



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



Microsoft Dynamics CRM

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



Microsoft Dynamics CRM

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

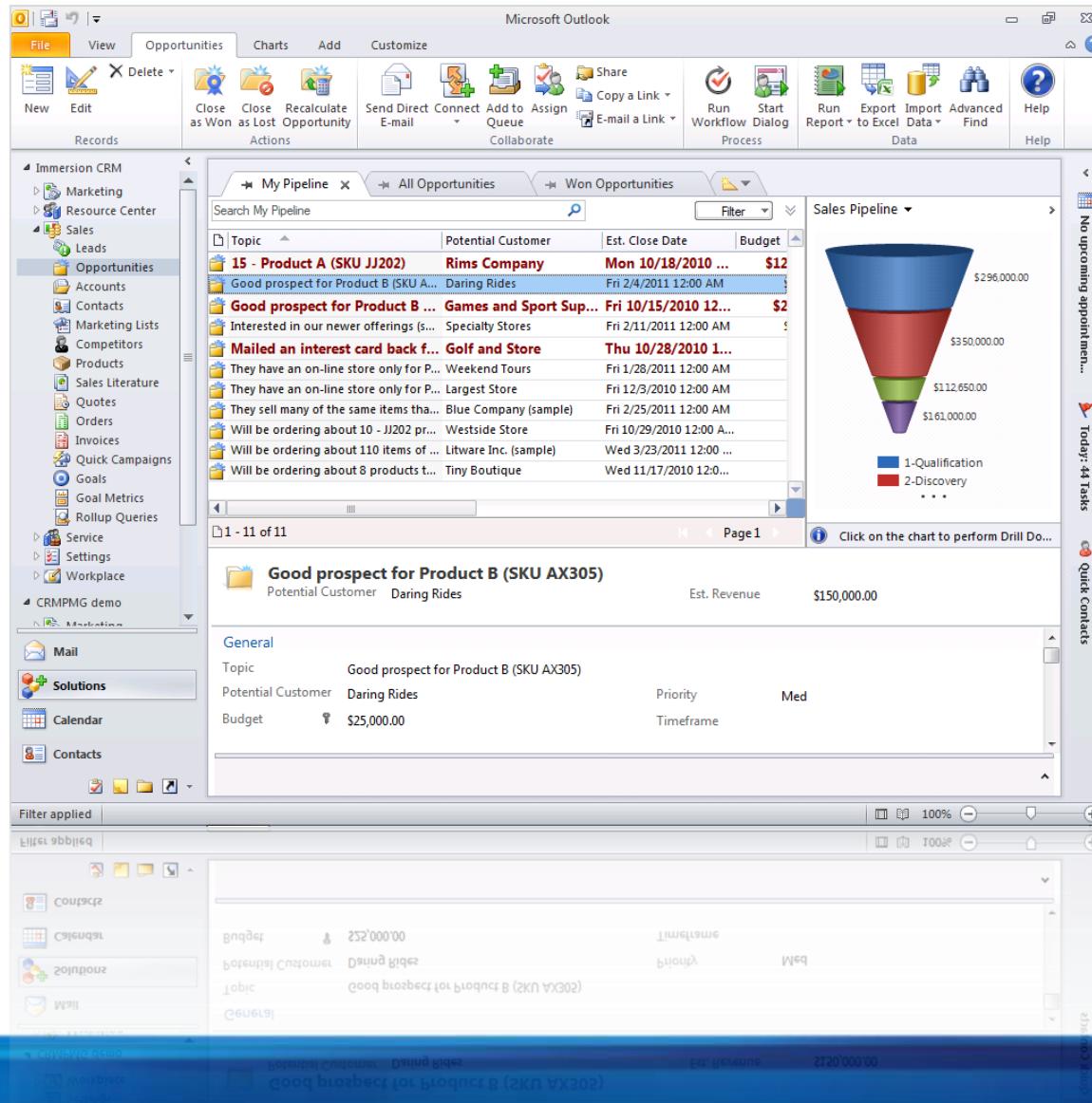
CONNECTED

Office Fluent UI

The screenshot shows the Microsoft Dynamics CRM application interface using the Office Fluent UI. The top navigation bar includes 'File', 'Opportunity', 'Add', 'Customize', 'List Tools' (selected), and 'Opportunity Products'. The ribbon tabs are 'Records', 'Collaborate', 'Current View', 'View', 'Process', and 'Data'. The main content area displays an opportunity record for '15 - Product A (SKU JJ202)' with details like Potential Customer (Rims Company), Est. Revenue (\$112,500.00), and Est. Close Date (10/18/2010). The 'General' section contains fields for Topic, Potential Customer, Budget, Priority, and Forecast Information. The 'Line Items' section shows a sub-grid for 'Wholesale' products, with one item selected: 'Product A (SKU JJ202)' at \$7,500.00 per unit, 15 units, and a total of \$112,500.00. The bottom part of the screen shows a list of opportunities.

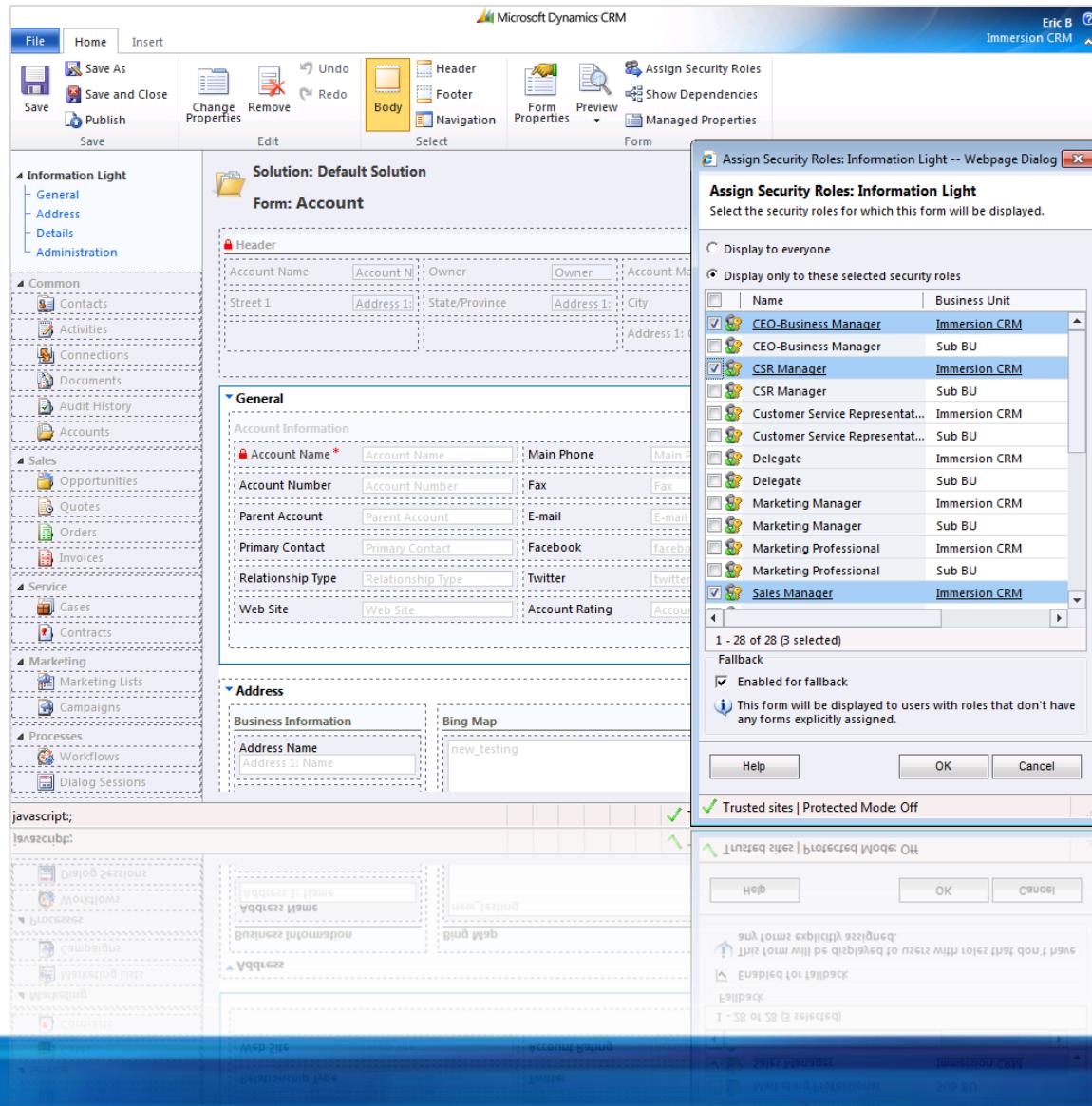
- Streamlined UI
- Expandable/contractible forms
- Contextual Ribbon
- Embedded sub-grids

