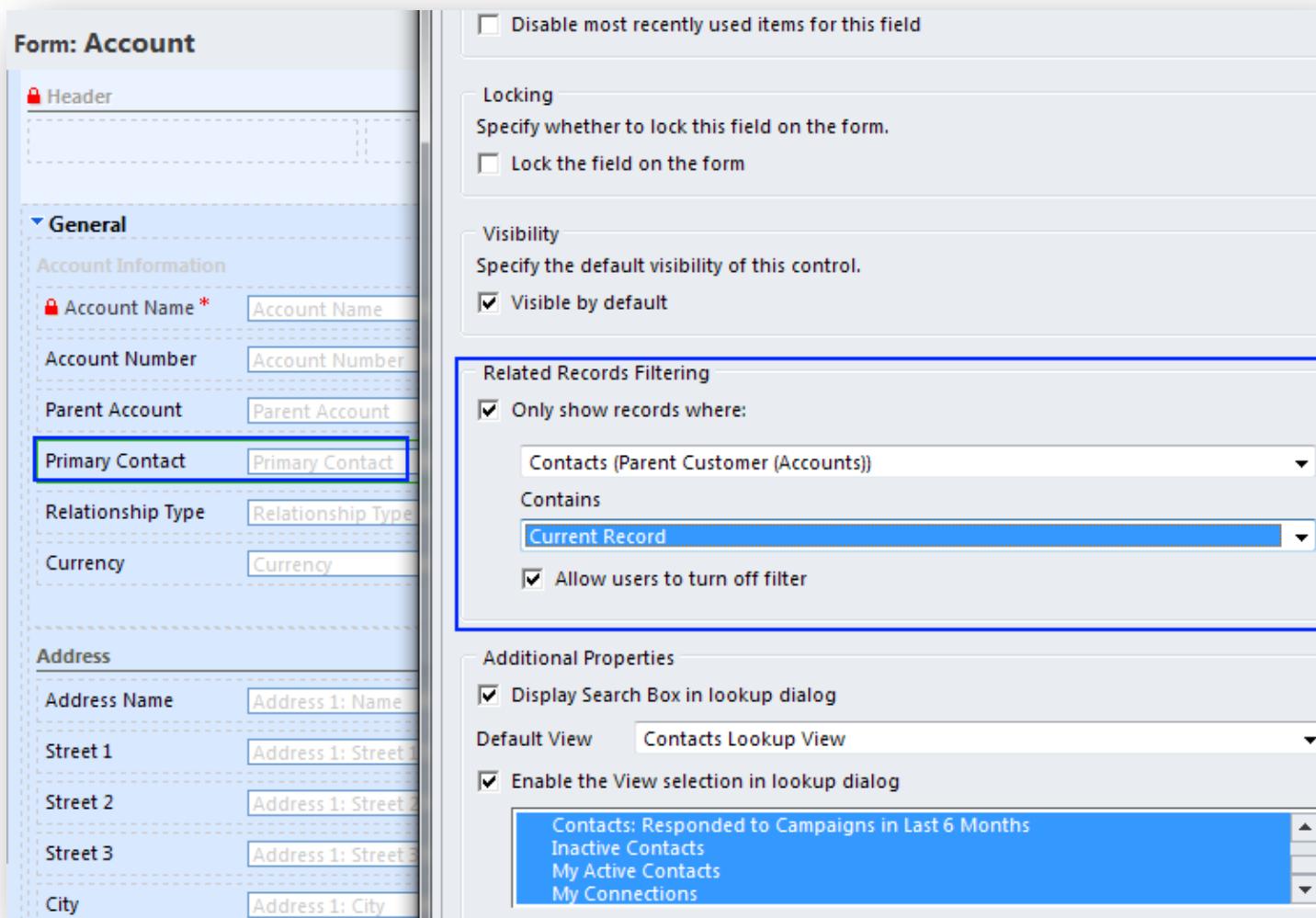
Additional Properties

Display Search Box in lookup dialog

Default View Contacts Lookup View

Enable the View selection in lookup dialog

Contacts: Responded to Campaigns in Last 6 Months
Inactive Contacts
My Active Contacts
My Connections



Option sets

- Option sets = global picklists
- Re-usable lists of values that can be shared across different entities
- Values can be populated/maintained through SDK

Type

Type * Option Set (picklist)

Use Existing Option Set Yes No

Default Value Unassigned Value

Options

Normal
Secret
Top Secret!

Label * Top Secret!

Value * 100 000 002

Description

Type

Type * Option Set (picklist)

Use Existing Option Set Yes No

Option Set *

Default Value

A Yes or No boolean
Activity Type
Category
Component State
Component Type
Dependency Type
Fiscal Period
Fiscal Year
Goal Type
MonthOfYear
Object Type
Pricing Error
Validation Status
Validation Status Reason

Edit New

Auditing

Auditing features

Feature	Capability
CRM Online Support	✓
CRM OnPrem Support	✓
Audit Customizable Entities	✓
Audit Custom Entities	✓
Configure Entities for Audit	✓
Configure Attributes for Audit	✓
Seclude Attributes from being Auditable	✓
Areaware Auditing	✓
Privilege based Audit Trail Viewing	✓
Privilege based Audit Summary Viewing	✓
Audit Log Deletion for Partitioned DB	✓
Audit Log Deletion for Non Partitioned DB	✓
SDK Support	✓
Audit of Field Create/Update/Delete of records	✓
Audit of Relationships (1: N & N:N)	✓
Audit of Audit Events	✓
Auditing of Read Operations	✗
Auditing of Meta Data changes	✗
Auditing of Text Blobs, Notes, Attachments	✗
Claims of adhering to Regulatory Standards	✗

From Microsoft Dynamics CRM 2011 Beta SDK

- Available on common entities as well as custom entities
- Auditing data is recorded across a designated period of time in partitions (audit logs), which can be deleted from the Settings menu

Enabling auditing

System Settings
Set system-level settings for Microsoft Dynamics CRM.

