Microsoft Dynamics CRM 2011 Walkthrough

Part 1: End-user tools and features

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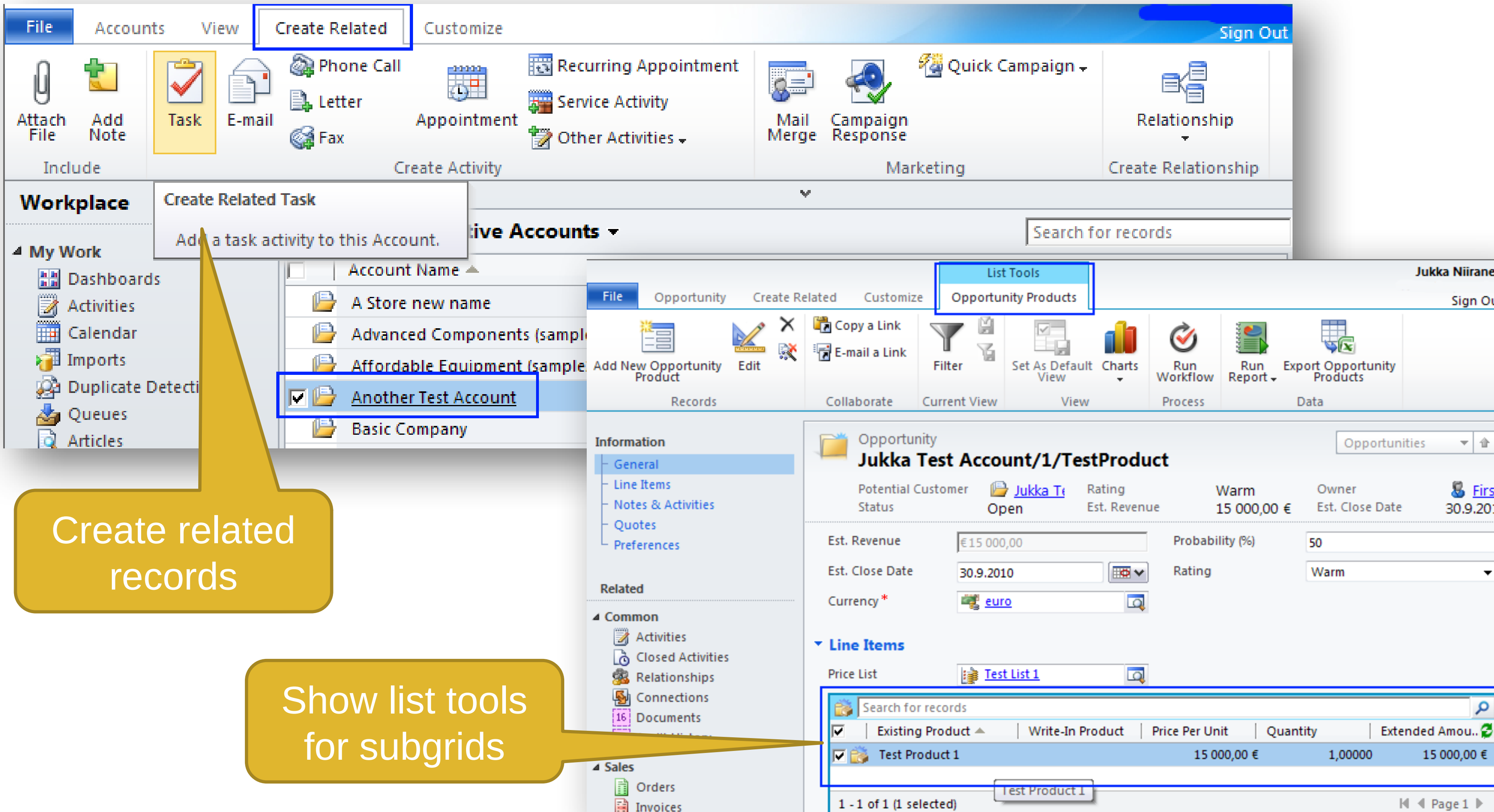
http://niiranen.eu/crm