Next-Generation Outlook Client



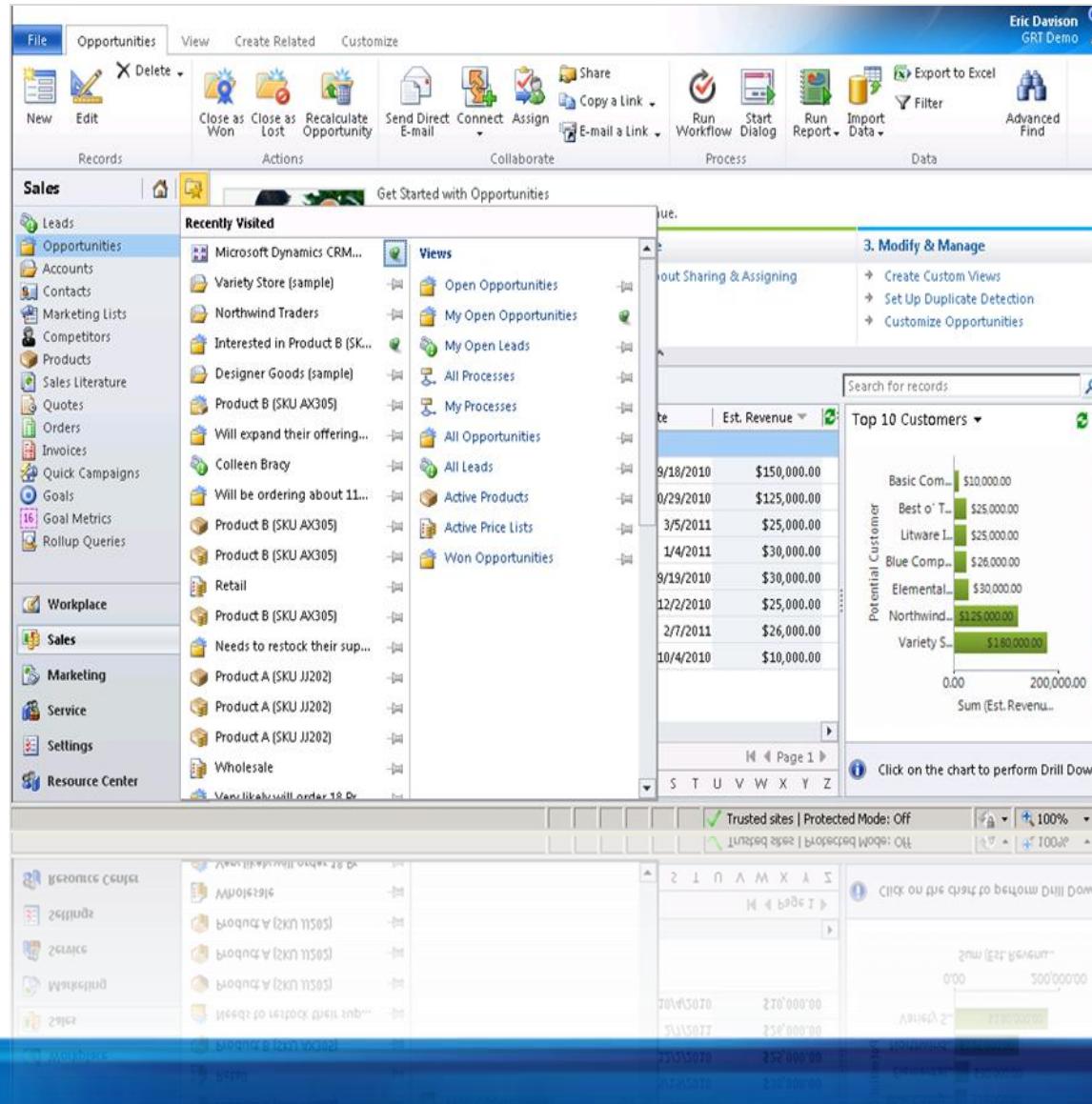
- True native Outlook experience
- Advanced Personalization
- Preview panes
- Outlook reminders on CRM records

Role Tailored Forms



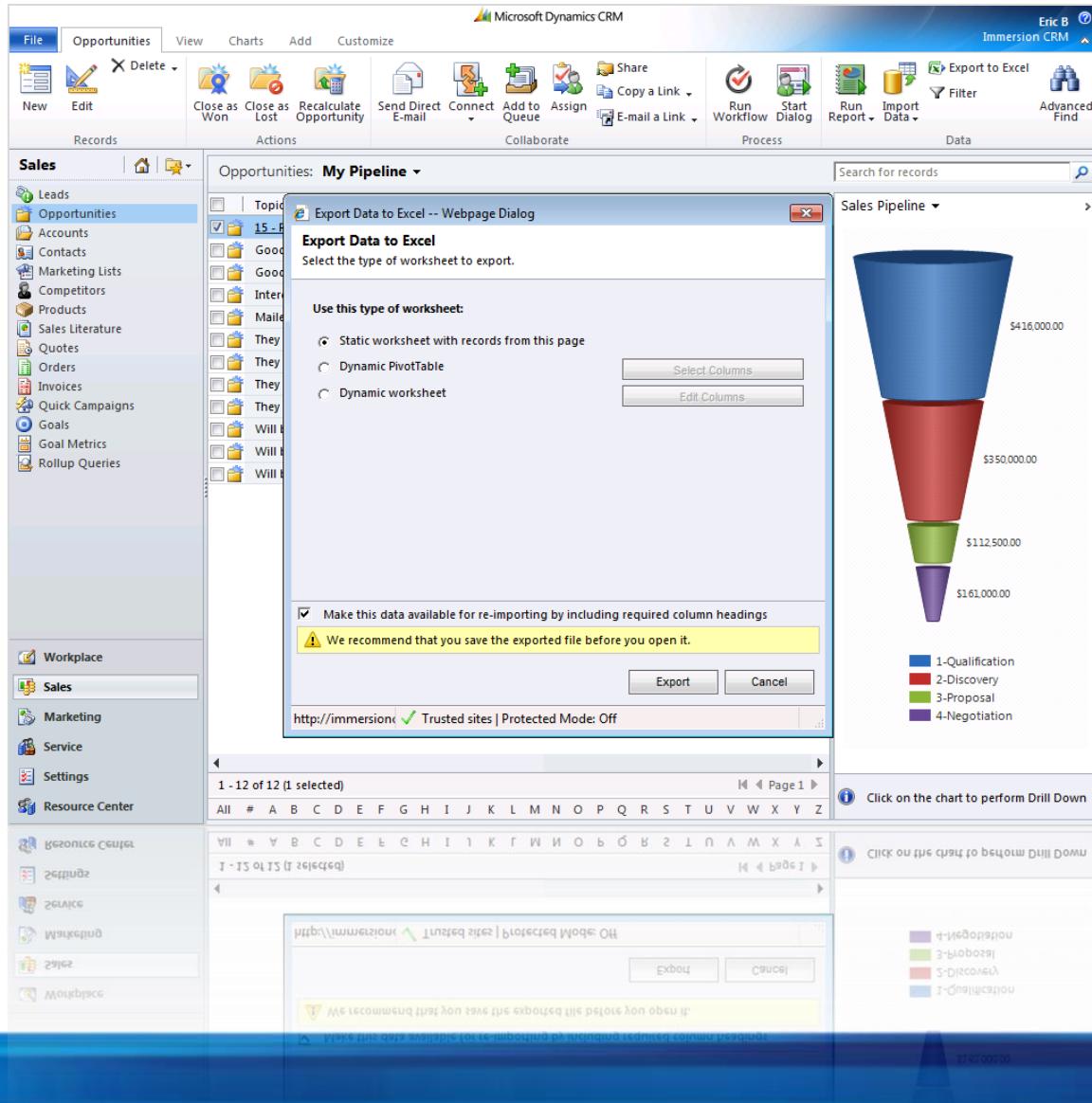
- **Role-based forms**
- **Multiple forms per entity**
- **Drag n' Drop creation**
- **Web and Mobile support**