General Calendar Formats **Auditing** E-mail

Audit Settings

Start Auditing

Enable Auditing in the following areas

Common Entities
 Sales Force Automation Entities
 Marketing Automation Entities
 Customer Service Entities



System level

View: All

New | X | Edit | N

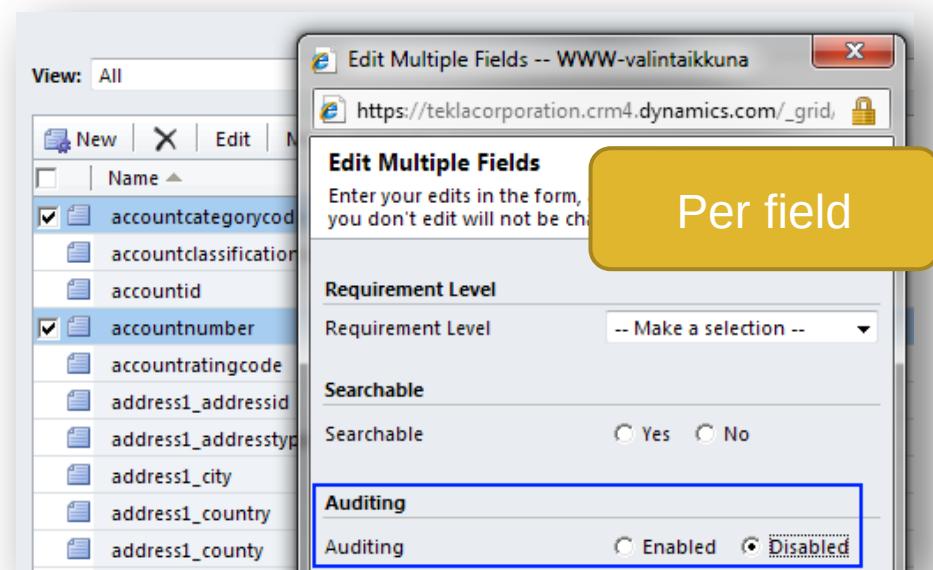
Name ▾
 accountcategorycode
 accountclassification
 accountid
 accountnumber
 accountratingcode
 address1_addressid
 address1_addressstyp
 address1_city
 address1_country
 address1_county

Edit Multiple Fields
Enter your edits in the form, you don't edit will not be changed.
https://teklacorporation.crm4.dynamics.com/_grid/

Requirement Level
Requirement Level -- Make a selection --

Searchable
Searchable Yes No

Auditing
Auditing Enabled Disabled



Per field

Account
Information

Solution: Default Solution

Entities
Account

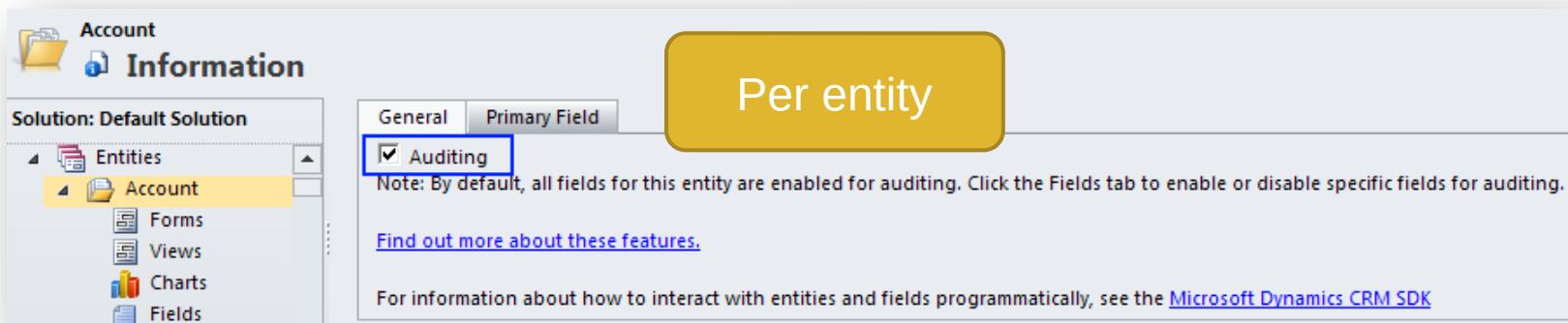
General Primary Field

Auditing

Note: By default, all fields for this entity are enabled for auditing. Click the Fields tab to enable or disable specific fields for auditing.

[Find out more about these features.](#)

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics CRM SDK](#)



Per entity

View audit history per record

Information

- General
- Line Items
- Notes & Activities
- Quotes
- Preferences

Related

- Common
 - Activities
 - Closed Activities
 - Relationships
 - Connections
 - Documents
 - Audit History
- Sales
 - Orders
 - Invoices
 - Competitors
- Processes
 - Workflows
 - Dialog Sessions

Opportunities

Opportunity
Jukka Test Account/1/TestProduct

Potential Customer Status	Jukka Test Account	Rating	Warm	Owner	First Last
	Open	Est. Revenue	15 000,00 €	Est. Close Date	30.9.2010

Filter on: All Fields

Changed Date	Changed By	Action	Changed Field	Old Value	New Value
15.9.2010 21:20	Jukka Niiranen	Update	Description		Added a description.
15.9.2010 20:26	Jukka Niiranen	Create	Total Amount	0.0000	15000.0000
			Total Pre-Freight Amo...	0.0000	15000.0000
			Pricing Error	None	None
			Est. Revenue	0.0000	15000.0000
			Total Line Item Discou...	0.0000	0.0000
			Total Tax	0.0000	0.0000
			Total Tax (Base)	0.0000	0.0000
			Total Line Item Discou...	0.0000	0.0000
			Total Pre-Freight Amo...	0.0000	15000.0000
15.9.2010 19:52	Jukka Niiranen	Update	Probability	50	
			Est. Close Date	30.9.2010 0:00	
			Time Zone Rule Versi...	0	
15.9.2010 19:51	Jukka Niiranen	Update	Total Amount	0.0000	0.0000
			Total Pre-Freight Amo...	0.0000	0.0000
			Pricing Error	Missing Price Level	None
			Est. Revenue	0.0000	

[View Audit History](#)

Audit summary view

Settings |

Business
Business Management
Templates
Product Catalog

System
Administration
Data Management
System Jobs
Document Management
Auditing (selected)