Table of contents

End-user tools and UI enhancements

Context-sensitive ribbon

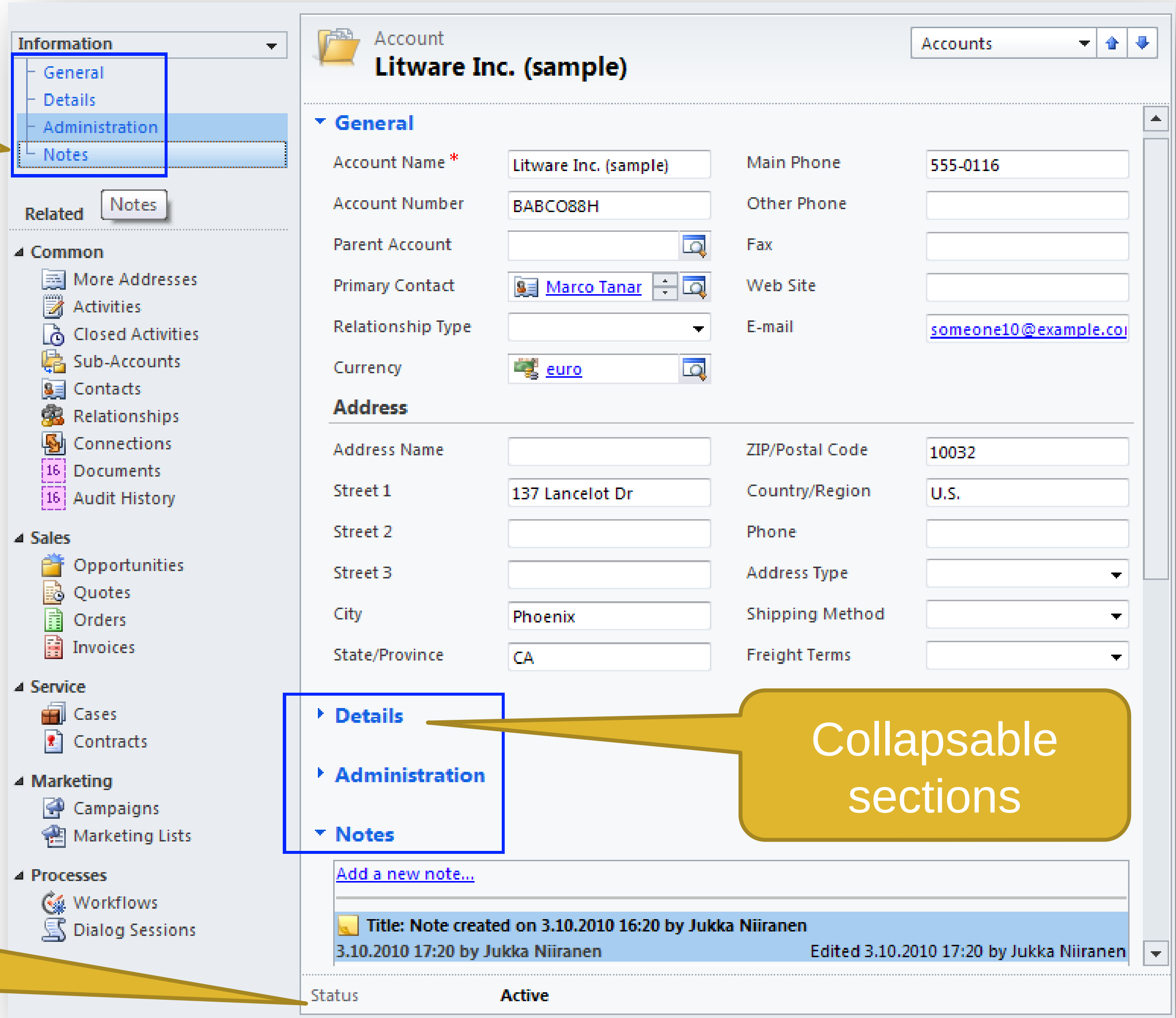


Create related records

Show list tools for subgrids

Form sections instead of tabs

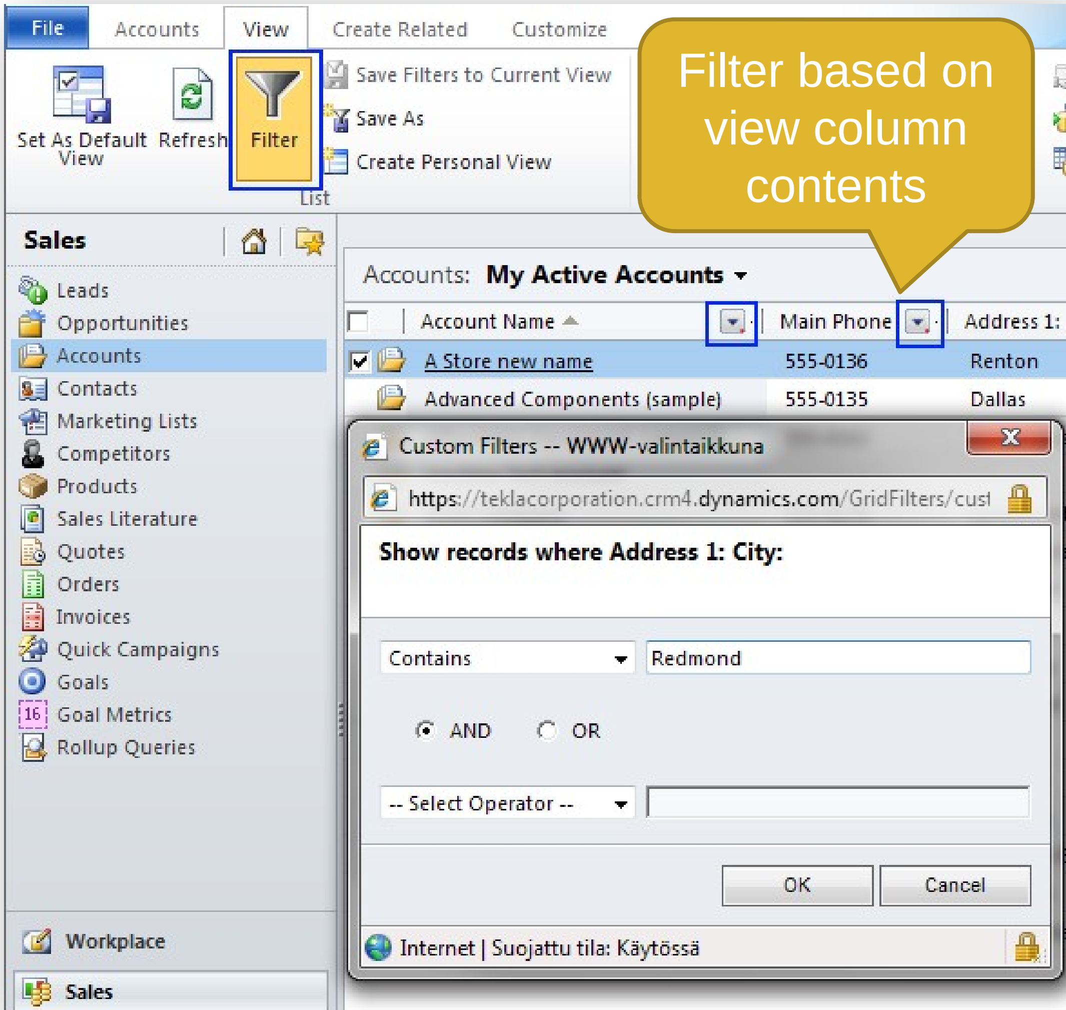
Links to section anchors



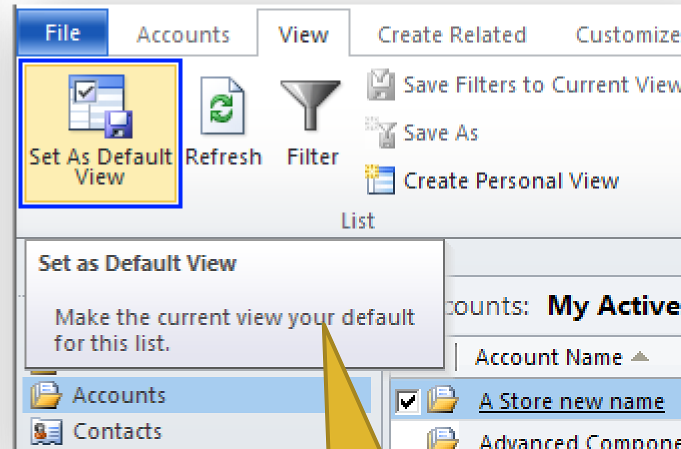
Collapsable sections

Persistent header and footer fields

Filters and default views

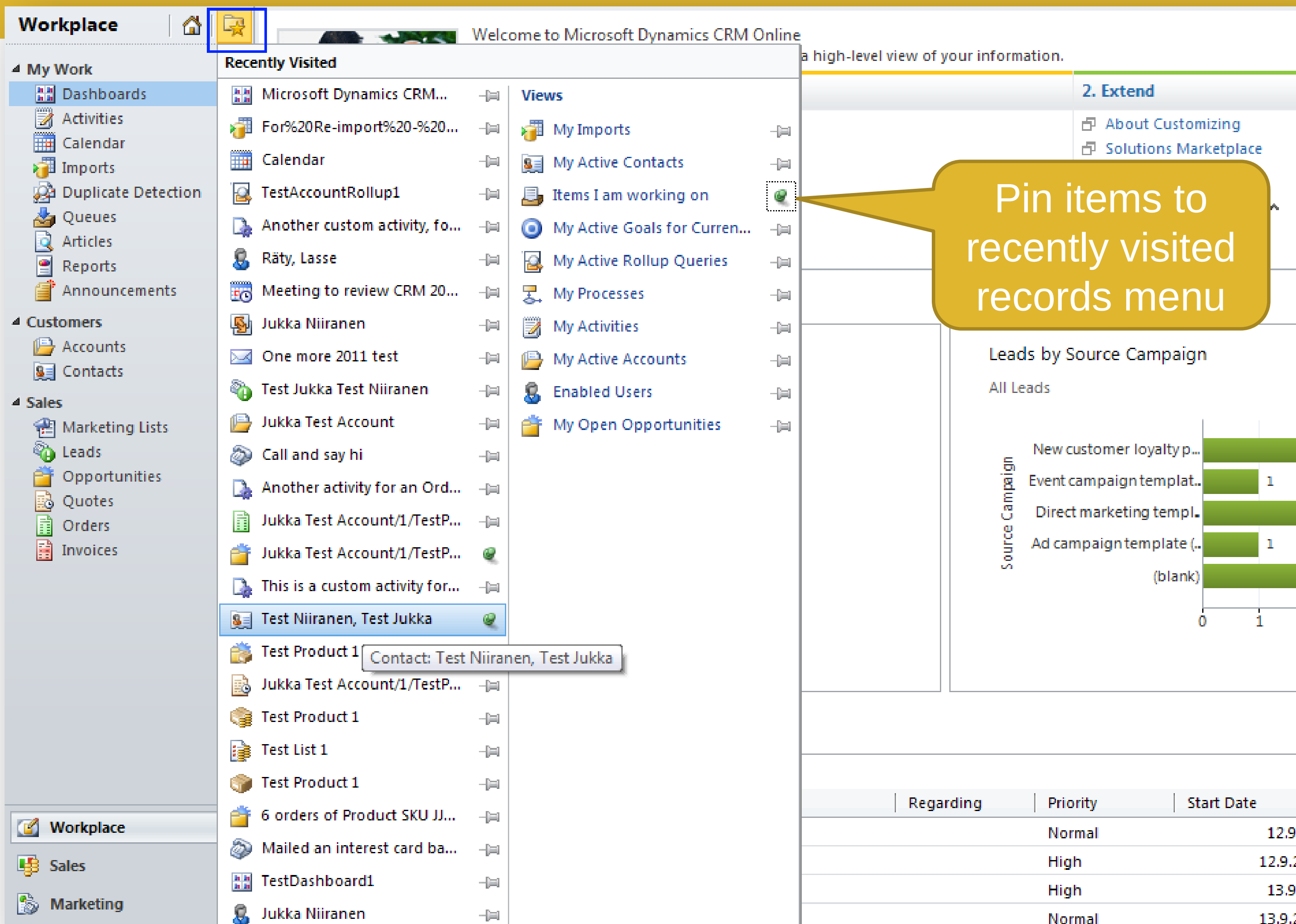


Filter based on view column contents

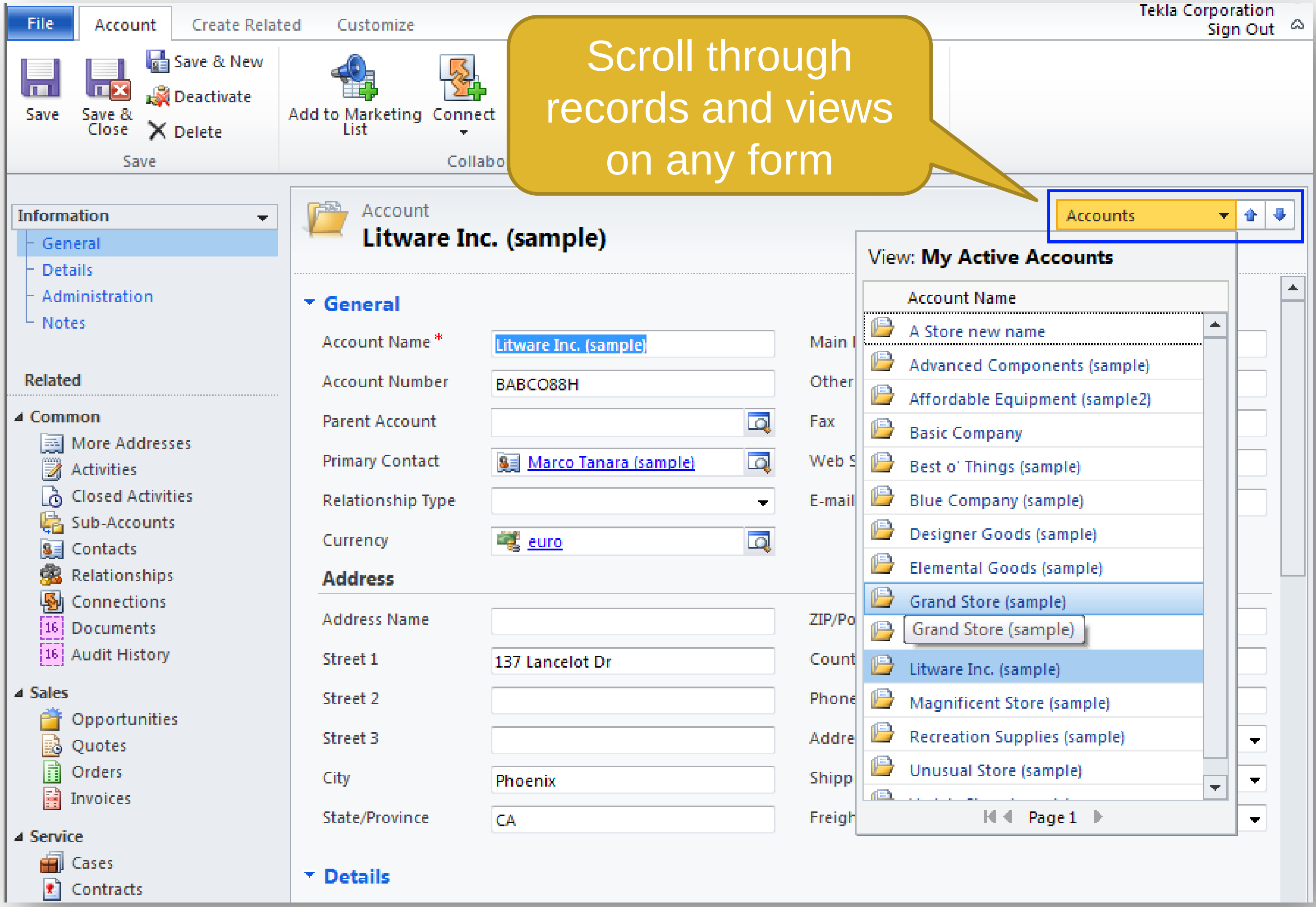


Set personal default views

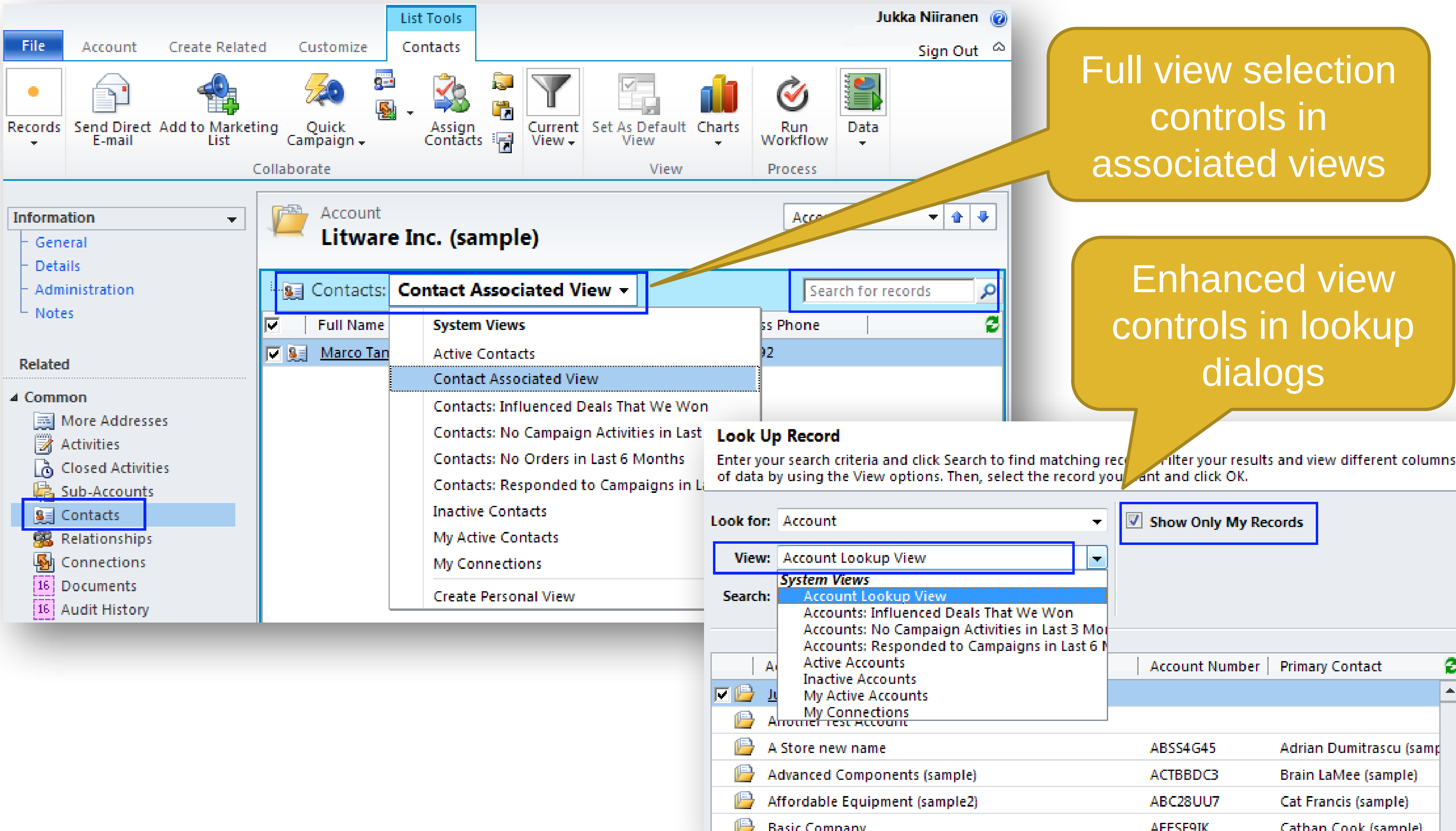
Recently visited records & views



Browse records on detail form



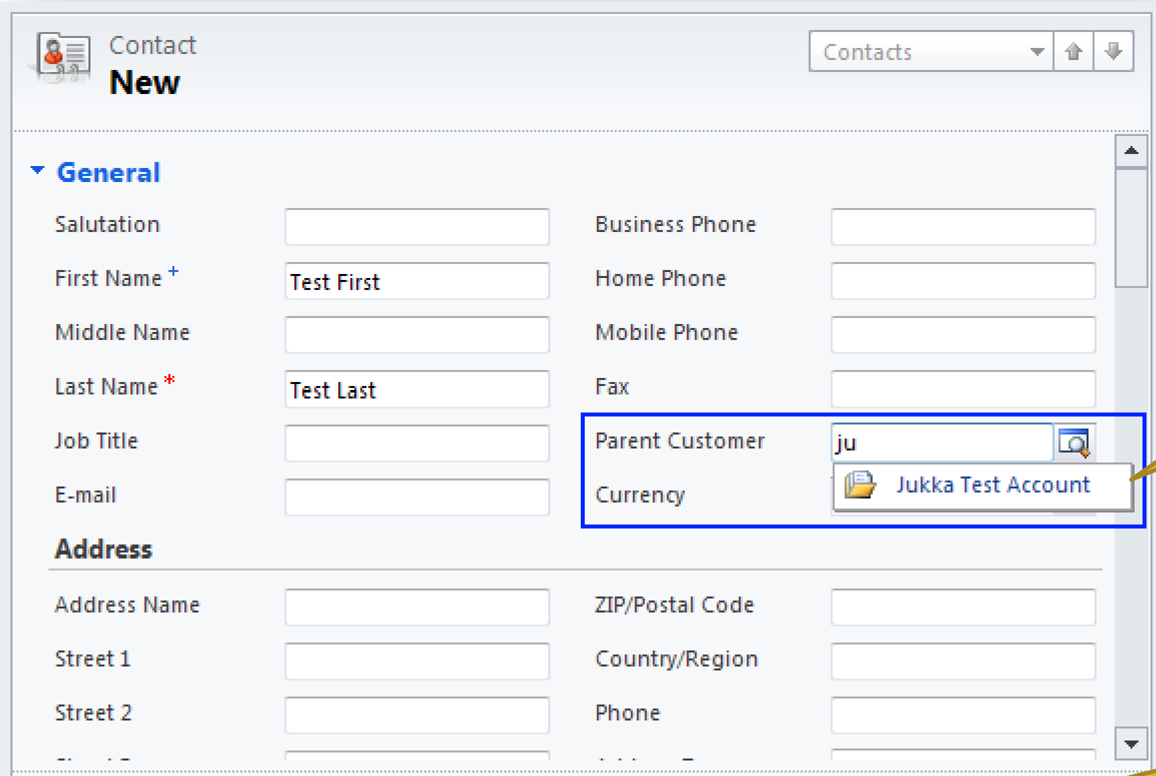
View options



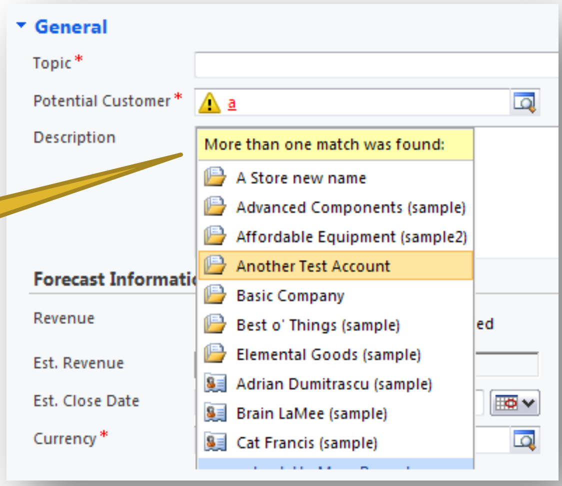
Full view selection controls in associated views

Enhanced view controls in lookup dialogs

No more form assistant pane



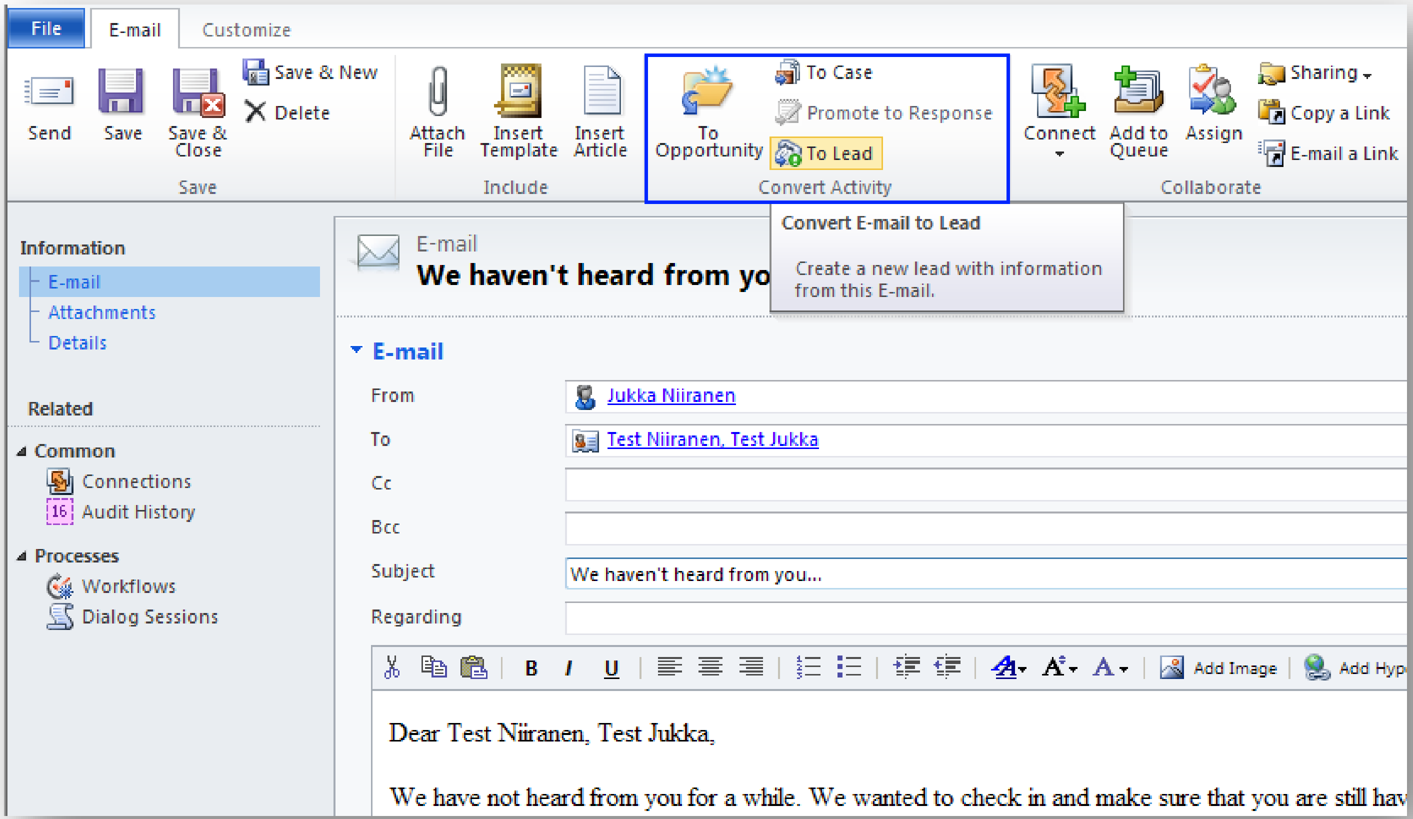
Smart lookup fields have replaced form assistant pane