Enhanced Navigation



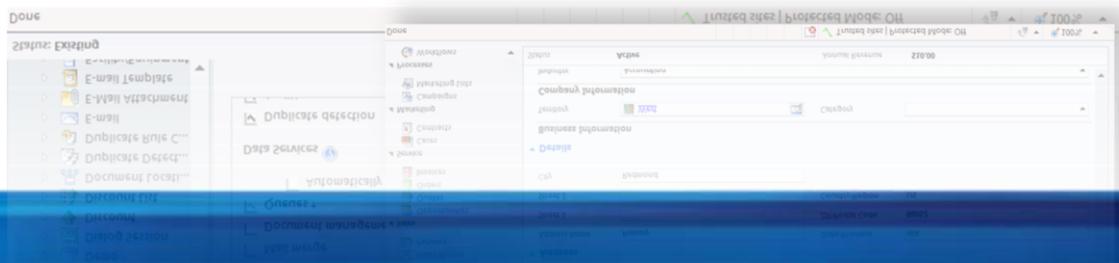
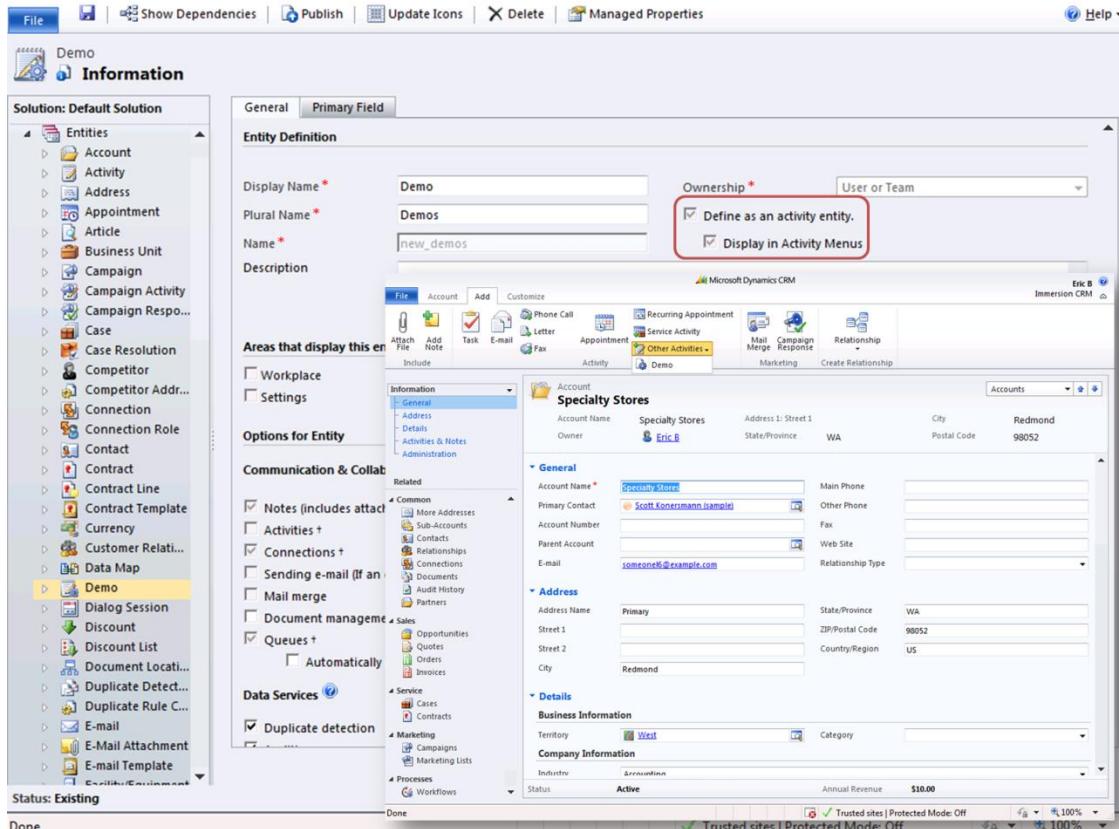
- Personal views
- Record pinning
- Most-Recently Used lists
- Real-time record filtering

Data Export/Import



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

Flexible Activities



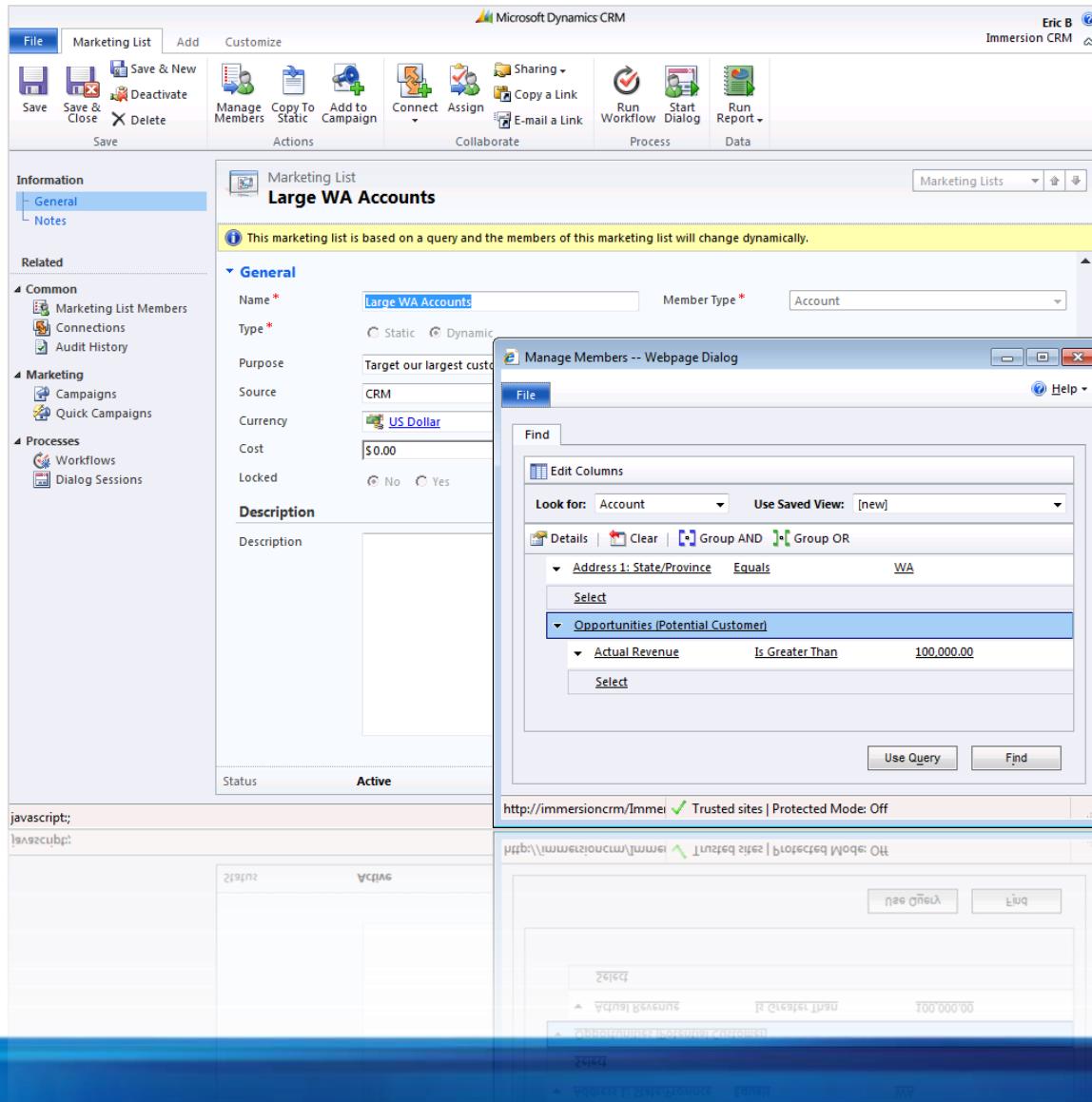
- Custom activities support
- Bulk actions (complete, cancel, Set Regarding)
- Event driven activities (i.e. case resolution)
- Re-occurring appointments

Products and Pricing Improvements

The screenshot shows the Microsoft Dynamics CRM interface for managing products. The main title bar reads "http://immersioncrm/?etn=product&extraqs=_gridType%3d1024%26etc%3d1024%26id%3d%257b57198D7C-8BC - Windows Internet Explorer". The ribbon menu has "Product" selected. The left sidebar shows navigation categories like "Information", "Related", "Common", "Sales", "Processes", and "Actions". The main content area displays a product record for "Product A - Kit". The "General" tab is active, showing fields such as ID (1), Name (Product A - Kit), Subject (Kit), Unit Group (Default Unit), Default Unit (Each), Quantity On Hand (475.00), URL, and Currency (US Dollar). The "Costs" section includes fields for Default Price List (Retail), Decimals Supported (2), List Price (\$25,000.00), Standard Cost (\$22,500.00), and Current Cost (\$15,000.00). The "Kit Products" section lists two components: Product A (SKU JJ202) and Product B (SKU AX305), both categorized under Sales Inventory. The status is set to Active. The bottom status bar indicates "Trusted sites | Protected Mode: Off" and "100%".