Customization
Customizations
Solutions
Dynamics Marketplace

Process Center
Processes

Audit Summary View

Enable/Disable Filters

	Changed Date	Action	Changed By	Record	Entity	Operation
[16]	28.9.2010 11:55	Create	Jukka Niiranen	Literature 1	Sales Literature	Update
[16]	28.9.2010 11:51	Create	Jukka Niiranen	Literature 1	Sales Literature	Update
<input checked="" type="checkbox"/> [16]	28.9.2010 11:49	Create	Jukka Niiranen	Literature 1	Sales Literature	Create
[16]	27.9.2010 23:24	Update	SYSTEM	Goal for Q4(Sample)	Goal	Update
[16]	27.9.2010 23:24	Update	SYSTEM	Goal for Q4(Sample)	Sales Literature	Update
[16]	27.9.2010 23:24	Update	SYSTEM	MPC testi	Sales Literature	Update
[16]	27.9.2010 6:19	Complete		Telephone		
[16]	27.9.2010 6:19	Update		Telephone	The record was created with the following field values	
[16]	27.9.2010 6:19	Update	SYSTEM	Telephone Field Name	Value	
[16]	27.9.2010 6:19	Create		Currency	euro	
[16]	27.9.2010 6:15	Update		Basic Commodity	Customer Viewable	
[16]	27.9.2010 1:50	Update	SYSTEM	Goal for Q4(Sample)	No	
[16]	27.9.2010 1:50	Update	SYSTEM	Goal for Q4(Sample)	Description	
					Pricing policy for 2010	
					Employee Contact	
					Jukka Niiranen	
					Exchange Rate	
					1,0000000000	
					Expiration Date	
					31.12.2010 0:00	
					Has Attachments	
					No	
					Subject	
					Default Subject	
					Time Zone Rule Version Number	
					0	
					Title	
					Literature 1	

Audit data security

The screenshot shows the 'Security Role: Sales Manager' configuration screen. At the top, there are tabs for Details, Core Records, Marketing, Sales, and Service. Below this, under 'Miscellaneous Privileges', several options are listed with their status indicated by colored circles (red for none selected, green for user, yellow for business unit). A blue box highlights the 'View Audit History' and 'View Audit Summary' entries, both of which have green circles. At the bottom, a 'Key' section defines the color coding: red for 'None Selected', yellow for 'User', and yellow with a plus sign for 'Business Unit'.

Miscellaneous Privileges	Status
Add Reporting Services Reports	○ (Red)
Delete Audit Partitions	○ (Red)
Promote User to Microsoft Dynamics CRM Administrator Role	○ (Red)
Publish E-mail Templates	● (Green)
Publish Reports	○ (Red)
View Audit History	● (Green)
View Audit Summary	○ (Red)

Key
○ None Selected ● User ○ Business Unit

- Privileges are defined on system level, not per entity or field
- Complete audit summary can be hidden from normal system users

Limitations

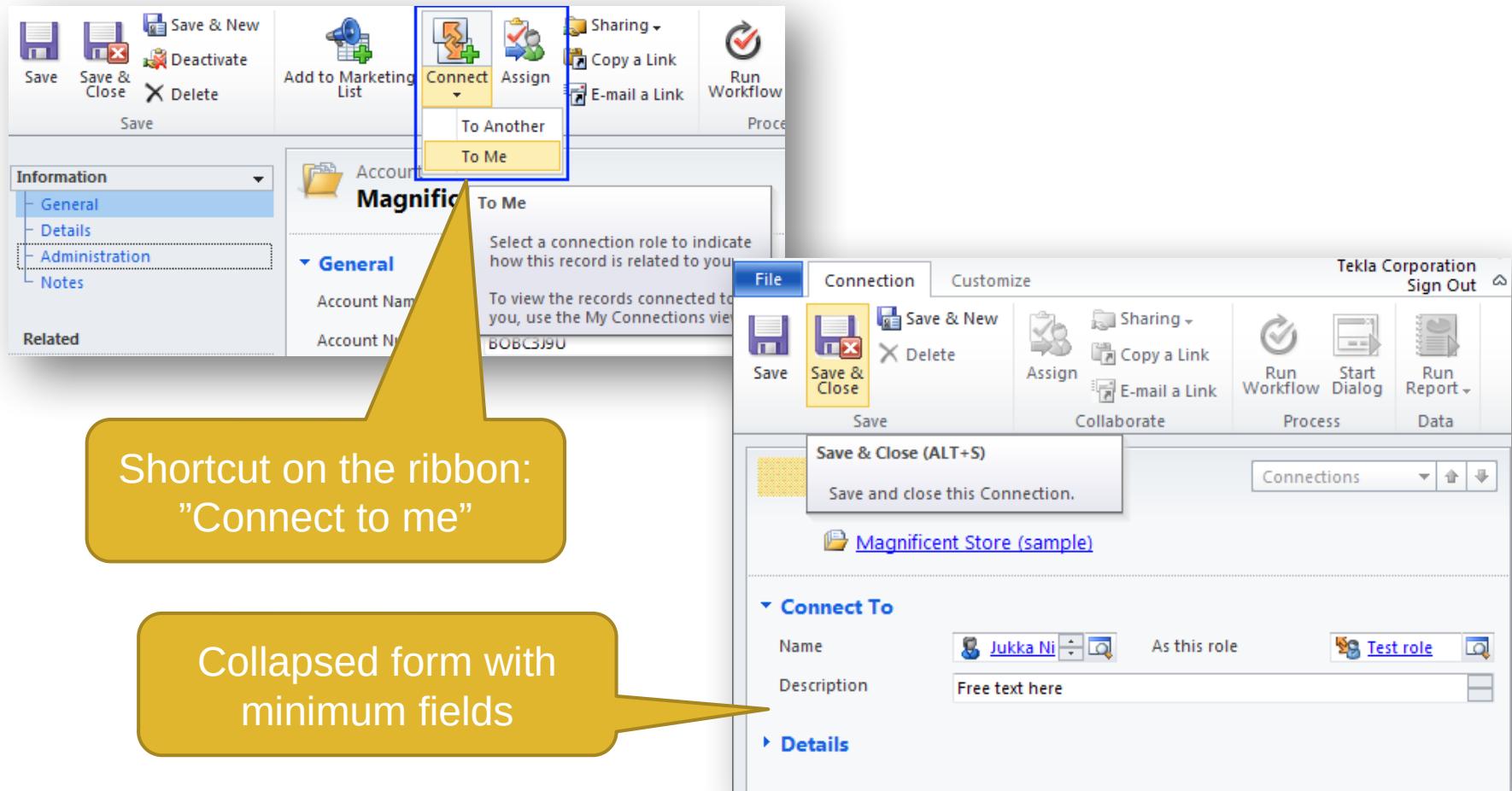
- Audit data is not available in Advanced Find queries, nor for reporting
- FilteredAudit view does not surface all relevant fields from the tables
- Audit records and record details can be retrieved through SDK
- Some system fields do not allow changing auditing settings other than on per entity level

