

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 illustrates the context-sensitive ribbon in Microsoft Dynamics CRM 2011. The ribbon is a horizontal bar at the top of the application window, divided into several tabs and toolbars. The 'Create Related' tab is highlighted in blue, indicating the current context. Below the ribbon, the main workspace shows a list of accounts and a detailed view of a selected account.

Top Ribbon: The ribbon tabs include File, Accounts, View, Create Related (highlighted in blue), Customize, Sign Out, and several activity-related icons (Task, E-mail, Phone Call, etc.).

Left Sidebar: The 'Workplace' sidebar on the left lists 'My Work' items such as Dashboards, Activities, Calendar, Imports, Duplicate Detection, Queues, and Articles. A yellow callout bubble with the text 'Create related records' points to the 'Create Related' tab in the ribbon.

Account List View: The main area shows a list of accounts. A yellow callout bubble with the text 'Show list tools for subgrids' points to the 'List Tools' tab in the ribbon. The list includes accounts like 'A Store new name', 'Advanced Components (sample)', 'Affordable Equipment (sample)', and 'Another Test Account' (which is selected and highlighted with a blue border).

Account Detail View: A detailed view of the 'Another Test Account' is shown. The 'Opportunity Products' tab is highlighted in blue. The detail view includes fields for Potential Customer (Jukka Niiranen), Status (Open), Rating (50), Warm (15 000,00 €), Owner (First), and Est. Close Date (30.9.2010). The 'Line Items' section shows a subgrid with a single item: 'Test Product 1' with a quantity of 1,00000 and an extended amount of 15 000,00 €.

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)

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

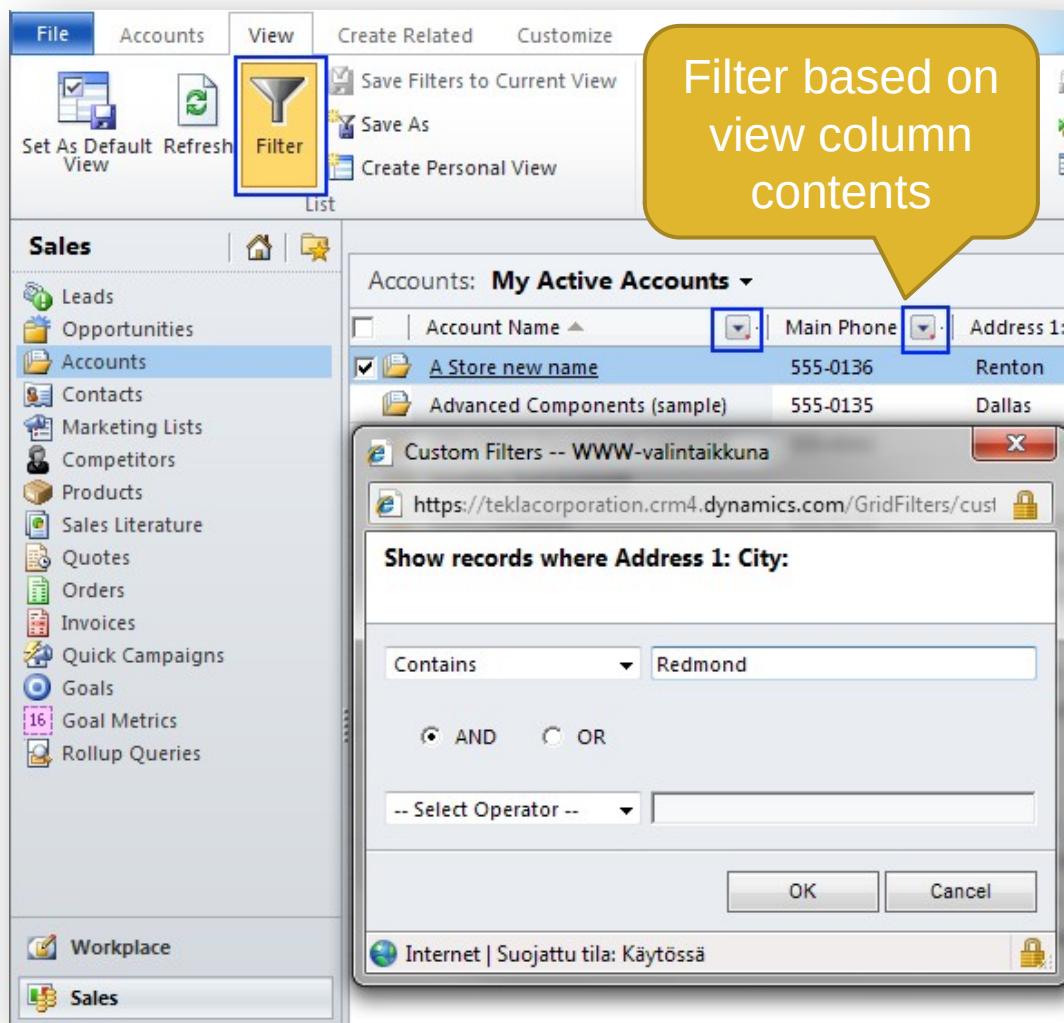
3.10.2010 17:20 by Jukka Niiranen

Edited 3.10.2010 17:20 by Jukka Niiranen

Status Active

Persistent header and footer fields

Filters and default views



File Accounts View Create Related Customize

Set As Default Refresh View Filter

Save Filters to Current View Save As Create Personal View

Sales

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

Accounts: **My Active Accounts**

Account Name Main Phone Address 1: City

A Store new name 555-0136 Renton

Advanced Components (sample) 555-0135 Dallas

Custom Filters -- WWW-valintaikkuna

Show records where Address 1: City:

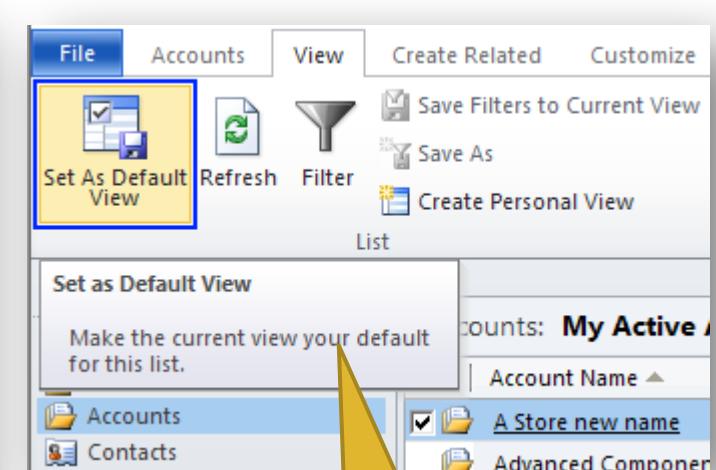
Contains Redmond

AND OR

-- Select Operator --

OK Cancel

Internet | Suojattu tila: Käytössä



File Accounts View Create Related Customize

Set As Default Refresh Filter

Save Filters to Current View Save As Create Personal View

Set as Default View

Make the current view your default for this list.

Accounts Contacts

Accounts: **My Active Accounts**

Account Name

A Store new name

Advanced Components (sample)

Recently visited records & views

The screenshot shows the Microsoft Dynamics CRM Online Workplace interface. The left sidebar contains navigation links for '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 records and views, including 'Microsoft Dynamics CRM...', 'Views', 'My Imports', 'My Active Contacts', 'Items I am working on', 'My Active Goals for Current...', 'My Active Rollup Queries', 'My Processes', 'My Activities', 'My Active Accounts', 'Enabled Users', 'My Open Opportunities', 'Test Niiranen, Test Jukka', 'Test Product 1', 'Contact: Test Niiranen, Test Jukka', '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', and 'Jukka Niiranen'. A yellow callout bubble points to the 'Test Niiranen, Test Jukka' item, with the text 'Pin items to recently visited records menu'. To the right of the menu, there are sections for '2. Extend' (About Customizing, Solutions Marketplace), 'Leads by Source Campaign' (a chart showing campaign counts), and a table of activities (Regarding, Priority, Start Date).

Recently Visited

2. Extend

Pin items to recently visited records menu

Leads by Source Campaign

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. The main window displays the 'Information' tab of the 'Account' detail form for 'Litware Inc. (sample)'. The 'General' section is expanded, showing fields for Account Name (Litware Inc. (sample)), Account Number (BABCO88H), Parent Account, Primary Contact (Marco Tanara (sample)), Relationship Type, and Currency (euro). The 'Address' section is also visible. On the left, a navigation bar lists 'Information', 'Related', 'Sales', and 'Service' sections with various sub-items. A yellow callout bubble points to the 'Accounts' button in the top right corner of the detail form area, with the text 'Scroll through records and views on any form'. To the right of the detail form, a sidebar titled 'View: My Active Accounts' lists a scrollable list of account names, with 'Grand Store (sample)' currently selected. The bottom right of the sidebar shows 'Page 1' of the list.

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

Full view selection controls in associated views

Enhanced view controls in lookup dialogs

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The top navigation bar includes 'File', 'Account', 'Create Related', 'Customize', 'List Tools' (selected), 'Contacts', 'Jukka Niiranen', and 'Sign Out'. Below the navigation bar are various buttons for 'Records', 'Send Direct E-mail', 'Add to Marketing List', 'Quick Campaign', 'Assign Contacts', 'Current View', 'Set As Default View', 'Charts', 'Run Workflow', and 'Data'. The main content area shows an 'Information' section for 'Litware Inc. (sample)' with tabs for 'General', 'Details', 'Administration', and 'Notes'. A 'Related' section includes 'Common' items like 'More Addresses', 'Activities', 'Closed Activities', 'Sub-Accounts', 'Contacts' (selected), 'Relationships', 'Connections', 'Documents', and 'Audit History'. The 'Contacts' list shows a contact for 'Marco Tan'. A yellow arrow points from the text 'Full view selection controls in associated views' to the 'Contact Associated View' dropdown menu, which lists 'System Views', 'Active Contacts', and 'Contact Associated View'. Another yellow arrow points from the text 'Enhanced view controls in lookup dialogs' to the 'System Views' dropdown in a 'Look Up Record' dialog, which lists 'Account Lookup View' and 'System Views' (selected). The 'System Views' dropdown shows a list of accounts, and a yellow box highlights the 'Show Only My Records' checkbox. The bottom right corner shows a list of accounts with columns for 'Account Number' and 'Primary Contact'.

Account Number	Primary Contact
ABSS4G45	Adrian Dumitrescu (sample)
ACTBBDC3	Brain LaMee (sample)
ABC28UU7	Cat Francis (sample)
AFFSE9IK	Cathan Cook (sample)

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"/>

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 Dumitrescu (sample)
-  Brain LaMee (sample)
-  Cat Francis (sample)