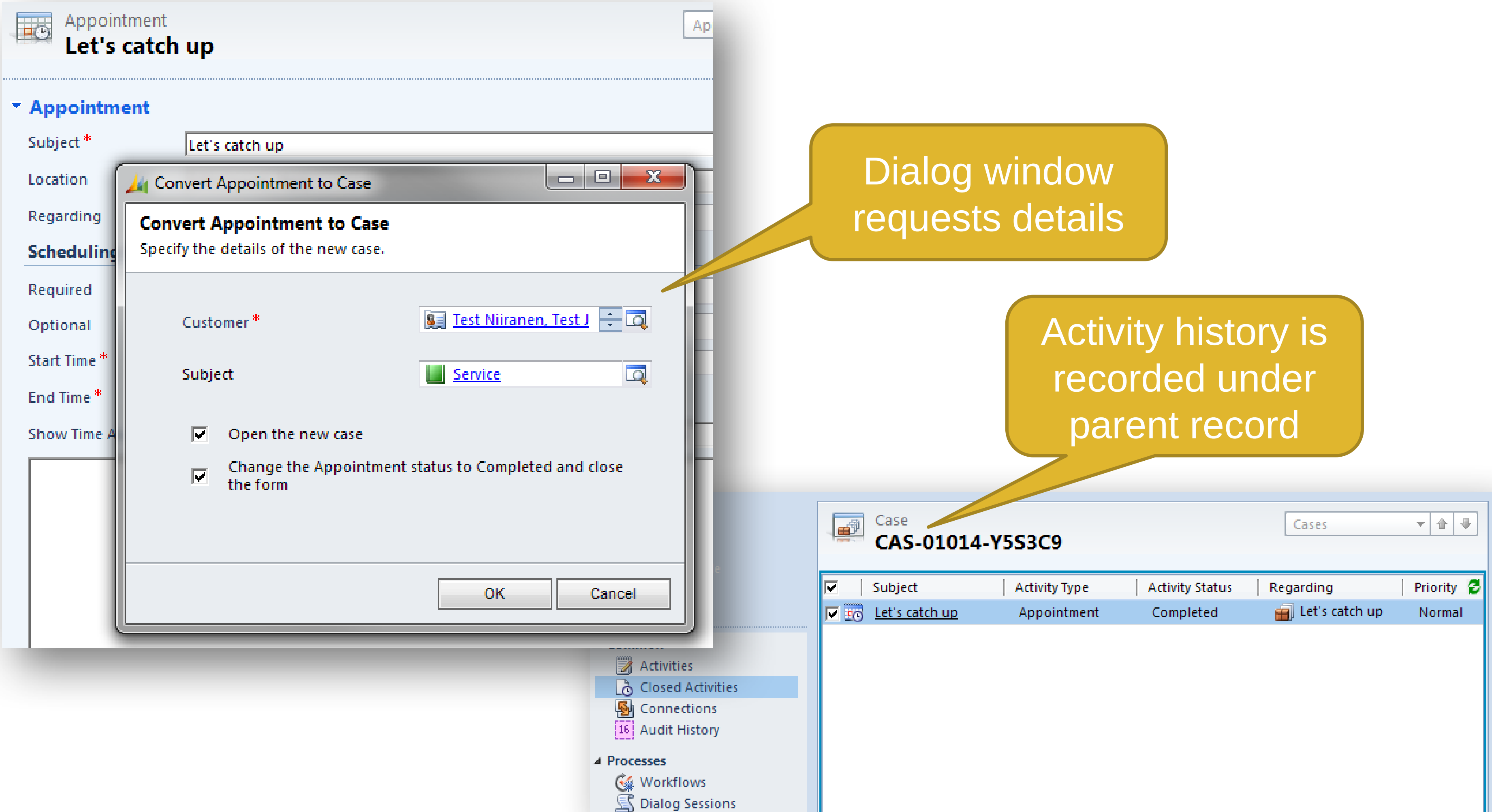
Form options for auto-resove and most recently used items

Convert emails (1)

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



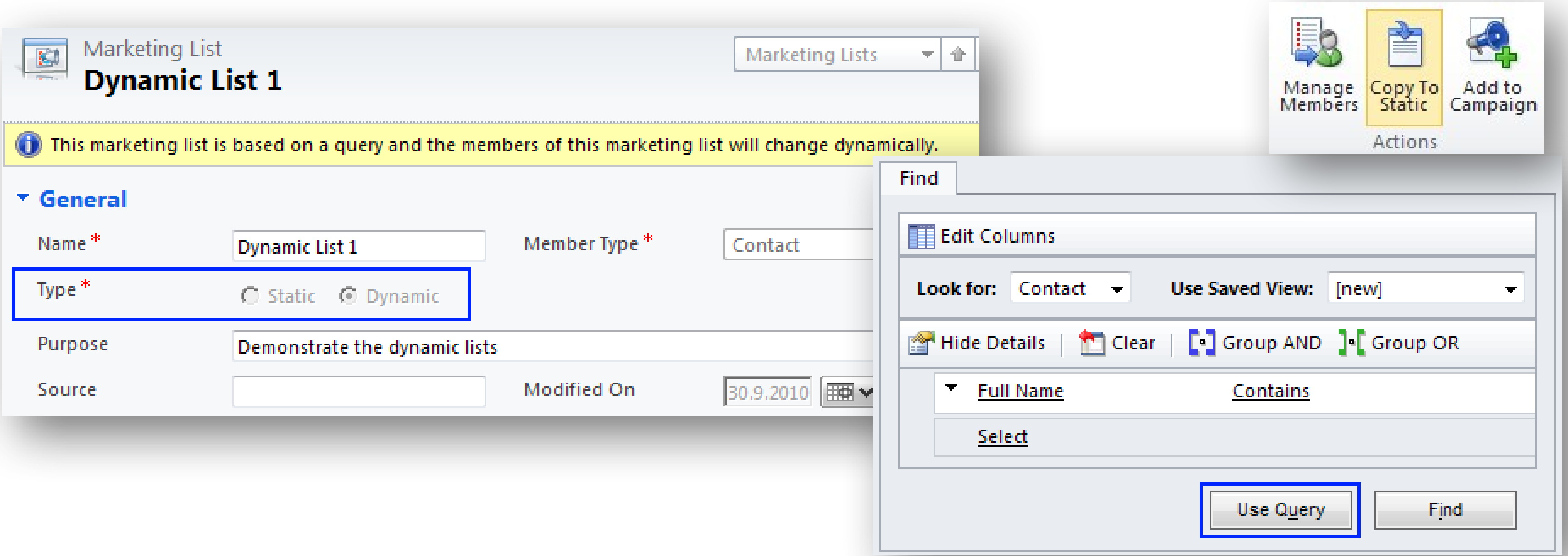
Convert emails (2)



Dialog window requests details

Activity history is recorded under parent record

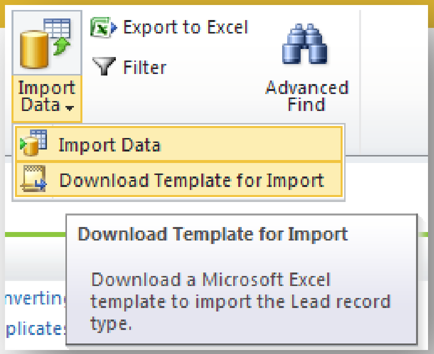
Dynamic Marketing Lists

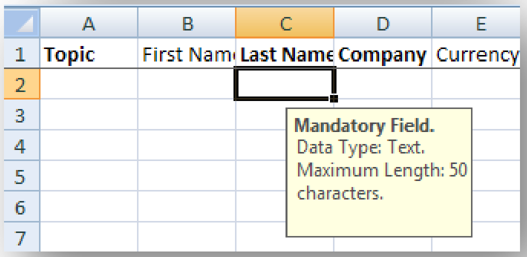


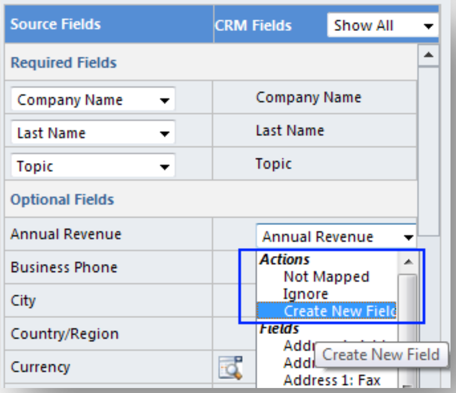
- Lists can be made static (traditional) or dynamic
- Dynamic list's members will be automatically updated based on a stored query criteria
- However, list membership is only shown for static lists under the member record's related marketing lists view

Data import wizard

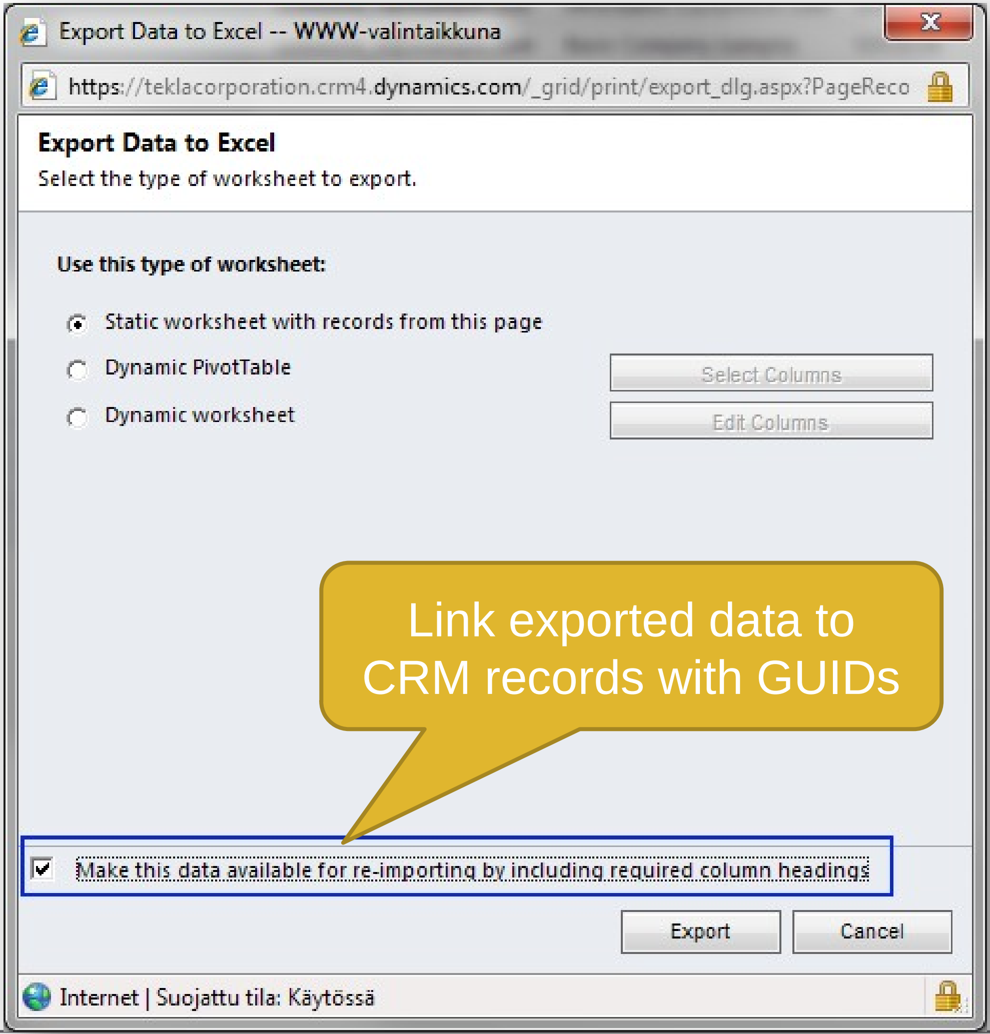
- Download example templates of entity field lists and formats
- Create new entities or fields directly through the import based on source data mappign
- There will be no separate Data Migration Manager for CRM 2011
- See blog post from PowerObjects for more details: http://www.powerobjects.com/blog/2010/10/01/crm-2011-data-import-wizard/





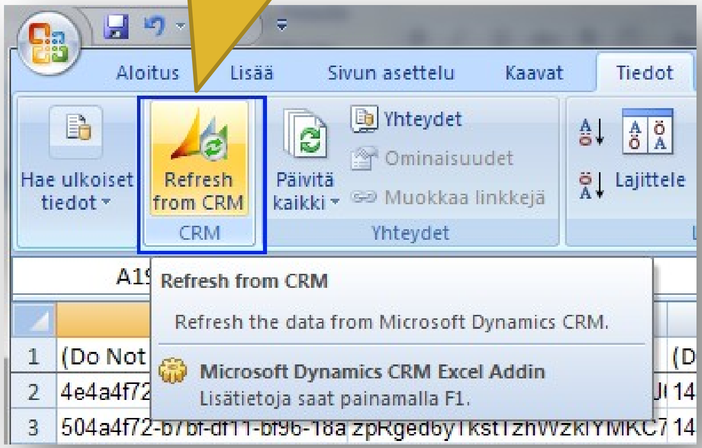


Excel data export & re-import (1)

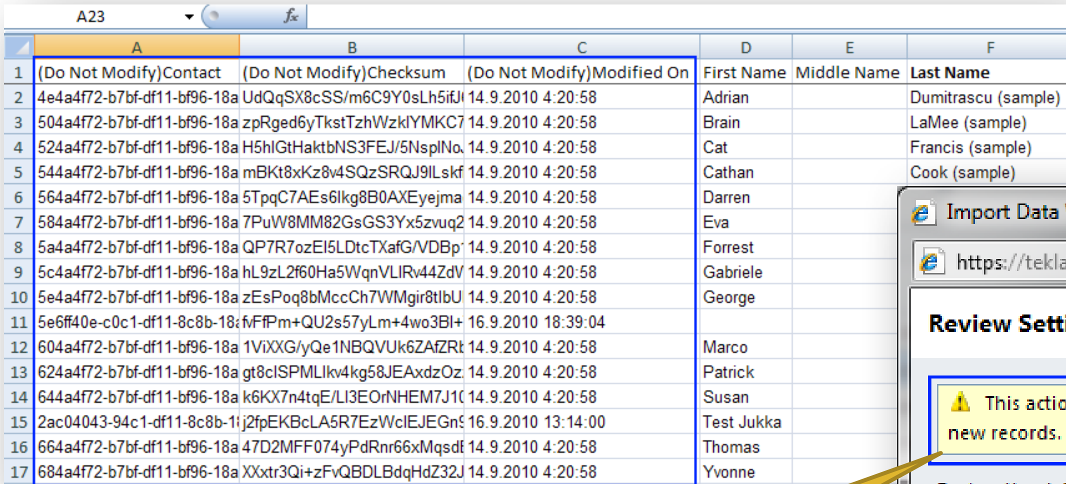


Link exported data to CRM records with GUIDs

Refresh Excel records of static worksheets with CRM data

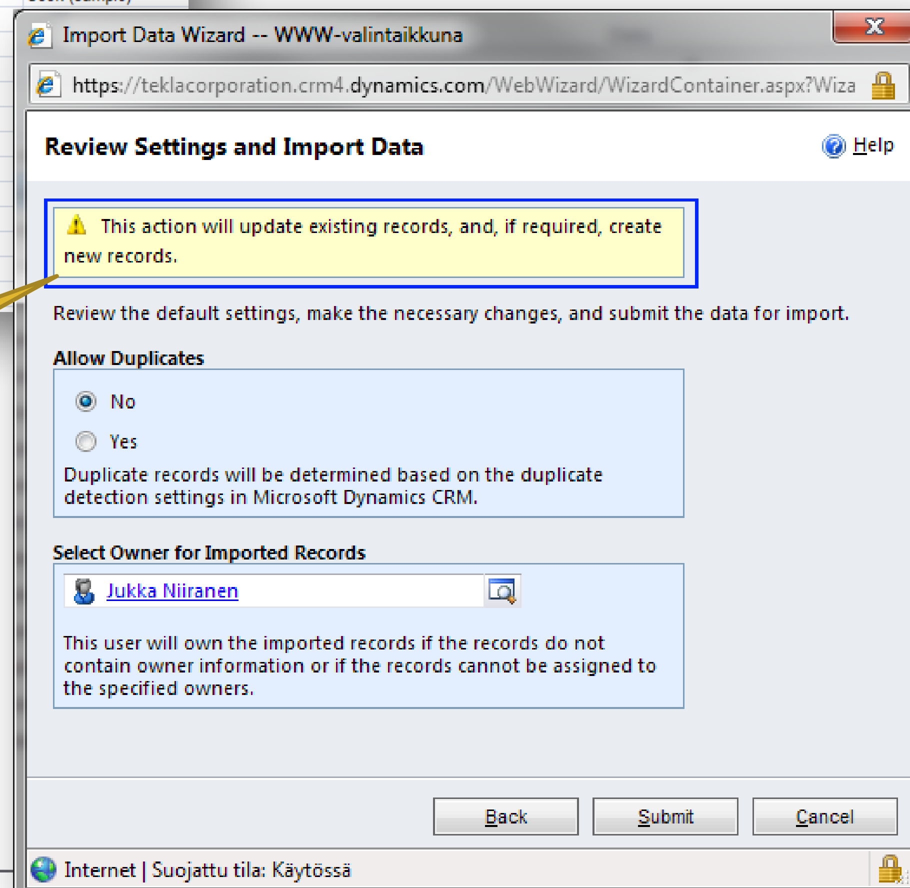


Excel data export & re-import (2)

