

Microsoft Dynamics CRM 2011 Walkthrough

*Part 1: End-user
tools and features*

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<http://niiranen.eu/crm>

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End-user tools and UI enhancements

Context-sensitive ribbon

The screenshot displays the Microsoft Dynamics CRM 2011 interface. The top ribbon is set to 'Create Related', with a callout box pointing to the 'Task' button. Below this, the 'Workplace' sidebar is visible, showing a list of accounts. 'Another Test Account' is selected and highlighted with a blue box. A callout box points to this selection with the text 'Create related records'. The main area shows the 'Opportunity' ribbon, with a callout box pointing to the 'List Tools' button. Below this, the 'Opportunity Products' subgrid is visible, showing a table with columns: Existing Product, Write-In Product, Price Per Unit, Quantity, and Extended Amount. The first row is selected, showing 'Test Product 1' with a price of 15,000.00 € and a quantity of 1,00000. A callout box points to this subgrid with the text 'Show list tools for subgrids'.

File Accounts View **Create Related** Customize Sign Out

Attach File Add Note Task E-mail Phone Call Letter Fax Appointment Recurring Appointment Service Activity Other Activities Mail Merge Campaign Response Quick Campaign Relationship

Workplace Create Related Task Add a task activity to this Account. Account Name A Store new name Advanced Components (sample) Affordable Equipment (sample) **Another Test Account** Basic Company

File Opportunity Create Related Customize **List Tools** Opportunity Products Sign Out

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

Information General Line Items Notes & Activities Quotes Preferences Related Common Activities Closed Activities Relationships Connections Documents Sales Orders Invoices

Opportunity Jukka Test Account/1/TestProduct Opportunities

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

Est. Revenue €15 000,00 Probability (%) 50 Est. Close Date 30.9.2010 Rating Warm Currency* euro

Line Items Price List Test List 1

Existing Product	Write-In Product	Price Per Unit	Quantity	Extended Amount
Test Product 1		15 000,00 €	1,00000	15 000,00 €

1 - 1 of 1 (1 selected) Test Product 1 Page 1

Create related records

Show list tools for subgrids

Form sections instead of tabs

Links to section anchors

Information

- General
- Details
- Administration
- Notes

Related Notes

Common

- More Addresses
- Activities
- Closed Activities
- Sub-Accounts
- Contacts
- Relationships
- Connections
- Documents
- Audit History

Sales

- Opportunities
- Quotes
- Orders
- Invoices

Service

- Cases
- Contracts

Marketing

- Campaigns
- Marketing Lists

Processes

- Workflows
- Dialog Sessions

Account Litware Inc. (sample)

Accounts

General

Account Name * Litware Inc. (sample) Main Phone 555-0116

Account Number BABCO88H Other Phone

Parent Account Fax

Primary Contact Marco Tanar Web Site

Relationship Type E-mail someone10@example.co

Currency euro

Address

Address Name ZIP/Postal Code 10032

Street 1 137 Lancelot Dr Country/Region U.S.

Street 2 Phone

Street 3 Address Type

City Phoenix Shipping Method

State/Province CA Freight Terms

Details

Administration

Notes

Add a new note...

Title: Note created on 3.10.2010 16:20 by Jukka Niiranen

3.10.2010 17:20 by Jukka Niiranen Edited 3.10.2010 17:20 by Jukka Niiranen

Status Active

Persistent header and footer fields

Collapsible sections

Filters and default views

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The 'View' tab is active, and the 'Filter' button is highlighted with a yellow box. A yellow callout bubble points to the 'Filter' button with the text 'Filter based on view column contents'. Below the callout, a 'Custom Filters' dialog box is open, showing a filter rule: 'Show records where Address 1: City: Contains Redmond'. The dialog box has 'OK' and 'Cancel' buttons. The background shows the 'Accounts' list with columns 'Account Name', 'Main Phone', and 'Address 1:'. The list contains two records: 'A Store new name' and 'Advanced Components (sample)'.

Filter based on view column contents

Custom Filters -- WWW-valintaikkuna

https://teklacorporation.crm4.dynamics.com/GridFilters/cust

Show records where Address 1: City:

Contains Redmond

AND OR

-- Select Operator --

OK Cancel

Internet | Suojattu tila: Käytössä

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The 'View' tab is active, and the 'Set As Default View' button is highlighted with a yellow box. A yellow callout bubble points to the 'Set As Default View' button with the text 'Set personal default views'. Below the callout, a 'Set as Default View' dialog box is open, showing the text 'Make the current view your default for this list.' The dialog box has 'OK' and 'Cancel' buttons. The background shows the 'Accounts' list with columns 'Account Name', 'Main Phone', and 'Address 1:'. The list contains two records: 'A Store new name' and 'Advanced Components (sample)'.

Set as Default View

Make the current view your default for this list.

Set personal default views

Recently visited records & views

Workplace | Welcome to Microsoft Dynamics CRM Online

My Work

- Dashboards
- Activities
- Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements

Customers

- Accounts
- Contacts

Sales

- Marketing Lists
- Leads
- Opportunities
- Quotes
- Orders
- Invoices

Workplace

Sales

Marketing

Recently Visited

- Microsoft Dynamics CRM...
- For%20Re-import%20-%20...
- Calendar
- TestAccountRollup1
- Another custom activity, fo...
- Räty, Lasse
- Meeting to review CRM 20...
- Jukka Niiranen
- One more 2011 test
- Test Jukka Test Niiranen
- Jukka Test Account
- Call and say hi
- Another activity for an Ord...
- Jukka Test Account/1/TestP...
- Jukka Test Account/1/TestP...
- This is a custom activity for...
- Test Niiranen, Test Jukka**
- Test Product 1
- Jukka Test Account/1/TestP...
- Test Product 1
- Test List 1
- Test Product 1
- 6 orders of Product SKU JJ...
- Mailed an interest card ba...
- TestDashboard1
- Jukka Niiranen

Views

- My Imports
- My Active Contacts
- Items I am working on
- My Active Goals for Curren...
- My Active Rollup Queries
- My Processes
- My Activities
- My Active Accounts
- Enabled Users
- My Open Opportunities

Pin items to recently visited records menu

Leads by Source Campaign

All Leads

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

Regarding	Priority	Start Date
	Normal	12.9.20
	High	12.9.20
	High	13.9.20
	Normal	13.9.20

Browse records on detail form

Scroll through records and views on any form

File Account Create Related Customize

Save Save & Close Deactivate Add to Marketing List Connect

Information

- General
- Details
- Administration
- Notes

Related

- Common
 - More Addresses
 - Activities
 - Closed Activities
 - Sub-Accounts
 - Contacts
 - Relationships
 - Connections
 - Documents
 - Audit History
- Sales
 - Opportunities
 - Quotes
 - Orders
 - Invoices
- Service
 - Cases
 - Contracts

Account

Litware Inc. (sample)

General

Account Name * Litware Inc. (sample)

Account Number BABCO88H

Parent Account

Primary Contact Marco Tanara (sample)

Relationship Type

Currency euro

Address

Address Name

Street 1 137 Lancelot Dr

Street 2

Street 3

City Phoenix

State/Province CA

Details

Accounts

View: My Active Accounts

Account Name
A Store new name
Advanced Components (sample)
Affordable Equipment (sample2)
Basic Company
Best o' Things (sample)
Blue Company (sample)
Designer Goods (sample)
Elemental Goods (sample)
Grand Store (sample)
Grand Store (sample)
Litware Inc. (sample)
Magnificent Store (sample)
Recreation Supplies (sample)
Unusual Store (sample)

Page 1

View options

The screenshot displays the Microsoft Dynamics CRM 2011 interface. The top navigation bar includes tabs for File, Account, Create Related, Customize, and Contacts. The 'Contacts' tab is active, showing a list of contacts for 'Litware Inc. (sample)'. A dropdown menu for 'Contact Associated View' is open, showing various system and user-defined views. A yellow callout bubble points to this dropdown, stating 'Full view selection controls in associated views'. Another yellow callout bubble points to the 'Look Up Record' dialog, stating 'Enhanced view controls in lookup dialogs'. The dialog shows search criteria for 'Account' and a list of search results. A 'Show Only My Records' checkbox is also visible.

Full view selection controls in associated views

Enhanced view controls in lookup dialogs

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Account

View: Account Lookup View

Search: System Views

- Account Lookup View
- Accounts: Influenced Deals That We Won
- Accounts: No Campaign Activities in Last 3 Months
- Accounts: Responded to Campaigns in Last 6 Months
- Active Accounts
- Inactive Accounts
- My Active Accounts
- My Connections

	Account Number	Primary Contact
Another test Account		
A Store new name	ABSS4G45	Adrian Dumitrascu (sample)
Advanced Components (sample)	ACTB8DC3	Brain LaMee (sample)
Affordable Equipment (sample2)	ABC28UU7	Cat Francis (sample)
Basic Company	AFFSE9IK	Cathan Cook (sample)