- 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



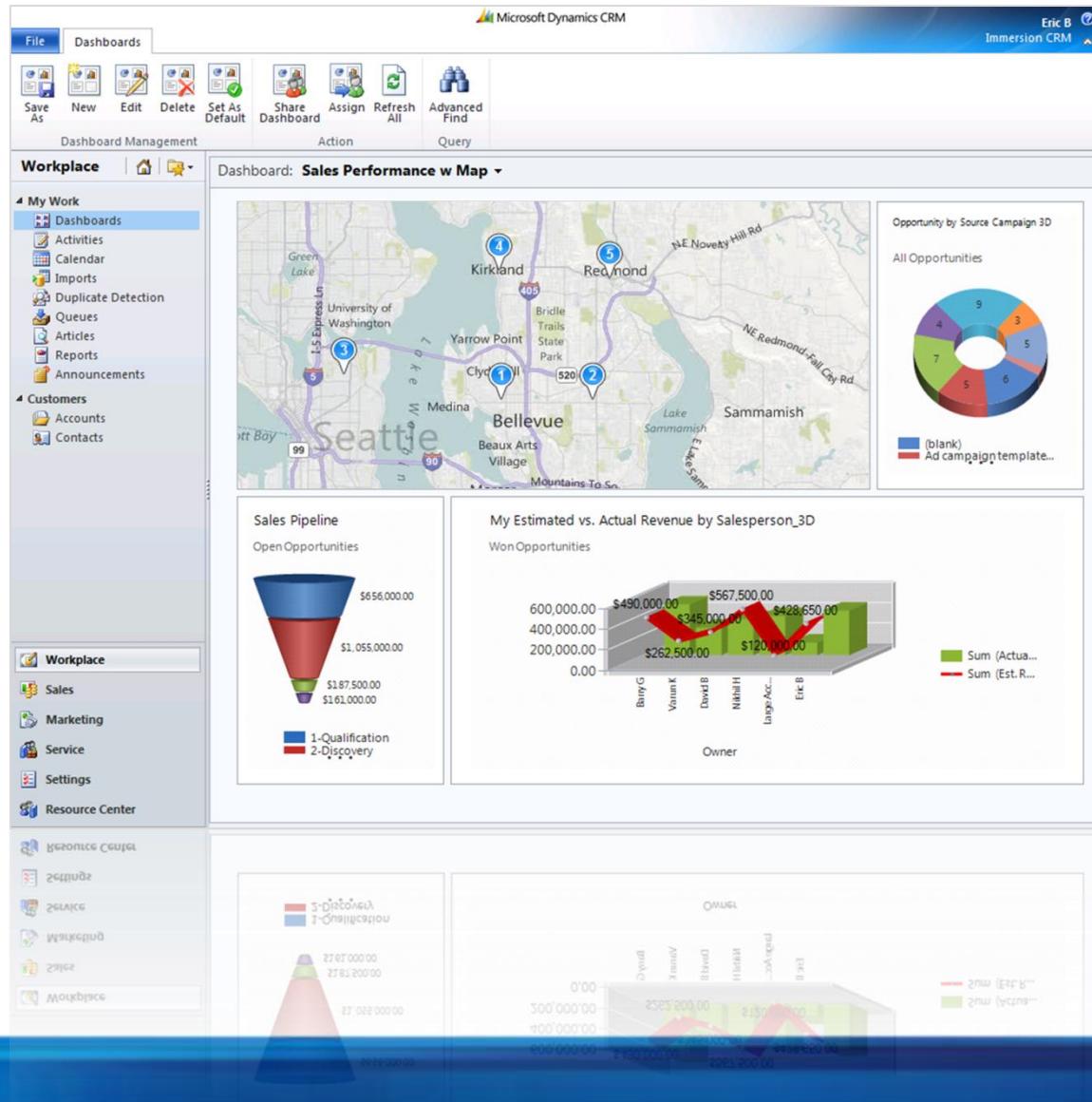
INTELLIGENT

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

CONNECTED

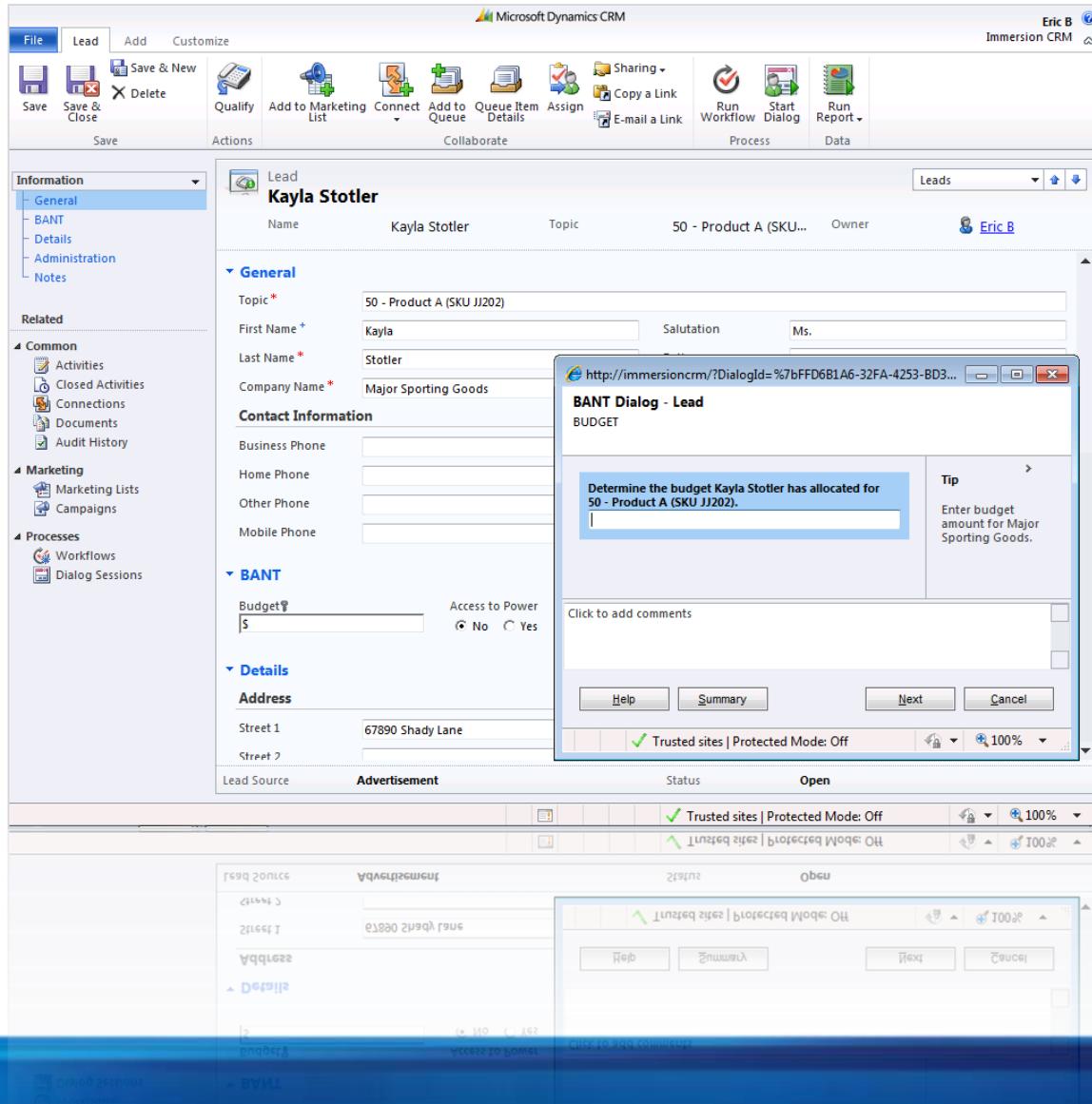


Real-Time Dashboards



- **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

The screenshot shows the Microsoft Dynamics CRM interface with several inline visualizations:

- Left Navigation Bar:** Sales, Workplace, Sales, Marketing, Service, Settings, Resource Center.
- Top Bar:** Leads, View, Charts, Add, Customize.
- Record List:** Leads: My Open Leads. A pie chart titled "Leads by Source 3D" is displayed next to the list, showing data for Advertisement, Seminar, Employee Referral, Partner, and Public Relations.
- Detail View:** A detailed view of a lead record for Kim Abercrombie, showing topics like "Restock of JJ202" and "Interested in Product B (SKU AX305)".
- Bottom Grid:** A grid of leads with names like Kelli Stoffler, Karen Merton, and Kim DeGraw.

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

Conditional Formatting

The screenshot shows the Microsoft Dynamics CRM interface. On the left, there's a navigation pane with sections like Immersion CRM, Sales, and Solutions. The main area displays a list of 'My Open Leads' with columns for Name, Topic, Status Reason, and Lead. A pie chart titled 'Leads by Rating' is overlaid on the list, divided into three segments: Cold (blue), Hot (red), and Warm (green). Below the list, a detailed view for 'Kim Abercrombie' is shown with fields for General information like Topic, Given Name, Family Name, Company Name, and Currency. At the bottom, there's a grid of small icons representing various CRM features.