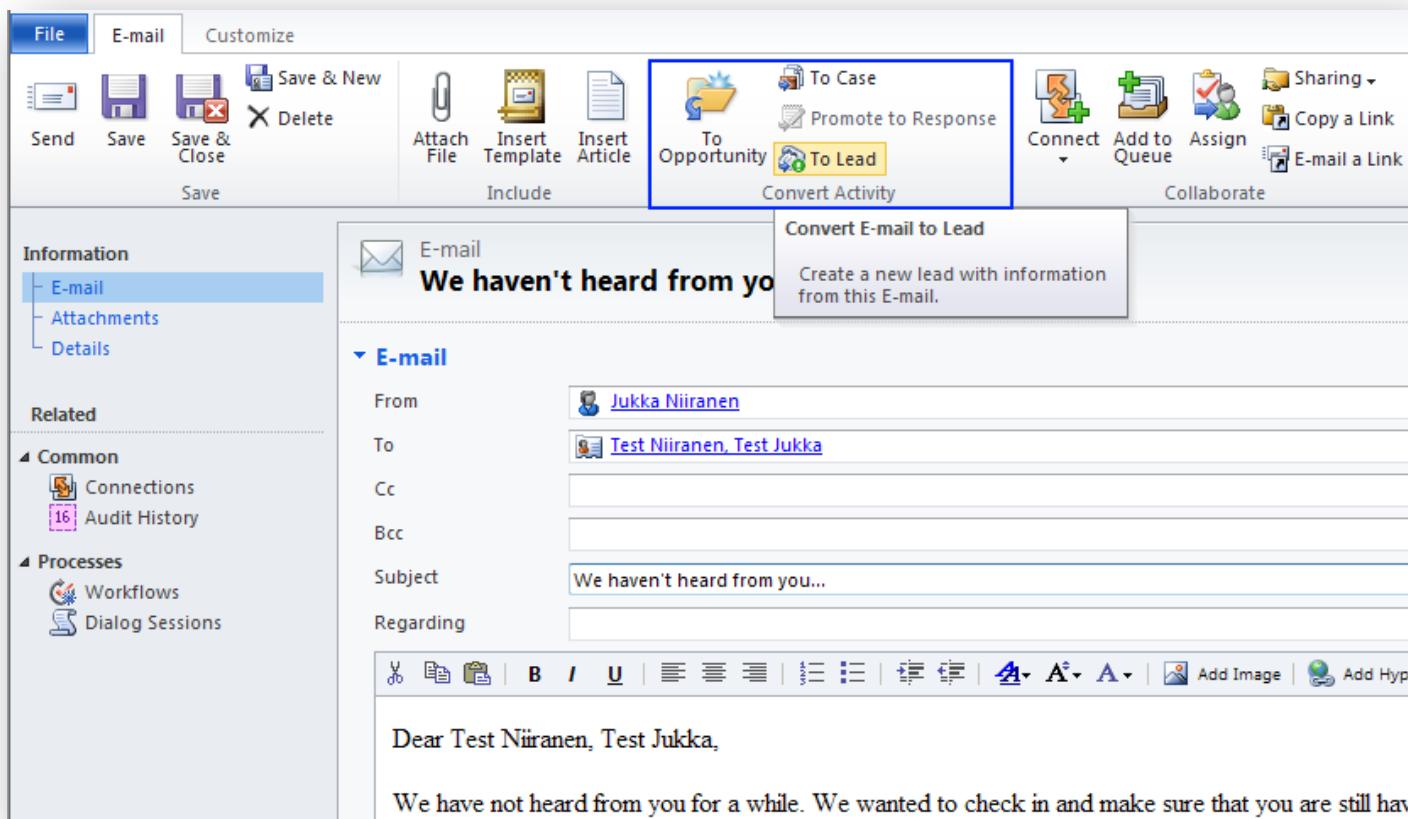
Forecast Information

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

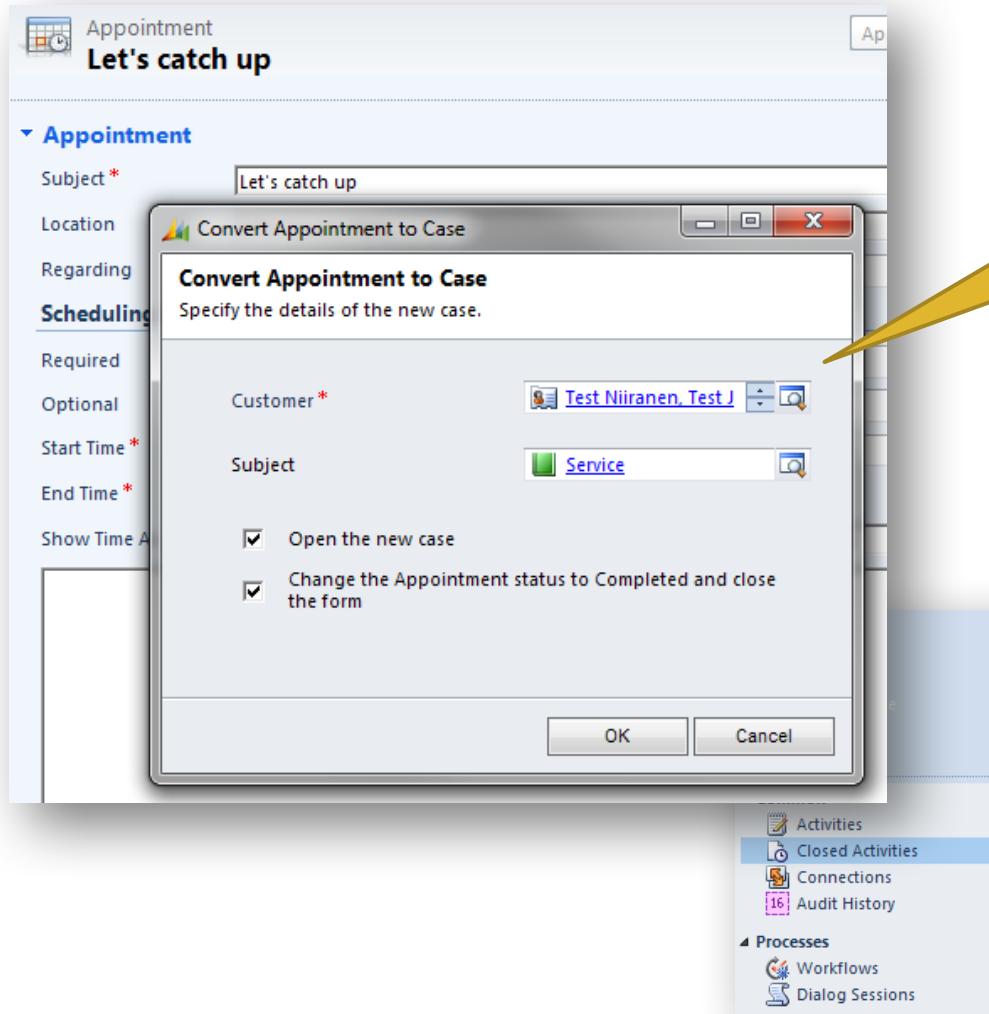
Form options for auto-
resove and most
recently used items

Convert emails (1)

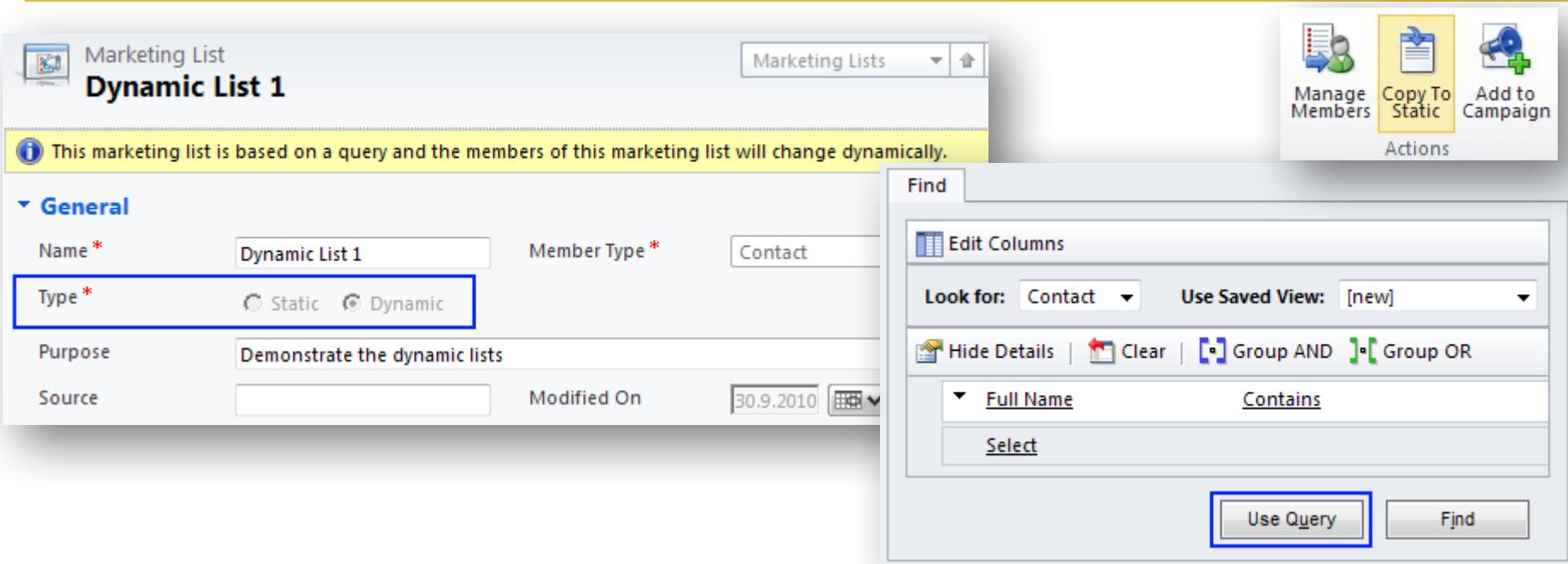
- Create a new lead, opportunity or case directly from the email activity ribbon



Convert emails (2)



Dynamic Marketing Lists



Marketing List
Dynamic List 1

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

Find

Edit Columns

Look for: Contact Use Saved View: [new]

Hide Details Clear Group AND Group OR

Full Name Contains Select

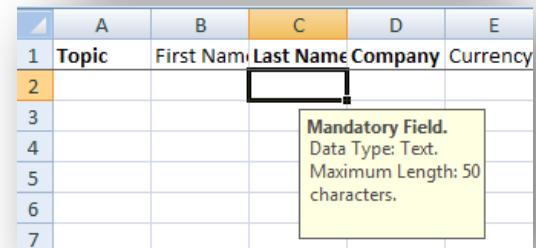
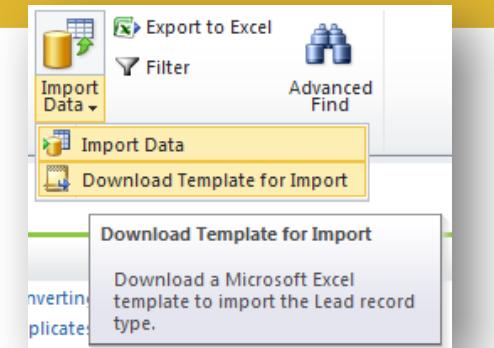
Use Query Find

- 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

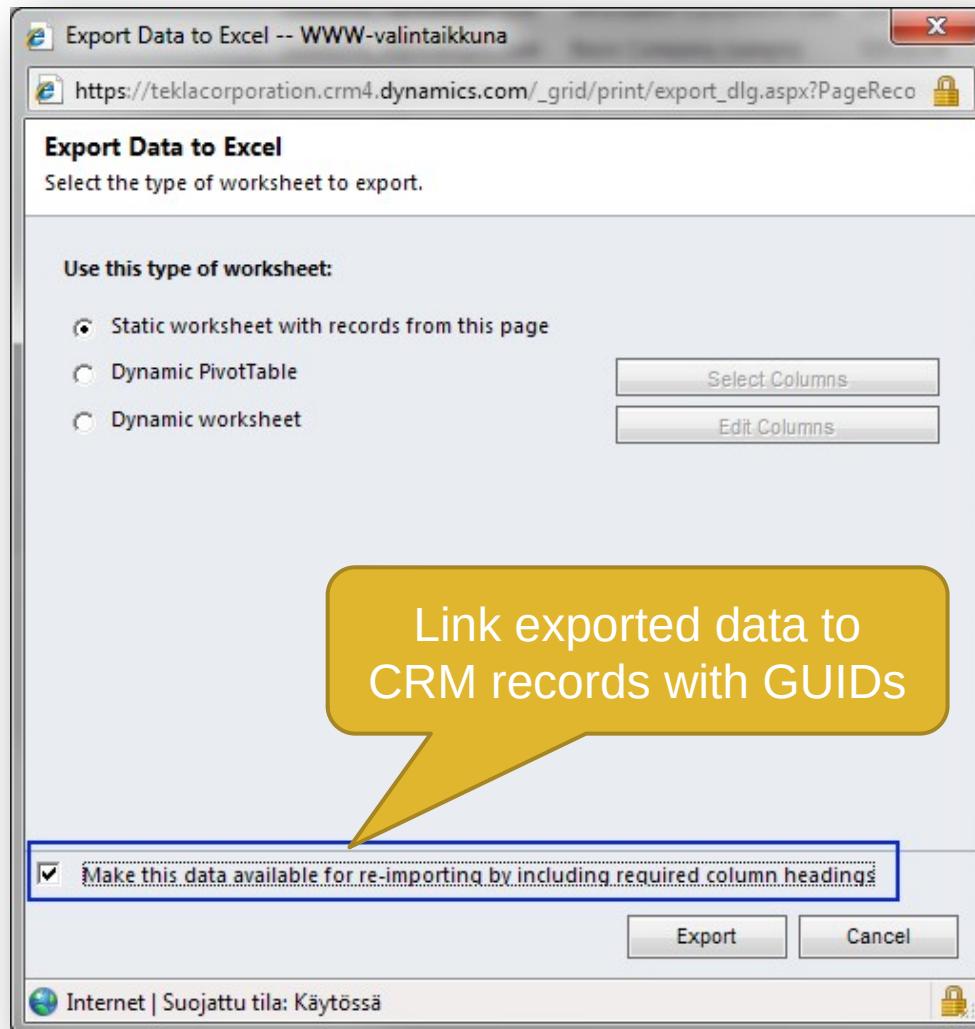
Data import wizard

- 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:

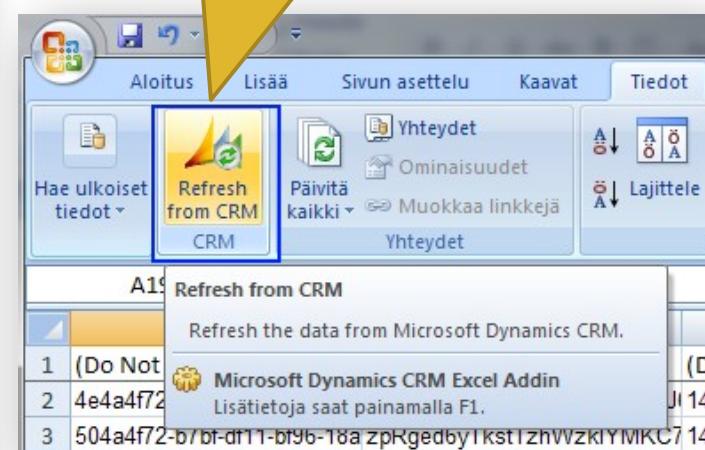
<http://www.powerobjects.com/blog/2010/10/01/crm-2011-data-import-wizard/>



Excel data export & re-import (1)



Refresh Excel records of static worksheets with CRM data



Excel data export & re-import (2)

Import data to update existing records or create new ones

	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/m6C9Y0sLh5fJl	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	5TpqC7AEs6Ikg8B0AXeyejma	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/VDp	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	mFPm+QU2s57yLm+4wo3B+	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	gt8cISPMLlkv4kg58JEaxdzOz	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-1j2fpEKBcLA5R7EzWclEJEGn	16.9.2010 13:14:00	Thomas			
16	664a4f72-b7bf-df11-bf96-18a	47D2MFF074yPdRnr66xMqsd	14.9.2010 4:20:58	Yvonne		
17	684a4f72-b7bf-df11-bf96-18a	XXxt3Qi+zFvQBDLBdqHdZ32J	14.9.2010 4:20:58			

Import Data Wizard -- WWW-valintaikkuna

<https://tekla.corporation.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

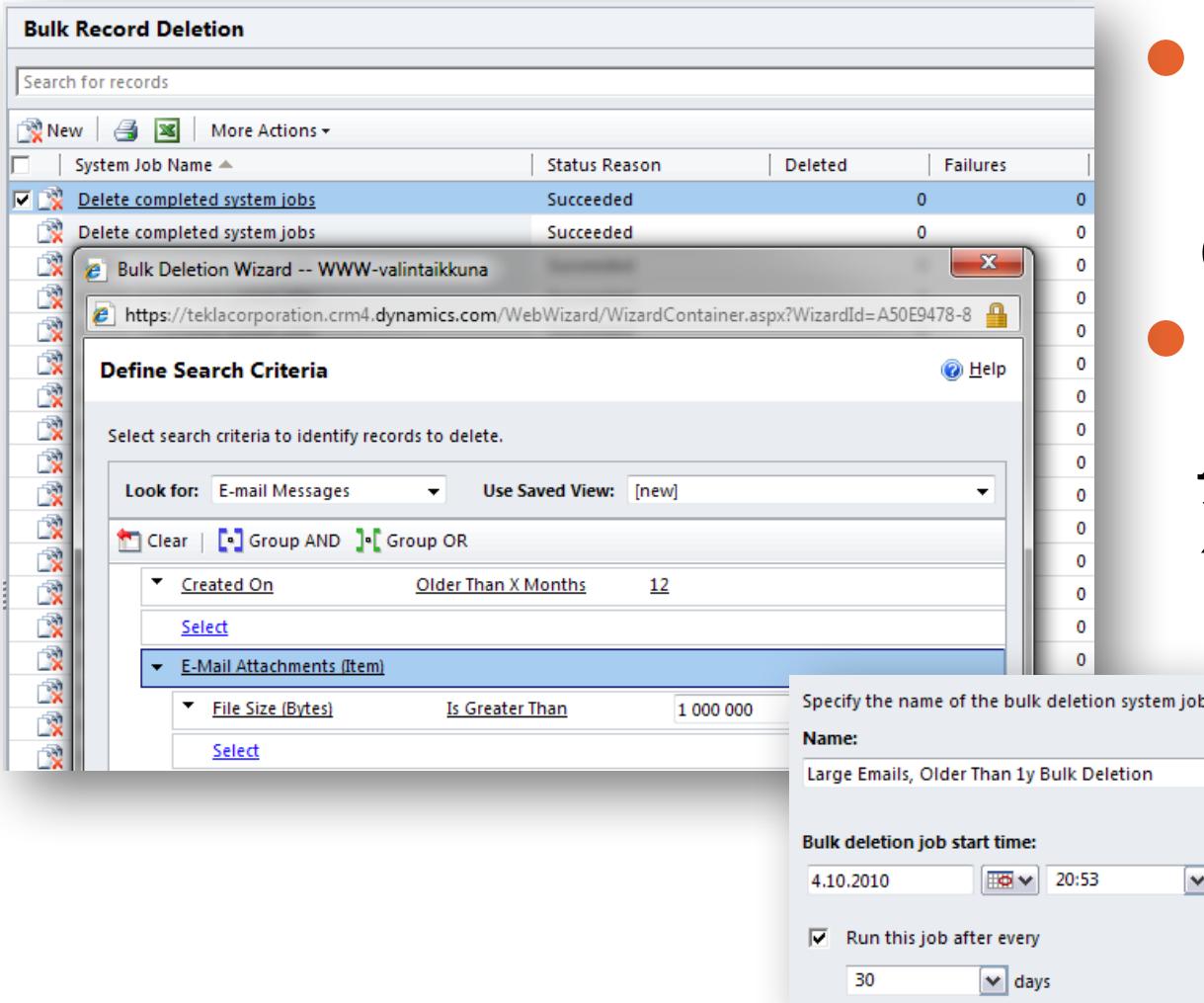
Jukka Niiranen

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

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	Start Date	End 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		
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:

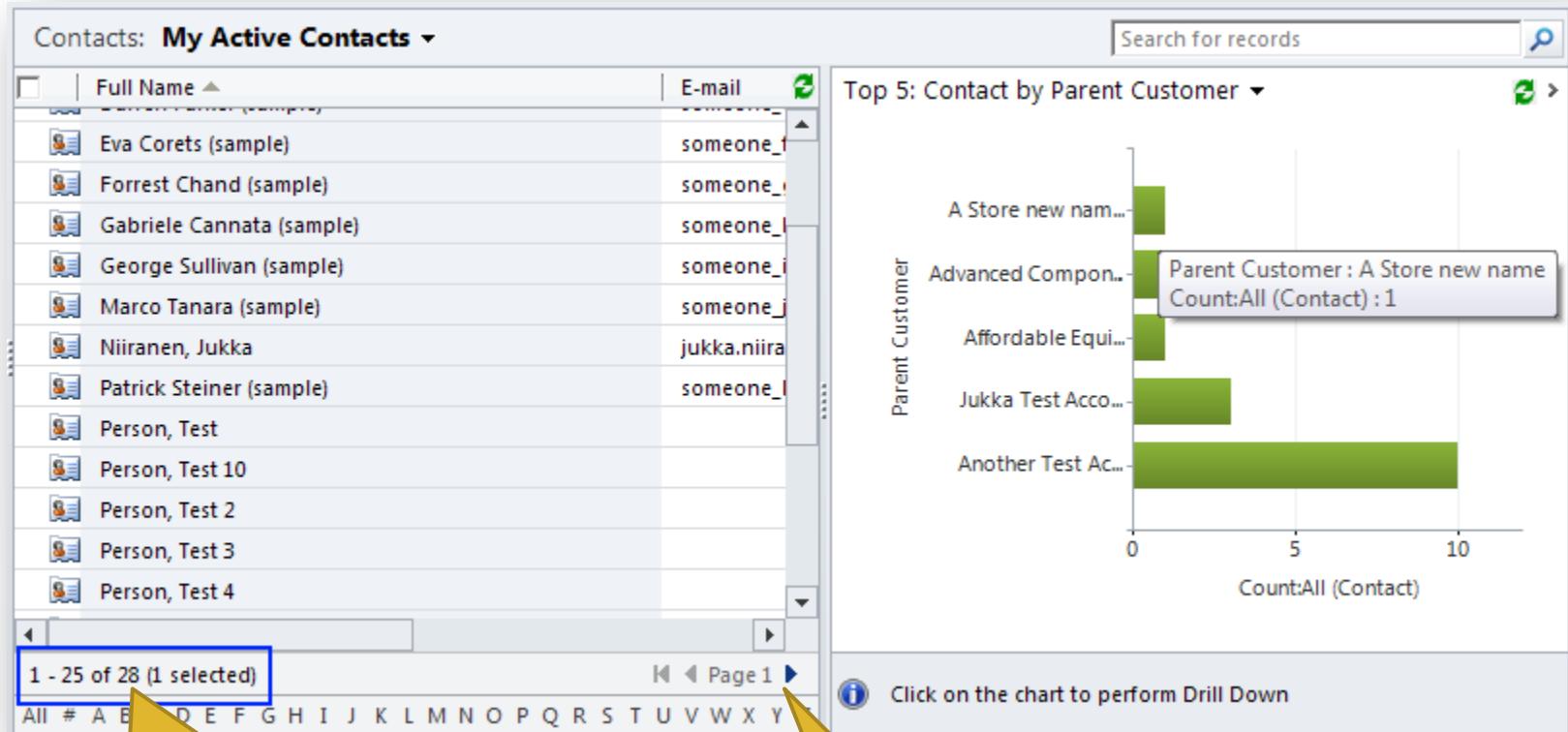
sunnuntai maanantai tiistai keskiviikko
 torstai perjantai lauantai

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

File Sales Literature Customize

Save Save & Close Delete

Send as E-mail Add a Sales Attachment Sharing Copy a Link Run Workflow

Actions Collaborate

Information General

Related

Common

- Sales Attachments
- Products
- 16 Documents
- 16 Audit History

Sales Attachments: Sales L

New Sales Attachment

Title	Modified
Literature 1 File A	28.9
Literature 1 File B	28.9

E-mail

File E-mail Customize

Send Save Save & Close Delete

Attach File Insert Template Insert Article To Case To Opportunity To Lead Promote to Response

Save

Information E-mail

Attachments Details

Related

Common

- Connections
- 16 Audit History

Processes

- Workflows
- Dialog Sessions

E-mail Literature 1

Attachments

E-Mail Attachments: Activity Attachment Associated

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

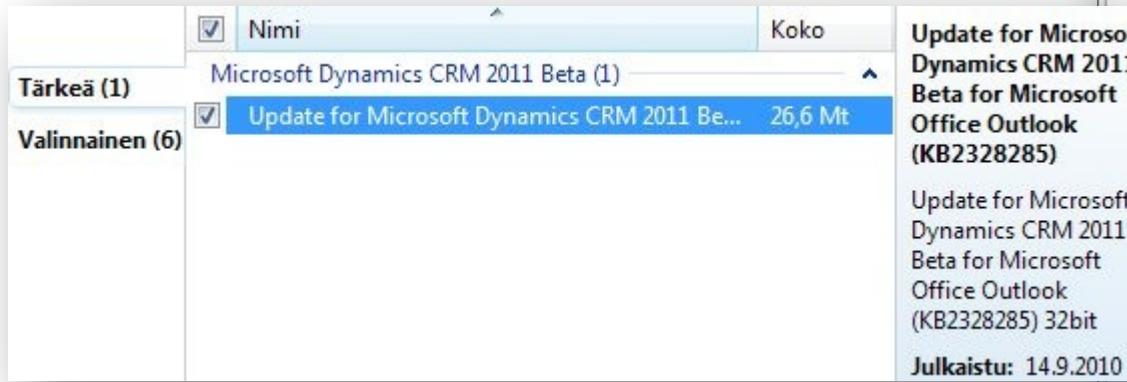
1 - 2 of 2 (0 selected)

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 a side-by-side comparison of Microsoft Dynamics CRM 2011's interface. On the left, the 2010 version is displayed with a ribbon menu at the top and a navigation pane on the left containing 'Accounts', 'Marketing', 'Opportunities', 'Products', 'Sales Literature', 'Quotes', 'Orders', 'Invoices', 'Quick Campaigns', 'Goals', 'Goal Metrics', 'Related Queries', 'Service', 'Settings', and 'Workplace'. The main area shows a list of 'My Active Accounts' with columns for Account Name, Main Phone, Address & City, Primary Contact, and E-mail (Primary Contact). A detailed view of 'Blue Company (sample)' is shown on the right. On the right, the 2007/2003 version is displayed with a standard menu bar (File, Edit, View, Add, Customize, Accounts, Charts, Delete, Merge, Duplicates, Send Draft, E-mail, Add to, Connect, Assign, Compose, Copy a Link, Run Workflow Dialog, Start Workflow Process, Run Report, Import, Advanced Data, Find, Help, and a question mark icon). The main area shows the same list of accounts and a detailed view of 'Blue Company (sample)'. A yellow speech bubble points from the 2007/2003 menu bar to the 2010 ribbon, with the text 'Ribbons are converted to menus in 2007/2003'. A yellow arrow points from the 2010 navigation pane to the 2007/2003 navigation pane, with the text 'Navigation panes and graphic folders only in 2010'.