Connections

Connections vs. Relationships

- Replaces the Customer Relationships feature that was limited to accounts, contacts and opportunities
- Connections can be formed between any entity (default and custom)
- However, the old Relationship remains in the schema for backward compatibility purposes
 - Default security roles will not even show the Relationship data to normal users, but of course admins will have them in the UI
- Relationships will be deprecated in future CRM versions, data should be migrated to Connections

Quick-create a Connection



Relationship roles

The screenshot shows the Microsoft Dynamics CRM 2011 interface for creating a new Connection Role. On the left, a list of connection roles is displayed, with 'Influencer' selected. A blue box highlights the 'New' button in the toolbar. On the right, the 'Connection Role: Test sales role 2' form is open. The 'General' tab is selected, showing fields for Name (Test sales role 2), Connection Role Category (Sales), and Description. A large yellow callout bubble points to this section with the text: 'Role data is stored on the solution, i.e. records are portable'. Below the general tab, the 'Matching Connection Roles' tab is visible. The status bar at the bottom indicates 'Working on solution: Default Solution'. A second yellow callout bubble points to the 'New' button in the toolbar with the text: 'Unlike Relationship roles, new Connection roles can be created by a user'.

Look for: Connection Role
View: Applicable Connection Roles
Search: Search for records

Name

- Test role
- Employer
- Partner
- Former Employer
- Referral
- Influencer**

1 - 7 of 7 (1 selected)

Properties New

Connection Role: Test sales role 2

E 32 E Information

E Information

E General Matching Connection R...

E Related

Common

Audit History

Processes

Workflows Dialog Sessions

Step 1: Describe the connection role

Name * Test sales role 2

Connection Role Category Sales

Description

Step 2: Select record types

All

Only these record types:

- Account
- Appointment
- Campaign
- Campaign Activity
- Case
- Competitor
- Contact
- Contract
- Custom Activity
- Dialog Session

New Add Existing Run Workflow... Start Dialog More Actions ▾

Name Connection Role Category Status

Working on solution: Default Solution

Unlike Relationship roles, new Connection roles can be created by a user

Role data is stored on the solution, i.e. records are portable

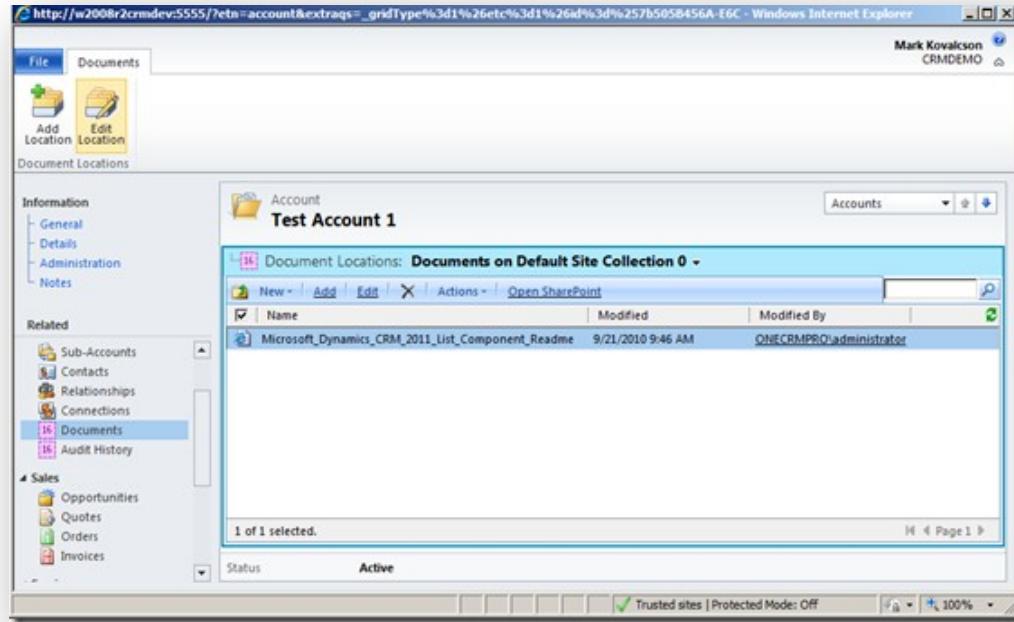
SharePoint Integration

Features

- Integration to Document Library functionality only
- Supports MOSS2007 and SP2010
 - iFrame & default chrome in MOSS2007
- Automatic folder creation
 - Folder naming: Account, contact or custom entity
 - Required the list component, which is only available for SP2010
- Documents can be attached to multiple locations
 - However, automatic folders support only one location
- Entities can be enabled for SharePoint integration in configuration