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

Goal Management

Sales

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

Workplace
Sales
Marketing
Service
Settings
Resource Center

Records

File Goals View Charts Add Customize

New Edit Activate Close Goal Delete Recalculate Connect Change Goal Manager Share Copy a Link Run Workflow Start Dialog Run Report Import Data Filter Advanced Find

Actions Collaborate Process Data

Goals: Active Goals

	Name	Goal Owner	Fiscal Period	Fiscal Year
<input checked="" type="checkbox"/>	Nikhil's Q3 Goal	Nikhil H	Quarter 3	FY2010
<input type="checkbox"/>	Corporate Goal for Q3 - 2010	Bill P	Quarter 3	FY2010
<input type="checkbox"/>	Eric's Q4 Goal	Eric B	Quarter 4	FY2010
<input type="checkbox"/>	Varun's Q4 Goal	Varun K	Quarter 4	FY2010
<input type="checkbox"/>	Nikhil's Q4 Goal	Nikhil H	Quarter 4	FY2010
<input type="checkbox"/>	Barry's Q4 Large Accounts	Barry G	Quarter 4	FY2010
<input type="checkbox"/>	Corporate Goal for Q4 - 2010	Bill P	Quarter 4	FY2010

Search for records

Goal Progress (Money)

Name	Target (Money)	Today's Target (Money)	In-progress (Money)	Actual (Money)
Eric's Q4 Goal	~400,000	~400,000	~400,000	~400,000
Varun's Q4 Goal	~200,000	~200,000	~200,000	~200,000
Nikhil's Q4 Goal	~300,000	~300,000	~300,000	~300,000
Nikhil's Q4 Large Accounts	~400,000	~400,000	~400,000	~400,000
Corporate Goal for Q3 - 2010	~800,000	~800,000	~800,000	~800,000
Corporate Goal for Q4 - 2010	~1,400,000	~1,400,000	~1,400,000	~1,400,000

1 - 7 of 7 (1 selected) Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Microsoft Dynamics CRM

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

Enhanced Queues

The screenshot shows the Microsoft Dynamics CRM interface for managing queues. The top navigation bar includes File, Queue Items, View, Charts, Add, and Customize. The Queue Items tab is selected. The ribbon below has sections for Records, Actions, Collaborate, Process, and Data. The left sidebar under 'Workplace' lists 'My Work' (Dashboards, Activities, Calendar, Imports, Duplicate Detection, Queues), 'Customers' (Accounts, Contacts), and 'Resource Center' (KPIs, Settings, Resource Center). The main area displays a grid of 'Queue Items: All Items' with columns for Title, Entered Queue, and Type. A checkmark is present next to the first item. To the right is a chart titled 'Records in Queue' showing the count of queue items across different queues: Large Accounts (2), Big Deal Opportunities (4), High Priority Cases (4), and Hot Leads Queue (7). A tooltip says 'Click on the chart to perform Drill Down'. At the bottom, there's a small preview of a grid with columns labeled A through Z.

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

Business Auditing

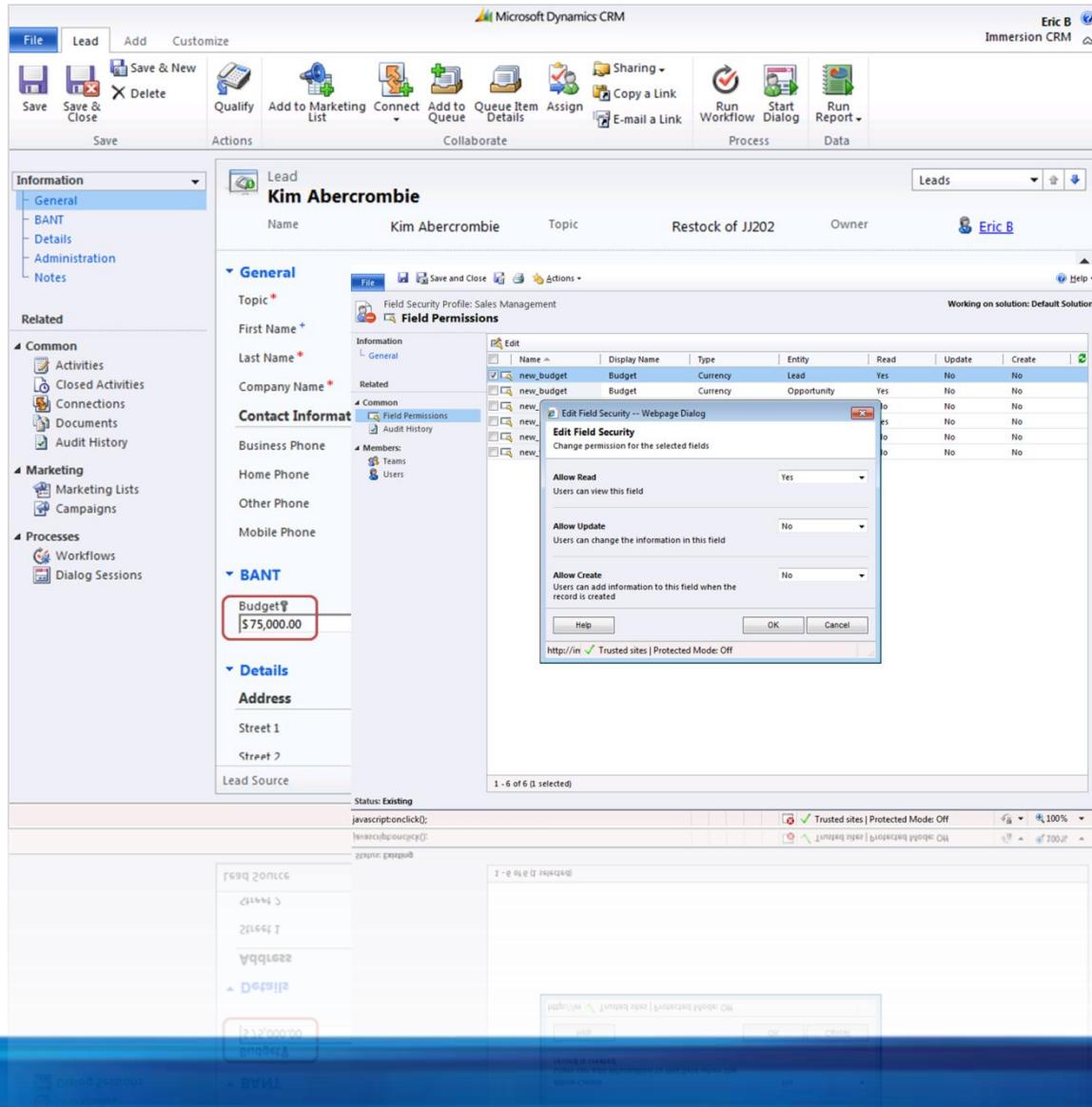
The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'File', 'Opportunity' (selected), 'Add', 'Customize', and user information 'Eric B' and 'Immersion CRM'. Below the navigation is a toolbar with actions like Save & New, Delete, Close as Won, Recalculate Opportunity, Connect, Add to Queue, Queue Item Details, Assign, Sharing, Copy a Link, Run Workflow, Start Dialog, Run Report, and Collaborate.

The main content area displays an 'Opportunity' record for '15 - Product A (SKU JJ202)'. The record details include 'Potential Customer: Rims Company', 'Est. Revenue: \$112,650.00', and 'Est. Close Date: 10/18/2010'. On the left, a sidebar shows 'Information' sections for General, Line Items, Notes & Activities, Quotes, and Preferences. Under 'Related' activities, 'Audit History' is selected. The audit history grid shows a list of changes made to the opportunity, such as updates to Budget and Est. Revenue, and creates for various related fields. The bottom of the grid shows '1 - 22 of 22 (1 selected)'.

The status bar at the bottom indicates 'Trusted sites | Protected Mode: Off' and shows system performance metrics: CPU: 0%, RAM: 100%, Disk: 0%, and Network: 0%.