No more form assistant pane

Contact New

Contacts

General

Salutation

First Name ⁺ Test First

Middle Name

Last Name ^{*} Test Last

Job Title

E-mail

Business Phone

Home Phone

Mobile Phone

Fax

Parent Customer ju

Currency Jukka Test Account

Address

Address Name

Street 1

Street 2

ZIP/Postal Code

Country/Region

Phone

Forecast Information

Revenue

Est. Revenue

Est. Close Date

Currency ^{*}

Smart lookup fields
have replaced form
assistant pane

Form options for auto-
resolve and most
recently used items

General

Topic ^{*}

Potential Customer ^{*} a

Description

Forecast Information

Revenue

Est. Revenue

Est. Close Date

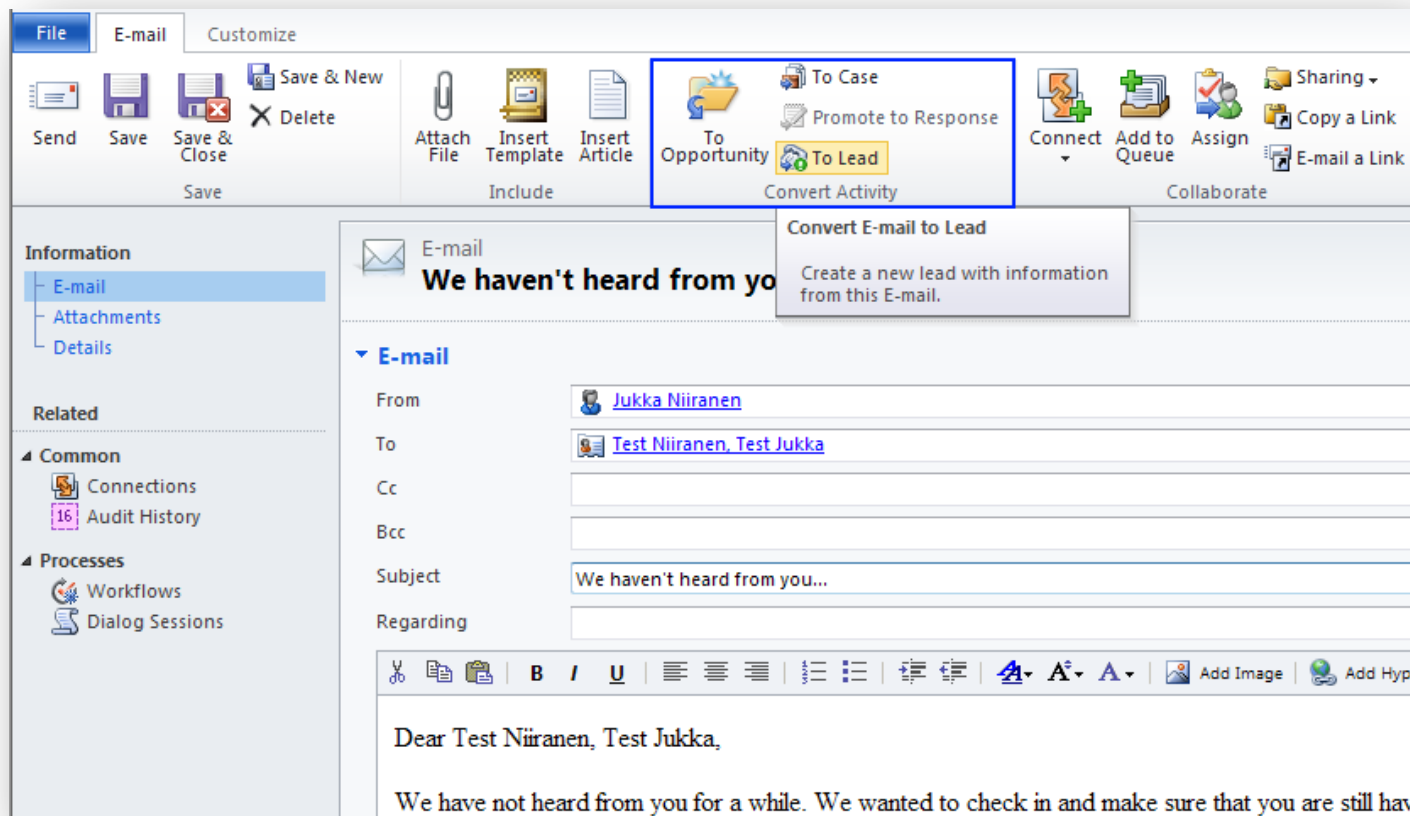
Currency ^{*}

More than one match was found:

- A Store new name
- Advanced Components (sample)
- Affordable Equipment (sample2)
- Another Test Account
- Basic Company
- Best o' Things (sample)
- Elemental Goods (sample)
- Adrian Dumitrascu (sample)
- Brain LaMee (sample)
- Cat Francis (sample)

Convert emails (1)

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



Convert emails (2)

The screenshot displays the Microsoft Dynamics CRM 2011 interface. On the left, the 'Appointment' record 'Let's catch up' is visible. A dialog box titled 'Convert Appointment to Case' is open, prompting the user to 'Specify the details of the new case.' The dialog includes fields for 'Customer' (Test Niiranen, Test J) and 'Subject' (Service). Two checkboxes are present: 'Open the new case' (checked) and 'Change the Appointment status to Completed and close the form' (checked). A yellow callout points to the dialog box with the text 'Dialog window requests details'. Below the dialog, a sidebar menu shows 'Activities', 'Closed Activities', 'Connections', 'Audit History', 'Processes', 'Workflows', and 'Dialog Sessions'. On the right, the 'Case' record 'CAS-01014-Y5S3C9' is shown in the 'Cases' table. The table has columns for 'Subject', 'Activity Type', 'Activity Status', 'Regarding', and 'Priority'. The record 'Let's catch up' is listed with 'Appointment' as the Activity Type, 'Completed' as the Activity Status, and 'Let's catch up' as the Regarding entity. A yellow callout points to the 'Regarding' column with the text 'Activity history is recorded under parent record'.

Appointment
Let's catch up

▼ Appointment

Subject * Let's catch up

Location

Regarding

Scheduling

Required

Optional

Start Time *

End Time *

Show Time A

Convert Appointment to Case

Convert Appointment to Case

Specify the details of the new case.

Customer * Test Niiranen, Test J

Subject Service

☒ Open the new case

☒ Change the Appointment status to Completed and close the form

OK Cancel

Case
CAS-01014-Y5S3C9

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

Activities

Closed Activities

Connections

Audit History

Processes

Workflows

Dialog Sessions

Dialog window requests details

Activity history is recorded under parent record

Dynamic Marketing Lists

The screenshot shows the 'Marketing List' configuration interface for 'Dynamic List 1'. The 'General' tab is active, showing fields for Name, Member Type, Type, Purpose, and Source. The 'Type' field is set to 'Dynamic'. A yellow banner 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, an 'Actions' bar contains icons for 'Manage Members', 'Copy To Static', and 'Add to Campaign'. Overlaid on the right is the 'Find' dialog box, which has a 'Look for' dropdown set to 'Contact' and a 'Use Saved View' dropdown set to '[new]'. It also includes options for 'Hide Details', 'Clear', 'Group AND', and 'Group OR'. The 'Full Name' field is selected with the 'Contains' operator, and a 'Select' button is visible. At the bottom of the dialog, the 'Use Query' button is highlighted with a blue border.

Marketing List
Dynamic List 1

Marketing Lists

This marketing list is based on a query and the members of this marketing list will change dynamically.

General

Name * Dynamic List 1 Member Type * Contact

Type * ☐ Static ☒ Dynamic

Purpose Demonstrate the dynamic lists

Source Modified On 30.9.2010

Actions: Manage Members, Copy To Static, Add to Campaign

Find

Edit Columns

Look for: Contact Use Saved View: [new]

Hide Details Clear Group AND Group OR

Full Name Contains

Select

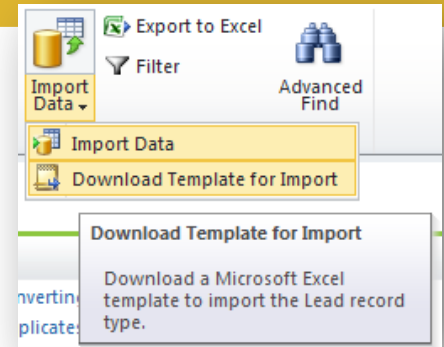
Use Query Find

- 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

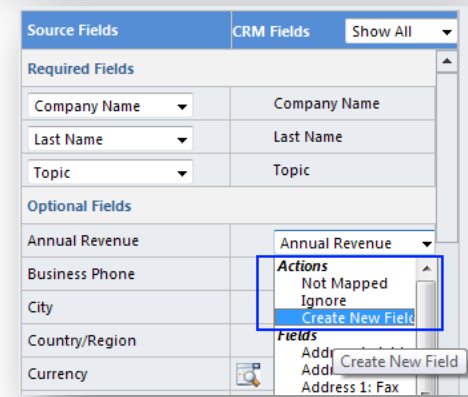
- Download example templates of entity field lists and formats
- Create new entities or fields directly through the import based on source data mapping
- There will be no separate Data Migration Manager for CRM 2011
- See blog post from PowerObjects for more details:

<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.



Excel data export & re-import (1)

Export Data to Excel -- WWW-valintaikkuna

https://teklacorporation.crm4.dynamics.com/_grid/print/export_dlg.aspx?PageReco

Export Data to Excel

Select the type of worksheet to export.

Use this type of worksheet:

- ☒ Static worksheet with records from this page
- ☐ Dynamic PivotTable
- ☐ Dynamic worksheet

Select Columns

Edit Columns

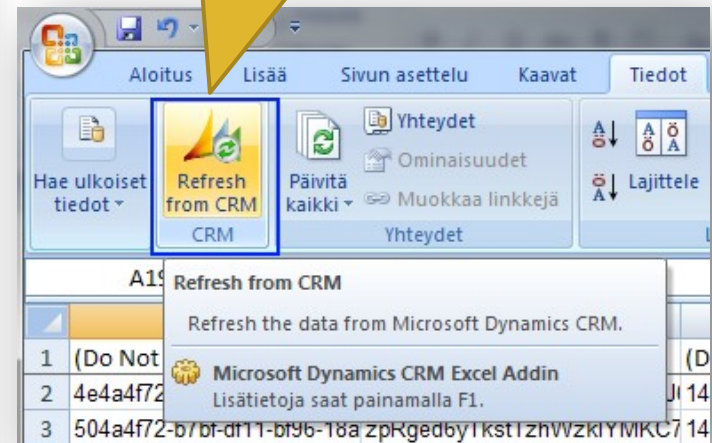
☒ Make this data available for re-importing by including required column headings

Export Cancel

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Link exported data to CRM records with GUIDs

Refresh Excel records of static worksheets with CRM data



Excel data export & re-import (2)


	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	4e4a4f72-b7bf-df11-bf96-18a	UdQqSX8cSS/m6C9Y0sLh5ifJl	14.9.2010 4:20:58	Adrian		Dumitrascu (sample)
3	504a4f72-b7bf-df11-bf96-18a	zpRged6yTkstTzhWzklYMKC7	14.9.2010 4:20:58	Brain		LaMee (sample)
4	524a4f72-b7bf-df11-bf96-18a	H5hGtHaktbNS3FEJ/5NspI	14.9.2010 4:20:58	Cat		Francis (sample)
5	544a4f72-b7bf-df11-bf96-18a	mBkt8xKz8v4SQzSRQJ9lLskf	14.9.2010 4:20:58	Cathan		Cook (sample)
6	564a4f72-b7bf-df11-bf96-18a	5TPqC7AEs6lkg8B0AXEYejma	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	QP7R7ozEI5LDtcTXafG/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	zEsPoq8bMcCCh7VWMgir8tlbU	14.9.2010 4:20:58	George		
11	5e6ff40e-c0c1-df11-8c8b-18a	fFfPm+QU2s57yLm+4wo3BI+	16.9.2010 18:39:04			
12	604a4f72-b7bf-df11-bf96-18a	1ViXG/yQe1NBQVUk6ZAfZRt	14.9.2010 4:20:58	Marco		
13	624a4f72-b7bf-df11-bf96-18a	gt8clSPMLkv4kg58JEAxdzOz	14.9.2010 4:20:58	Patrick		
14	644a4f72-b7bf-df11-bf96-18a	k6KX7n4tqE/LI3EOtNHEM7J1C	14.9.2010 4:20:58	Susan		
15	2ac04043-94c1-df11-8c8b-11j2fpEKBcLA5R7EzWclEJEGn	5	16.9.2010 13:14:00	Test Jukka		
16	664a4f72-b7bf-df11-bf96-18a	47D2MFF074yPdRnr66xMqsd	14.9.2010 4:20:58	Thomas		
17	684a4f72-b7bf-df11-bf96-18a	XXxtr3Qi+zFvQBDLBdqHdZ32J	14.9.2010 4:20:58	Yvonne		

Import data to update existing records or create new ones

Import Data Wizard -- WWW-valintaikkuna

<https://teklacorporation.crm4.dynamics.com/WebWizard/WizardContainer.aspx?Wiza>

Review Settings and Import Data

 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
☐ 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](#)

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Bulk deletion wizard

Bulk Record Deletion

Search for records

New | Print | More Actions ▾

	System Job Name ▲	Status Reason	Deleted	Failures
<input checked="" type="checkbox"/>	Delete completed system jobs	Succeeded	0	0
<input type="checkbox"/>	Delete completed system jobs	Succeeded	0	0

Bulk Deletion Wizard -- WWW-valintaikkuna

https://teklacorporation.crm4.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=A50E9478-8

Define Search Criteria Help

Select search criteria to identify records to delete.