Ribbons are converted to menus in 2007/2003

Navigation panes and graphic folders only in 2010

Reading panes

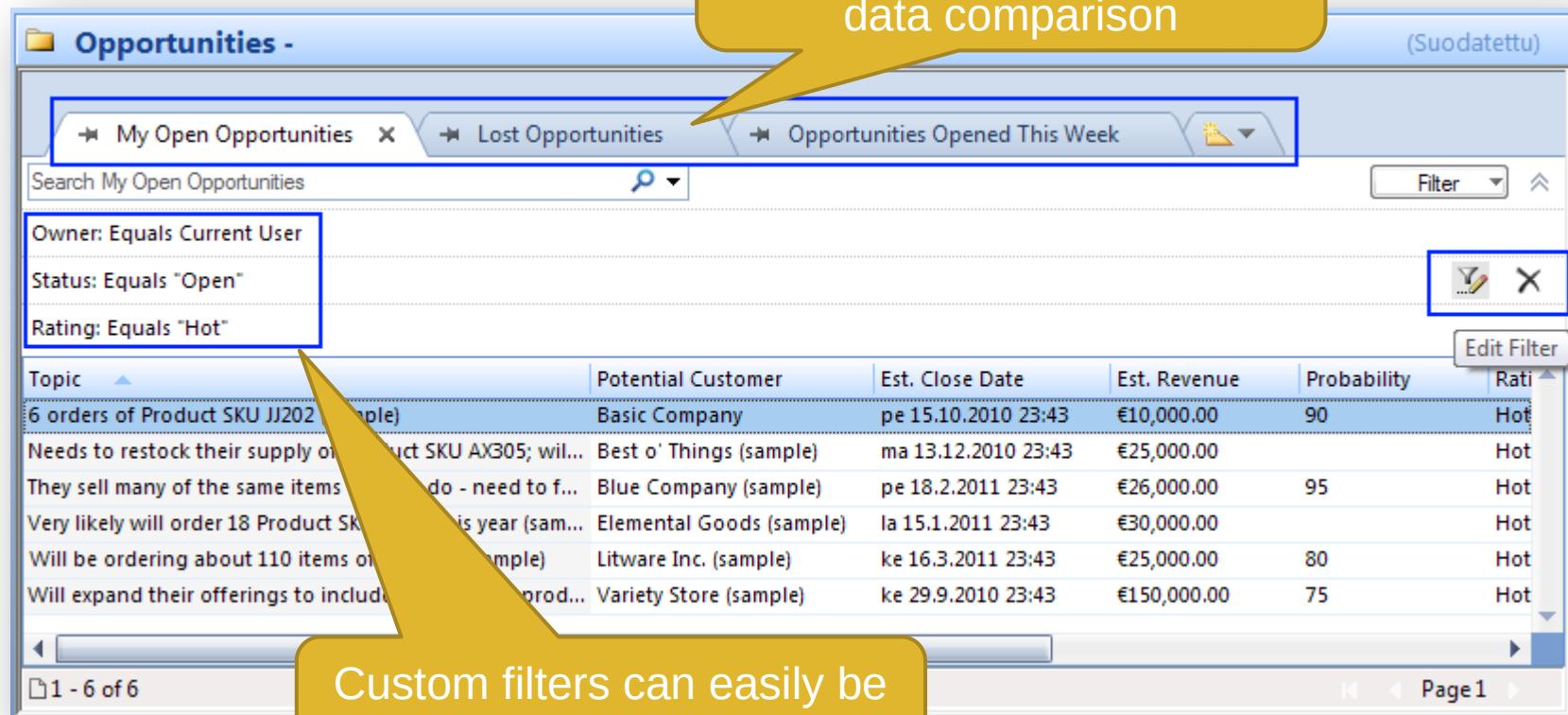
Scrolling through records in grid allows "inbox style" navigation through CRM data

The screenshot shows the Microsoft Dynamics CRM 2011 interface. At the top, there is a blue header bar with the title 'Opportunities -' and a status indicator '(Suodatettu)'. Below the header is a search bar labeled 'Search My Open Opportunities' with a magnifying glass icon and a 'Filter' dropdown. The main area is a grid titled 'My Open Opportunities' with columns: Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, and Rating. The grid contains several rows of opportunity data. Below the grid is a navigation bar with a left arrow, a page number '1 - 8 of 8', a right arrow, and a 'Page 1' button. To the right of the grid is a 'Personalize Reading Pane' section with a folder icon and the text 'Add or remove sections from the reading pane. Select the sections to add or remove from the reading pane.' Below this is a 'Available Sections' list with 'Preferences', 'Internal Information', 'Line Items', and 'Product Line Item Totals'. The 'Line Items' section is currently selected and highlighted in blue. To the right of this is a 'Displayed Sections' list containing 'Opportunity Information', 'Forecast Information', and 'Opportunity Products'. The bottom of the reading pane has 'Add >>' and '<< Remove' buttons. The main content area below the grid shows a detailed view for the first opportunity in the list, titled 'Jukka Test Account/1/TestProduct'. It displays fields for Potential Customer (Jukka Test Account), Rating (Warm), Owner (First Last), Status (Open), Est. Revenue (€15,000.00), and Est. Close Date (30.9.2010). Below this is a 'Forecast Information' section with fields for Revenue (€15,000.00), Status (System Calculated), and Currency (euro). At the bottom is a 'Line Items' section with a 'Price List' field set to 'Test List 1'.

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



The screenshot shows the Microsoft Dynamics CRM 2011 Opportunities view. 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. A blue box highlights the filter section, which contains three custom filters: 'Owner: Equals Current User', 'Status: Equals "Open"', and 'Rating: Equals "Hot"'. Another yellow callout points to this section with the text: 'Custom filters can easily be applied to existing views'. The main area displays a table of opportunities with columns: Topic, Potential Customer, Est. Close Date, Est. Revenue, Probability, and Rating. The table shows six rows of data. At the bottom, there is a navigation bar with page numbers and a 'Page 1' button.

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 product (sample)	Litware Inc. (sample)	ke 16.3.2011 23:43	€25,000.00	80	Hot
Will expand their offerings to include our product (...	Variety Store (sample)	ke 29.9.2010 23:43	€150,000.00	75	Hot

Full visualizations support

The screenshot displays a Microsoft Dynamics CRM 2011 interface with multiple windows open, illustrating the platform's visualization and reporting capabilities.

Left Window (Dashboard):

- Overview:**
 - Sales Pipeline:** A funnel chart showing opportunities. The top of the funnel is labeled "15 000 €" and the bottom is "175 000 €". The segments are color-coded: blue for "(blank)", green for "1-Prospect", and red for "1-Potential".
 - Leads by Source Campaign:** A bar chart showing the count of leads by source campaign. The categories are "New cus...", "Event cu...", "Direct", and "(blank)". The values are 3, 1, 5, and 3 respectively.
 - Cases By Priority (Per Day):** A stacked bar chart showing active cases by priority (Low, Normal, High) per day. The chart is for the date 14.9.2010. The values are approximately 4 (Low), 3 (Normal), and 3 (High).
- Activities:** A list of recent activities including E-mails, Tasks, and Phone Calls.

Right Window (Customer List):

- Top 10 Customers:** A chart showing the top 10 customers by estimated revenue. The chart is for the period 0.00 to 200,000.00 €. The data is as follows:

Potential Customer	Sum (Est. Revenue) (€)
Basic Company	10 000.00 €
Jukka Test Account	15 000.00 €
Best o' Things (sample)	25 000.00 €
Blue Company (sample)	26 000.00 €
Elemental Goods (sample)	30 000.00 €
Litware Inc. (sample)	180 000.00 €
Best o' Things...	25 000.00 €
Blue Company...	26 000.00 €
Elemental Good...	30 000.00 €
Variety Store (sample)	180 000.00 €

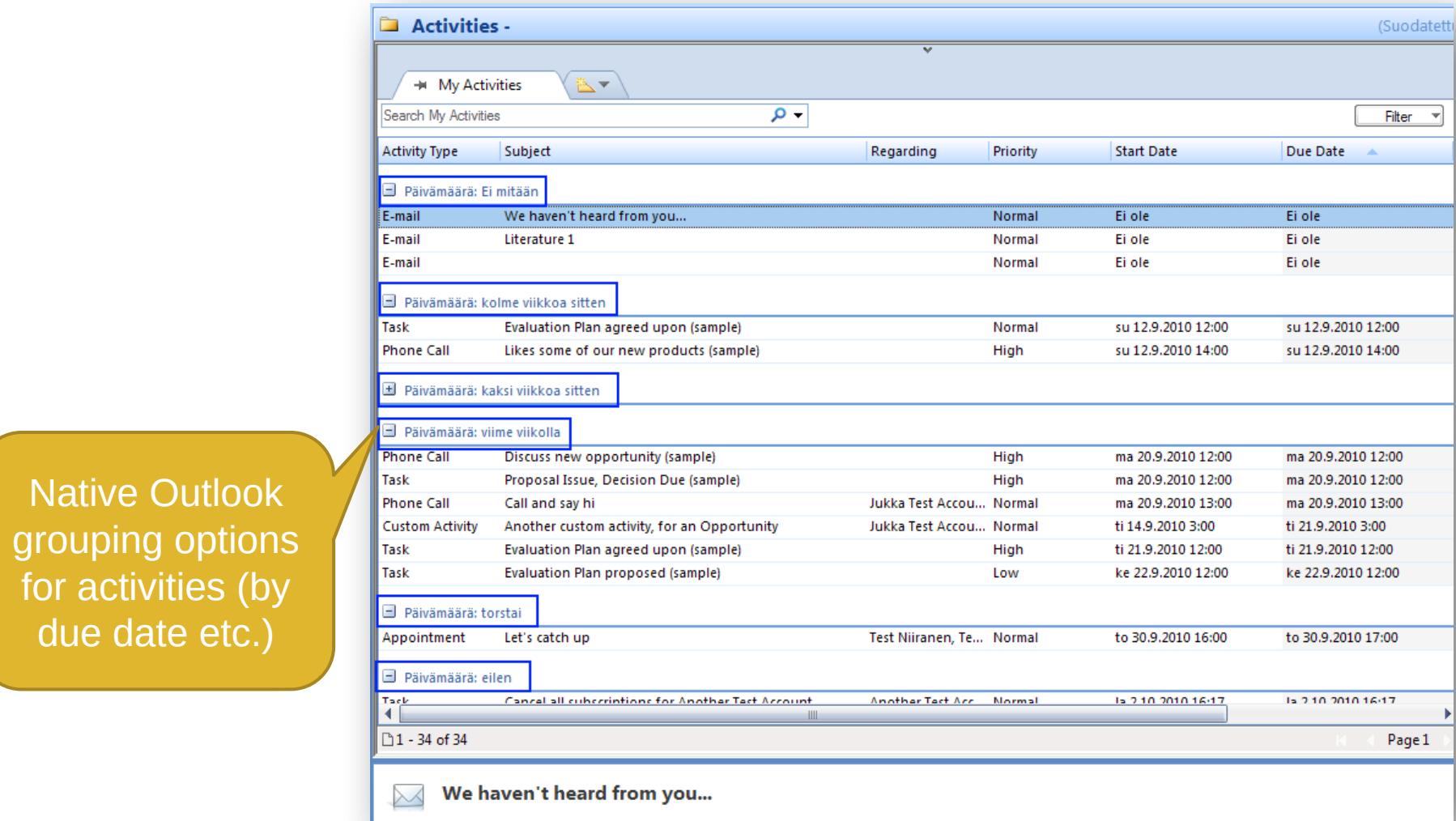
Bottom Window (Detail View):

- 6 orders of Product SKU JJ202 (sample):** A detail view showing the following information:

Potential Customer	Rating	Owner
Basic Company	Hot	
Status	Est. Revenue	First Last
Open	€10,000.00	Est. Close Date
		15.10.2010
- General:** A summary section showing the topic "6 orders of Product SKU JJ202 (sample)" and the potential customer "Basic Company".