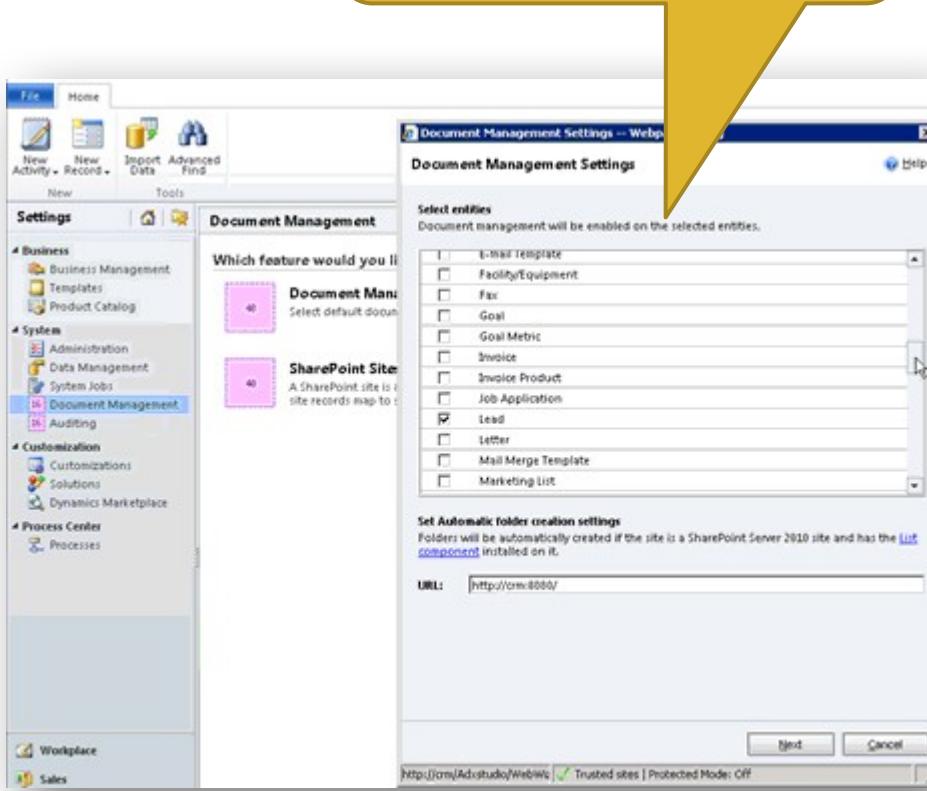
SharePoint List Component

- See blog post by Mark Kovalcson on the component installation process:
 - <http://crmscape.blogspot.com/2010/09/ms-crm-2011-sharepoint-list-component.html>



Document management settings

Select entities to be enabled for Document Management



Define folder structure to be used in path names



No security integration

- CRM and SharePoint security settings are not synchronized in any way
- User rights to the CRM record and the SharePoint site where documents are stored will have to be managed independently from one another
- Especially with MOSS2007, the iFrame will allow users to navigate to any site/library, so UI cannot be utilized as a "soft" security measure

CRM data in SharePoint

- BDC was not included in WSS 3.0, whereas BCS (Business Connectivity Services) is included in the new SharePoint Foundations
- With the help of Search Server Express 2010 this will allow building "Google style" global free-text search for CRM data
- Note: SP2010 uses .NET 3.5, while CRM 2011 is built on .NET 4

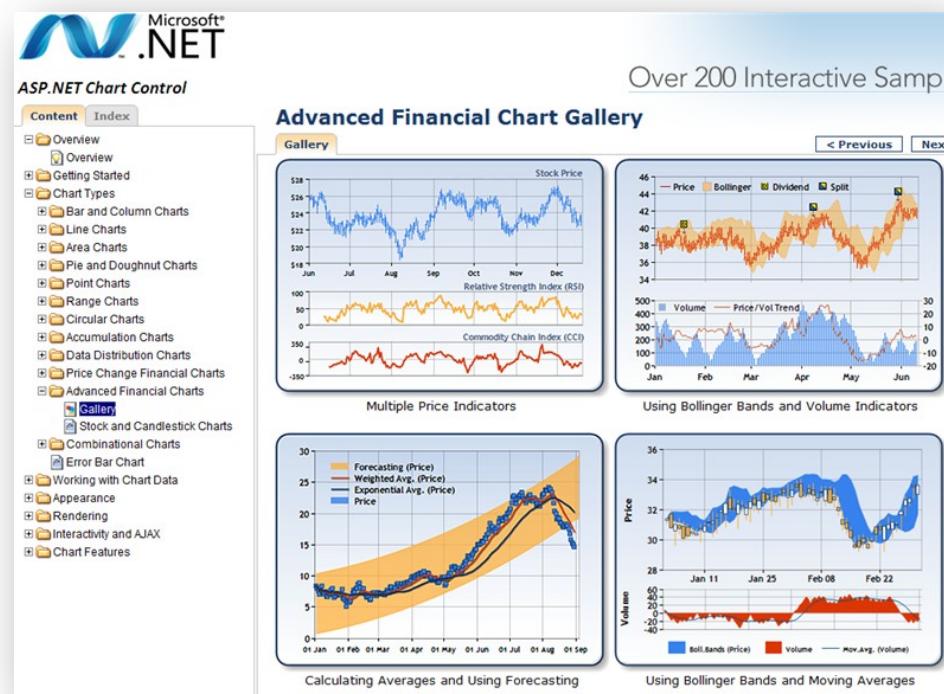
Visualizations

Charts and grids

- CRM visualizations are attached to entities
- Default visualizations = charts with GUI editor
- Also Web Resources can be used as visualization components through SDK
- Charts are integrated with grids, displaying the same data that is defined in the view query criteria
- Drilling down on a chart updates the grid, filtering the grid updates the chart

Chart controls

- Built on Microsoft Chart Controls for .NET Framework 3.5
- Included types out-of-the-box: column, bar, line, pie, funnel
- CRM supports single-series and multi-series charts, but not multi-category



See <http://code.msdn.microsoft.com/mschart> for sample downloads on MS Chart Controls for .NET 3.5