Look for: E-mail Messages Use Saved View: [new]

Clear | Group AND | Group OR

▼ Created On Older Than X Months 12
[Select](#)

▼ E-Mail Attachments (Item)
▼ File Size (Bytes) Is Greater Than 1 000 000
[Select](#)

Specify the name of the bulk deletion system job,
Name:
Large Emails, Older Than 1y Bulk Deletion

Bulk deletion job start time:
4.10.2010 20:53

☒ Run this job after every
30 days

- 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** ▾

<input type="checkbox"/>	Subject	Regarding	Location	
<input checked="" type="checkbox"/>	Meeting to review CRM 2011	Jukka Test Ac	Out on the	2010 8:00
<input type="checkbox"/>	Let's catch up	Test Niiranen,	Eiffel tower	2010 14:00
<input type="checkbox"/>	Recurring appointment nr. 1		Unknown	2010 18:30
<input type="checkbox"/>	Recurring appointment nr. 1		Unknown	
<input type="checkbox"/>	Recurring appointment nr. 1		Unknown	
<input type="checkbox"/>	Recurring appointment nr. 1		Unknown	
<input type="checkbox"/>	Recurring appointment nr. 1		Unknown	

Type dropdown menu:

- All
- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity
- Campaign Response
- Campaign Activity
- Recurring Appointment**
- Custom Activity
- Normal

New activity type provided for recurring appointments

Appointment Recurrence

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

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

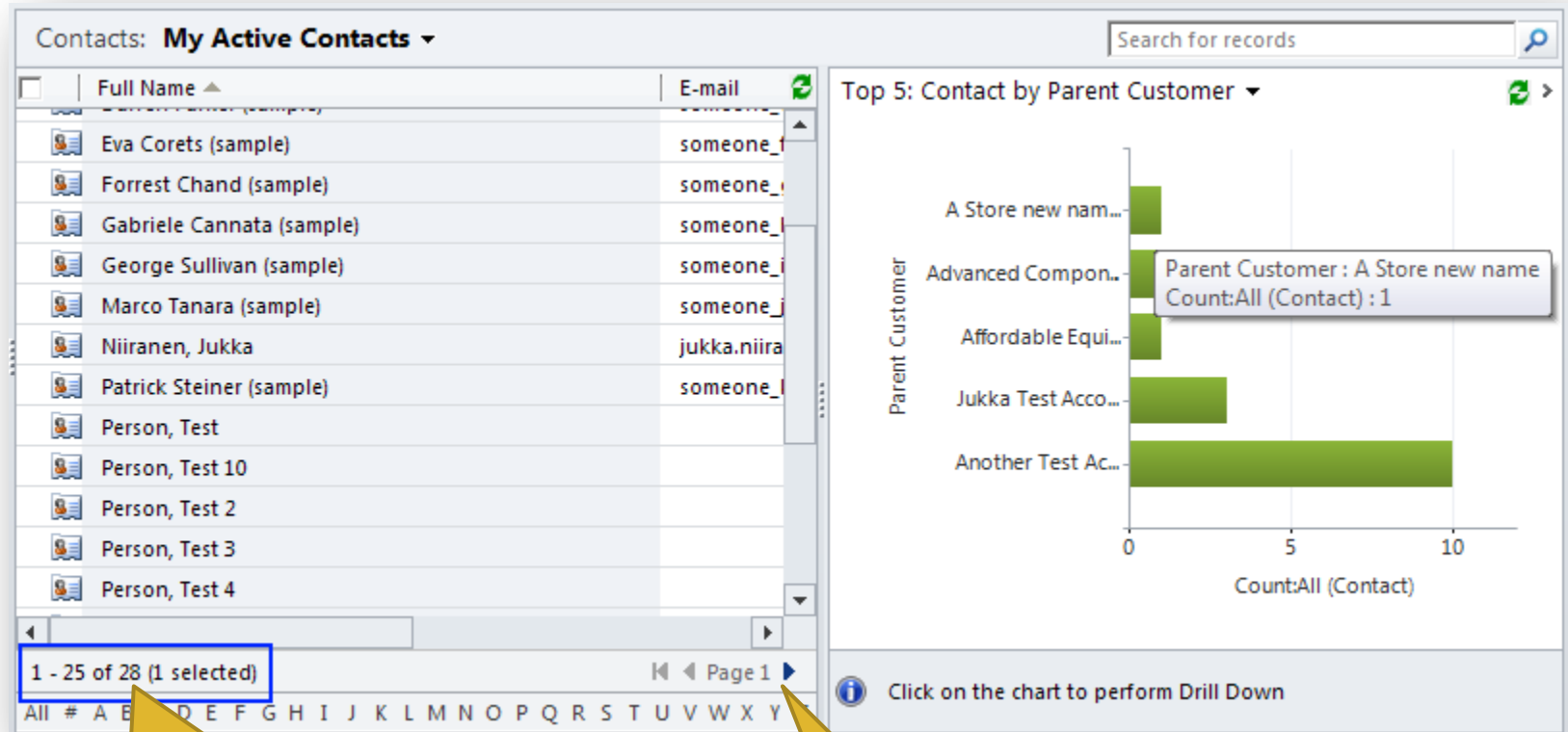
Range of Recurrence

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

File Sales Literature Customize

Save Save & Close Delete Save & New Send as E-mail Add a Sales Attachment Sharing Copy a Link E-mail a Link Run Workflow

Information General

Related

Common

- Sales Attachments
- Products
- Documents
- Audit History

Sales Literature Literature 1

Sales Attachments: Sales Literature 1

	Title	Modified
<input type="checkbox"/>	New Sales Attachment	
<input checked="" type="checkbox"/>	Literature 1 File A	28.9
<input type="checkbox"/>	Literature 1 File B	28.9

File E-mail Customize

Send Save Save & Close Delete Save & New Attach File Insert Template Insert Article To Case Promote to Response To Opportunity To Lead

Information

- E-mail
- Attachments
- Details

Related

Common

- Connections
- Audit History

Processes

- Workflows
- Dialog Sessions

E-mail Literature 1

Attachments

E-Mail Attachments: Activity Attachment Associated With Literature 1

File Name	File Size (Bytes)
Forrester Enterprise CRM 2010.pdf	765 775
Forrester Midsize CRM 2010.pdf	773 607

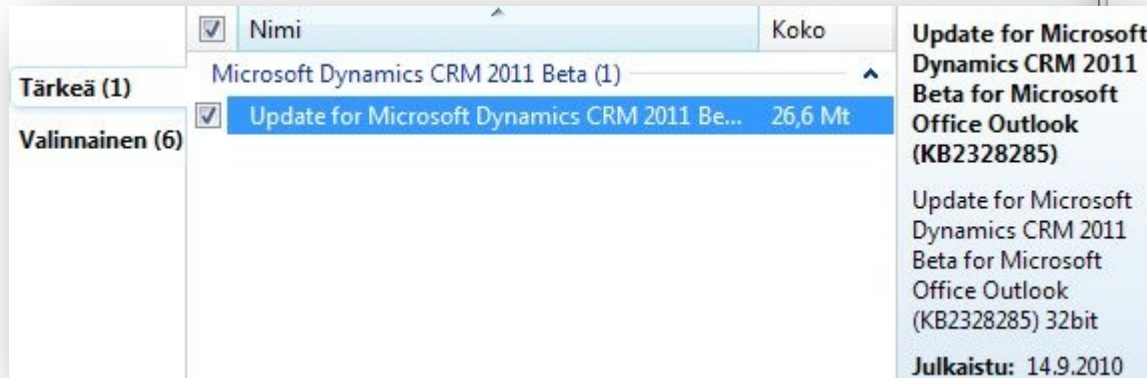
1 - 2 of 2 (0 selected)

All # A B C D E F G H I J K L

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 image shows two versions of Microsoft Outlook side-by-side. The background window is Outlook 2007/2003, featuring a menu bar and a task pane on the left. The foreground window is Outlook 2010, which has a ribbon interface and a navigation pane on the left. A yellow callout bubble points to the ribbon in Outlook 2010, stating: "Ribbons are converted to menus in 2007/2003". Another yellow callout bubble points to the navigation pane in Outlook 2010, stating: "Navigation panes and graphic folders only in 2010".

Outlook 2010 Interface Details:

- Ribbon:** Tiedot, Muokkaa, Opportunities, Create Related, Customize, Näytä, Design, Siirry, Työkalut, Toiminnot, CRM, Ohje.
- Navigation Pane:** Suosikkikansiot, Postikansiot, Kaikki sähköpostiviestit, Omat kansiot, Gmail, Tekia Corporation, Workplace, My Work, Customers, Sales, Leads, Opportunities, Accounts, Contacts, Marketing Lists, Competitors, Products, Sales Literature, Quotes, Orders, Invoices, Quick Campaigns.
- Opportunities Table:**

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rati
6 orders of Product SKU JJ202 (sample)	Basic Company	pe 15.10.2010 23:43	€10,000.00	90	Hot
Jukka Test Account/1/TestProduct	Jukka Test Account	to 30.9.2010 3:00	€15,000.00	50	Wa
Needs to restock their supply of Product SKU AX305; will...	Best o' Things (sample)	ma 13.12.2010 23:43	€25,000.00		Hot
They sell many of the same items that 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 JJ202 this year (sam...	Elemental Goods (sample)	la 15.1.2011 23:43	€30,000.00		Hot
Will be ordering about 110 items of all types (sample)	Litware Inc. (sample)	ke 16.3.2011 23:43	€25,000.00	80	Hot
Will expand their offerings to include some of our prod...	Variety Store (sample)	ke 29.9.2010 23:43	€150,000.00	75	Hot
Will order some items soon (sample)	Variety Store (sample)	to 30.9.2010 23:43	€30,000.00	10	Col

Jukka Test Account/1/TestProduct	
Potential Customer	Jukka Test Account
Status	Open
Rating	Warm
Est. Revenue	€15,000.00
Owner	
Est. Close Date	30.9.2010

Forecast Information
Revenue: System Calculated (selected), User Prov
Est. Revenue: €15,000.00
Est. Close Date: 30.9.2010
Currency: euro
Probability (%): 50
Rating: Warm

Reading panes

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

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

The screenshot displays the Microsoft Dynamics CRM 2011 interface. At the top, the 'Opportunities' tab is active, showing a list of 'My Open Opportunities'. The grid lists various opportunities with columns for Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, and Rating. Below the grid, the 'Jukka Test Account/1/TestProduct' reading pane is open, displaying detailed information about the selected opportunity, including its status (Open), estimated revenue (€15,000.00), and estimated close date (30.9.2010). The reading pane also shows forecast information and line items.