Activity grouping

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



The screenshot shows the 'Activities' list view in Microsoft Dynamics CRM 2011. The list is grouped by due date, with five distinct groups visible. Each group is preceded by a small blue square icon with a white symbol. The columns in the list are: Activity Type, Subject, Regarding, Priority, Start Date, and Due Date. The groups are:

- Päivämäärä: Ei mitään**
 - E-mail: We haven't heard from you...
 - E-mail: Literature 1
 - E-mail: (empty)
- 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

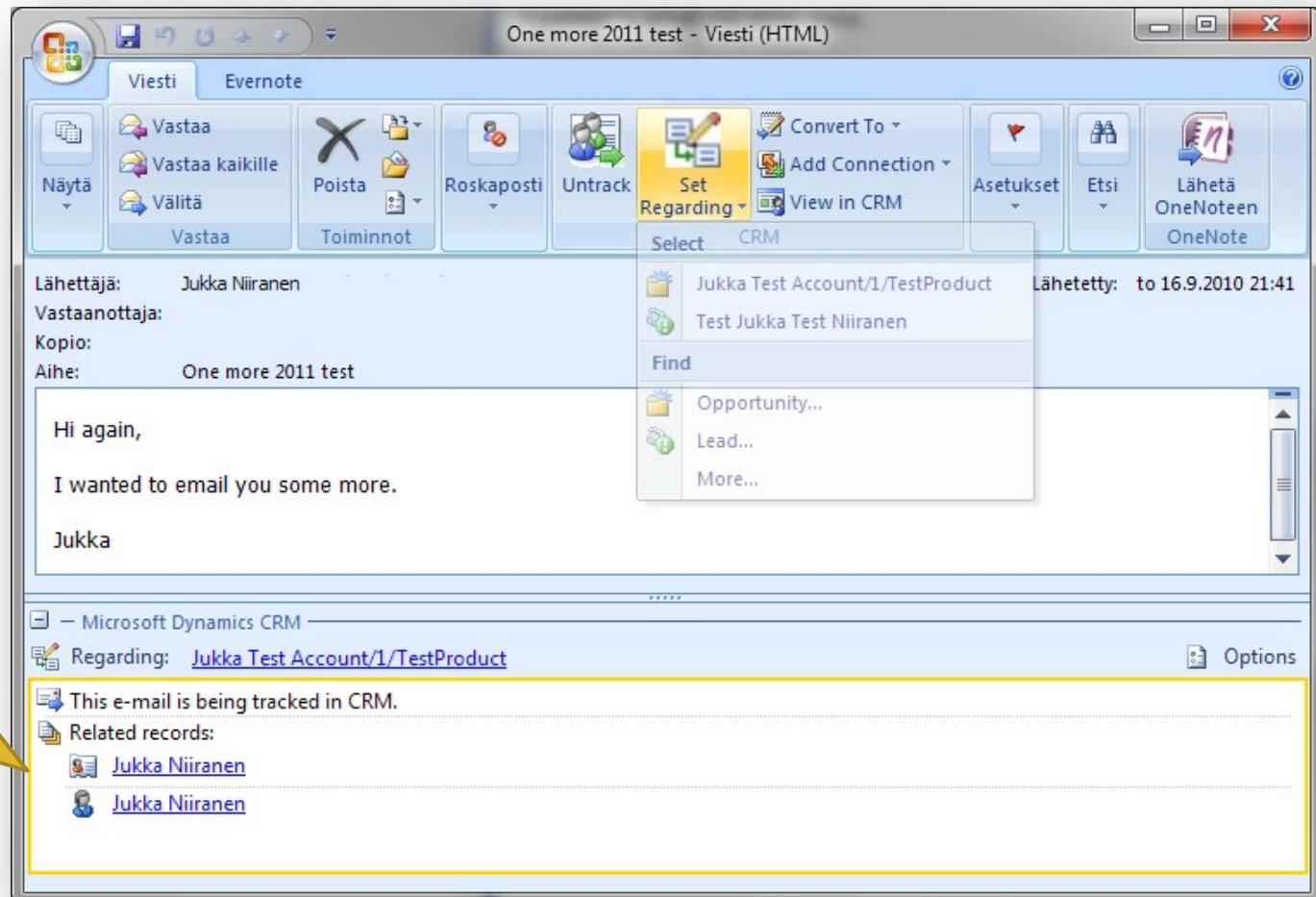
At the bottom of the list, a message box displays: "We haven't heard from you..." with an envelope icon.

Conditional formatting

Create custom format rules based on field data conditions

The screenshot shows the Microsoft Dynamics CRM 2011 'Activities' grid and a 'Format Rules' dialog box. The grid lists various activities with their types, subjects, regarding objects, priorities, start dates, due dates, and recurrence instances. A yellow callout points to the 'Format Rules' dialog box, which is titled 'Automaattinen muotoilu' (Automatic Formatting). It contains a list of rules: 'Jäkeluluetelon kohdat', 'Uudet yhteystiedot', 'Vanhentuneet yhteystiedot', and 'Custom'. The 'Custom' rule is selected. Below this is a section for 'Valitun säännön ominaisuudet' (Properties of the selected rule), with 'Nimi' set to 'Custom' and 'Fontti...' set to '8 pt Segoe UI'. The dialog has 'OK' and 'Peruuta' buttons. The bottom of the screen shows a detail view for a custom activity: 'This is a custom activity for a contact' with a gear icon, under the 'General' tab, with the subject 'This is a custom activity for a contact'.

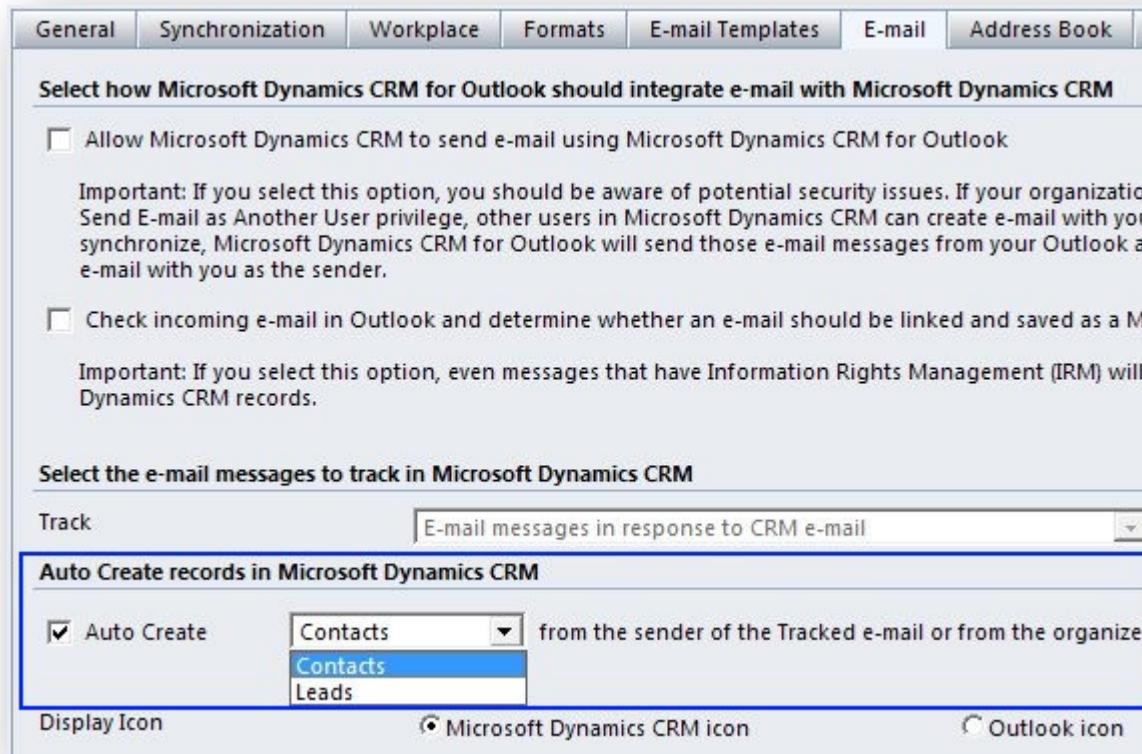
Regarding records



Regarding pane
displays links to
related records

Auto create contacts or leads

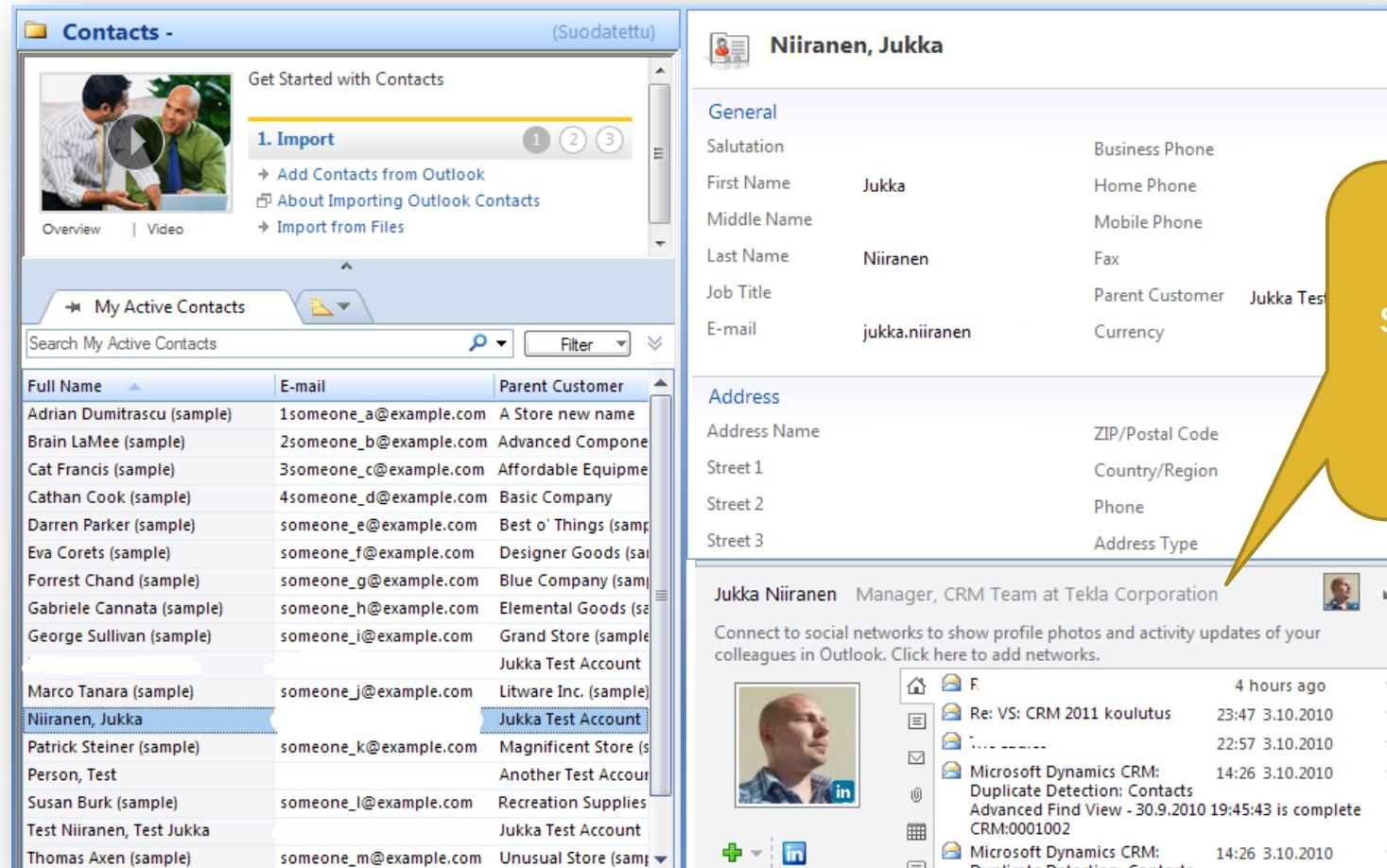
- Outlook settings can be configured to create new records for sender of an email tracked to CRM