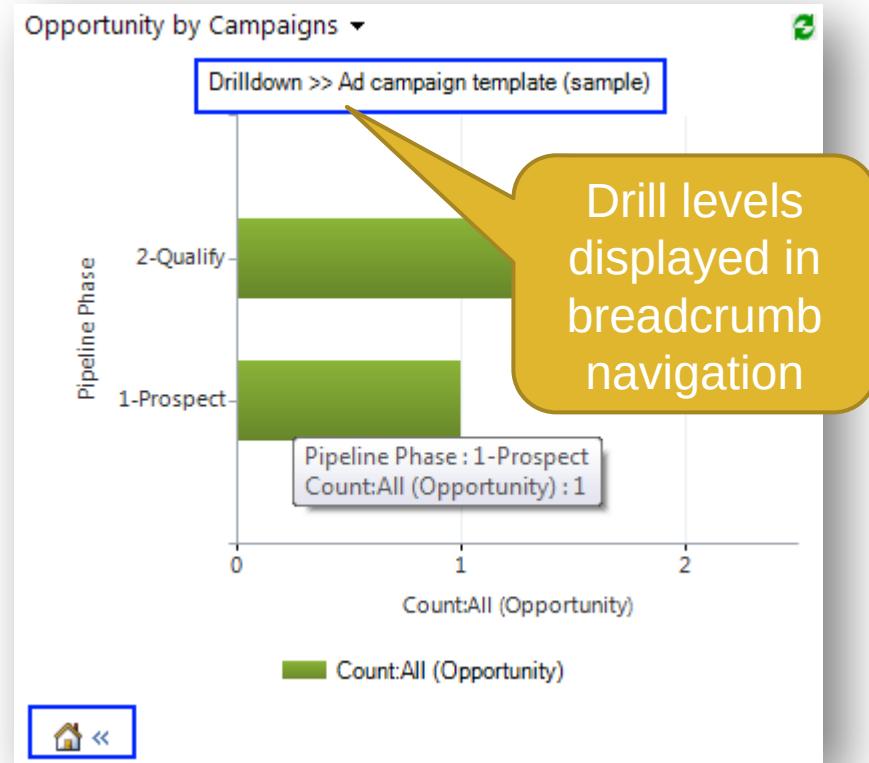
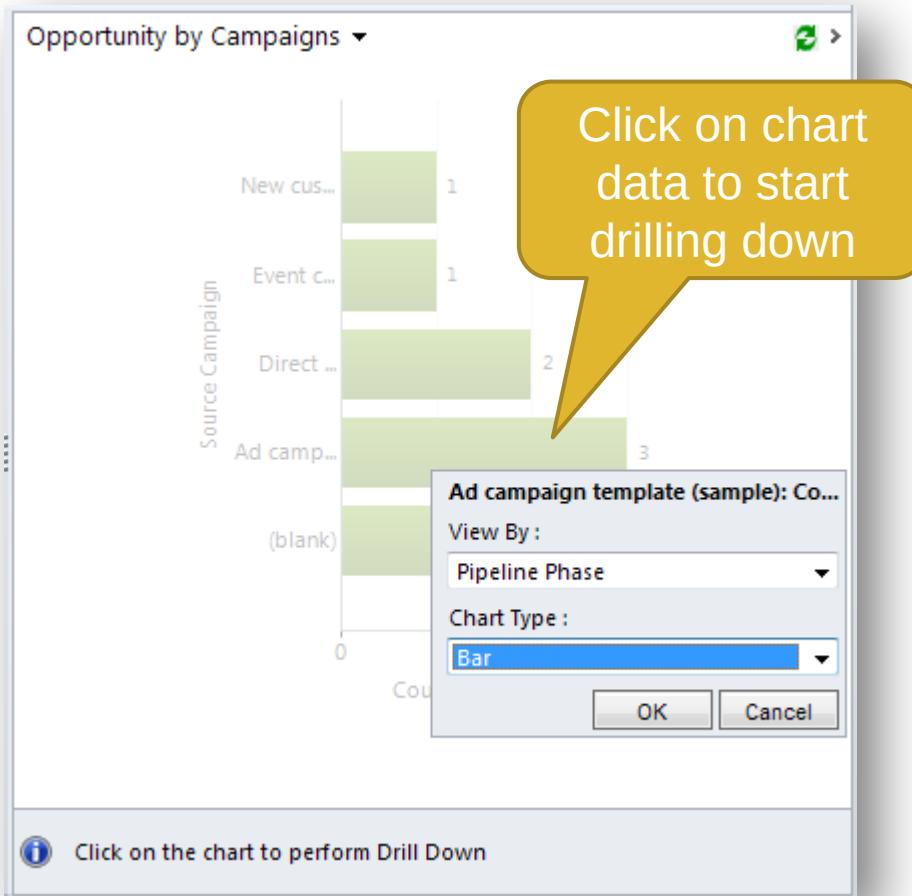
Viewing charts on grids

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The top navigation bar has tabs for File, Accounts, View, Create Related, and Customize. The View tab is highlighted with a blue border. A yellow callout bubble points to this tab with the text: "Editing controls are under the View tab". Below the navigation bar is a toolbar with icons for Set As Default View, Refresh, Filter, Save Filters to Current View, Save As, Create Personal View, Charts, New Chart, Save As, Edit, Delete Chart, Share This Chart, Import Chart, Assign, and Export Chart. The main area is titled "Workplace" and shows a grid of "My Active Accounts". The grid columns include Account Name, Main Phone, and Address 1: City. To the right of the grid is a chart titled "Accounts By Territories". The chart is a horizontal bar chart with three bars labeled South (4), North (1), and East (10). A yellow callout bubble points to the chart area with the text: "Existing charts can be pulled from right side of the grid". On the left side, there is a sidebar with sections for Queues, Articles, Reports, Announcements, Customers (Accounts is selected), Contacts, Sales (Workplace is selected), Marketing, Service, and Settings.

Editing controls are under the View tab

Existing charts can be pulled from right side of the grid

Drilling down



Creating new personal charts

The screenshot shows the Microsoft Dynamics CRM 2011 interface with a yellow header bar. The main area displays a pie chart titled "Est. Revenue by Pipeline Phase". The chart has three segments: a large red segment labeled "175 000,00 €", a green segment labeled "85 000,00 €", and a purple segment labeled "36 000,00 €". Below the chart, the legend entries are listed as "Est. Revenue" and "Sum". The "Advanced Options" section includes fields for "Horizontal (Category) Axis Label" set to "Pipeline Phase" and "Legend Entries (Series)" dropdowns for "Est. Revenue" and "Sum". A tooltip "Select fields and values" points to the "Advanced Options" section.

File Opportunities View Create Related Customize Chart Tools Design Jukka Niiranen Sign Out

Save Save and Close Save As Column Bar Line Pie Funnel Close Designer Close

Sales Leads Opportunities Accounts Contacts Marketing Lists Competitors Products Sales Literature Quotes Orders Invoices Quick Campaigns Goals Goal Metrics Rollup Queries

Opportunities: My Open Opportunities

Search for records

Chart Designer

Est. Revenue by Pipeline Phase

Advanced Options Show

Legend Entries (Series)

Est. Revenue Sum

Horizontal (Category) Axis Label Pipeline Phase

Legend Entries (Series)