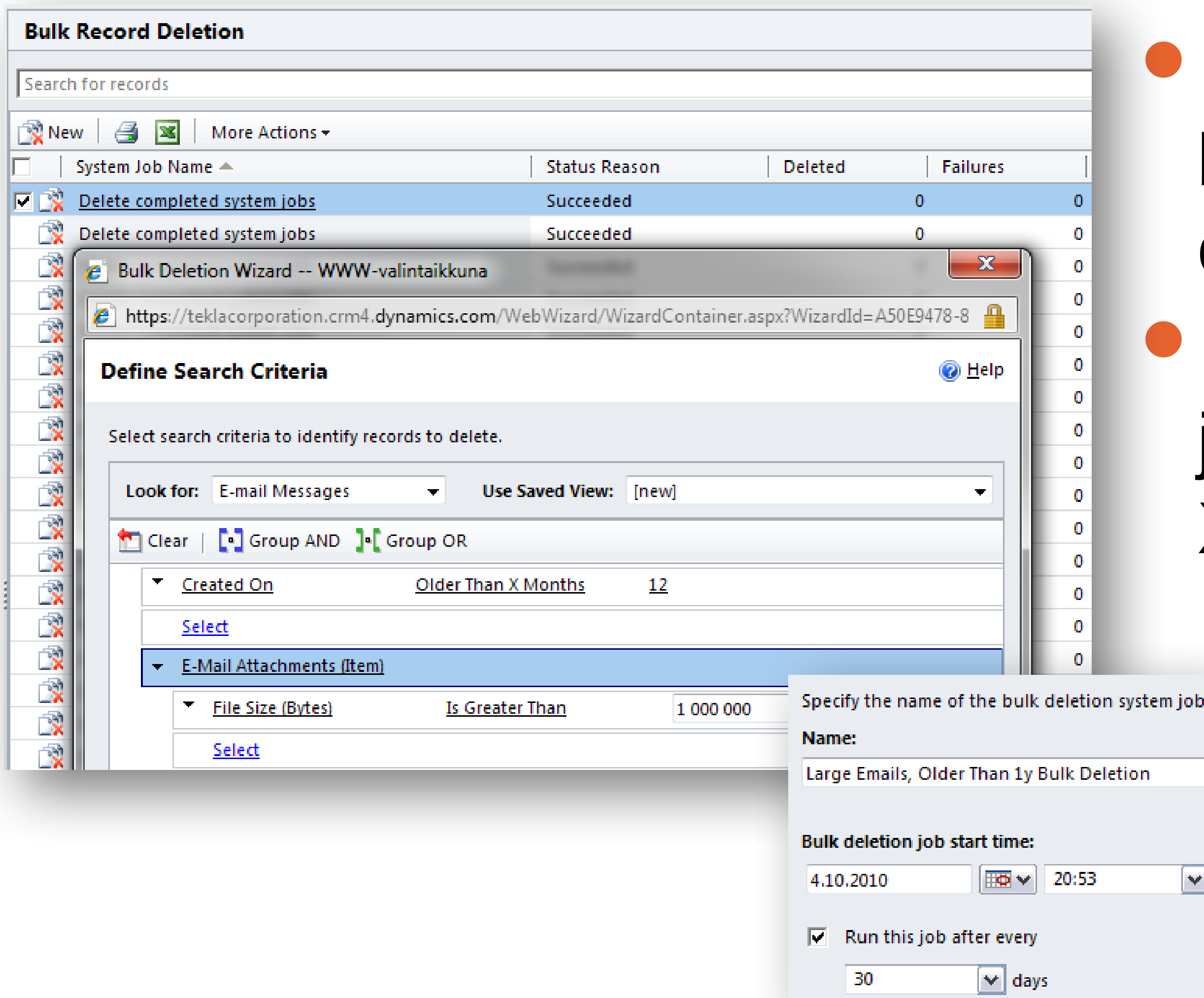


	A	B	C	D	E	F
1	(Do Not Modify)Contact	(Do Not Modify)Checksum	(Do Not Modify)Modified On	First Name	Middle Name	Last Name
2	4e4a4f72-b7bf-df11-bf96-18a	UdQqSX8cSS/m6C9Y0sLh5ifJ	14.9.2010 4:20:58	Adrian		Dumitrascu (sample)
3	504a4f72-b7bf-df11-bf96-18a	zpRged6yTkstTzhWzklYMKC7	14.9.2010 4:20:58	Brain		LaMee (sample)
4	524a4f72-b7bf-df11-bf96-18a	H5hlGtHaktbNS3FEJ/5NsplNo	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	7PuW8MM82GsGS3Yx5zvuq2	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	zEsPoq8bMccCh7WMgir8tlbU	14.9.2010 4:20:58	George		
11	5e6ff40e-c0c1-df11-8c8b-18	fvFfPm+QU2s57yLm+4wo3BI+	16.9.2010 18:39:04			
12	604a4f72-b7bf-df11-bf96-18a	1ViXXG/yQe1NBQVUk6ZAfZRt	14.9.2010 4:20:58	Marco		
13	624a4f72-b7bf-df11-bf96-18a	gt8clSPMLlkv4kg58JEAxdzOz	14.9.2010 4:20:58	Patrick		
14	644a4f72-b7bf-df11-bf96-18a	k6KX7n4tqE/LI3EOrNHEM7J1(	14.9.2010 4:20:58	Susan		
15	2ac04043-94c1-df11-8c8b-1	j2fpEKBcLA5R7EzWclEJEGn	16.9.2010 13:14:00	Test Jukka		
16	664a4f72-b7bf-df11-bf96-18a	47D2MFF074yPdRnr66xMqsdI	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

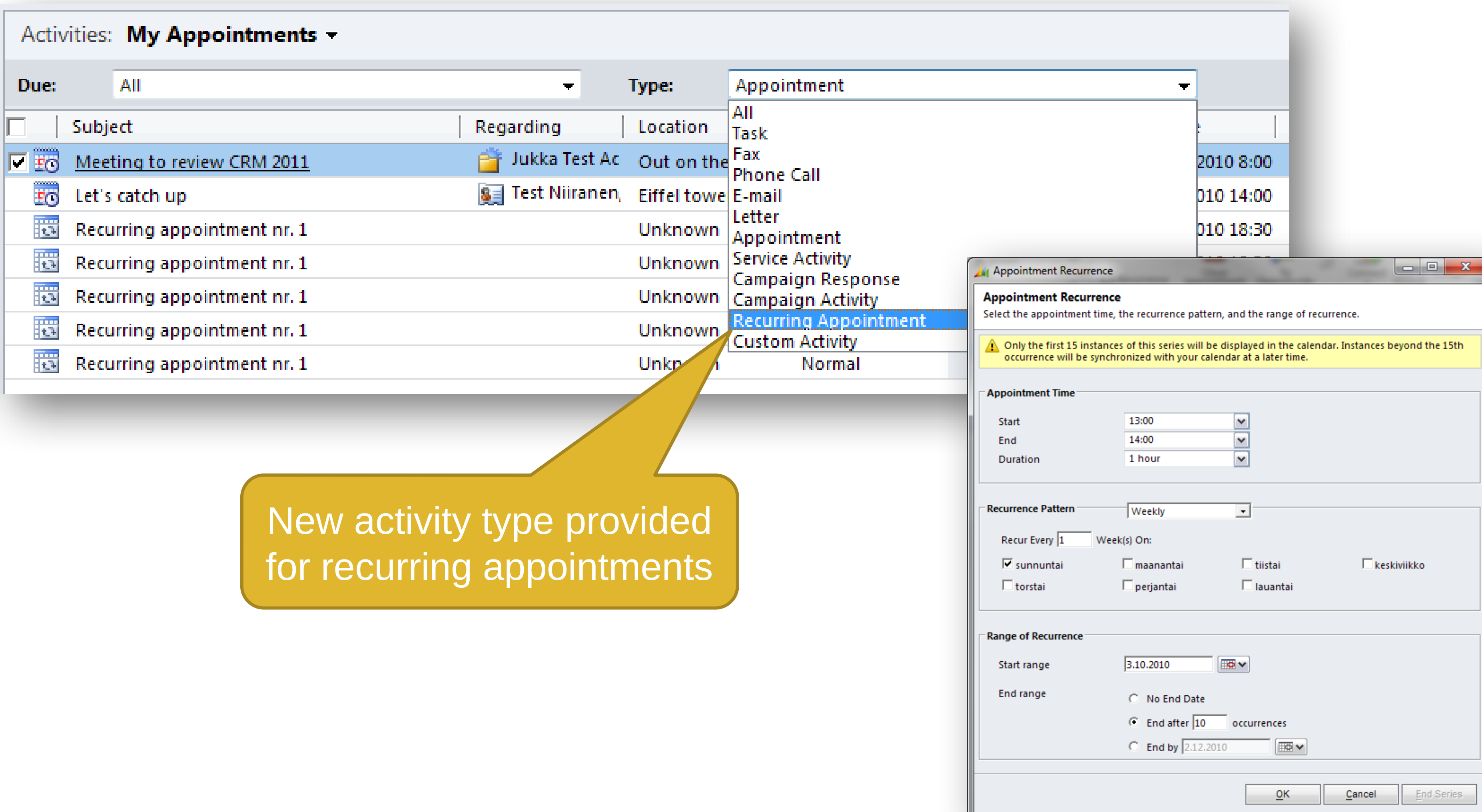


Bulk deletion wizard



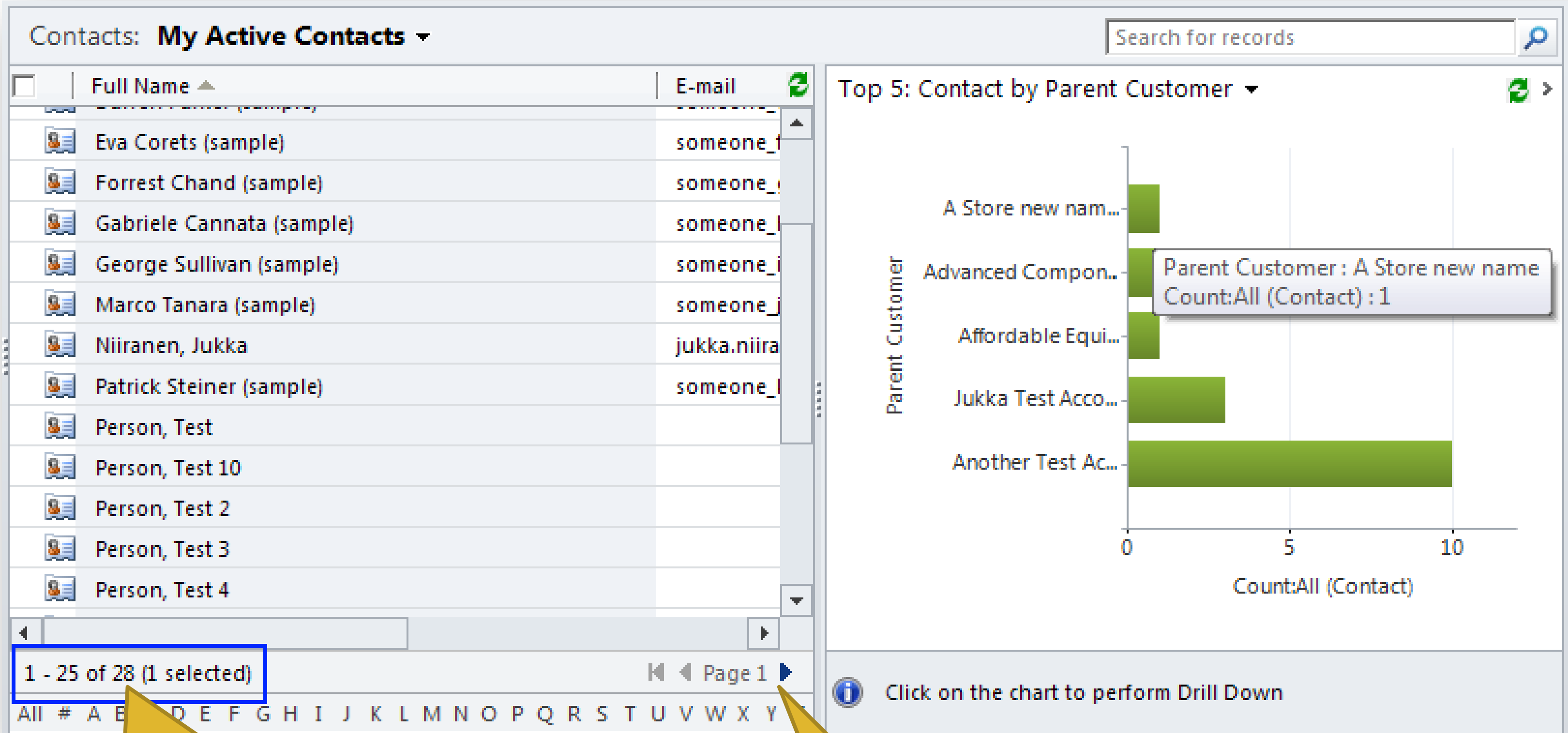
- Delete records in bulk based on AF criteria
- Schedule deletion jobs to run every X days