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 shows the Microsoft Dynamics CRM 2011 Contacts screen. On the left, there is a list of contacts under 'My Active Contacts'. One contact, 'Niiranen, Jukka', is selected and highlighted with a blue selection bar. On the right, the contact details for 'Niiranen, Jukka' are displayed. A yellow callout bubble points from the text 'Social network profiles and streams can be integrated into the contact reading pane' to the contact's profile photo and the social stream section below it. The contact's profile photo is shown next to the name 'Jukka Niiranen'. Below the name, it says 'Manager, CRM Team at Tekla Corporation'. A social stream is shown with several items, including a post from 'F.' (4 hours ago), a reply to 'VS: CRM 2011 koulutus' (23:47 3.10.2010), a post from 'Jukka Test Account' (22:57 3.10.2010), a post from 'Microsoft Dynamics CRM: Duplicate Detection: Contacts Advanced Find View - 30.9.2010 19:45:43 is complete CRM:0001002' (14:26 3.10.2010), and another post from '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

Account
Jukka Test Account

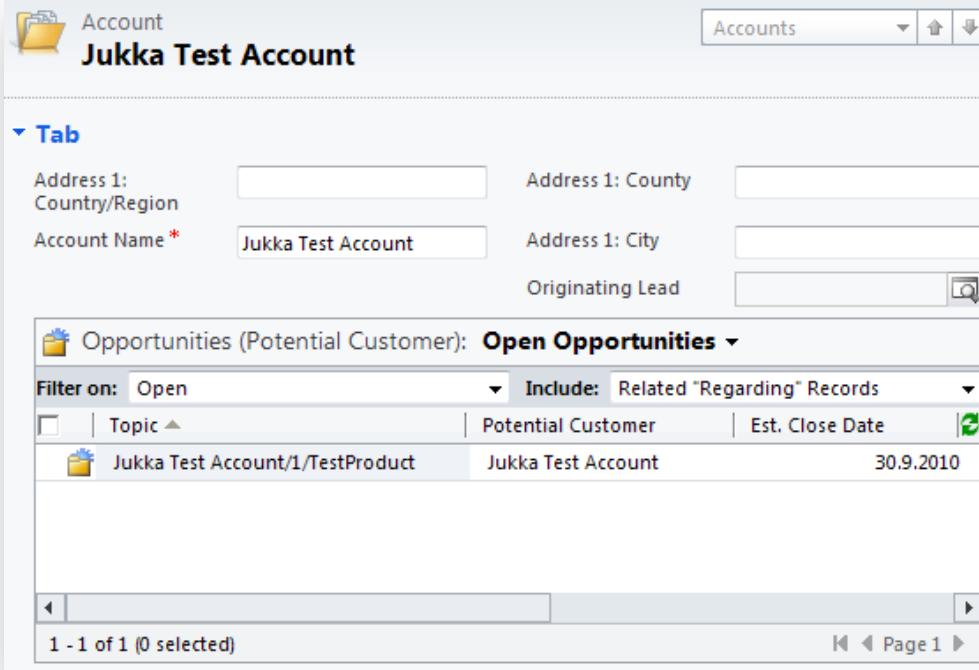
Address 1: Address 1: County
Country/Region Address 1: City
Account Name * Originating Lead

Opportunities (Potential Customer): **Open Opportunities**

Filter on: Open Include: Related "Regarding" Records

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

1 - 1 of 1 (0 selected)



Adding a sub-grid on the form

Solution: Demo Solution

Form: Account

Address 1: Country/Region

Address 1: County

Address 1: City

Originating Lead

Account Name *

Account Name

Opportunities (Potential Customer)

Sub-Grid

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

Sub-Grid Properties

Modify this Sub-Grid's properties.

Display

Name: Opportunities

Label: Opportunities (Potential Customer)

Display label on the Form:

Data Source

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:

File Home Insert

Section: One Column, Two Columns, Three Columns, Four Columns

Tab: One Column, Two Columns

Control: Sub-Grid, Spacer, IFRAME, Web Resource, Notes, Navigation Link

Test Form

Tab

Common

- Addresses
- Activities
- Accounts
- Contacts
- Customer Relations...
- Connections

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
Current Record

Allow users to turn off filter

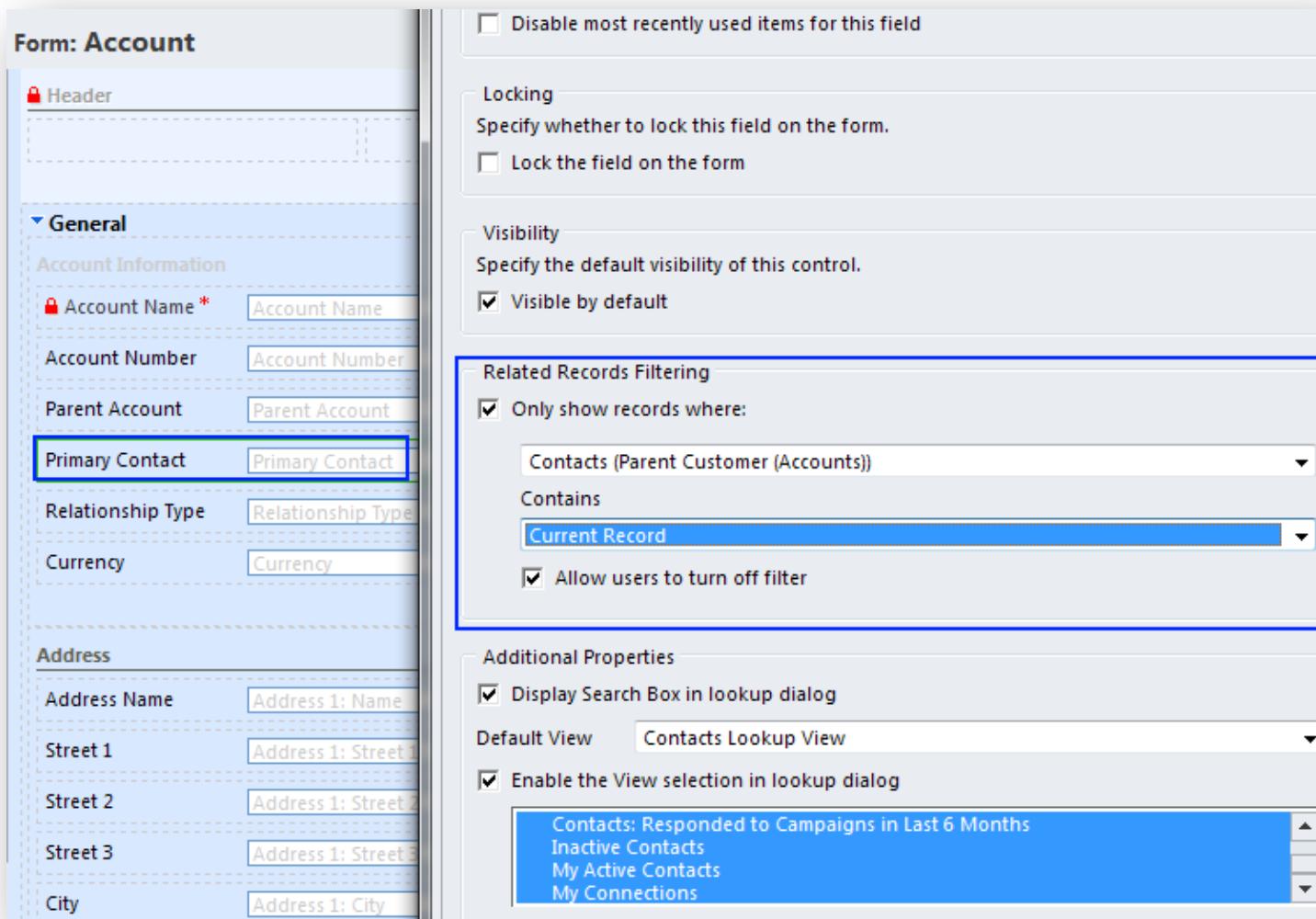
Additional Properties

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	Label *	Top Secret!
Secret	Value *	100 000 002
Top Secret!	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

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

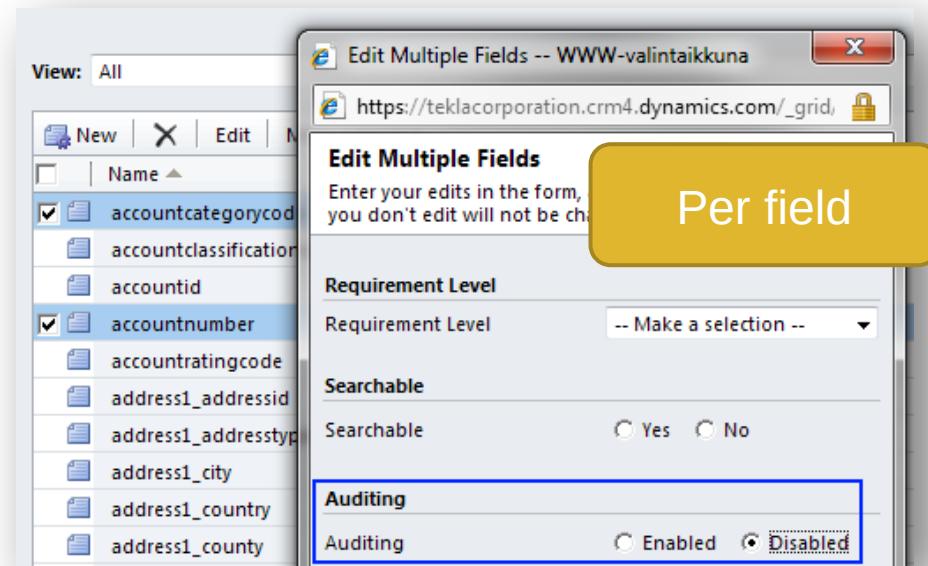
Edit Multiple Fields
Enter your edits in the form, you don't edit will not be changed

Requirement Level
Requirement Level -- Make a selection --

Searchable
Searchable Yes No

Auditing

Auditing Enabled Disabled



Per field

Account

Information

Solution: Default Solution

Entities
Account

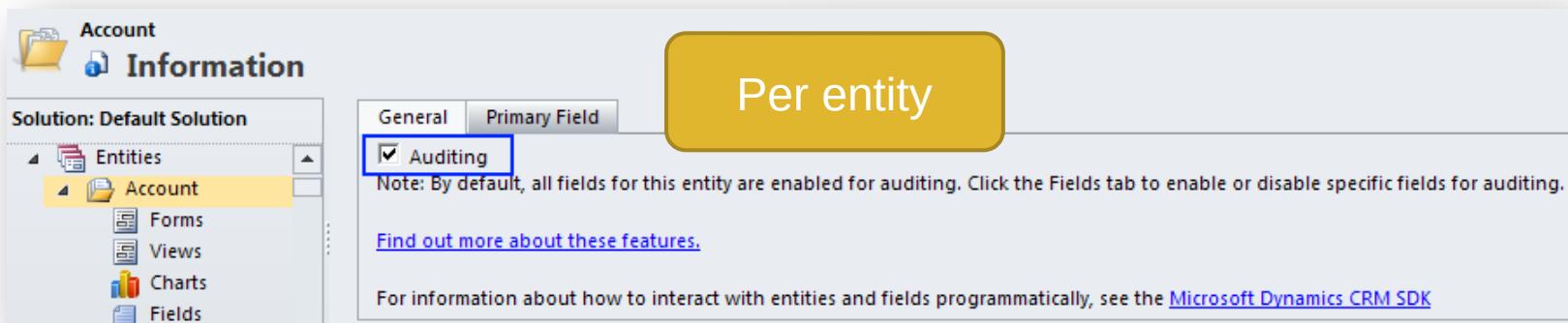
General Primary Field

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
 - 16 Documents
 - 16 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		Telephone	Currency	euro
16	27.9.2010 6:15	Update		Basic Comp	Customer Viewable	No
16	27.9.2010 1:50	Update	SYSTEM	Goal for Q4(Sample)	Description	Pricing policy for 2010
16	27.9.2010 1:50	Update	SYSTEM	Goal for Q4(Sample)	Employee Contact	Jukka Niiranen

Sales Literature: Literature 1; Changed By: Jukka Niiranen; Action: Create; Changed Date: 28.9.2010 11:49

The record was created with the following field values

Field Name	Value
Telephone	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

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

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

The screenshot illustrates the 'To Me' connection dialog and the 'Connections' ribbon tab in Microsoft Dynamics CRM 2011.