- **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

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Connections

Contextual Document Mgmt

Social Media

Team Management

Declarative Design

Dynamics Marketplace

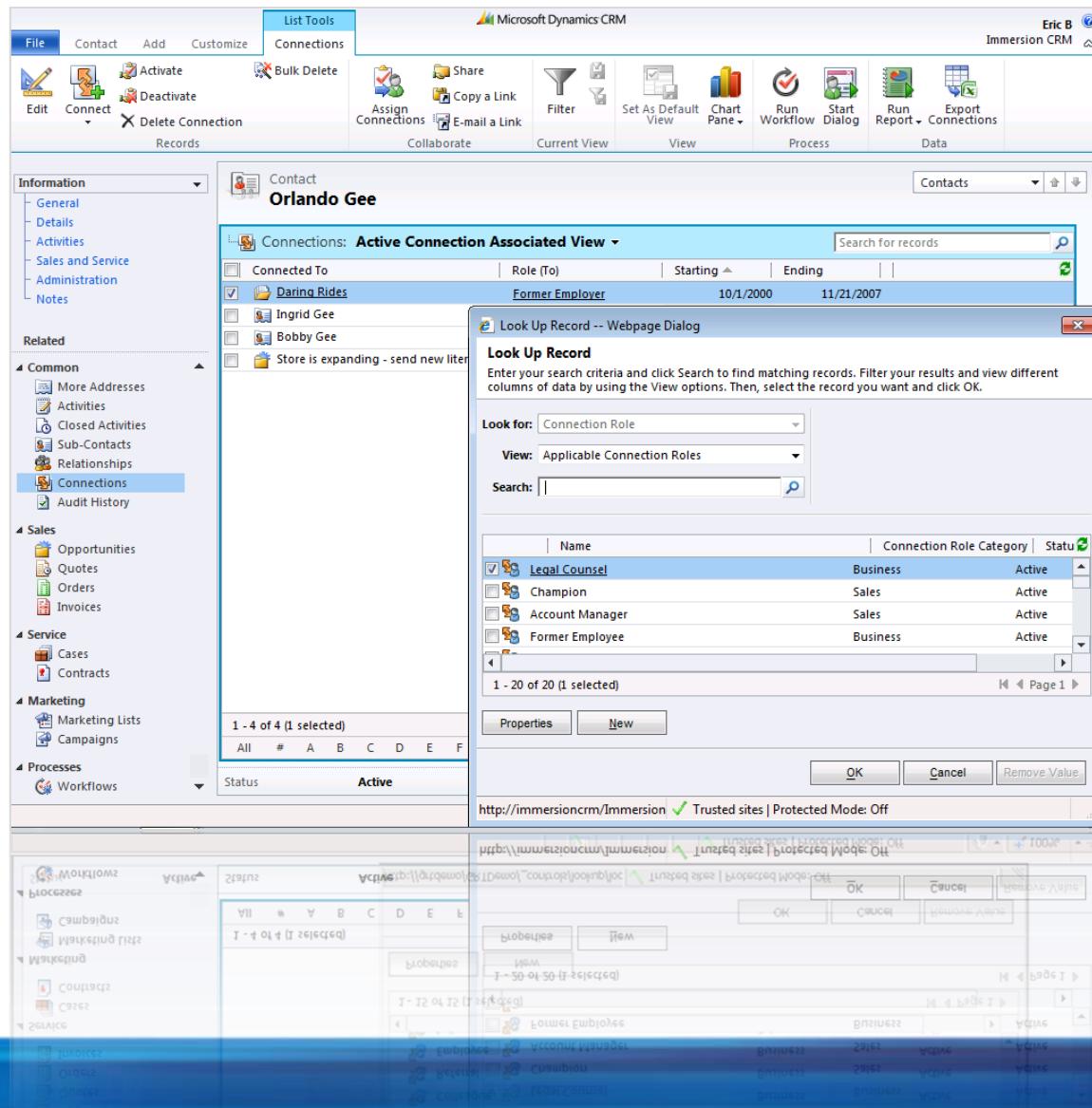
Solutions Management

Developer Tools



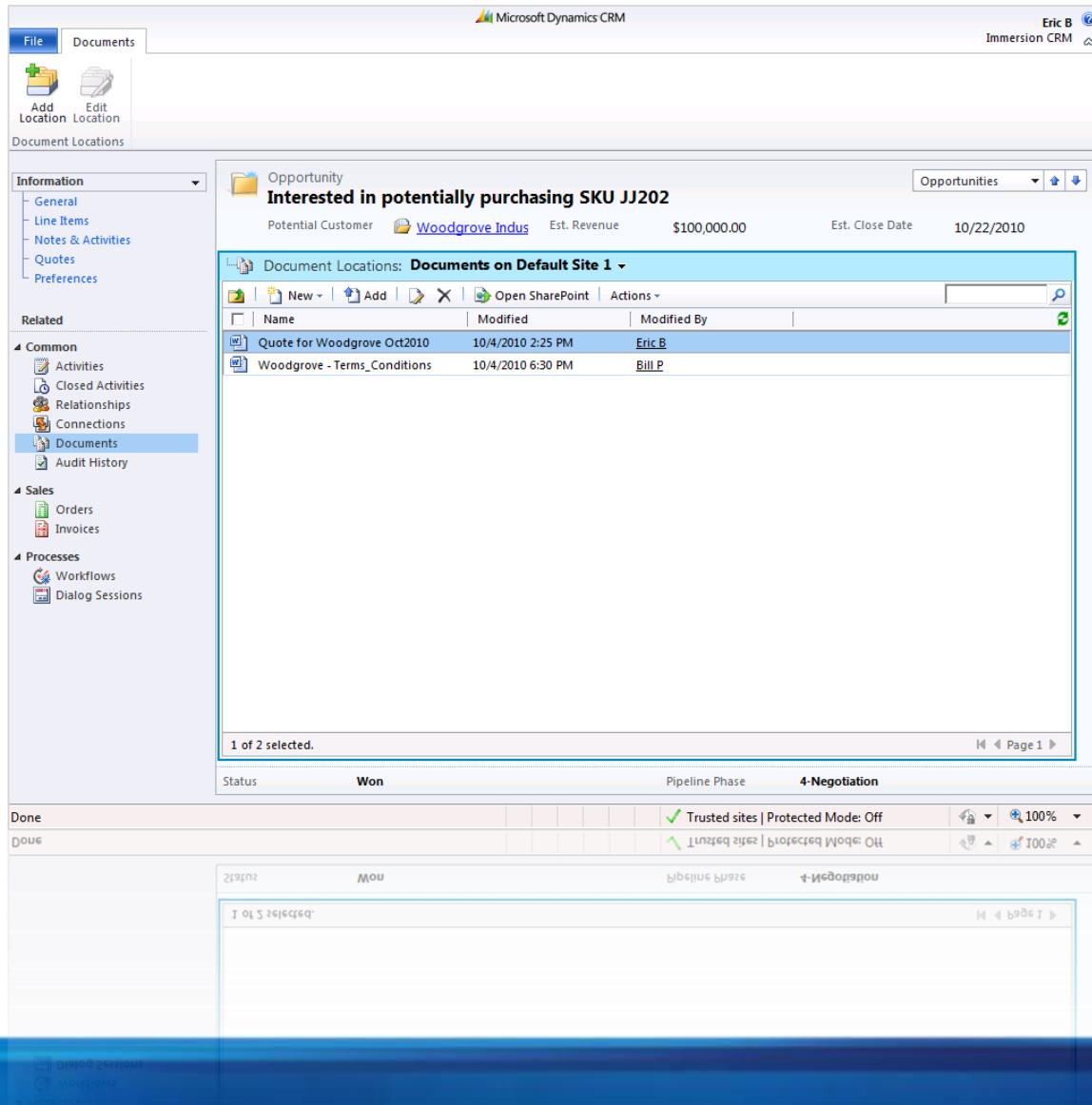
Microsoft Dynamics CRM

Connections



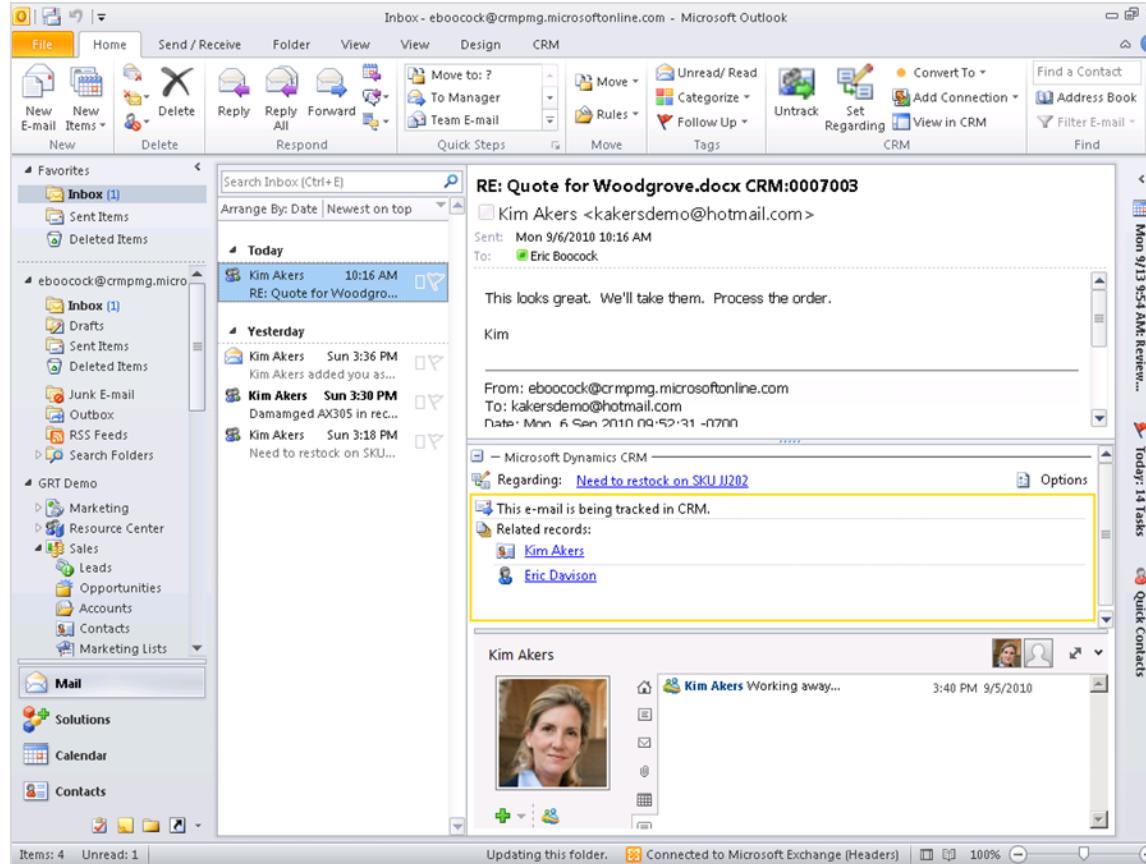
- Connect any entity
- Definable roles
- Easy association of roles to individuals
- Time based queries