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
Jukka Test Account/1/TestProduct	Jukka Test Account	to 30.9.2010 3:00	€15,000.00	50	Warm
Needs to restock their supply of Product SKU AX305; will...	Best o' Things (sample)	ma 13.12.2010 23:43	€25,000.00		Hot
Will sell many of the same items that 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 JJ202 this year (sam...	Elemental Goods (sample)	la 15.1.2011 23:43	€30,000.00		Hot
Will be ordering about 110 items of all types (sample)	Litware Inc. (sample)	ke 16.3.2011 23:43	€25,000.00	80	Hot
Will expand their offerings to include some of our prod...	Variety Store (sample)	ke 29.9.2010 23:43	€150,000.00	75	Hot
Will order some items soon (sample)	Variety Store (sample)	to 30.9.2010 23:43	€30,000.00	10	Cold

Jukka Test Account/1/TestProduct
Potential Customer: Jukka Test Account
Rating: Warm
Owner: First Last
Status: Open
Est. Revenue: €15,000.00
Est. Close Date: 30.9.2010

Forecast Information
Revenue: System Calculated
Est. Revenue: €15,000.00
Est. Close Date: 30.9.2010
Currency: euro

Line Items
Price List: Test List 1

The 'Personalize Reading Pane' dialog box allows users to customize the sections displayed in the reading pane. It features a list of 'Available Sections' on the left and a list of 'Displayed Sections' on the right. The 'Available Sections' list includes Preferences, Internal Information, Line Items, and Product Line Item Totals. The 'Displayed Sections' list includes Opportunity Information, Forecast Information, and Opportunity Products. Users can add or remove sections using the 'Add >>' and '<< Remove' buttons.

Personalize Reading Pane
Add or remove sections from the reading pane.
Select the sections to add or remove from the reading pane.

Available Sections
Preferences
Internal Information
Line Items
Product Line Item Totals

Displayed Sections
Opportunity Information
Forecast Information
Opportunity Products

Buttons: Add >>, << Remove

View tabs and filters

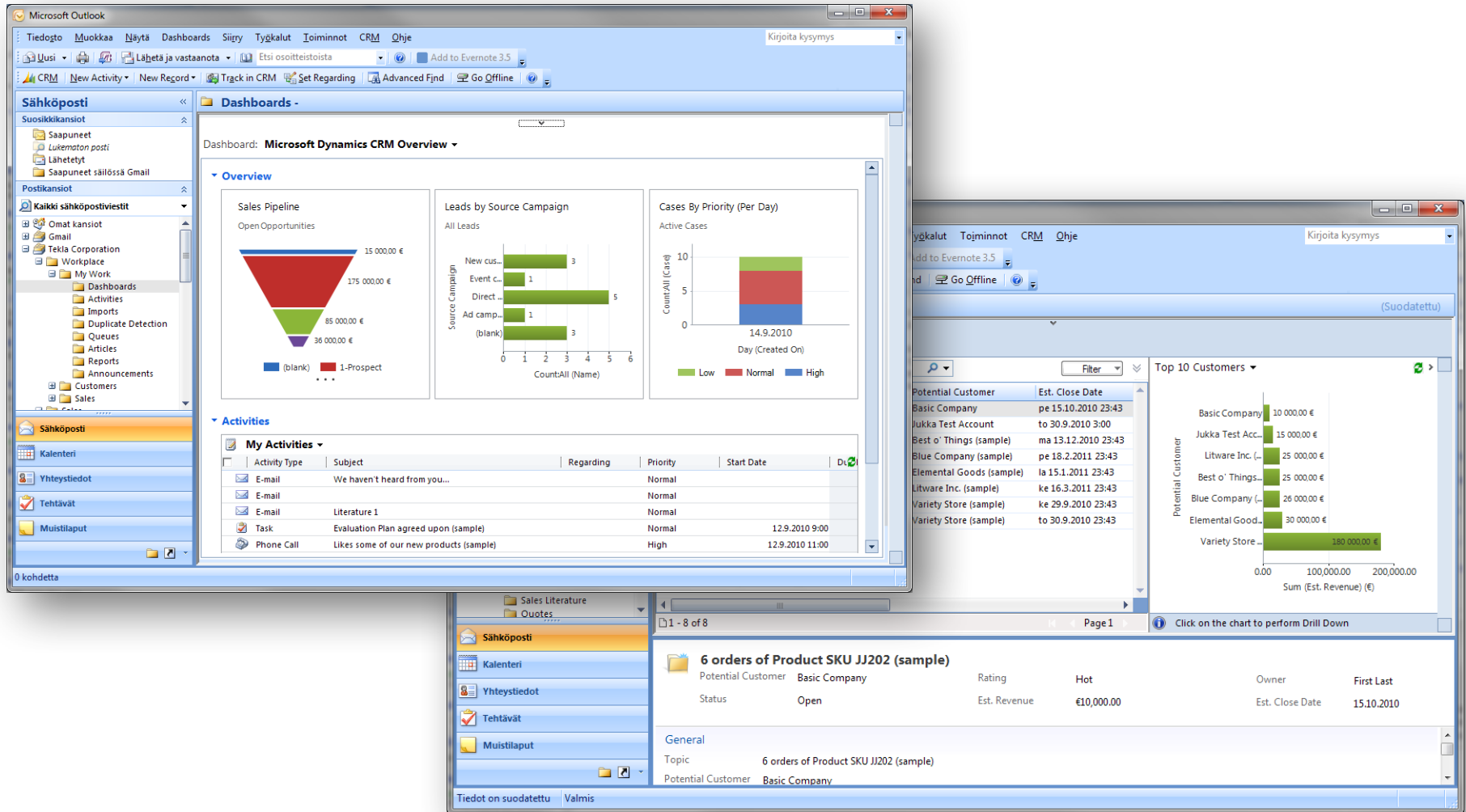
Multiple views can be opened on tabs for quick data comparison

The screenshot displays the 'Opportunities' view in Microsoft Dynamics CRM 2011. At the top, there are three tabs: 'My Open Opportunities', 'Lost Opportunities', and 'Opportunities Opened This Week'. Below the tabs is a search bar labeled 'Search My Open Opportunities'. To the right of the search bar is a 'Filter' button. Below the search bar, there are three filter criteria: 'Owner: Equals Current User', 'Status: Equals "Open"', and 'Rating: Equals "Hot"'. To the right of these filters is an 'Edit Filter' button. Below the filters is a table with the following columns: 'Topic', 'Potential Customer', 'Est. Close Date', 'Est. Revenue', 'Probability', and 'Rating'. The table contains six rows of data. At the bottom of the table, there is a pagination bar showing '1 - 6 of 6' and 'Page 1'.

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; will...	Best o' Things (sample)	ma 13.12.2010 23:43	€25,000.00		Hot
They sell many of the same items as 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 SKUs this year (sam...	Elemental Goods (sample)	la 15.1.2011 23:43	€30,000.00		Hot
Will be ordering about 110 items of Product SKU (sample)	Litware Inc. (sample)	ke 16.3.2011 23:43	€25,000.00	80	Hot
Will expand their offerings to include Product SKU (sample)	Variety Store (sample)	ke 29.9.2010 23:43	€150,000.00	75	Hot

Custom filters can easily be applied to existing views

Full visualizations support



Activity grouping

Activities - (Suodatett...

My Activities

Search My Activities

Filter

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Päivämäärä: Ei mitään					
E-mail	We haven't heard from you...		Normal	Ei ole	Ei ole
E-mail	Literature 1		Normal	Ei ole	Ei ole
E-mail			Normal	Ei ole	Ei ole
Päivämäärä: kolme viikkoa sitten					
Task	Evaluation Plan agreed upon (sample)		Normal	su 12.9.2010 12:00	su 12.9.2010 12:00
Phone Call	Likes some of our new products (sample)		High	su 12.9.2010 14:00	su 12.9.2010 14:00
Päivämäärä: kaksi viikkoa sitten					
Päivämäärä: viime viikolla					
Phone Call	Discuss new opportunity (sample)		High	ma 20.9.2010 12:00	ma 20.9.2010 12:00
Task	Proposal Issue, Decision Due (sample)		High	ma 20.9.2010 12:00	ma 20.9.2010 12:00
Phone Call	Call and say hi	Jukka Test Accou...	Normal	ma 20.9.2010 13:00	ma 20.9.2010 13:00
Custom Activity	Another custom activity, for an Opportunity	Jukka Test Accou...	Normal	ti 14.9.2010 3:00	ti 21.9.2010 3:00
Task	Evaluation Plan agreed upon (sample)		High	ti 21.9.2010 12:00	ti 21.9.2010 12:00
Task	Evaluation Plan proposed (sample)		Low	ke 22.9.2010 12:00	ke 22.9.2010 12:00
Päivämäärä: torstai					
Appointment	Let's catch up	Test Niiranen, Te...	Normal	to 30.9.2010 16:00	to 30.9.2010 17:00
Päivämäärä: eilen					
Task	Cancel all subscriptions for Another Test Account	Another Test Acc...	Normal	la 2.10.2010 16:17	la 2.10.2010 16:17

1 - 34 of 34 Page 1

We haven't heard from you...

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

Conditional formatting

Create custom
format rules
based on field
data conditions

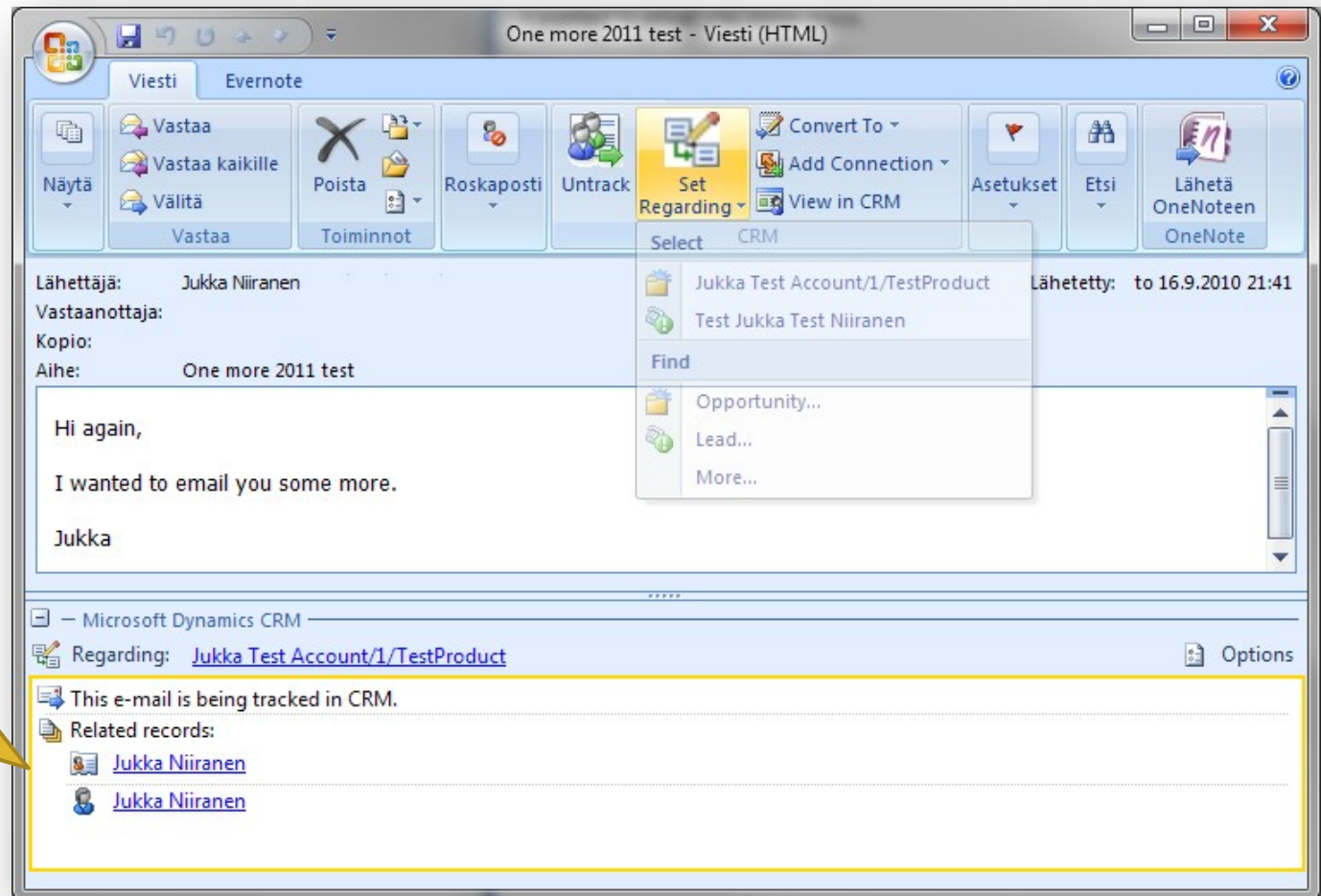
The screenshot shows the 'Activities' window in Microsoft Dynamics CRM 2011. A list of activities is displayed with columns: Activity Type, Subject, Regarding, Priority, Start Date, Due Date, and Recurring Instance. The 'Subject' column is highlighted with a yellow background for activities that are 'Not Recurring'. A dialog box titled 'Mukauta näkymää: My Activities' is open, showing the 'Automaattinen muotoilu' (Automatic Formatting) tab. The dialog lists the following rules for the 'Subject' field:

- Jakeluluettelon kohdat
- Uudet yhteystiedot
- Vanhentuneet yhteystiedot
- Custom

The 'Custom' rule is selected. The 'Valitut säännön ominaisuudet' (Selected rule properties) section shows the rule name 'Custom' and the font '8 pt Segoe UI'. The 'OK' button is highlighted.

Below the activities list, a section titled 'This is a custom activity for a contact' is visible, showing the 'General' tab with the subject 'This is a custom activity for a contact'.

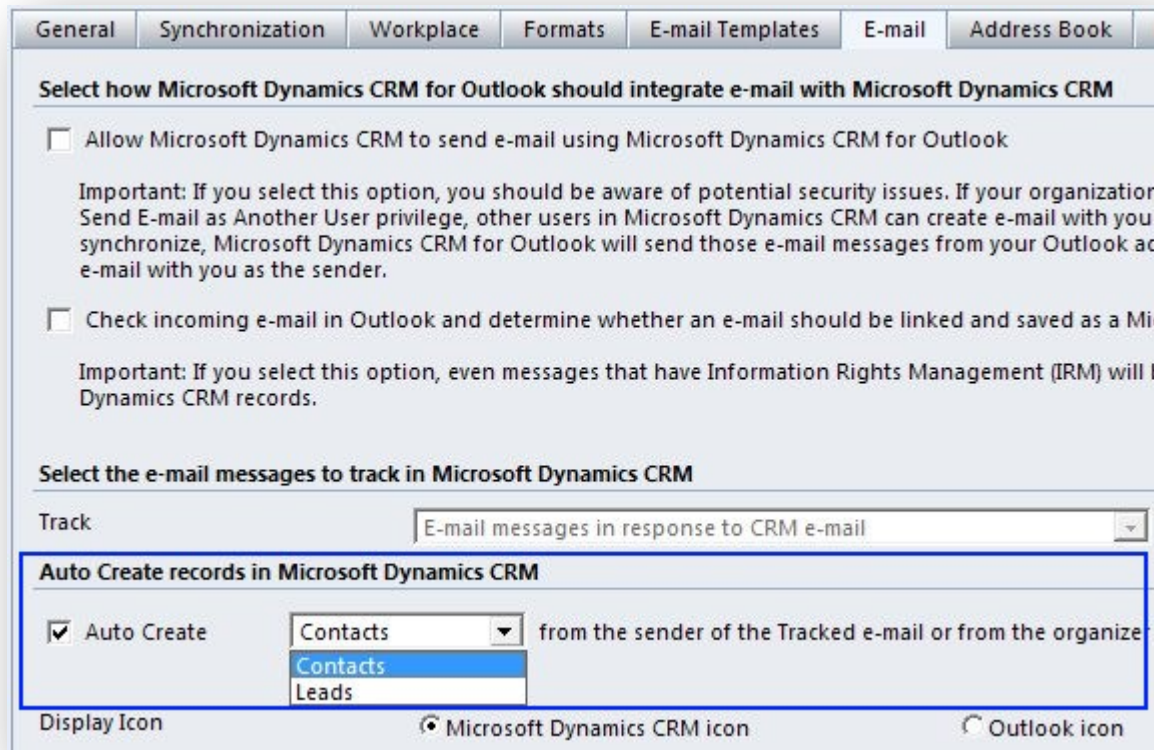
Regarding records



Regarding pane displays links to related 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 displays the Outlook Social Connector interface. On the left, the 'Contacts' pane shows a list of contacts with columns for Full Name, E-mail, and Parent Customer. The contact 'Niiranen, Jukka' is selected. The right pane shows the contact's details, including General information (Salutation, First Name, Middle Name, Last Name, Job Title, E-mail, Business Phone, Home Phone, Mobile Phone, Fax, Parent Customer, Currency) and Address information (Address Name, ZIP/Postal Code, Street 1, Street 2, Street 3, Country/Region, Phone, Address Type). Below the address, there is a section for 'Jukka Niiranen' with a profile photo and a description: 'Manager, CRM Team at Tekla Corporation'. A message box indicates: 'Connect to social networks to show profile photos and activity updates of your colleagues in Outlook. Click here to add networks.' Below this, there is a list of recent activity updates, including a message from 'F.' and a message from 'Re: VS: CRM 2011 koulutus'.

Contacts - (Suodatettu)

Get Started with Contacts

1. Import

- Add Contacts from Outlook
- About Importing Outlook Contacts
- Import from Files

My Active Contacts

Search My Active Contacts

Full Name	E-mail	Parent Customer
Adrian Dumitrascu (sample)	1someone_a@example.com	A Store new name
Brain LaMee (sample)	2someone_b@example.com	Advanced Compone
Cat Francis (sample)	3someone_c@example.com	Affordable Equipme
Cathan Cook (sample)	4someone_d@example.com	Basic Company
Darren Parker (sample)	someone_e@example.com	Best o' Things (samp
Eva Corets (sample)	someone_f@example.com	Designer Goods (sa
Forrest Chand (sample)	someone_g@example.com	Blue Company (sam
Gabriele Cannata (sample)	someone_h@example.com	Elemental Goods (sa
George Sullivan (sample)	someone_i@example.com	Grand Store (sample
Marco Tanara (sample)	someone_j@example.com	Jukka Test Account
Niiranen, Jukka		Jukka Test Account
Patrick Steiner (sample)	someone_k@example.com	Litware Inc. (sample
Person, Test		Magnificent Store (s
Susan Burk (sample)	someone_l@example.com	Another Test Accoun
Test Niiranen, Test Jukka		Recreation Supplies
Thomas Axen (sample)	someone_m@example.com	Jukka Test Account
		Unusual Store (sam

Niiranen, Jukka

General

Salutation: Jukka

First Name: Jukka

Middle Name: Niiranen

Last Name: Jukka

Job Title: Jukka Test

E-mail: jukka.niiranen

Business Phone: Jukka Test

Home Phone: Jukka Test

Mobile Phone: Jukka Test

Fax: Jukka Test

Parent Customer: Jukka Test

Currency: Jukka Test

Address

Address Name: Jukka Test

ZIP/Postal Code: Jukka Test

Street 1: Jukka Test

Street 2: Jukka Test

Street 3: Jukka Test

Country/Region: Jukka Test

Phone: Jukka Test

Address Type: Jukka Test

Jukka Niiranen Manager, CRM Team at Tekla Corporation

Connect to social networks to show profile photos and activity updates of your colleagues in Outlook. Click here to add networks.

Recent Activity Updates:

- F. 4 hours ago
- Re: VS: CRM 2011 koulutus 23:47 3.10.2010
- 22:57 3.10.2010
- Microsoft Dynamics CRM: Duplicate Detection: Contacts Advanced Find View - 30.9.2010 19:45:43 is complete CRM:0001002 14:26 3.10.2010
- Microsoft Dynamics CRM: Duplicate Detection: Contacts 14:26 3.10.2010

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 displays the 'Jukka Test Account' form in Microsoft Dynamics CRM 2011. The form is titled 'Account' and 'Jukka Test Account'. It includes fields for 'Address 1: Country/Region', 'Address 1: County', 'Account Name *' (containing 'Jukka Test Account'), 'Address 1: City', and 'Originating Lead'. Below these fields is a sub-grid titled 'Opportunities (Potential Customer): Open Opportunities'. The sub-grid has a filter set to 'Open' and includes a table with columns 'Topic', 'Potential Customer', and 'Est. Close Date'. The table contains one record: 'Jukka Test Account/1/TestProduct', 'Jukka Test Account', and '30.9.2010'. The sub-grid also shows pagination information: '1 - 1 of 1 (0 selected)' and 'Page 1'.

Topic	Potential Customer	Est. Close Date
Jukka Test Account/1/TestProduct	Jukka Test Account	30.9.2010

Adding a sub-grid on the form

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

Display **Formatting**

Name
Specify a unique name.
Name * Opportunities

Name
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
Edit New

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

Solution: Demo Solution
Form: Account

Sub-Grid
Format a sub-grid and insert it into the form.

Address 1: Country/Region
Address 1: Country
Address 1: City
Account Name * Account Name
Originating Lead
Opportunities (Potential Customer)

Test Form
Tab

Common
Addresses
Activities
Accounts
Contacts
Customer Relations...
Connections

File **Home** **Insert**

Section **Tab** **Control**

One Column Two Columns Three Columns Four Columns
One Column Two Columns
Sub-Grid Web Resource Notes
Spacer IFRAME
Navigation Link

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

Header

General

Account Information

Account Name *

Account Number

Parent Account

Primary Contact

Relationship Type

Currency

Address

Address Name

Street 1

Street 2

Street 3

City

☐ 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:

Contains

☒ Allow users to turn off filter

Additional Properties

☒ Display Search Box in lookup dialog

Default View

☒ Enable the View selection in lookup dialog

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

This screenshot shows the 'New Option Set' form. The 'Type' is set to 'Option Set (picklist)'. The 'Use Existing Option Set' radio buttons are set to 'No'. The 'Default Value' is 'Unassigned Value'. The 'Options' list contains three items: 'Normal', 'Secret', and 'Top Secret!'. The 'Label' field is 'Top Secret!' and the 'Value' field is '100 000 002'. The 'Description' field is empty.