Recurring appointments



New activity type provided for recurring appointments

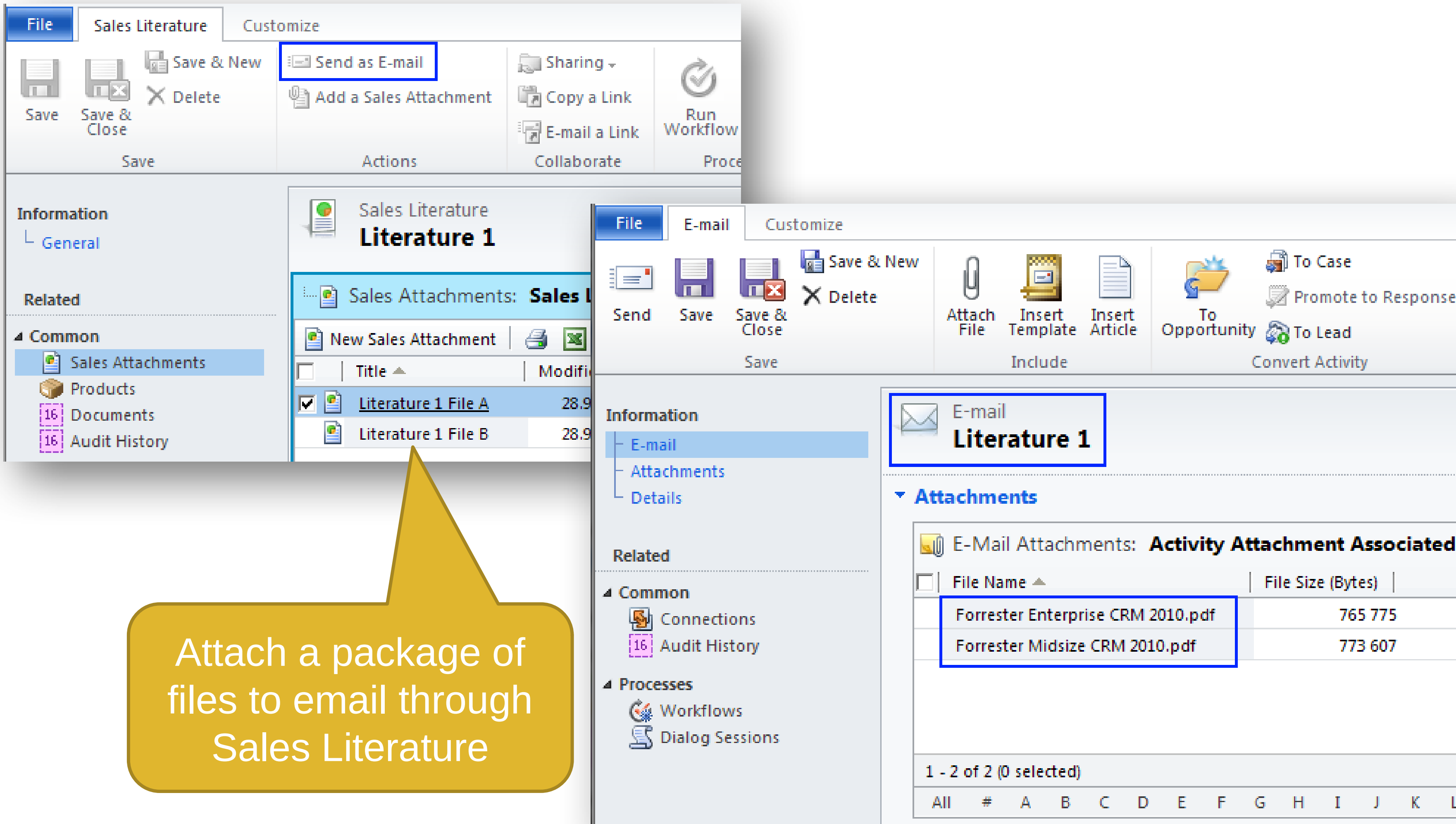
Total counts in grids



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

…but page count is not

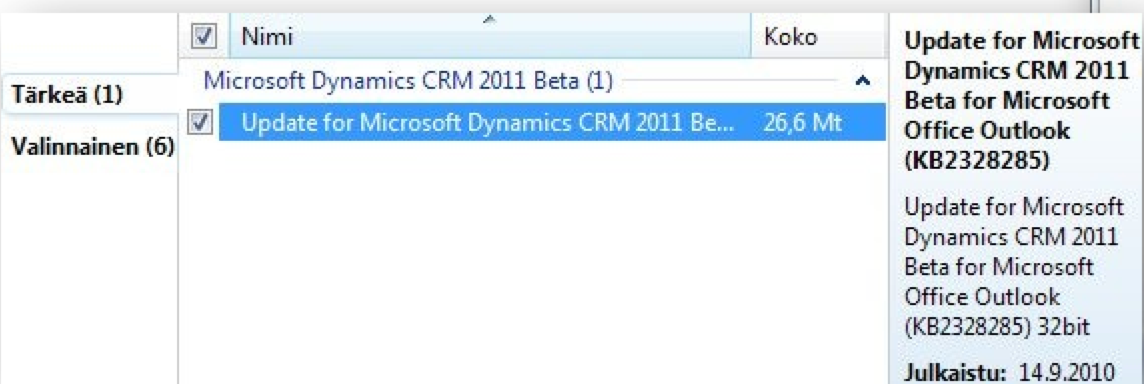
Sales Literature emailing



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

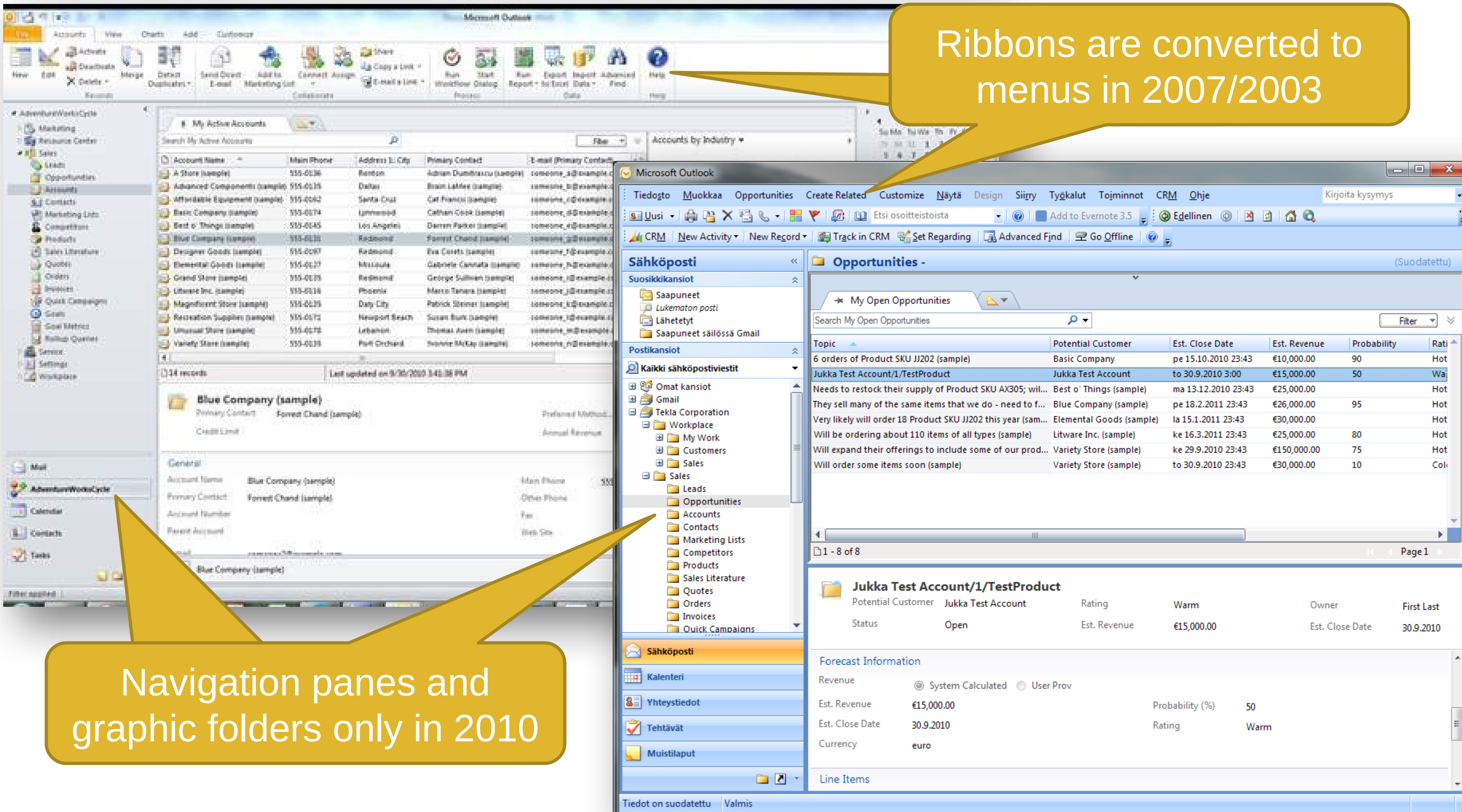


Outlook Client

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)

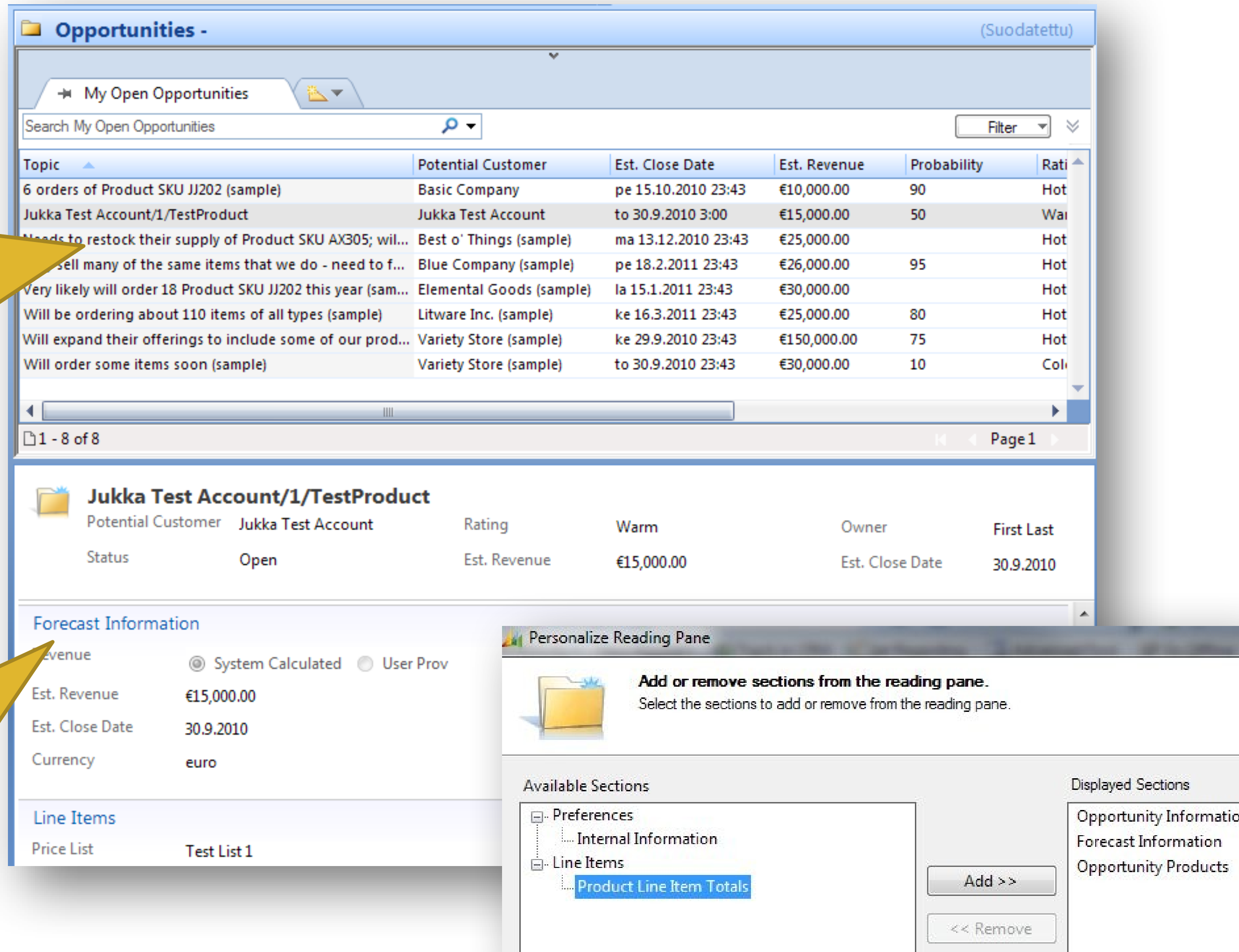
Outlook 2010 vs. 2007/2003



Reading panes

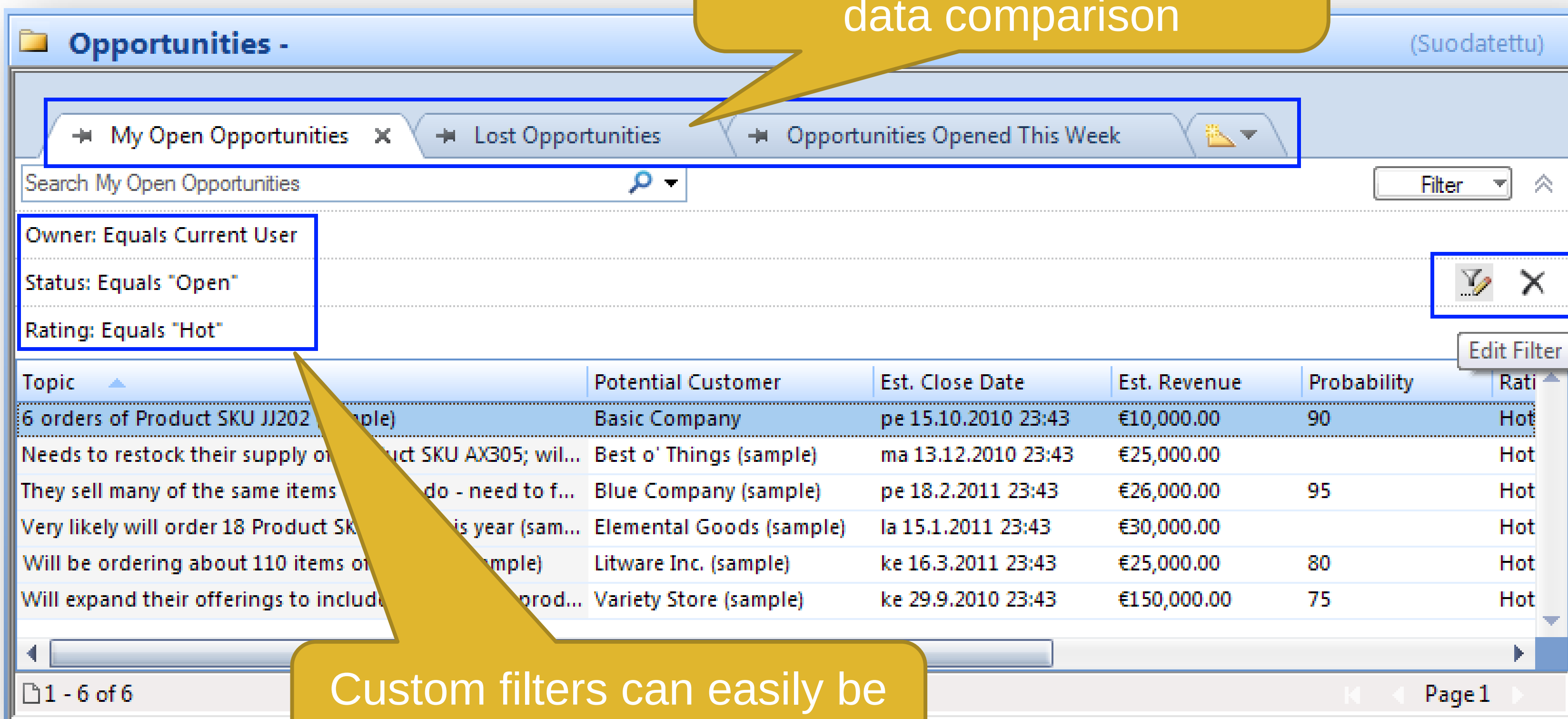
Scrolling through records in grid allows ”inbox style” navigation through CRM data