Contextual Document Management

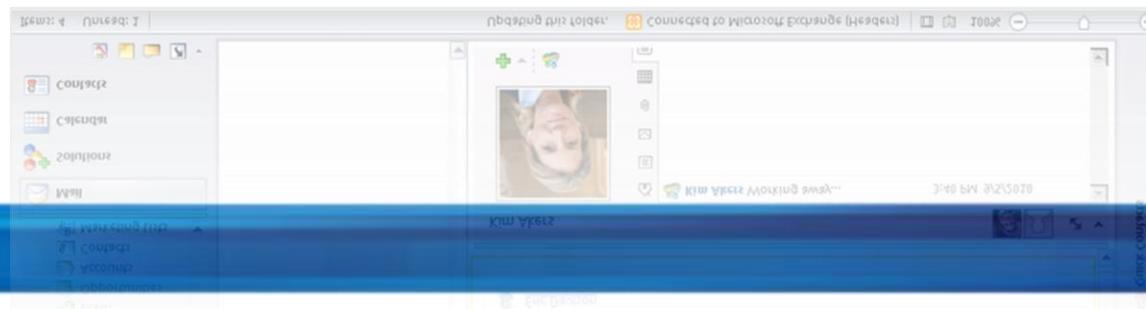


- Wizard-driven **SharePoint** configuration
- Contextual document libraries
- Check-in/check-out
- Track changes and **version control**

Social Media Capabilities



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

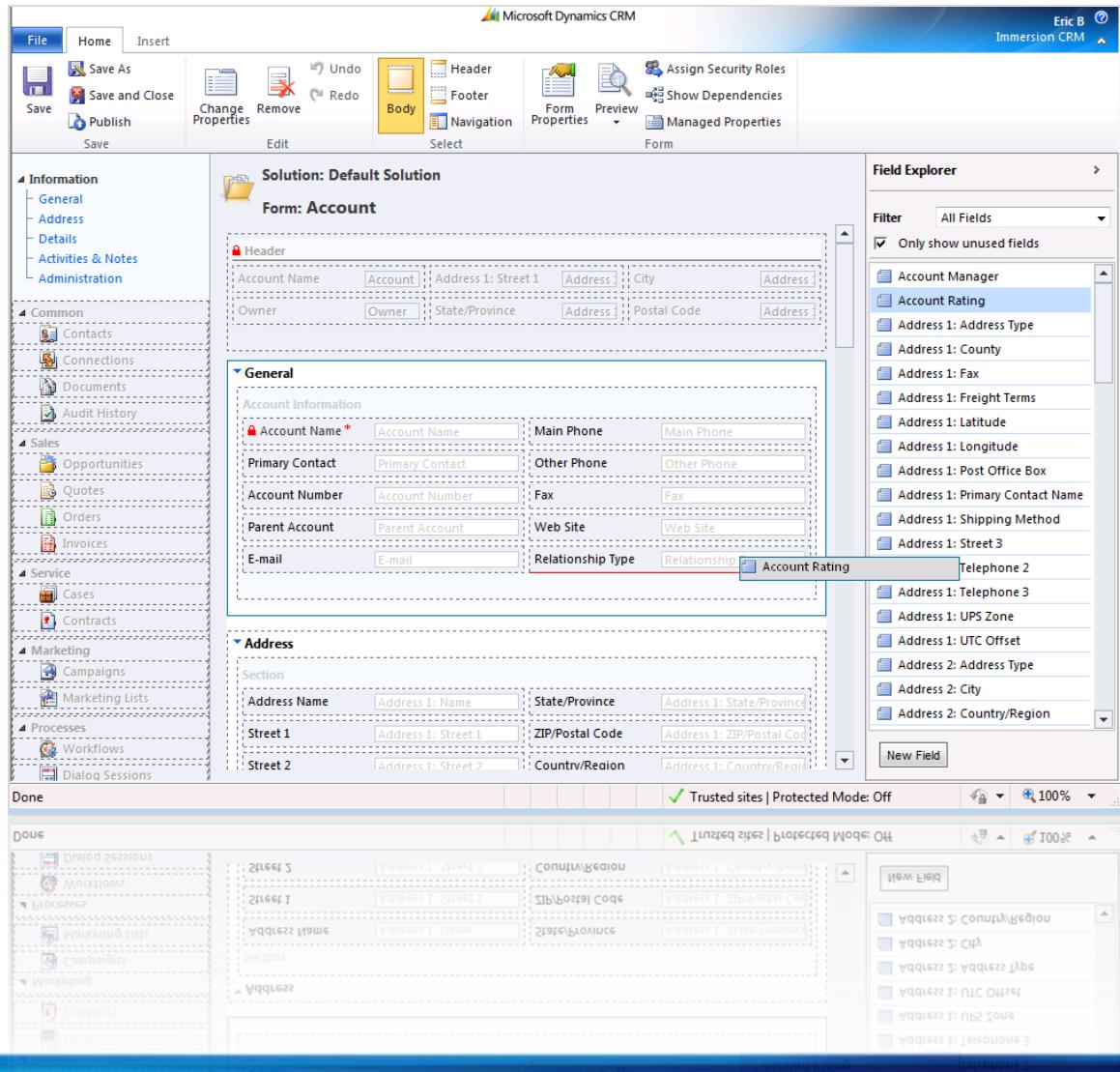


Team Management

The screenshot shows the Microsoft Dynamics CRM interface for managing an account record. The top navigation bar includes File, Account, Add, and Customize tabs. Below the toolbar, the main area displays the 'Accessories and Kits' account record. The left sidebar contains a navigation tree with sections like Common, Sales, Service, Marketing, and Processes. The 'Administration' tab is currently selected. The main content area shows fields for Account Name (Accessories and Kits), Owner (Large Accounts), Address (71890 Main Street, WA, 20955), and various contact methods (Email, Bulk Email, Phone, Fax, Mail) with allow/deny settings. It also includes sections for Marketing Information (Last Date Included in Campaign, Send Marketing Materials) and Service Preferences (Preferred Day, Preferred Time). At the bottom, there is a grid view of related records.

- 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

All Marketplaces | Microsoft Dynamics | System Center | Windows Azure Platform | Microsoft Online | more ▾ United States ▾

Microsoft Dynamics Marketplace

Sign in or Register | Get Listed | Help | About

Refine by Category

- >All (416)
- Solutions (76)
- Service Providers (340)

Works With

- All (1514)
- Microsoft Dynamics CRM**

Business Needs

- Analytics (76)
- Collaboration Tools (36)
- Customer Service (169)
- Finance + Administration (87)
- Human Resources (63)
- Marketing (28)
- IT Management (54)
- Sales (230)
- Service & Support (79)

Industry Focus

- Government (89)
- Financial Services (210)
- Manufacturing (58)
- Professional Services (380)
- Healthcare Providers (51)
- Health & Social Services (69)
- Retail (109)
- Hospitality & Entertainment (62)
- Education (74)
- Media (93)

Key Features

- 4 & 5 Star Reviews (298)

Lease Management

Microsoft Dynamics CRM ▾ Search

Microsoft Dynamics Marketplace > Microsoft Dynamics CRM > All > "Lease Management"

Solutions found: 76

ARGUS Lease CRM ★★★★☆ (05)
...customer relationship management and leasing management solution built by a company that focuses specifically on providing solutions for the real estate industry. ARGUS Lease CRM is a...