Est. Revenue Sum

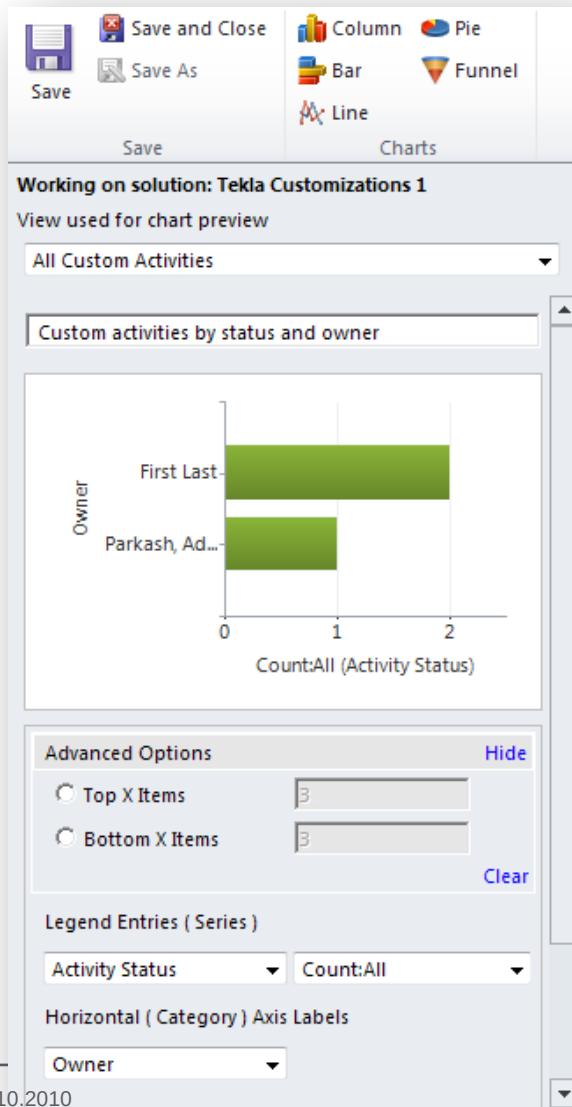
Avg Count:All Count:Non-empty Max Min Sum

1 - 8 of 8 (1 selected) Page 1

Define chart type

Select fields and values

Creating new system charts



- Defined in entity customizations, included as a solution file component
- Note: view selection setting is for preview only, as charts consume data from the views the user selects

Custom charts

The screenshot shows the Microsoft Dynamics CRM interface. On the left, there's a sidebar with navigation links like Home, Opportunities, Accounts, etc. The main area has a ribbon with 'Charts' selected. Below the ribbon, there's a toolbar with icons for Charts, New Chart, Save As, Edit, Delete Chart, Assign, Import Chart, and Export Chart. The 'Import Chart' and 'Export Chart' buttons are highlighted with a yellow box. To the right of the toolbar, there's some FetchXML code. A context menu is open over the XML code, with 'Export Chart' highlighted. Below the XML code, there's a bar chart titled 'Member Demographics'. The chart has three bars: Fitness (Avg (No. of Children) = 5), Downtown (Avg (Annual Income) (\$) = \$52,494.79), and Orange (Avg (Annual Income) (\$) = \$69,441.49). The chart also includes a line graph and a legend.

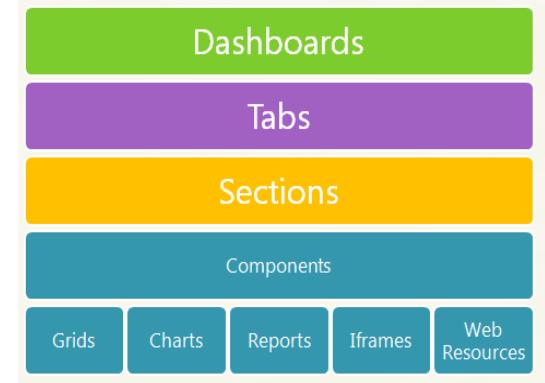
```
<visualizations>
<visualizationid>
<name>Opportunities</name>
<description>Potential opportunities by customer</description>
<primaryentitytypecode>opportunity</primaryentitytypecode>
<datadescription>
<datadefinition>
<fetchcollection>
<fetch mapping="logical" count="10" aggregate="true">
<entity name="opportunity">
<attribute name="estimatedvalue" aggregate="sum" alias="sum_estimatedvalue" />
<attribute name="customerid" groupby="true" alias="customerid" />
<order alias="sum_estimatedvalue" descending="true" />
</entity>
</fetch>
</fetchcollection>
<categorycollection>
<category>
<measurecollection>
<measure alias="sum_estimatedvalue" />
</measurecollection>
</category>
</categorycollection>
</datadefinition>
</datadescription>
<presentationdescription>
<Chart>
<Series>
<Series ChartType="Bar" ID="189">
<BackGradientStyle>TopBottom</BackGradientStyle>
<BackSecondaryColor>112, 142, 50</BackSecondaryColor>
<Font>66</Font>

```

- Chart definitions can be exported and imported
- Query criteria can be modified using FetchXML to retrieve data not allowed by the simplified chart designer
- Also presentation can be modified with parameters in the XML

Dashboards

- Collections of visualization components that can be built and configured by the CRM end-user
- Supported content types: charts, grids, iFrames, web resources (html, scripts, Silverlight...)



Creating a new dashboard (1)

Select Dashboard Layout

Select a layout for your dashboard. You can use this as your initial outline, and then resize, add, or rearrange the components within this layout.

The interface displays seven layout options:

- 3-Column Regular Dashboard
- 4-Column Focused Dashboard
- 4-Column Overview Dashboard
- 2-Column Regular Dashboard** (highlighted with a blue border)
- 3-Column Overview Dashboard
- 3-Column Focused Dashboard

On the right, a preview area shows four cards representing different dashboard types:

- Grid-based dashboard with horizontal bars
- Bar chart with multiple series
- Bar chart with fewer series
- Donut chart and a small grid icon

2-Column Regular Dashboard

This layout can accommodate components across two columns.

- Select from predefined layout options

Creating a new dashboard (2)

The screenshot shows the Microsoft Dynamics CRM 2011 interface for creating a new dashboard. The top navigation bar includes 'File', 'Dashboard' (selected), 'Save', 'Close', 'Dashboard Properties', 'Edit Component', 'Remove', 'Undo', 'Redo', 'Chart' (selected), 'List', 'Web Resource', 'IFrame', 'Increase Width', 'Decrease Width', 'Increase Height', 'Decrease Height', and 'Layout'. The main area displays 'TestDashboard1' with a 'Tab' section containing a 'Section' title. Three components are visible: 'Incoming Lead Analysis by Month' (a bar chart showing 13 leads for 'sys 2010'), 'Top 10 Opportunities' (a bar chart showing estimated revenue for various opportunities), and an 'Activities' section with three columns labeled 'Column', 'Column', and 'Column'. Callout boxes provide instructions: 'Add components on the dashboard' points to the section where components are listed; 'Modify tab and section titles' points to the 'Tab' and 'Section' titles; and 'Adjust component size on the form' points to the 'Layout' tools in the ribbon.