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



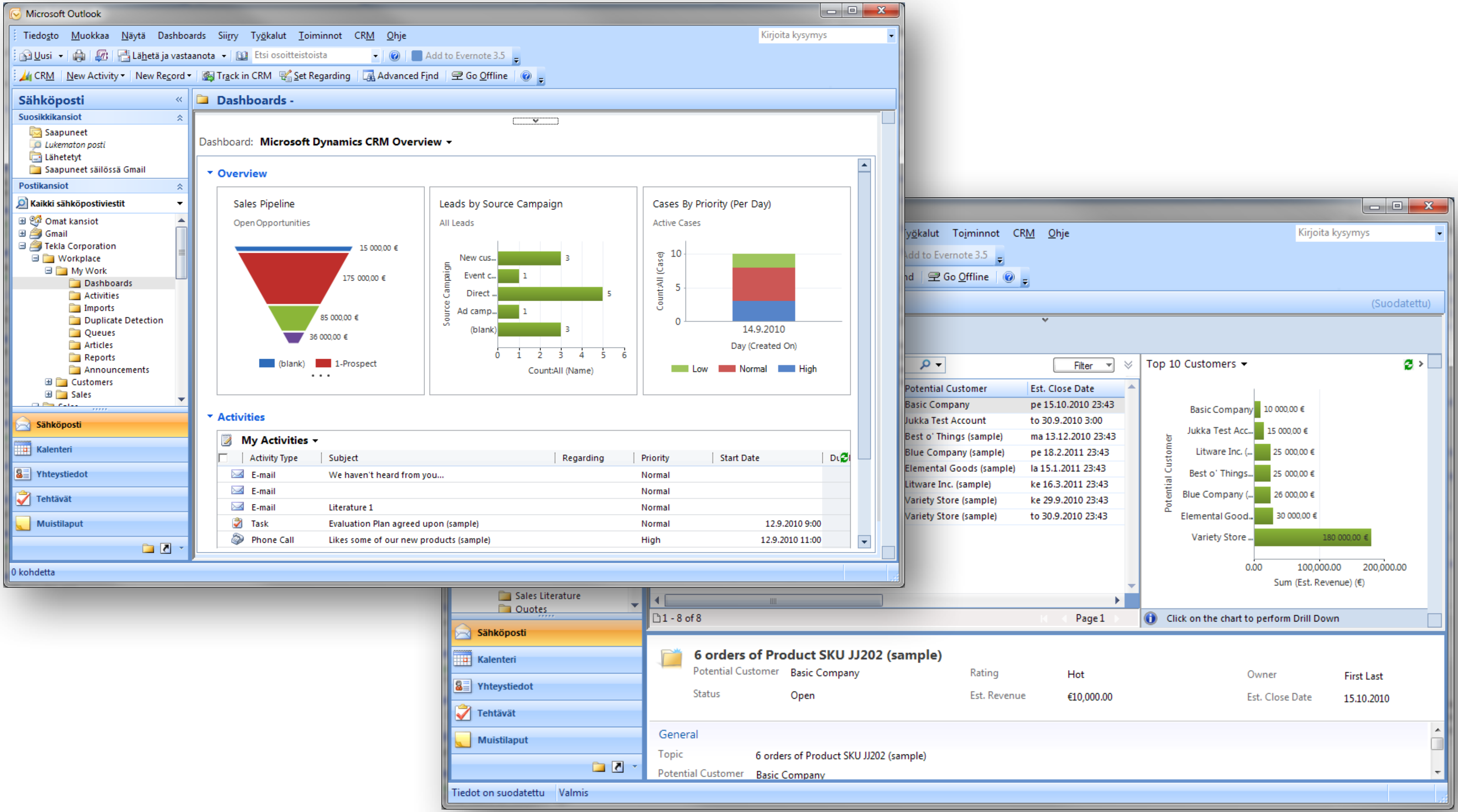
View tabs and filters

Multiple views can be opened on tabs for quick data comparison

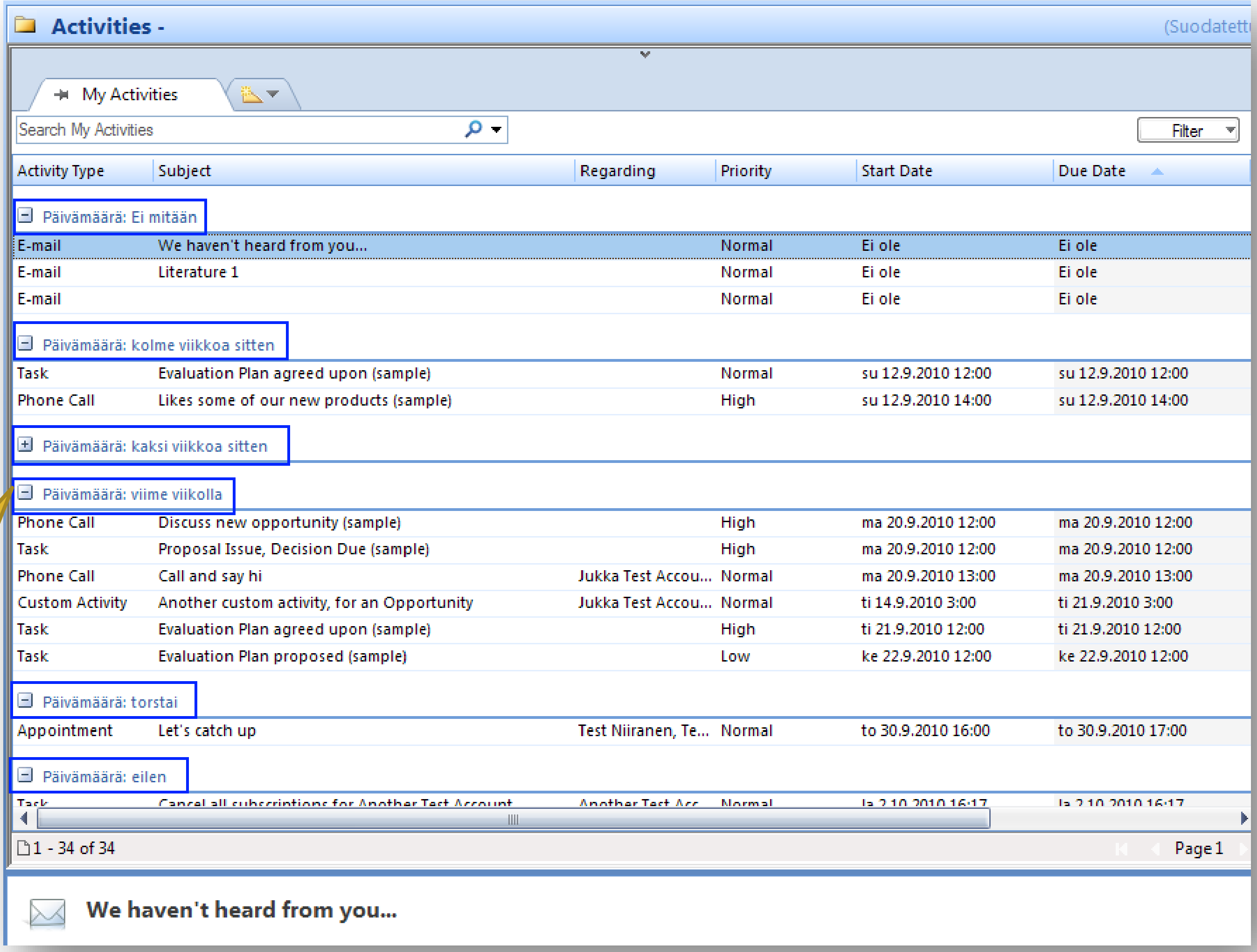


Custom filters can easily be applied to existing views

Full visualizations support



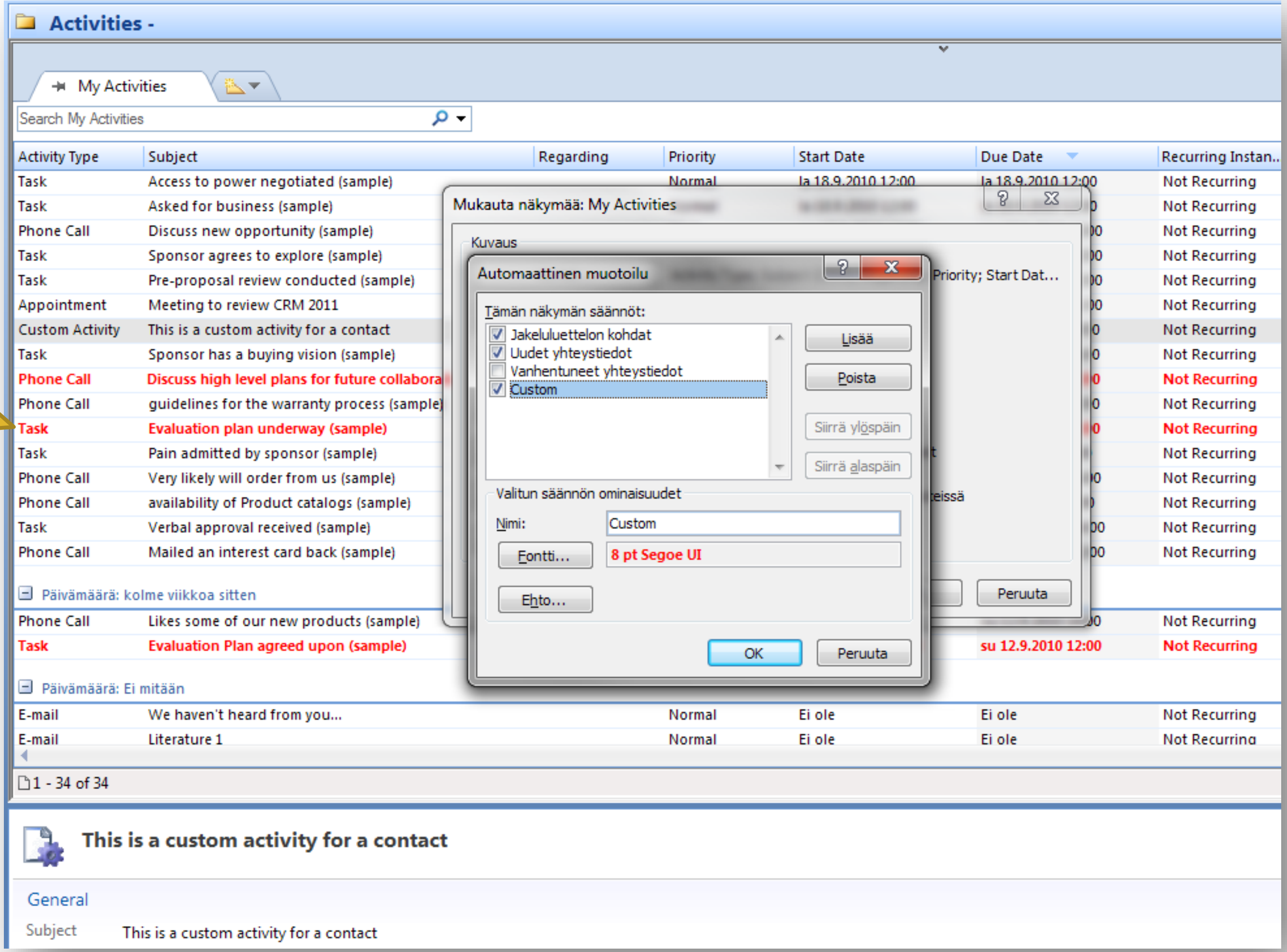
Activity grouping



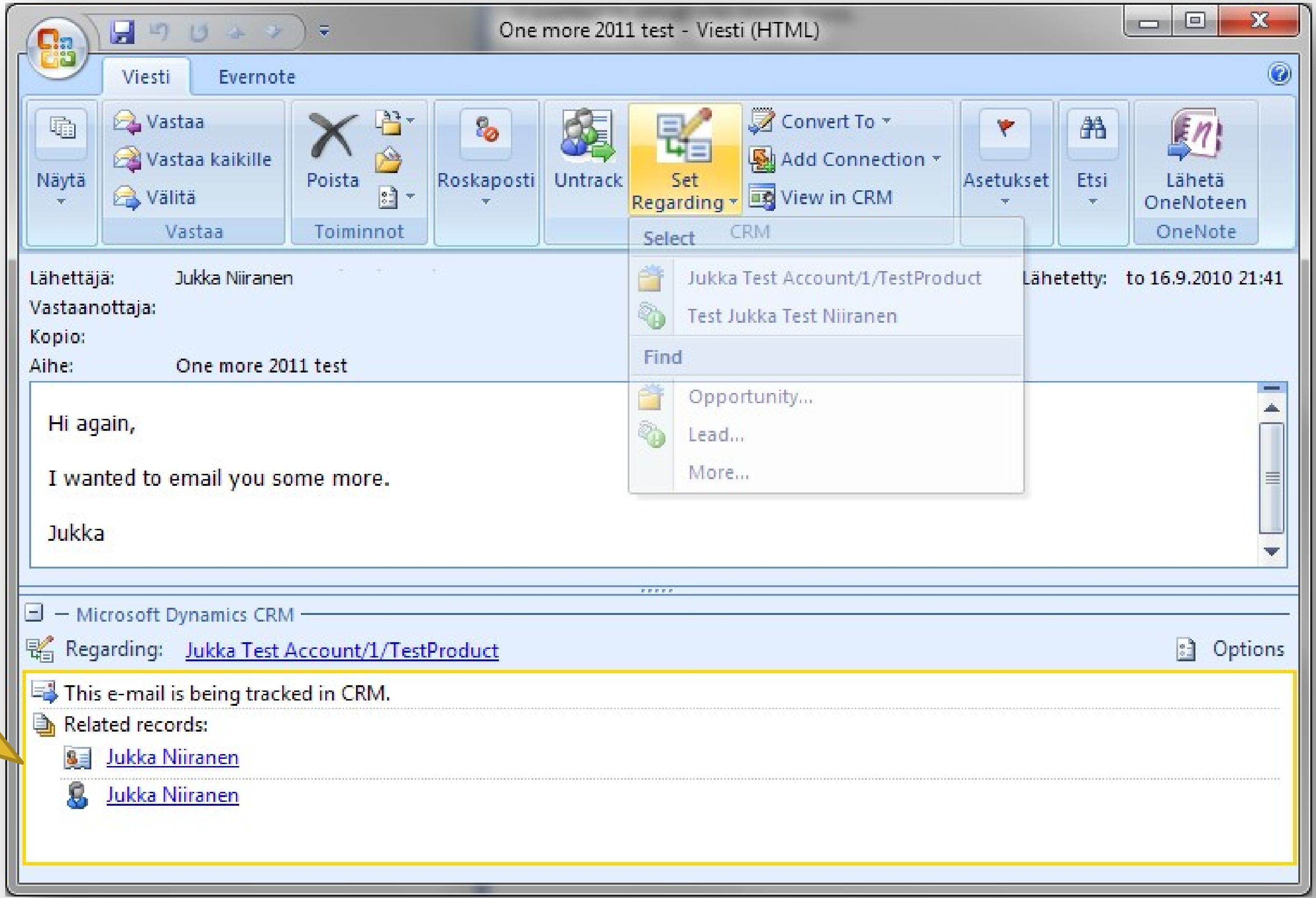
Native Outlook grouping options for activities (by due date etc.)