To Me Connection Dialog: The dialog is titled 'To Me' and displays the message: 'Select a connection role to indicate how this record is related to you.' It also shows the text: 'To view the records connected to you, use the My Connections view' and the identifier 'BOBC3J9U'. A yellow callout box points to the 'Save & Close' button on the ribbon, with the text: 'Shortcut on the ribbon: "Connect to me"'.

Connections Ribbon Tab: The ribbon tab is selected and shows the following buttons: Save, Save & Close (highlighted), Delete, Assign, Copy a Link, E-mail a Link, Run Workflow, Start Dialog, and Run Report. A yellow callout box points to the 'Save & Close' button with the text: 'Save and close this Connection.'

Collapsed Form: A yellow callout box points to the 'Connections' ribbon tab with the text: 'Collapsed form with minimum fields'.

Relationship roles

The screenshot shows the Microsoft Dynamics CRM 2011 interface. On the left, a list of connection roles is displayed with a blue box around the 'New' button. The 'Influencer' role is selected. On the right, a detailed view of the 'Influencer' role is shown, with a blue box around the 'General' tab. The 'Name' field is set to 'Test sales role 2'. The 'Connection Role Category' is 'Sales'. The 'Description' field is empty. Below this, a 'Matching Connection Roles' section is visible. The status bar at the bottom right says '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

The screenshot shows the 'New Connection Role' dialog. The 'General' tab is selected, showing fields for 'Name' (set to 'Test sales role 2'), 'Connection Role Category' (set to 'Sales'), and 'Description'. Below this, a 'Matching Connection Roles' section is visible. The status bar at the bottom right says 'Working on solution: Default Solution'.