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

This screenshot shows the 'Edit Option Set' form. The 'Type' is set to 'Option Set (picklist)'. The 'Use Existing Option Set' radio buttons are set to 'Yes'. The 'Option Set' dropdown is open, showing a list of option sets. The 'Default Value' is 'Category'. The 'Edit' and 'New' buttons are visible.

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	✓
Areawise 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

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	accountcategorycode
<input type="checkbox"/>	accountclassification
<input type="checkbox"/>	accountid
<input checked="" type="checkbox"/>	accountnumber
<input type="checkbox"/>	accountratingcode
<input type="checkbox"/>	address1_addressid
<input type="checkbox"/>	address1_addressstyp
<input type="checkbox"/>	address1_city
<input type="checkbox"/>	address1_country
<input type="checkbox"/>	address1_county

Edit Multiple Fields -- WWW-valintaikkuna

https://teklacorporation.crm4.dynamics.com/_grid/

Edit Multiple Fields

Enter your edits in the form, you don't edit will not be ch

Requirement Level

Requirement Level -- Make a selection --

Searchable

Searchable ☐ Yes ☐ No

Auditing

Auditing ☐ Enabled ☒ Disabled

Per field

Account Information

Solution: Default Solution

Entities

Account

- Forms
- Views
- Charts
- Fields

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
- 16 Documents
- 16 Audit History

Sales

- Orders
- Invoices
- Competitors

Processes

- Workflows
- Dialog Sessions

Opportunity

Jukka Test Account/1/TestProduct

Opportunities

Potential Customer
Status

[Jukka Test Account](#)
Open

Rating
Est. Revenue

Warm
15 000,00 €

Owner
Est. Close Date

[First Last](#)
30.9.2010

Filter on: All Fields

	Changed Date	Changed By	Action	Changed Field	Old Value	New Value
<input checked="" type="checkbox"/>	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

Customization

Customizations

Solutions

Dynamics Marketplace

Process Center

Processes

Audit Summary View

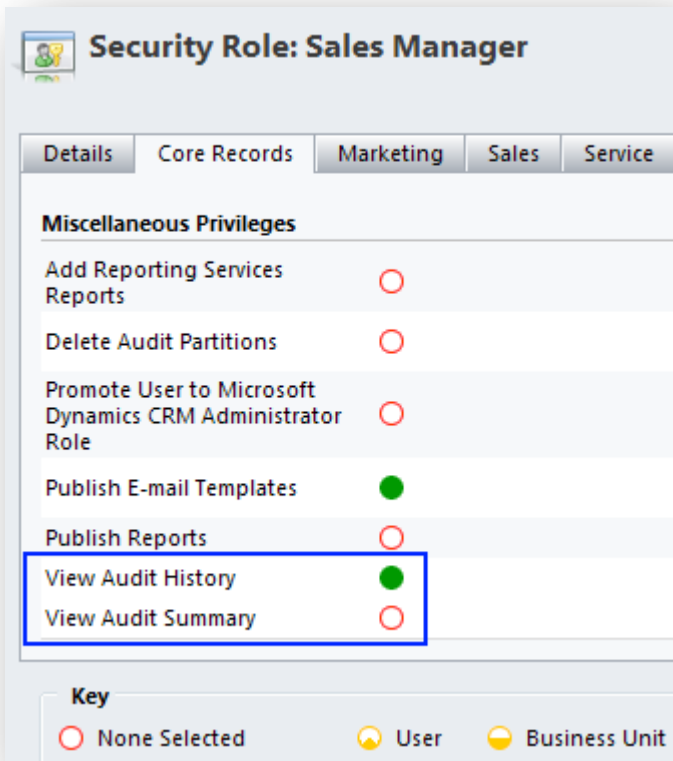
Enable/Disable Filters

	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
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: Literature 1; Changed By: Jukka Niiranen; Action: Create; Changed Date: 28.9.2010 11:49	
16	27.9.2010 23:24	Update	SYSTEM	MPC testi		
16	27.9.2010 6:19	Complete		Telephone		
16	27.9.2010 6:19	Update		Telephone		
16	27.9.2010 6:19	Update	SYSTEM	Telephone		
16	27.9.2010 6:19	Create		Telephone		
16	27.9.2010 6:15	Update		Basic Company Information		
16	27.9.2010 1:50	Update	SYSTEM	Goal for Q4(Sample)		
16	27.9.2010 1:50	Update	SYSTEM	Goal for Q4(Sample)		

The record was created with the following field values

Field Name	Value
Currency	euro
Customer Viewable	No
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



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

Limitations

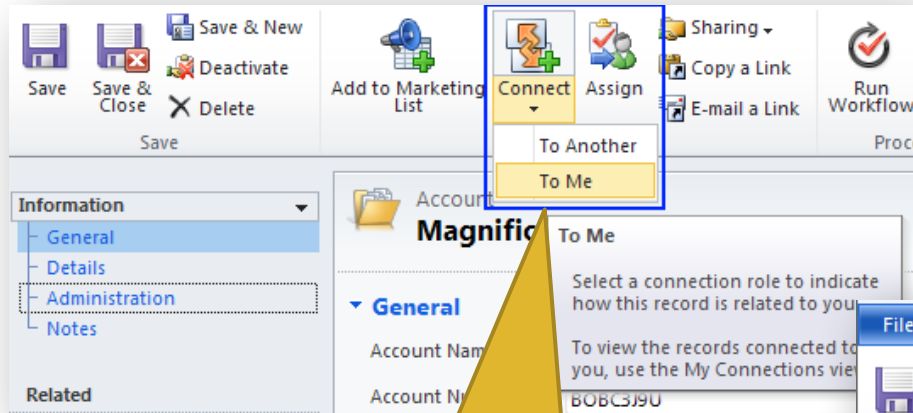
- Audit data is not available in Advanced Find queries, nor for reporting
- FilteredAudit view does not surface all relevant fields from the tables
- Audit records and record details can be retrieved through SDK
- Some system fields do not allow changing auditing settings other than on per entity level

Connections

Connections vs. Relationships

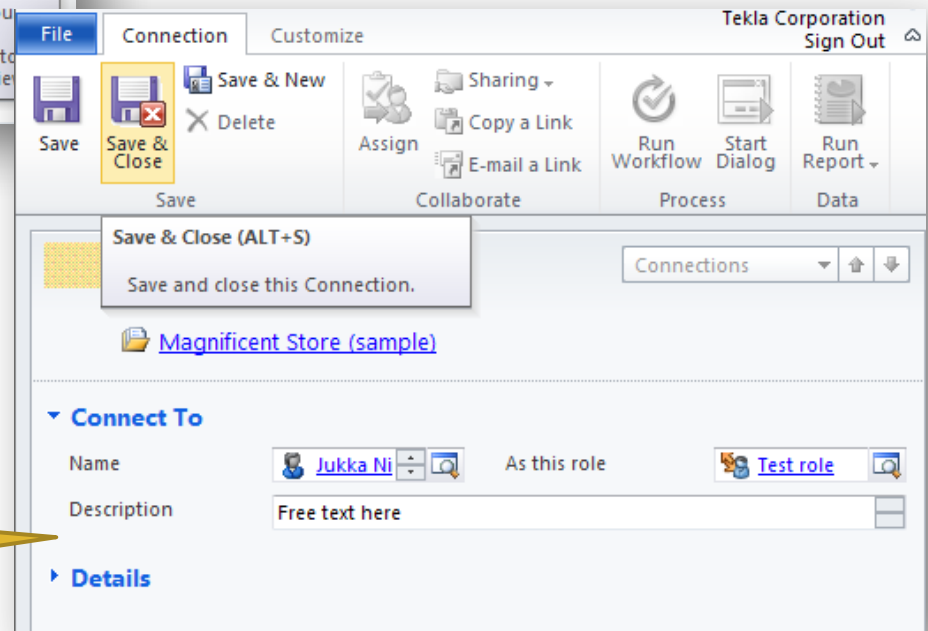
- Replaces the Customer Relationships feature that was limited to accounts, contacts and opportunities
- Connections can be formed between any entity (default and custom)
- However, the old Relationship remains in the schema for backward compatibility purposes
 - Default security roles will not even 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



Shortcut on the ribbon:
"Connect to me"

Collapsed form with
minimum fields



Relationship roles

Look for: Connection Role

View: Applicable Connection Roles

Search: Search for records

Name	Conn
Test role	
Employer	
Partner	
Former Employer	
Referral	
Influencer	

1 - 7 of 7 (1 selected)

Properties New

Connection Role: Test sales role 2

Information

- General
- Matching Connection R...

Related

- Common
 - Audit History
- Processes
 - Workflows
 - Dialog Sessions

General

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

Matching Connection Roles

Step 3: List matching connection roles (optional)