Conditional formating

Create custom format rules based on field data conditions



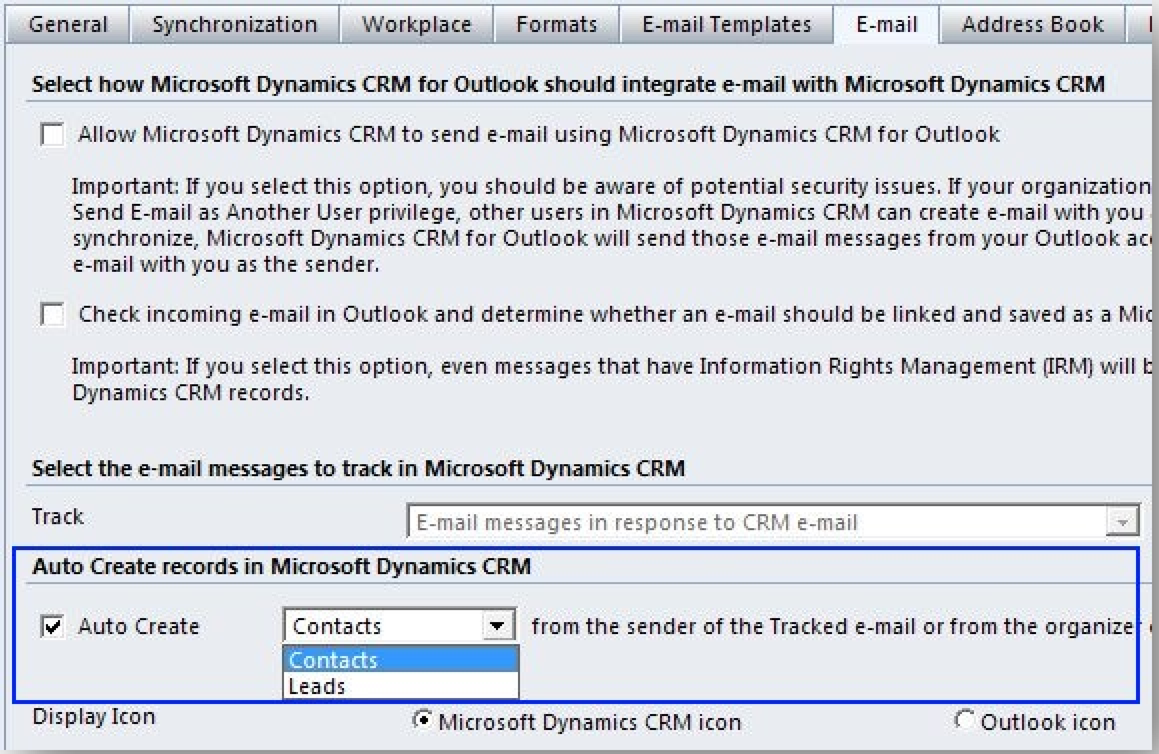
Regarding records



Regarding pane displays links to related records

Auto create contacts or leads

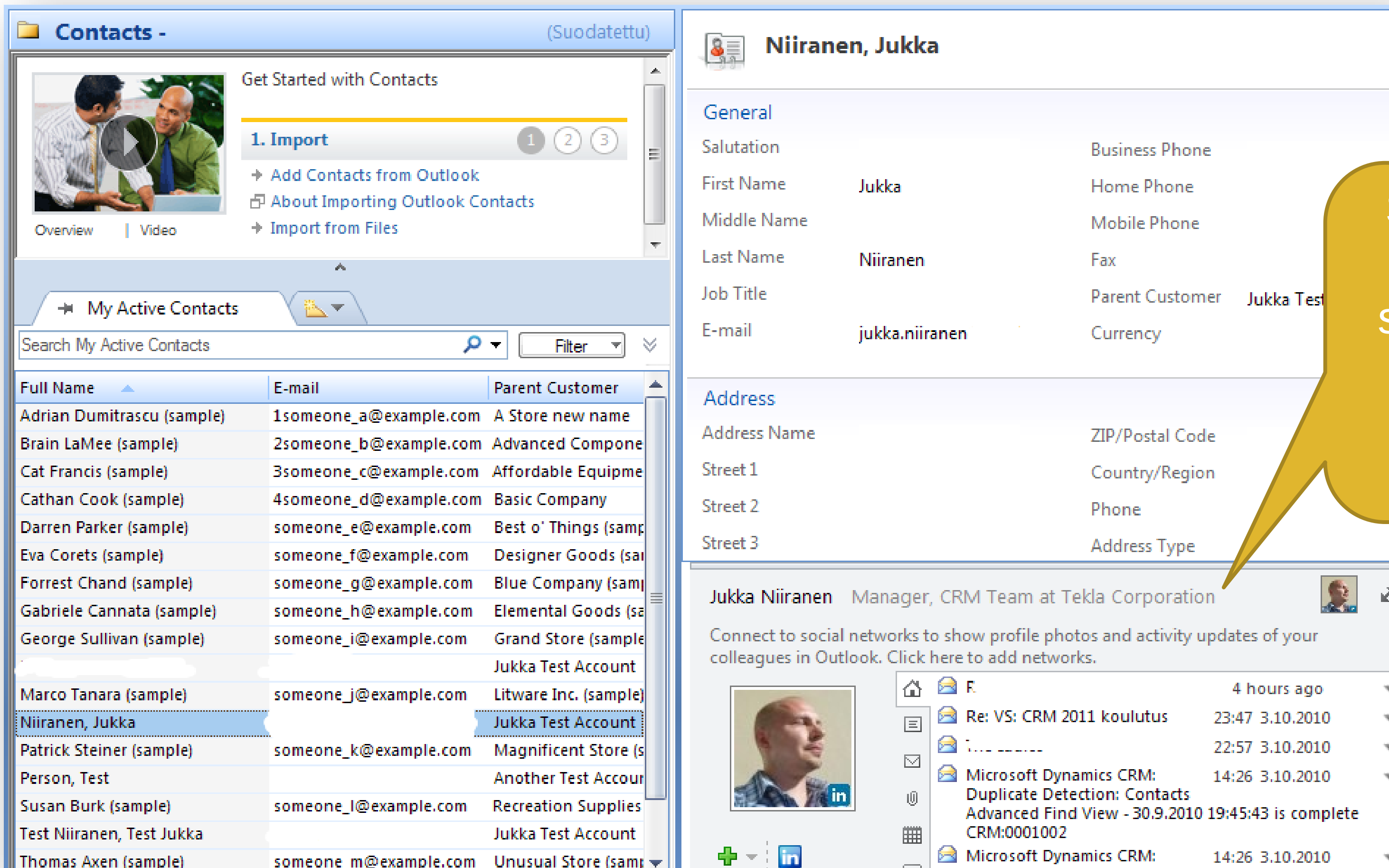
- Outlook settings can be configured to create new records for sender of an email tracked to CRM



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

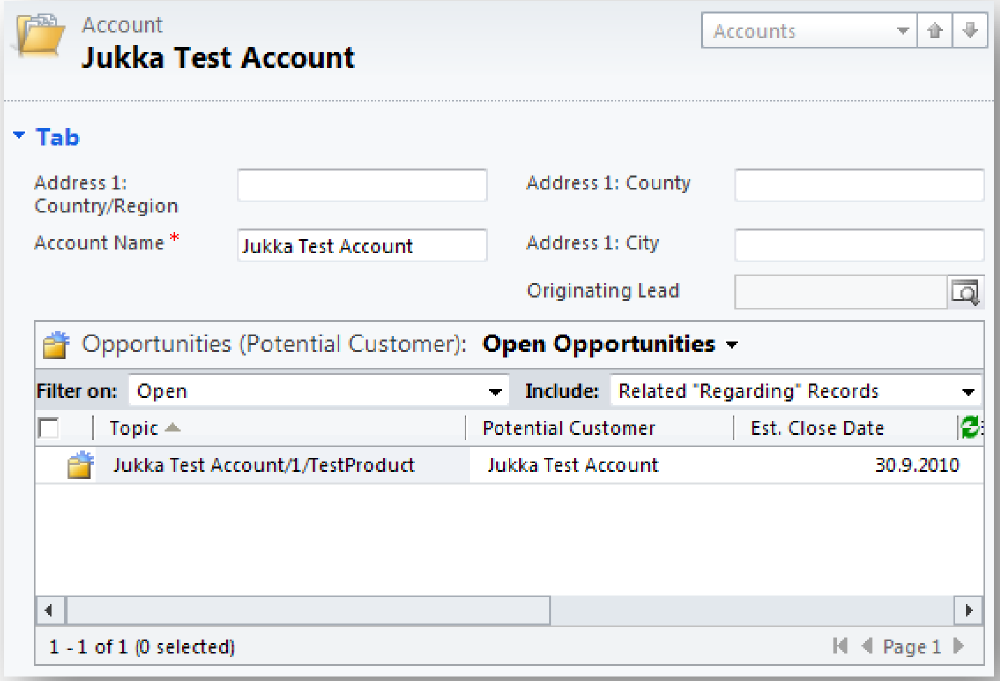


Social network profiles and streams can be integrated into the contact reading pane

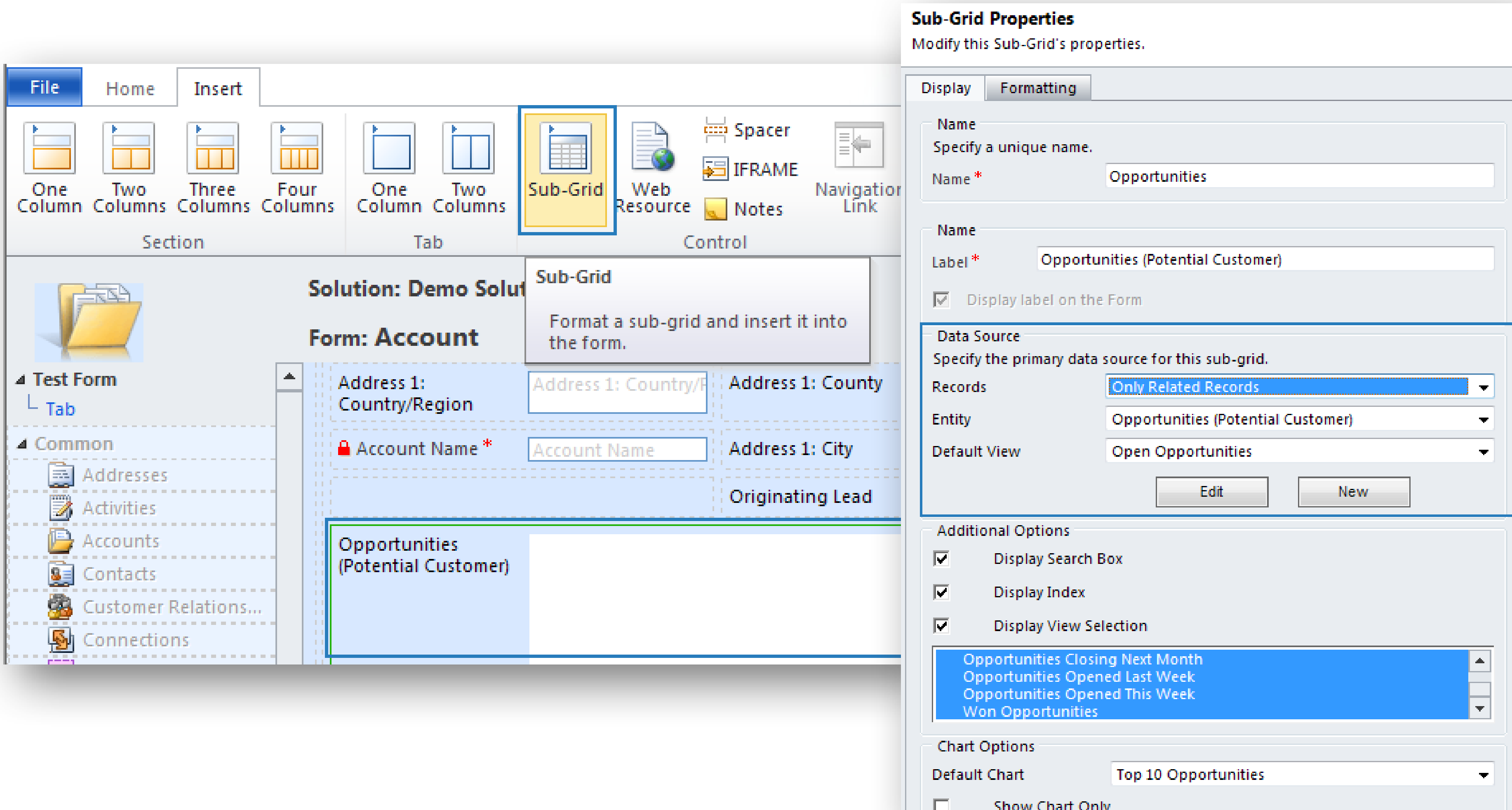
Form Customization Options

Sub-grids

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



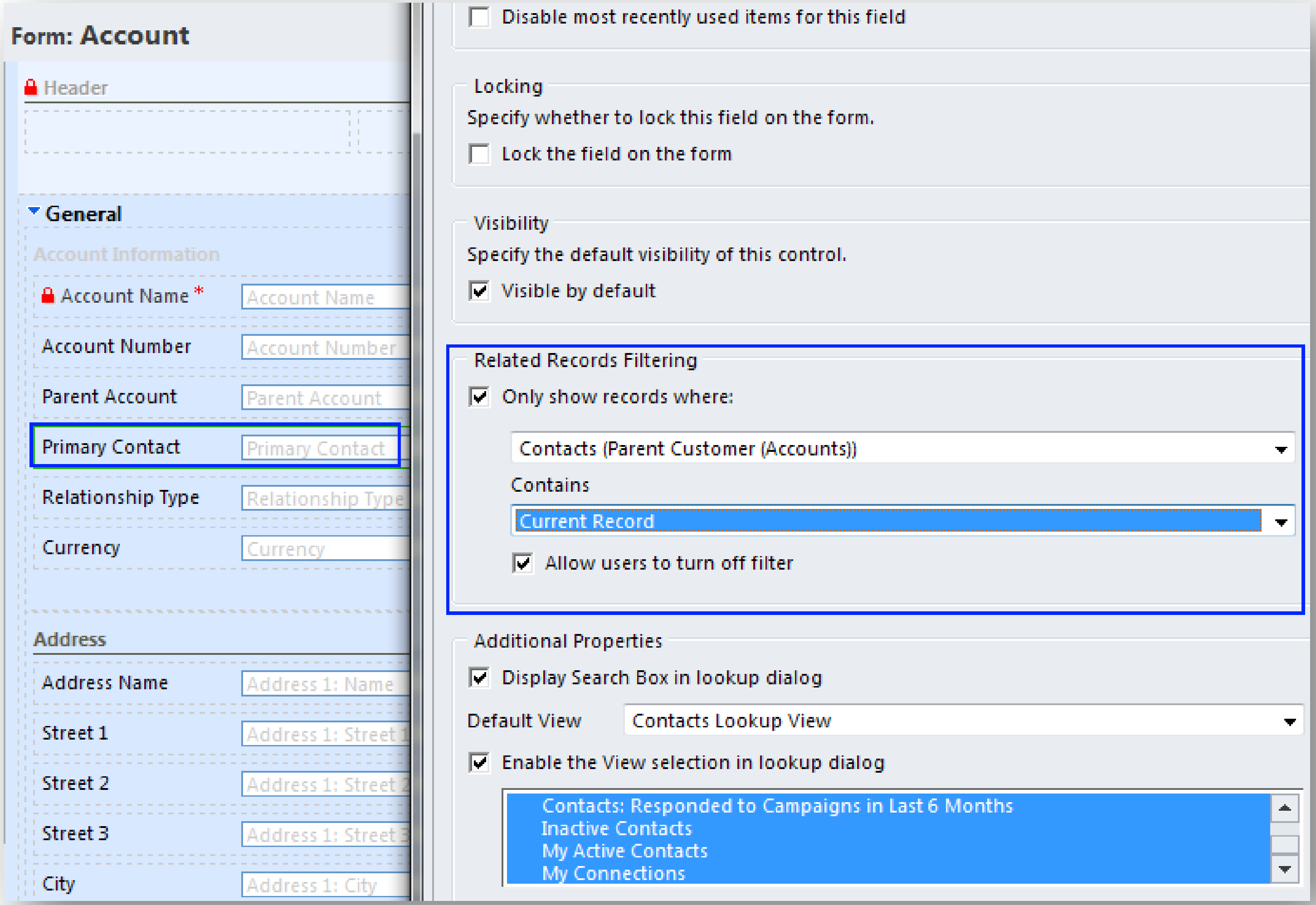
Adding a sub-grid on the form



Filtered lookups

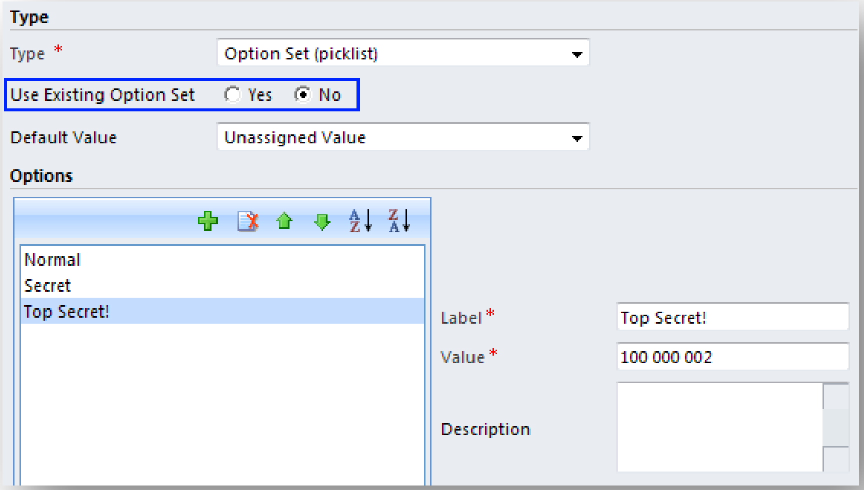
- Form customization options include ability to show records based on simple query criteria
- Common scenario: show only accounts where the parent account is equal to current account
- Lookup controls are programmable, i.e. can be modified through SDK when GUI is not enough