Add components on the dashboard

Modify tab and section titles

Adjust component size on the form

Incoming Lead Analysis by Month

Month (Created On)	CountAll (Lead)
sys 2010	13

Top 10 Opportunities

Topic	Est. Revenue
6 orders of Pr...	10 000,00 €
Jukka Test Acc...	15 000,00 €
Will be orderi...	25 000,00 €
Needs to resto...	25 000,00 €
They sell many...	26 000,00 €
Will order som...	30 000,00 €
Very likely wi...	30 000,00 €
Will expand th...	150 000,00 €

Activities

Column Column Column

Creating a new dashboard (3)

Configure data sources for charts

Sub-Grid Properties
Modify this Sub-Grid's properties.

Name
Specify a unique name.
Name * Component18352cc

Name
Label * New Accounts By Month
 Display label on the Dashboard

Data Source
Specify the primary data source for this sub-grid.
Records All Record Types
Entity Accounts
Default View Active Accounts

Additional Options
 Display Search Box
 Display Index
 Display View Selection

System Views
Accounts: Influenced Deals That We Won
Accounts: No Campaign Activities in Last 3 Months
Accounts: Responded to Campaigns in Last 6 Months

Chart Options
Default Chart New Accounts By Month
 Show Chart Only
 Display Chart Selection

Configure chart type

Configure options visible on the dashboard

Goals

Features

- Goal management: set targets, measure results
- Track actual, in-progress or custom data
- Hierarchies:
 - Parent and child goals
 - Roll up goal totals to parent
 - Goal manager has editing rights, Goal owner can only read and append
- Connected to CRM fiscal period or custom period

Goal data structure

- Goal: target figures
 - "X qualified web leads in period Y"
- Goal Metric: target data type (amount or count)
 - "Lead records, by status, per creation date"
- Rollup Query: record set to calculate the metric from
 - "All leads where source = web"

Goals and goal metrics records

Information

- General
- Time Period
- Targets
- Child Goals
- Actuals
- Goal Criteria
- Notes

Related

- Common
 - Connections
 - Audit History
- Participating Records
 - Actual (Integer)
 - In-progress (Integer)
- Processes
 - Workflows
 - Dialog Sessions

Goal

Qualified leads Q4 2010

Goals

General

Name * Qualified leads Q4 2010

Parent Goal

Goal Metric * [Number of qualified leads](#)

Goal Owner * [Jukka Niiranen](#)

Manager * [First Last](#)

Time Period

Goal Period Type Custom Period Fiscal Period

Fiscal Period * Quarter 4

Fiscal Year * FY2010

From 1.10.2010 To 31.12.2010

Targets

Target (Integer) 10

Goal Metric

Number of qualified leads

General

Step1 : Define the metric

Name * Number of qualified leads

Metric Type * Count Amount

Amount Data Type

Track Stretch Target

Rollup Fields

Step2 : Define the rollup fields for this metric to track the target's actual and in-progress values

	Rollup Field	Source Record Type	Source Field	Source Record Type State	Source Record Type Status
<input type="checkbox"/>	Actual (Integer)	Lead		Qualified	Qualified
<input type="checkbox"/>	In-progress (Integer)	Lead		Open	New

To be continued in part
2...

Working with Microsoft Dynamics CRM, day in day out



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Outlook 2007 with Dynamics CRM 2011: will it blend?

2 comments

Posted on 16th September 2010 by Jukka Niiranen in Features

CRM 2011, Office, Outlook, UI

Perhaps the most visible improvement in Microsoft Dynamics CRM 2011 for the end user is the completely revamped Outlook client. Instead of merely wrapping the CRM web client UI inside the Outlook frame with stripped navigation and giving you the all important tracking buttons, the new Outlook client promises additional usability features over the web client. In the demos we've seen, things certainly do look pretty with Outlook 2010, but one question remains: will it blend with the previous versions of Outlook?

Here's a reminder of what Dynamics CRM 2011 Outlook client delivers with Outlook 2010:

The screenshot shows the Microsoft Dynamics CRM 2011 Outlook client. The ribbon menu is visible at the top with tabs like Opportunities, View, Create Related, Customize, etc. Below the ribbon is a toolbar with icons for Settings, Reverse Sort, Add Column, Expand/Collapse, and Arrangement. The main area displays a list of opportunities. A filter bar at the top of the list allows searching by topic, potential customer, edit close date, edit revenue, and probability. The list includes items such as '18 Touring bike thru summer', '25 Mountain bikes and at least 5 road bikes. Some inter...', '25 Road Bikes next quarter', '39 Bike orders - probably road and touring.', '24 road bike road bike', '4 Lower level touring bikes', '44 High end road bikes', '5 Road-250 bikes: Needs a discount to get him on board.', '5 Touring Bikes - medium and lower level', and '50 mountain bikes'. Each item has a small thumbnail image, a title, and some details about the customer and date.

Subscribe to my blog:
Surviving CRM <http://niiranen.eu/crm>

Follow my #MSDYNCRM tweets
on <http://twitter.com/jukkan>

The screenshot shows a Twitter search results page for the query "#msdyncrm from:jukkan". The search bar at the top contains the query. Below the search bar, there are buttons for "Back to Home" and "Save this search". The results list several tweets from the user "jukkan" (Jukka Niiranen). The tweets are as follows:

- jukkan** Jukka Niiranen

Amazon UK starts free shipping Finland, 2 weeks after I made my last physical Amazon order e (Kindle) <http://bit.ly/9ckK8x> 20 hours ago
- jukkan** Jukka Niiranen

Lotus Notes is in the cloud now <http://www.to/b1ptQF> But can the stop hating it after all these years <http://lotusnotesucks.4...> yesterday
- jukkan** Jukka Niiranen

Microsoft BPOS waiting for Exchange 2010 update over a year now, whereas CRM 2011 should launch Online before on-premises. Hmm... #MSDYNCRM from Eteläinen, Helsinki 10 Oct
- jukkan** Jukka Niiranen

Video of MS CRM 2011 Online reporting features: <http://t.co/IZjoJ5mN> Includes FetchXML export to VS, embedding RDLs to dashboards #MSDYNCRM 9 Oct
- jukkan** Jukka Niiranen

Finally! Dynamics CRM 2011 now displays the total number of records in the view ("1-50 of 99") #MSDYNCRM #CRM2011 <http://yfrog.com/6z7oup> 6 Oct
- jukkan** Jukka Niiranen

Date fields not supported in Dynamics CRM 2011 process dialogs: <http://bit.ly/crM9cl> - Well, there goes my use cases then #MSDYNCRM #CRM2011 5 Oct