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

Name	Connection Role Category	Status
------	--------------------------	--------

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

Working on solution: Default Solution

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

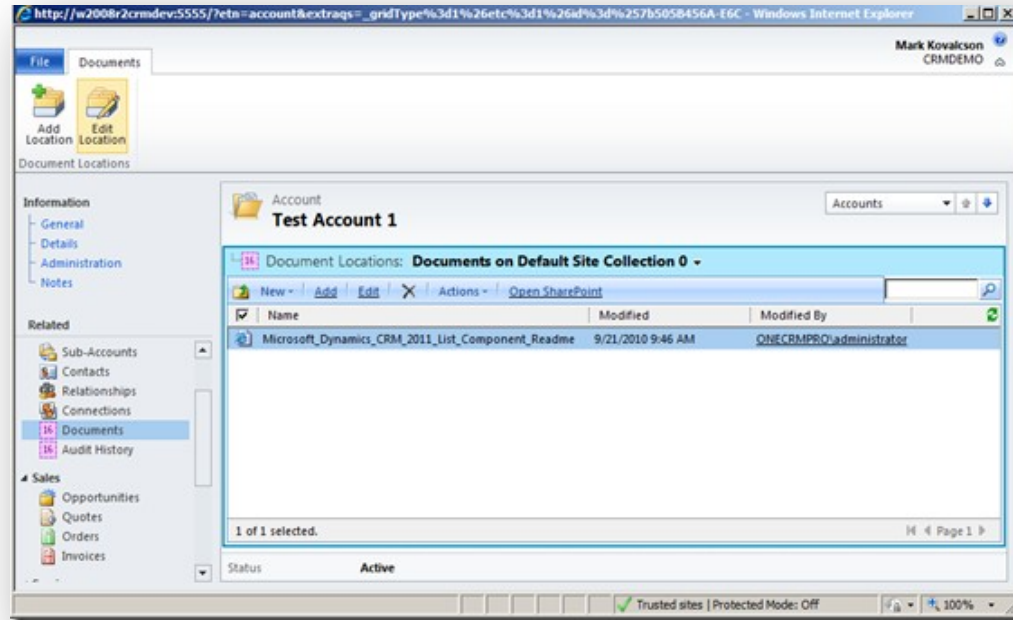
SharePoint Integration

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

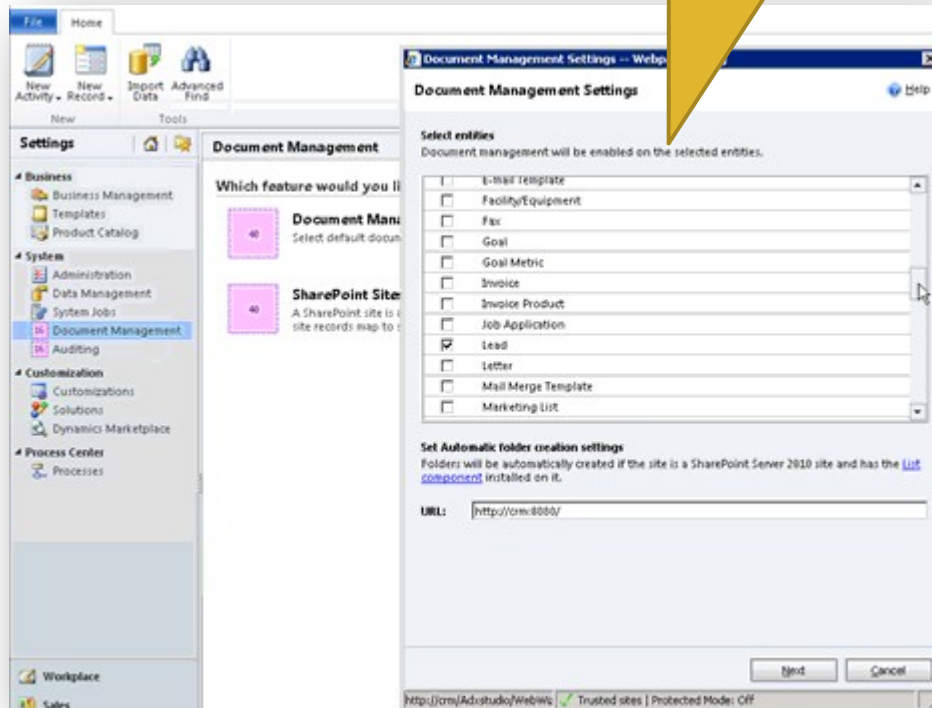
- See blog post by Mark Kovalcson on the component installation process:
- <http://crmscape.blogspot.com/2010/09/ms-crm-2011-sharepoint-list-component.html>



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 "Goolge style" global freetext search for CRM data
- Note: SP2010 uses .NET 3.5, while CRM 2011 is built on .NET 4

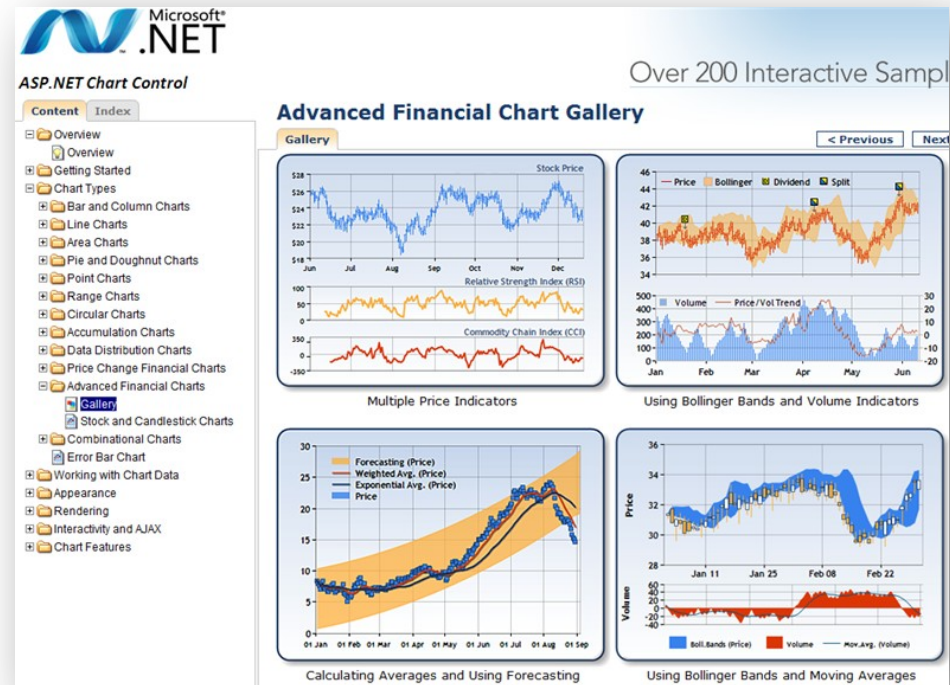
Visualizations

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 displays the Microsoft Dynamics CRM 2011 interface. The top navigation bar includes 'File', 'Accounts', 'View', 'Create Related', and 'Customize'. The 'View' tab is active, showing a ribbon with various editing controls. A yellow callout box points to this ribbon, stating: 'Editing controls are under the View tab'. The main workspace shows a grid of 'Accounts: My Active Accounts'. The grid has columns for 'Account Name', 'Main Phone', and 'Address 1: City'. The first row is highlighted. To the right of the grid, there is a chart titled 'Accounts By Territories'. A yellow callout box points to this chart, stating: 'Existing charts can be pulled from right side of the grid'. The chart is a horizontal bar chart showing the number of accounts for each territory: South (4), North (1), and East (1). The chart is part of a list of available charts, including 'System Charts', 'Accounts by Industry', 'Accounts by Owner', 'Accounts By Territories', and 'New Accounts By Month'.

File Accounts **View** Create Related Customize Sign Out

Set As Default View Refresh Filter Save Filters to Current View Save As Create Personal View List

Charts New Chart Save As Delete Chart Import Chart Export Chart Assign Charts

Workplace

Accounts: **My Active Accounts**

Search for records

Account Name Main Phone Address 1: City

A Store new name 555-0136 Renton

Advanced Components (...) 555-0135 Dallas

Affordable Equipment (s... 555-0162 Santa Cruz

Basic Company 555-0174 Lynnwood

Best o' Things (sample) 555-0145 Los Angeles

Blue Company (sample) 555-0131 Redmond

Designer Goods (sample) 555-0197 Redmond

Elemental Goods (sample) 555-0127 Missoula

Grand Store (sample) 555-0135 Redmond

Jukka Test Account

Litware Inc. (sample) 555-0116 Phoenix

Magnificent Store (samp... 555-0135 Daly City

Recreation Supplies (sa... 555-0171 Ne

Unusual Store (sample) 555-0178 Le

Variety Store (sample) 555-0135 Po

Accounts By Territories

System Charts

Accounts by Industry

Accounts by Owner

Accounts By Territories

New Accounts By Month

Territory

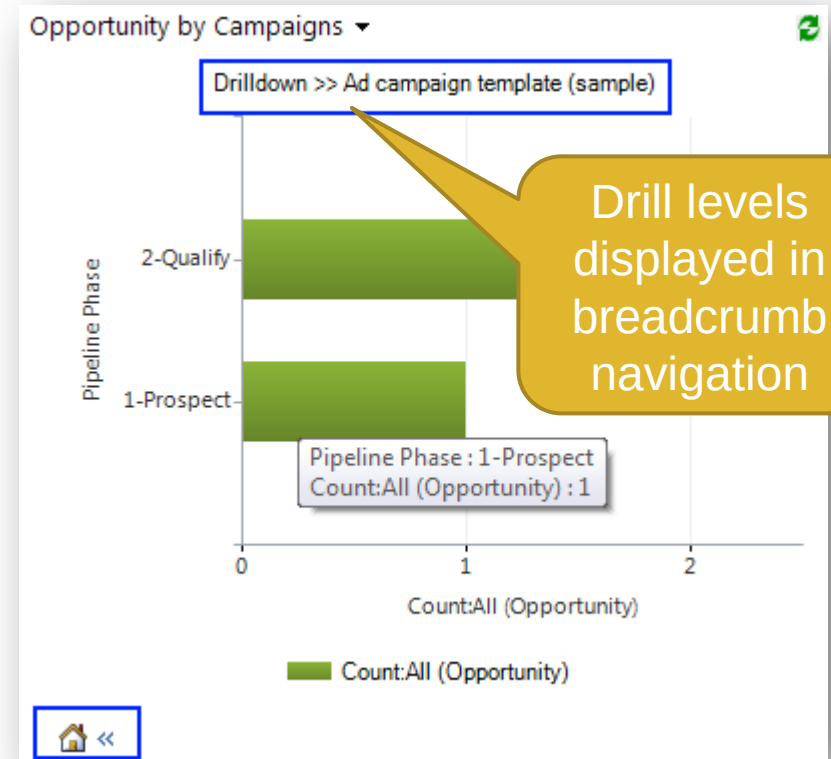
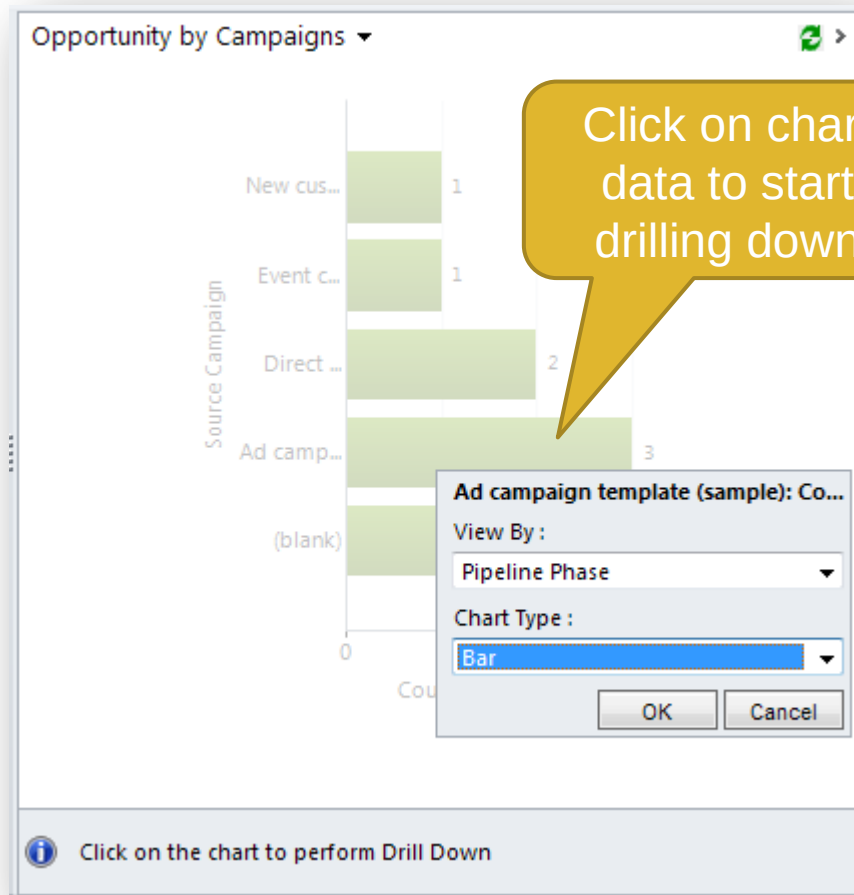
South 4