Commercial Property Management for Microsoft Dynamics CRM ★★★★★ (13)
...solution delivers better management. Actively manage your gross rental and total occupancy costs and as a result, you can more effectively negotiate alternative rent structures, calculate what-if...

Real Estate Advantage for Microsoft Dynamics CRM ★★★★☆ (22)
...CRM solution that helps office, retail, and industrial commercial real estate companies manage assets, leases, tenants, vendors and prospects in marketing, service, sales and support functions.

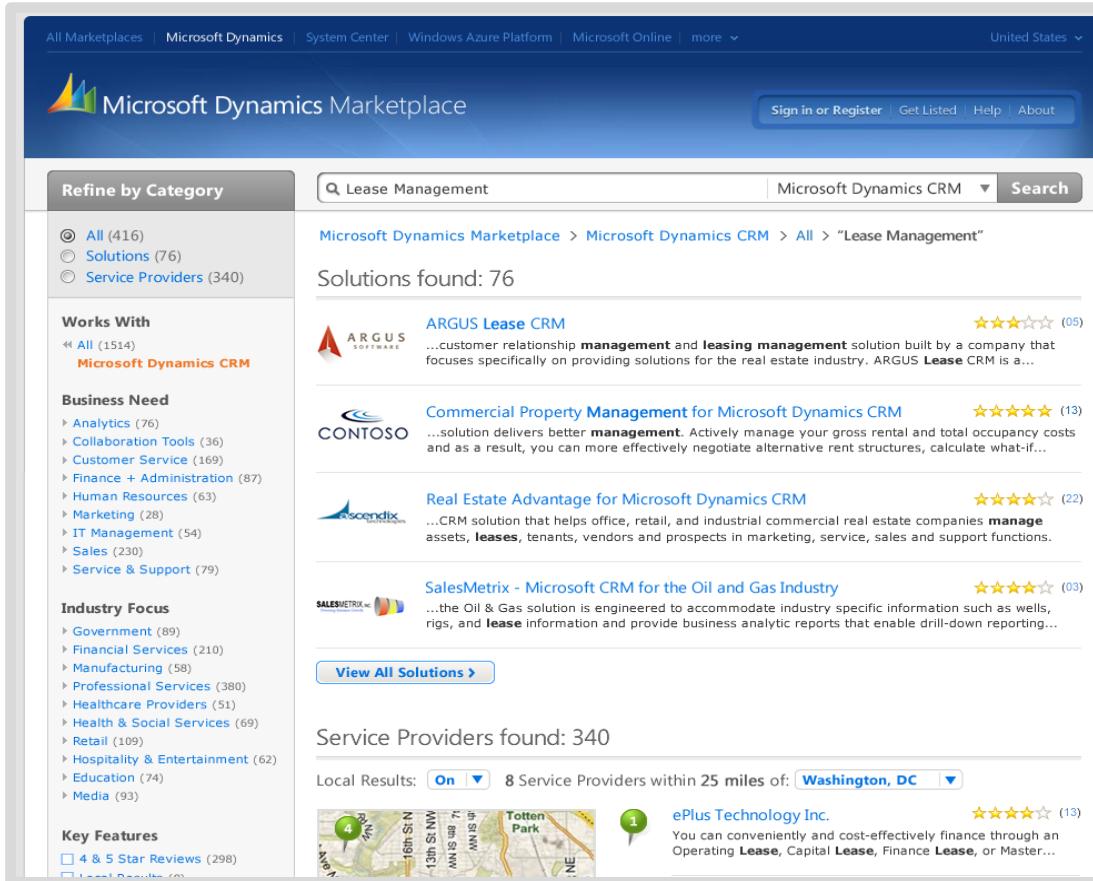
SalesMetric - Microsoft CRM for the Oil and Gas Industry ★★★★☆ (03)
...the Oil & Gas solution is engineered to accommodate industry specific information such as wells, rigs, and lease information and provide business analytic reports that enable drill-down reporting...

[View All Solutions ▾](#)

Service Providers found: 340

Local Results: On ▾ 8 Service Providers within 25 miles of: Washington, DC ▾

ePlus Technology Inc. ★★★★★ (13)
You can conveniently and cost-effectively finance through an Operating Lease, Capital Lease, Finance Lease, or Master...



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

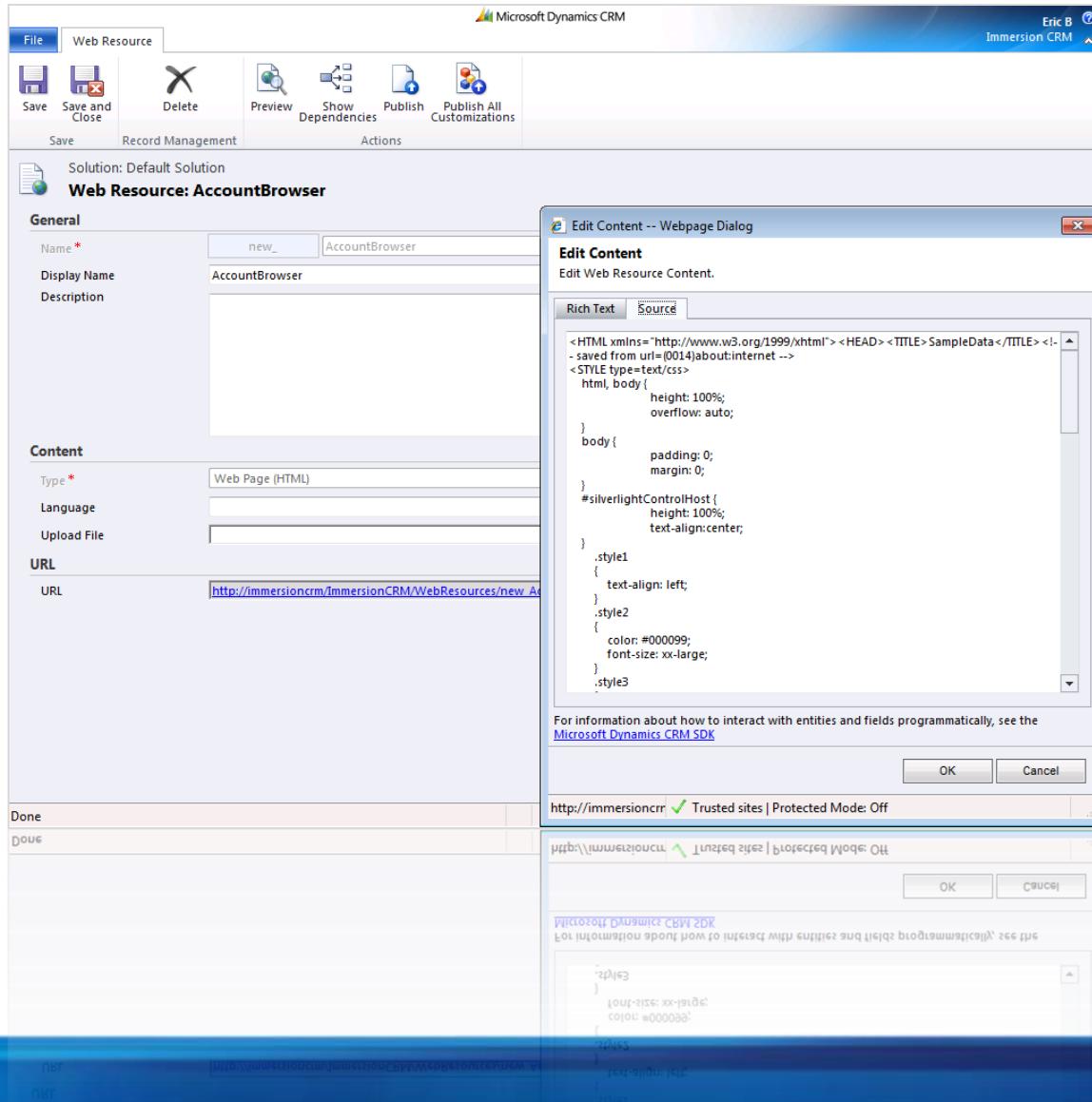
Solutions Management

The screenshot shows the Microsoft Dynamics CRM interface for managing solutions. The left sidebar is the Settings navigation bar, with the 'Solutions' option selected. The main area displays a grid of solutions with columns for Name, Display Name, Version, Installed On, Package Type, and Publisher. The 'AccountBrowserApp' solution is selected, highlighted in blue.

Name	Display Name	Version	Installed On	Package Type	Publisher
AccountBrowserApp	AccountBrowserApp	1.0	10/25/2010	Managed	Default Publisher for testorg01
DemoSolution	Demo Solution	0.1	10/11/2010	Unmanaged	NikhilH
CustomerCare	Customer Care	1.0.0.0	10/1/2010	Unmanaged	ReubenK
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



- **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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