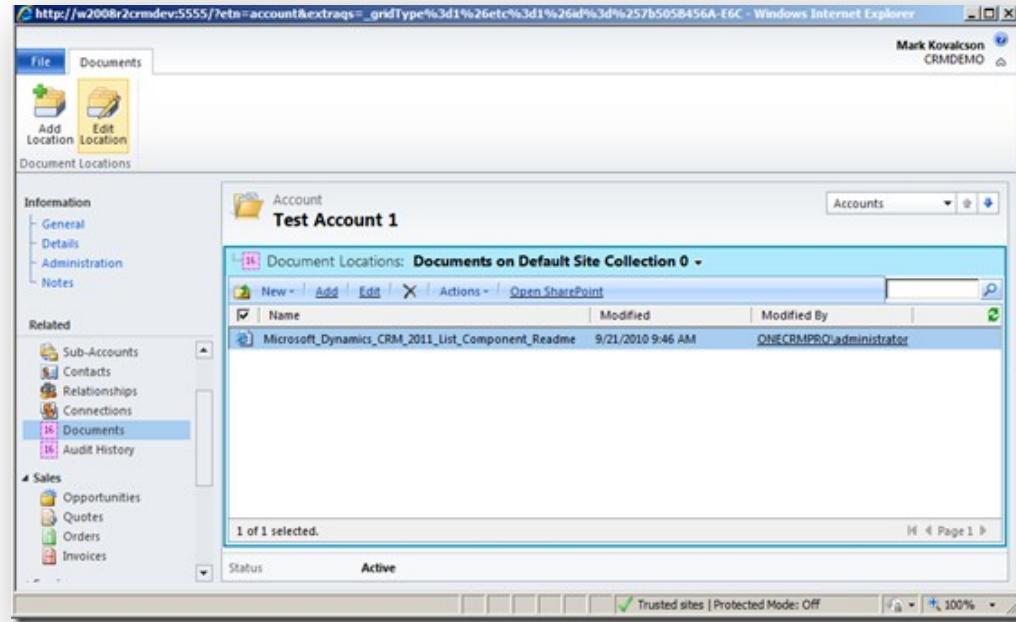
SharePoint Integration

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

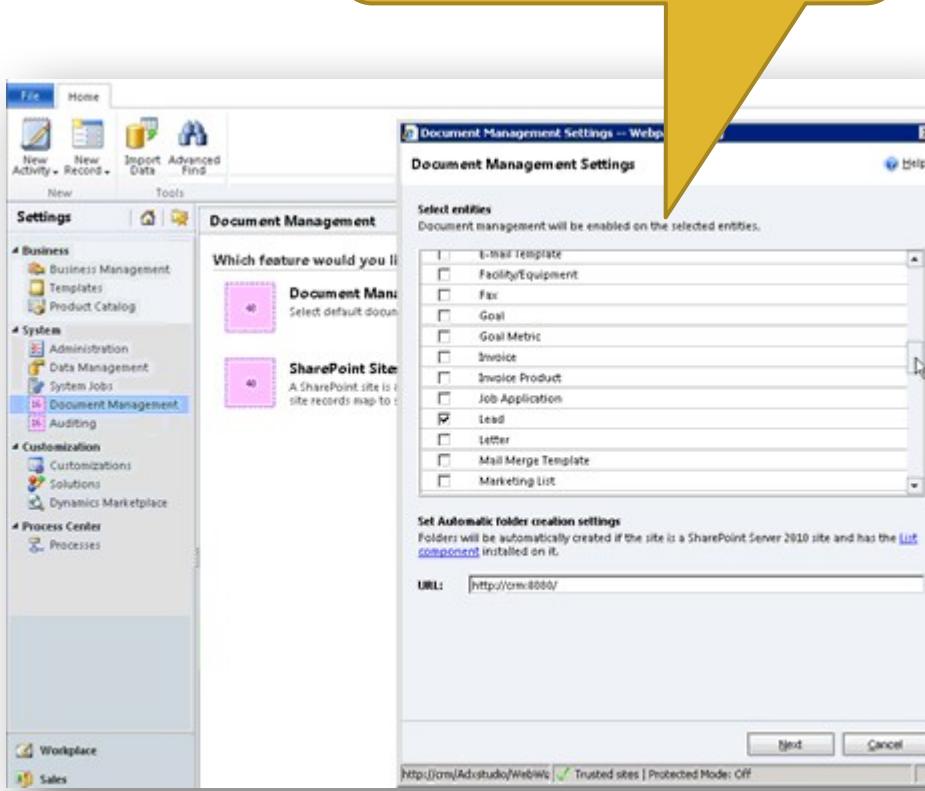
SharePoint List Component

- 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

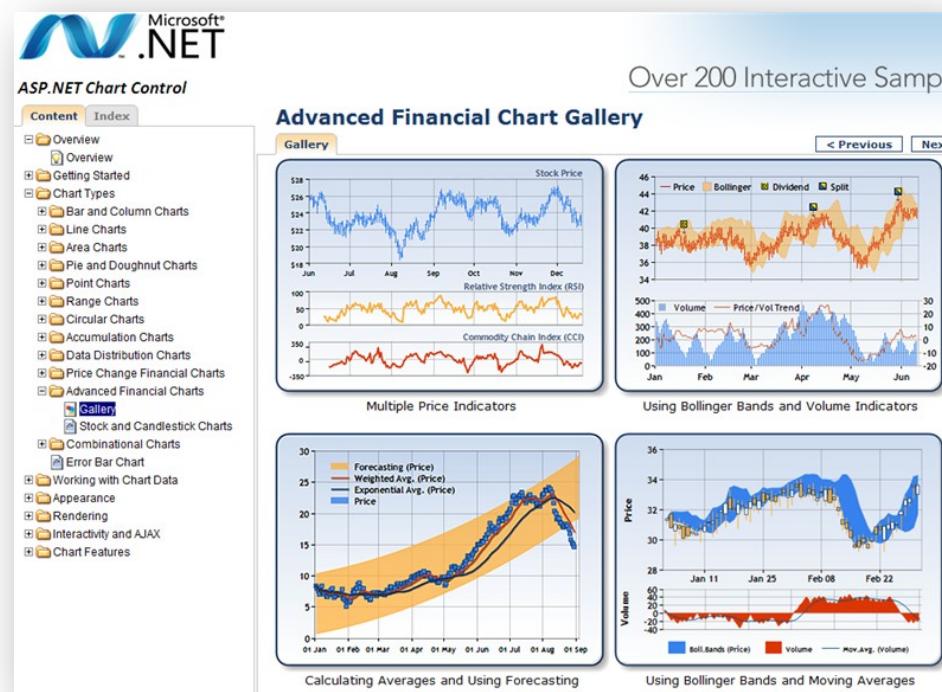
Visualizations

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

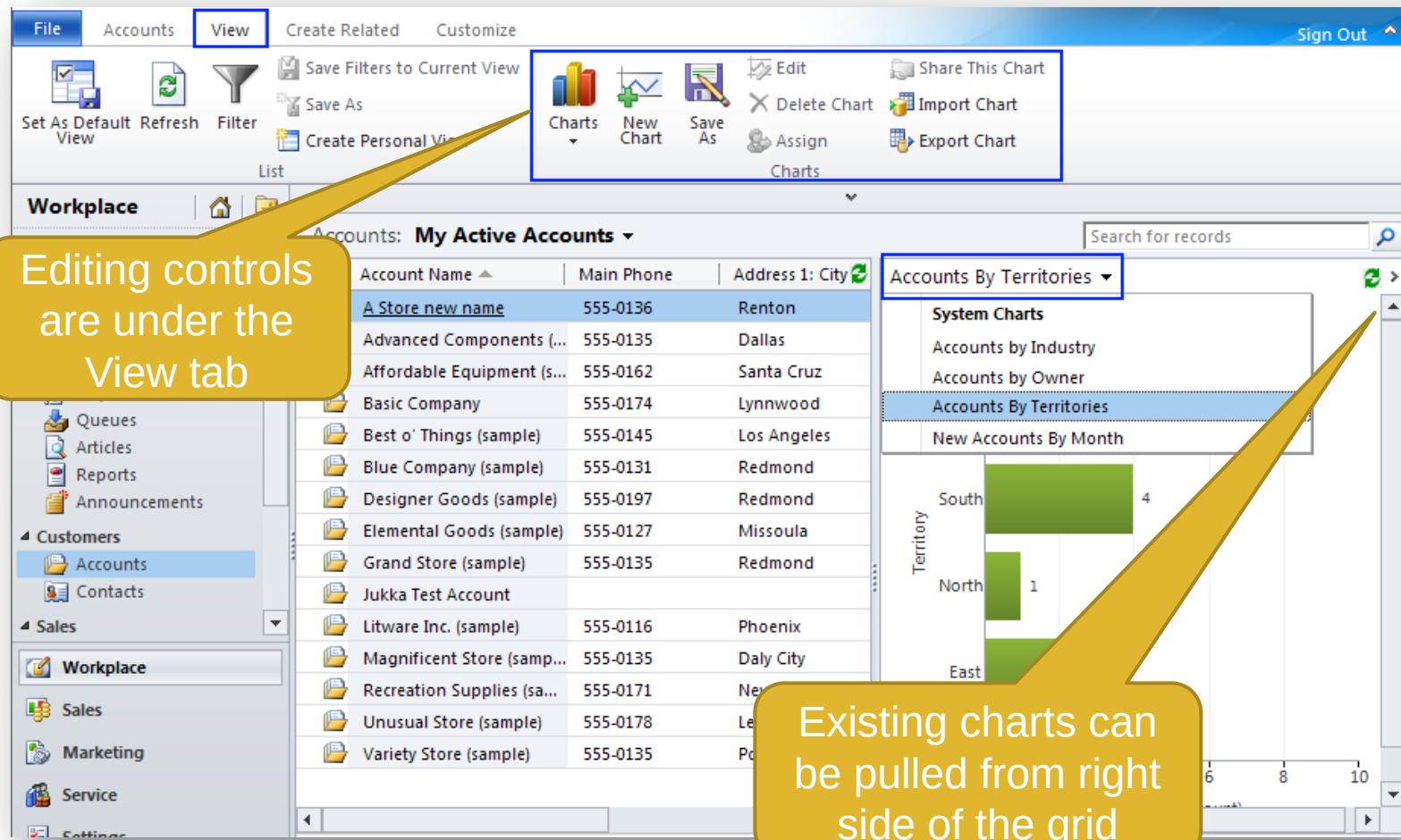
Chart controls

- 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

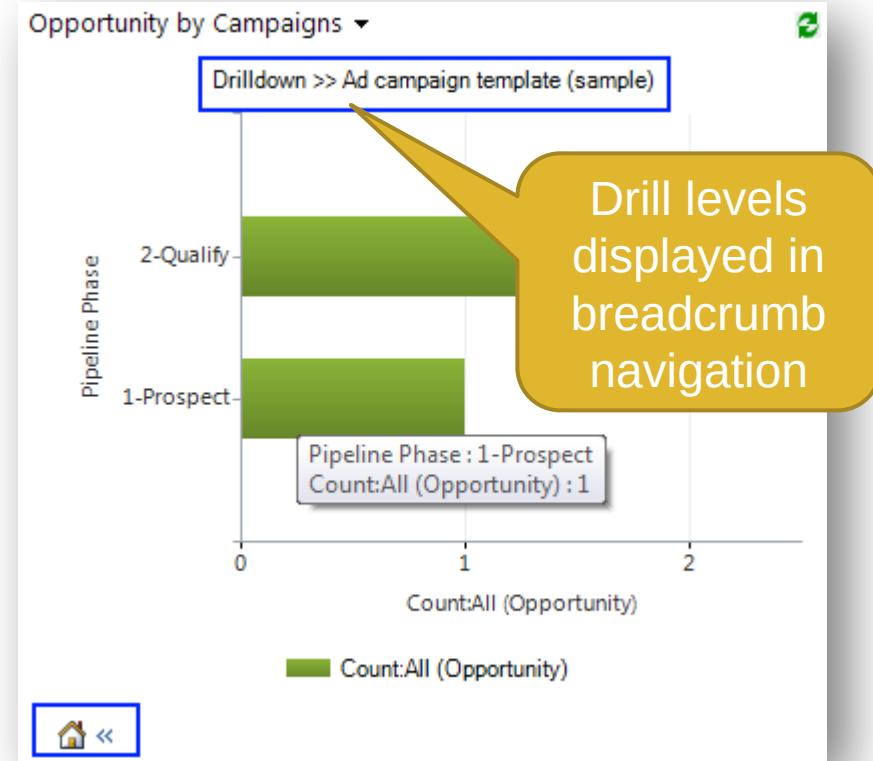
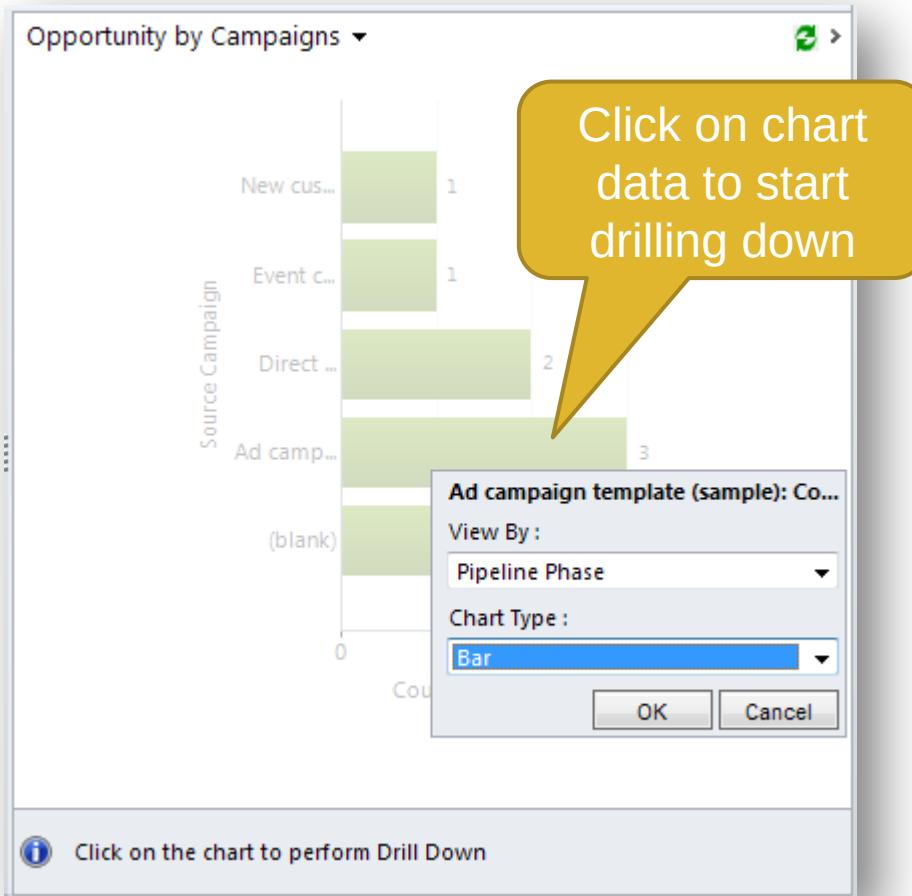


Editing controls are under the View tab

Existing charts can be pulled from right side of the grid

The screenshot shows the Microsoft Dynamics CRM 2011 interface. The top navigation bar includes 'File', 'Accounts', 'View' (which is selected and highlighted in blue), 'Create Related', and 'Customize'. The 'View' tab has a dropdown menu with options: 'Save Filters to Current View', 'Save As', 'Create Personal View', 'Charts' (selected and highlighted in blue), 'New Chart', 'Save As', 'Edit', 'Delete Chart', 'Share This Chart', 'Import Chart', 'Assign', and 'Export Chart'. The main workspace is titled 'Workplace' and shows a grid of 'My Active Accounts'. The grid columns are 'Account Name', 'Main Phone', and 'Address 1: City'. The grid rows list various account names with their phone numbers and cities. To the right of the grid is a chart titled 'Accounts By Territories'. The chart is a bar chart with three bars representing the number of accounts in the South (4), North (1), and East (10) territories. A legend on the left of the chart identifies the territories: South, North, and East. A yellow callout box points to the 'Charts' option in the 'View' tab's dropdown menu. Another yellow callout box points to the chart on the right, with the text '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 list of 'Opportunities: My Open Opportunities' and a 'Chart Designer' window. The 'Chart Designer' window contains a pie chart titled 'Est. Revenue by Pipeline Phase' with three segments: 175 000,00 € (red), 85 000,00 € (green), and 36 000,00 € (purple). Below the chart are 'Advanced Options' and a 'Legend Entries (Series)' section. A yellow callout bubble points to the 'Pie' icon in the 'Chart Tools' ribbon with the text 'Define chart type'. Another yellow callout bubble points to the 'Legend Entries (Series)' dropdown with the text 'Select fields and values'.

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

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

Save 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

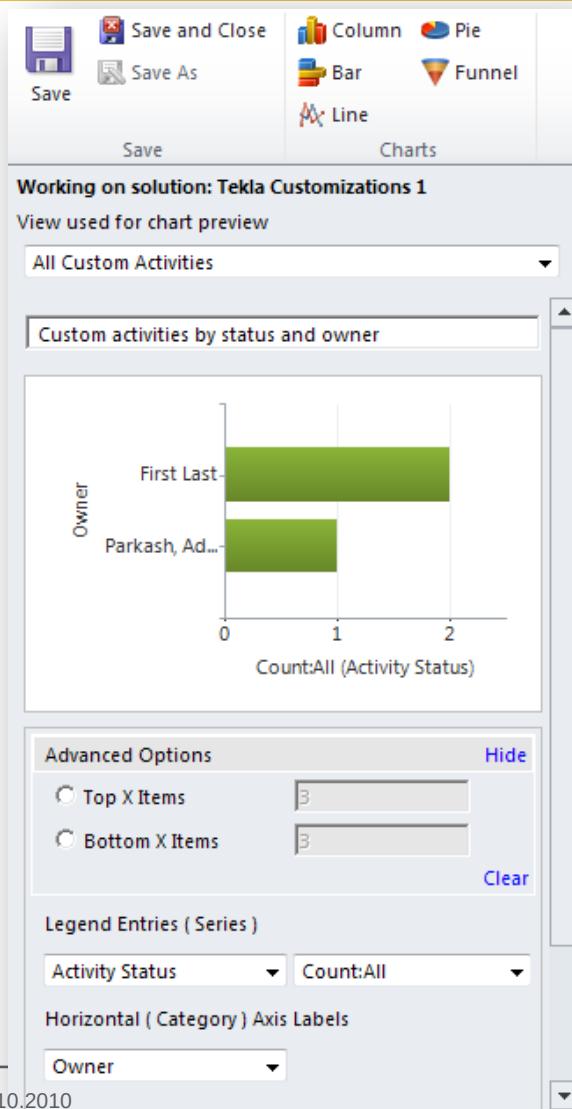
Pipeline Phase Sum

Avg Count:All Count:Non-empty Max Min

85 000,00 € 36 000,00 € 175 000,00 €

1 - 8 of 8 (1 selected) Page 1

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

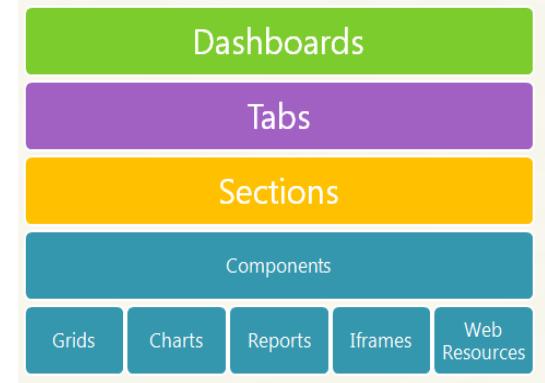
Chart definitions can be exported and imported using FetchXML.

```
<visual>
<visu
<nam
<desn Opportunities
<name.<
<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=
189,
```

- 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 a grid of layout options. The first row contains three options: '3-Column Regular Dashboard', '4-Column Focused Dashboard', and '4-Column Overview Dashboard'. The second row contains four options: '2-Column Regular Dashboard' (highlighted with a blue border), '3-Column Overview Dashboard', '3-Column Focused Dashboard', and a preview area showing four data components: a grid, a horizontal bar chart, a bar chart, and a donut chart. Below the preview area, the text '2-Column Regular Dashboard' is displayed, followed by the note 'This layout can accommodate components across two columns.'

2-Column Regular Dashboard

This layout can accommodate components across two columns.

- Select from predefined layout options

Creating a new dashboard (2)

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 €

Creating a new dashboard (3)

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

Name
Specify a unique name.

Name * Component18352cc

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 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

Goals

General

Name * Qualified leads Q4 2010

Parent Goal

Goal Metric * [16 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

Goal Metric **Number of qualified leads**

Target (Integer) 10

Child Goals

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"/>	16 Actual (Integer)	Lead		Qualified	Qualified
<input type="checkbox"/>	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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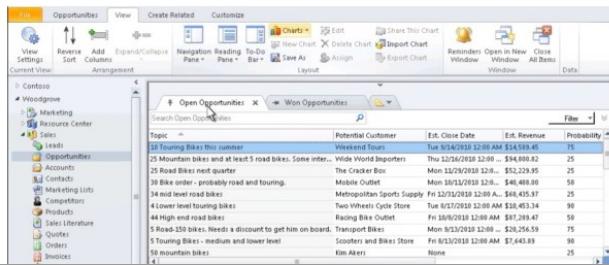
2 comments

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](#).



#msdynocrm from:jukkan



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Results for #msdynocrm from:jukkan

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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/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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