North 1

East 1

6 8 10

Drilling down



Creating new personal charts

File Opportunities View Create Related Customize Design

Save Save and Close Save As

Column Bar Line Pie Funnel Close Designer

Charts

Jukka Niiranen Sign Out

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

Opportunities: My Open Opportunities

Search for records

Topic Potential

6 orders of Product SKU JJ202 (sample) Basic Comp

Jukka Test Account/1/TestProduct Jukka Test

Needs to restock their supply of Product... Best o' Thir

They sell many of the same items that w... Blue Comp

Very likely will order 18 Product SKU JJ20... Elemental C

Will be ordering about 110 items of all t... Litware Inc

Will expand their offerings to include s... Variety Sto

Will order some items soon (sample) Variety Sto

1 - 8 of 8 (1 selected) Page 1

Chart Designer

Est. Revenue by Pipeline Phase

85 000,00 €

36 000,00 €

15 000,00 €

175 000,00 €

Advanced Options Show

Legend Entries (Series)

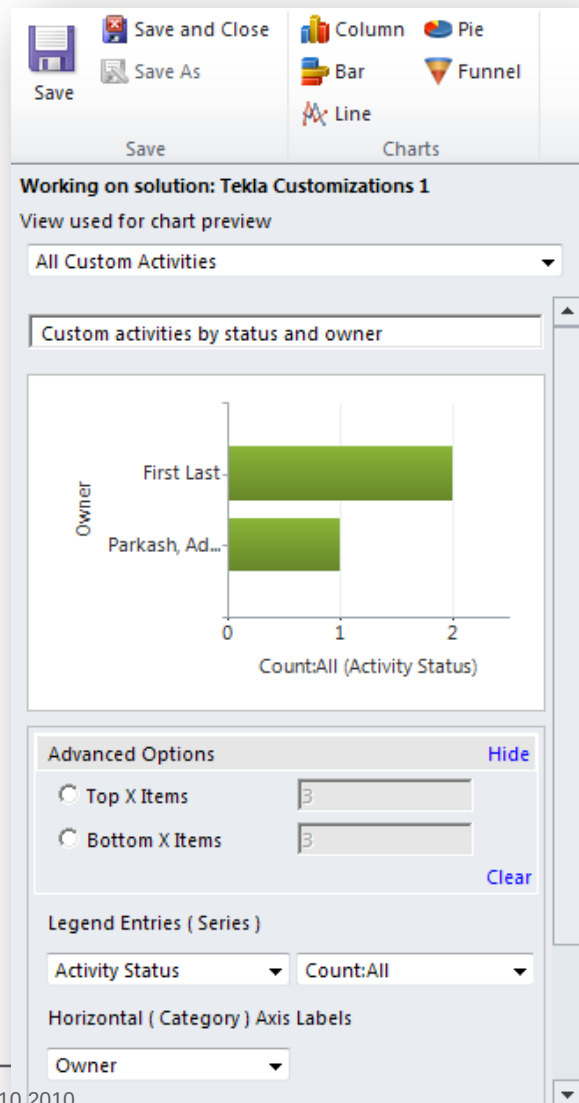
Est. Revenue Sum

Horizontal (Category) Axis La

Pipeline Phase

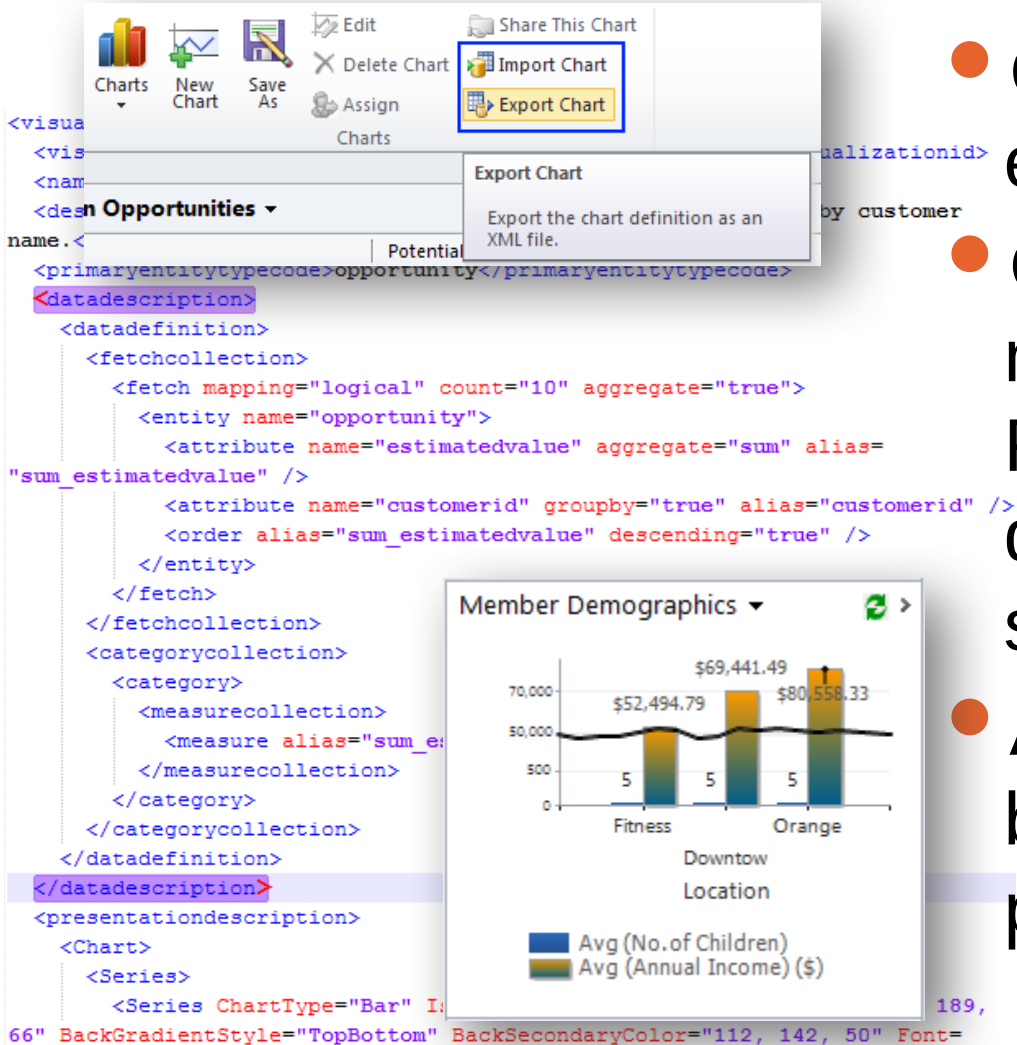
Avg Count:All Count:Non-empty Max Min Sum

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



Export Chart

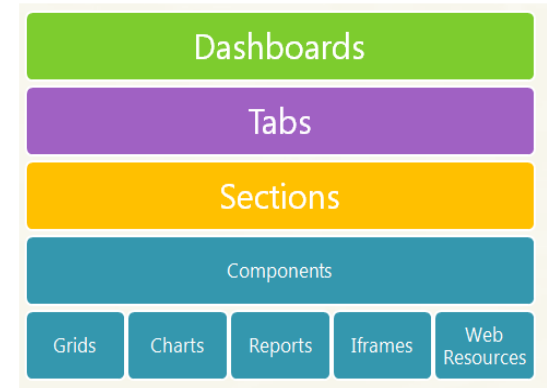
Export the chart definition as an XML file.

```
<visualizations>
  <visualization id="1" name="Member Demographics" description="Member Demographics" visualizationid="1" by customer>
    <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_e" />
            </measurecollection>
          </category>
        </categorycollection>
      </datadefinition>
    </datadescription>
    <presentationdescription>
      <Chart>
        <Series>
          <Series ChartType="Bar" I=
66" BackGradientStyle="TopBottom" BackSecondaryColor="112, 142, 50" 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.



**3-Column
Regular Dashboard**



**4-Column
Focused Dashboard**



**4-Column
Overview Dashboard**



**2-Column
Regular Dashboard**



**3-Column
Overview Dashboard**



**3-Column
Focused Dashboard**



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 dashboard editor interface. The dashboard is named 'TestDashboard1' and contains two main components: a bar chart titled 'Incoming Lead Analysis by Month' and a horizontal bar chart titled 'Top 10 Opportunities'. A third section titled 'Tab with a custom title' contains a table with three columns labeled 'Column'.

Callout 1: Add components on the dashboard (points to the 'Chart' icon in the 'Insert' group of the ribbon).

Callout 2: Modify tab and section titles (points to the 'Tab' and 'Section' labels on the left side of the dashboard).

Callout 3: Adjust component size on the form (points to the 'Increase Width', 'Decrease Width', 'Increase Height', and 'Decrease Height' icons in the 'Layout' group of the ribbon).

Dashboard Content:

- Incoming Lead Analysis by Month:** A bar chart showing the count of leads for 'syys 2010' (13). The Y-axis is labeled 'Count:All (Lead)' and ranges from 0 to 14. The X-axis is labeled 'Month (Created On)'.
- Top 10 Opportunities:** A horizontal bar chart showing the estimated revenue for various topics. The Y-axis is labeled 'Topic' and the X-axis is labeled 'Est. Revenue' (0 to 200,000 €).
- Tab with a custom title:** A section with a custom title and a table with three columns labeled 'Column'.

Creating a new dashboard (3)

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

Name
Specify a unique name.
Name *

Name
Label *
☐ Display label on the Dashboard

Data Source
Specify the primary data source for this sub-grid.
Records
Entity
Default View

Additional Options
☒ Display Search Box
☒ Display Index
☒ Display View Selection

System Views

Chart Options
Default Chart
☒ Show Chart Only
☒ Display Chart Selection

Configure data sources for charts

Configure options visible on the dashboard

Configure chart type

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

General

Name * Qualified leads Q4 2010

Parent Goal

Goal Owner * Jukka Niiranen

Goal Metric * 16 Number of qualified leads

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

Child Goals

Name

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
16	Actual (Integer)	Lead		Qualified	Qualified
16	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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Custom search engine on CRM

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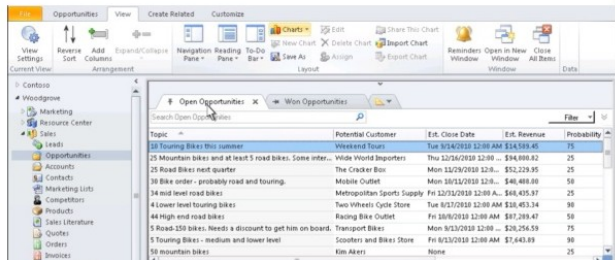
2 comments

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:



About this site

I'm a Microsoft Dynamics CRM specialist from Finland, having worked with the system since 2005. Occasionally when I have a thing to say about the topic, I may post it on my CRM blog, tweet it, save it to CRM links or bookmark it on Delicious.



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

Lotus Notes is in the cloud now <http://www.to/tpt/OF> But can the stop hating it after all these year <http://lotusnotesucks.4...> yesterday

Microsoft BPOS waiting for Exch 2010 update over a year now, CRM 2011 should launch Online on-premises. Hmm... #MSDYNCRM 2 days ago

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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/ZzoJ5mN> 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

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