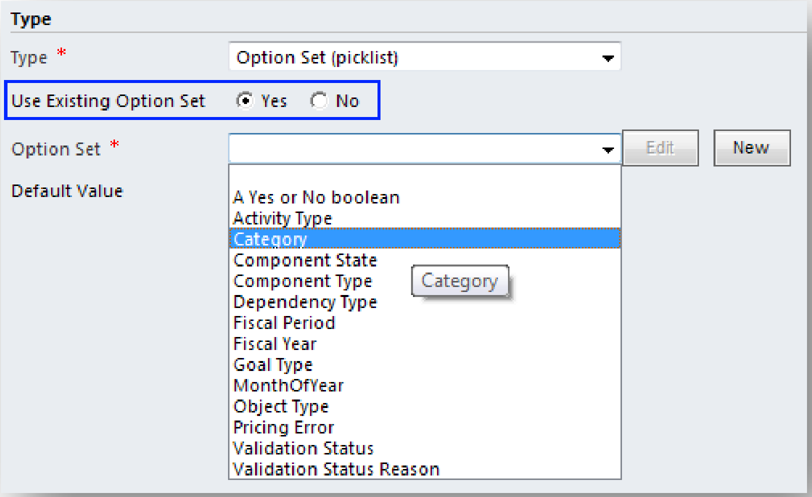
Related records filtering



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





Auditing

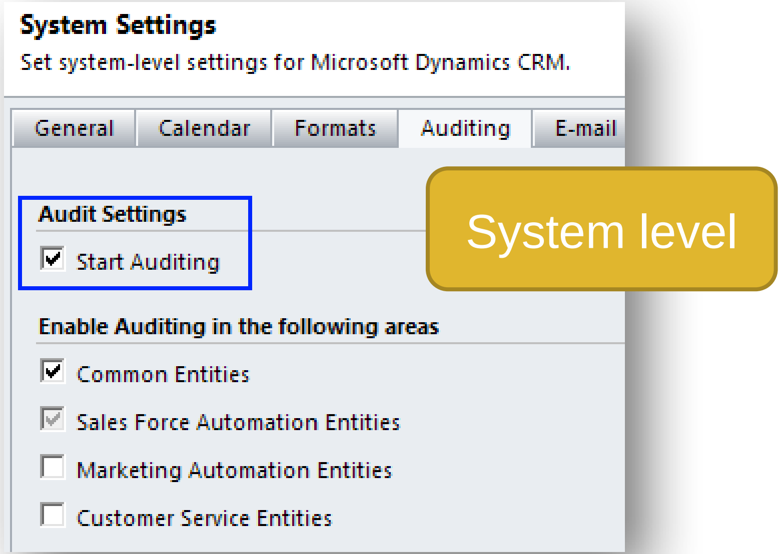
Auditing features

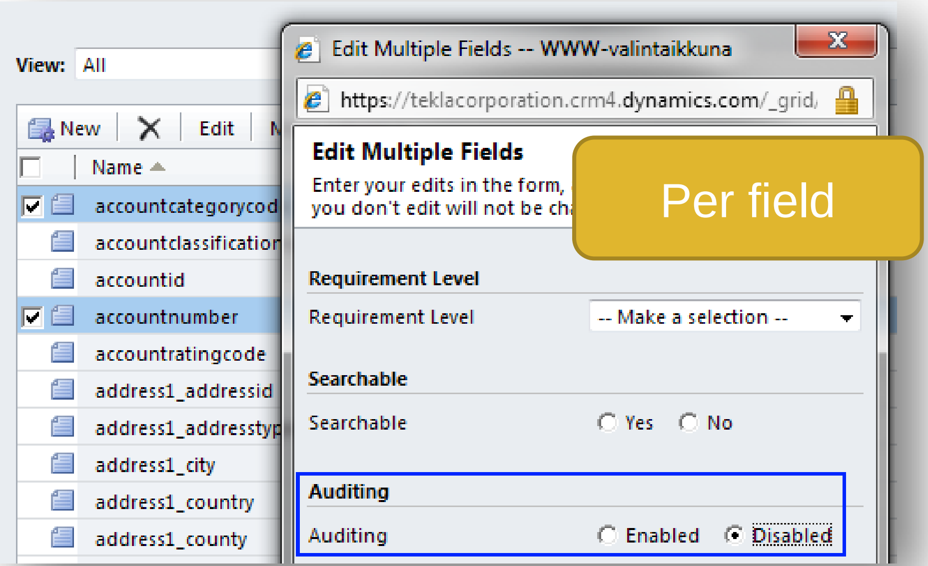
Feature	Capability
CRM Online Support	✓
CRM OnPrem Support	✓
Audit Customizable Entities	✓
Audit Custom Entities	✓
Configure Entities for Audit	✓
Configure Attributes for Audit	✓
Seclude Attributes from being Auditable	✓
Areawise Auditing	✓
Privilege based Audit Trail Viewing	✓
Privilege based Audit 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	✗

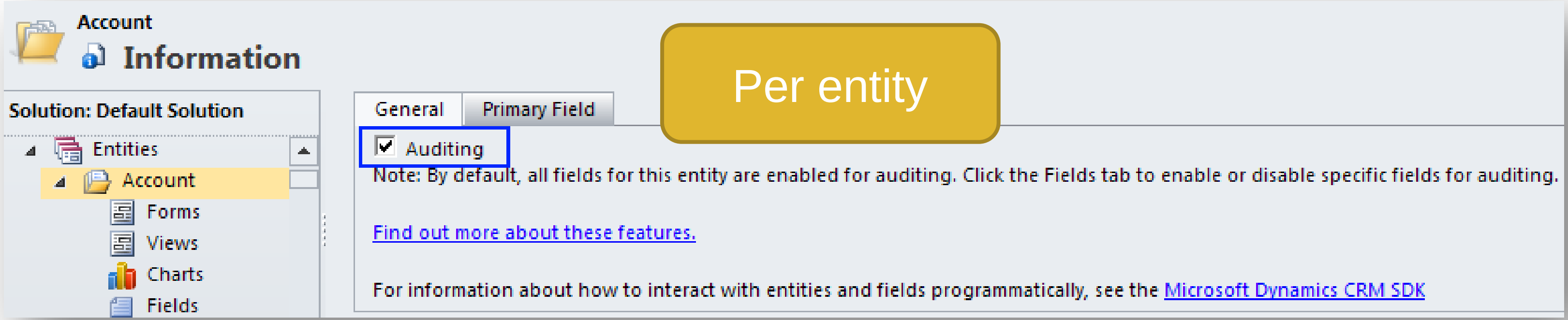
From Microsoft Dynamics CRM 2011 Beta SDK

- 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

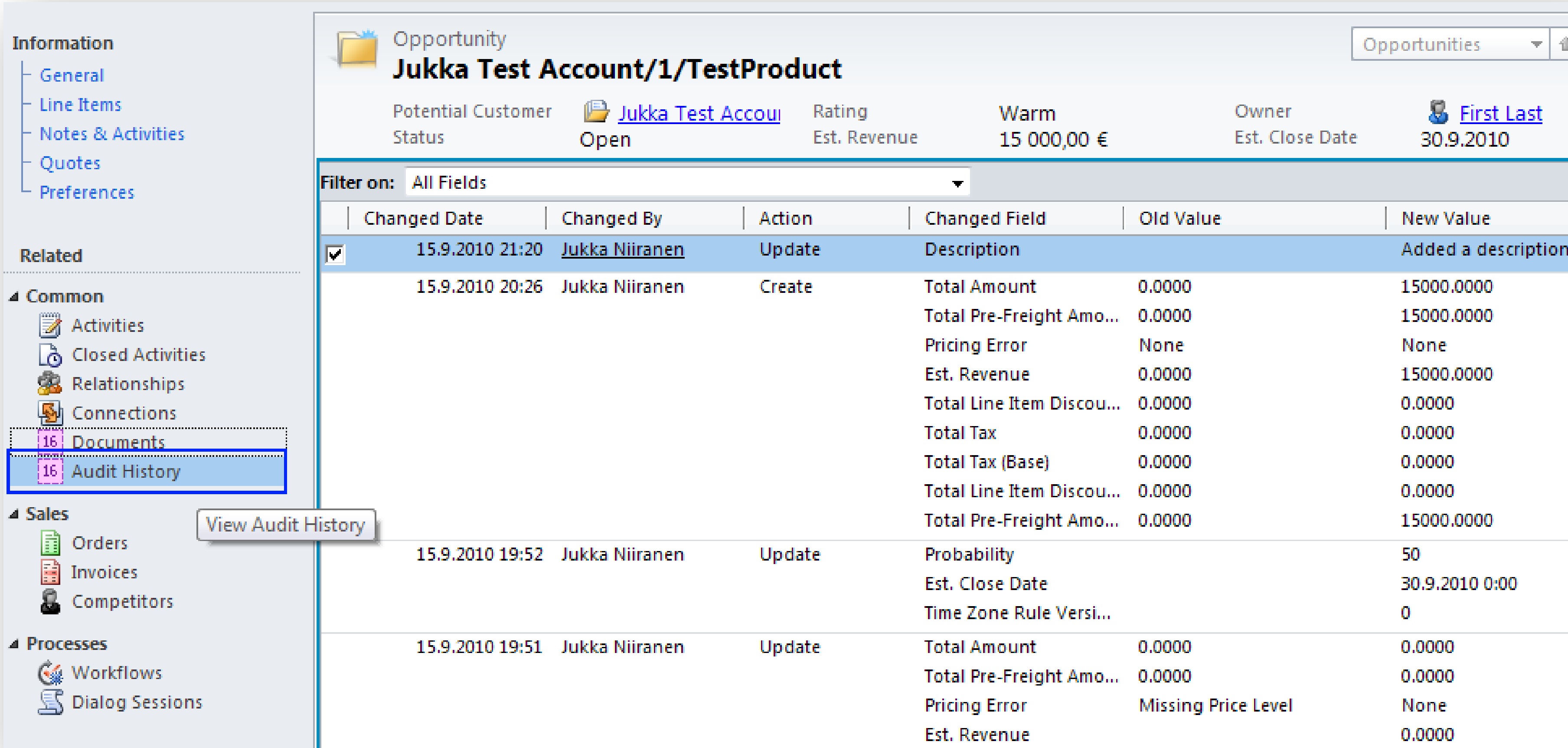
Enabling auditing



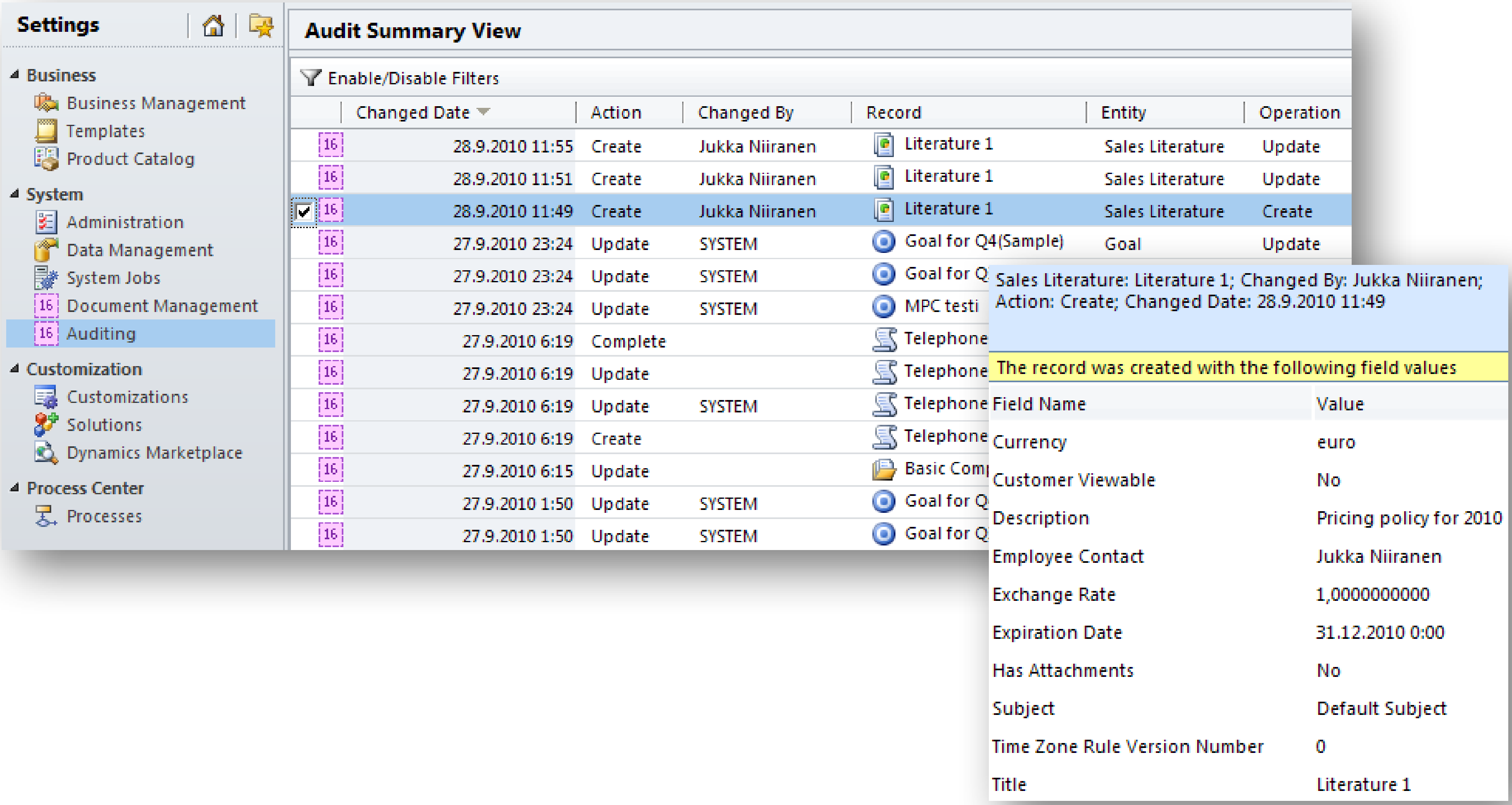




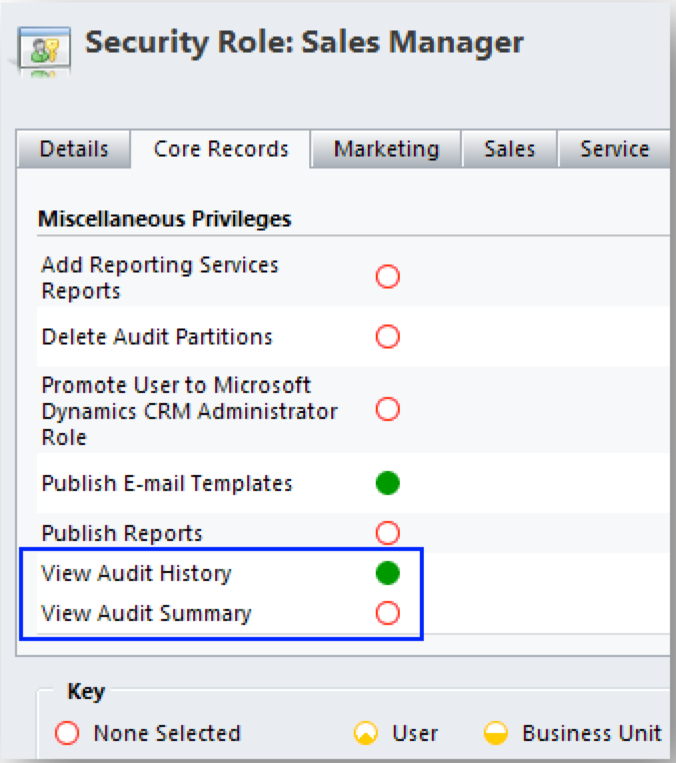
View audit history per record



Audit summary view



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

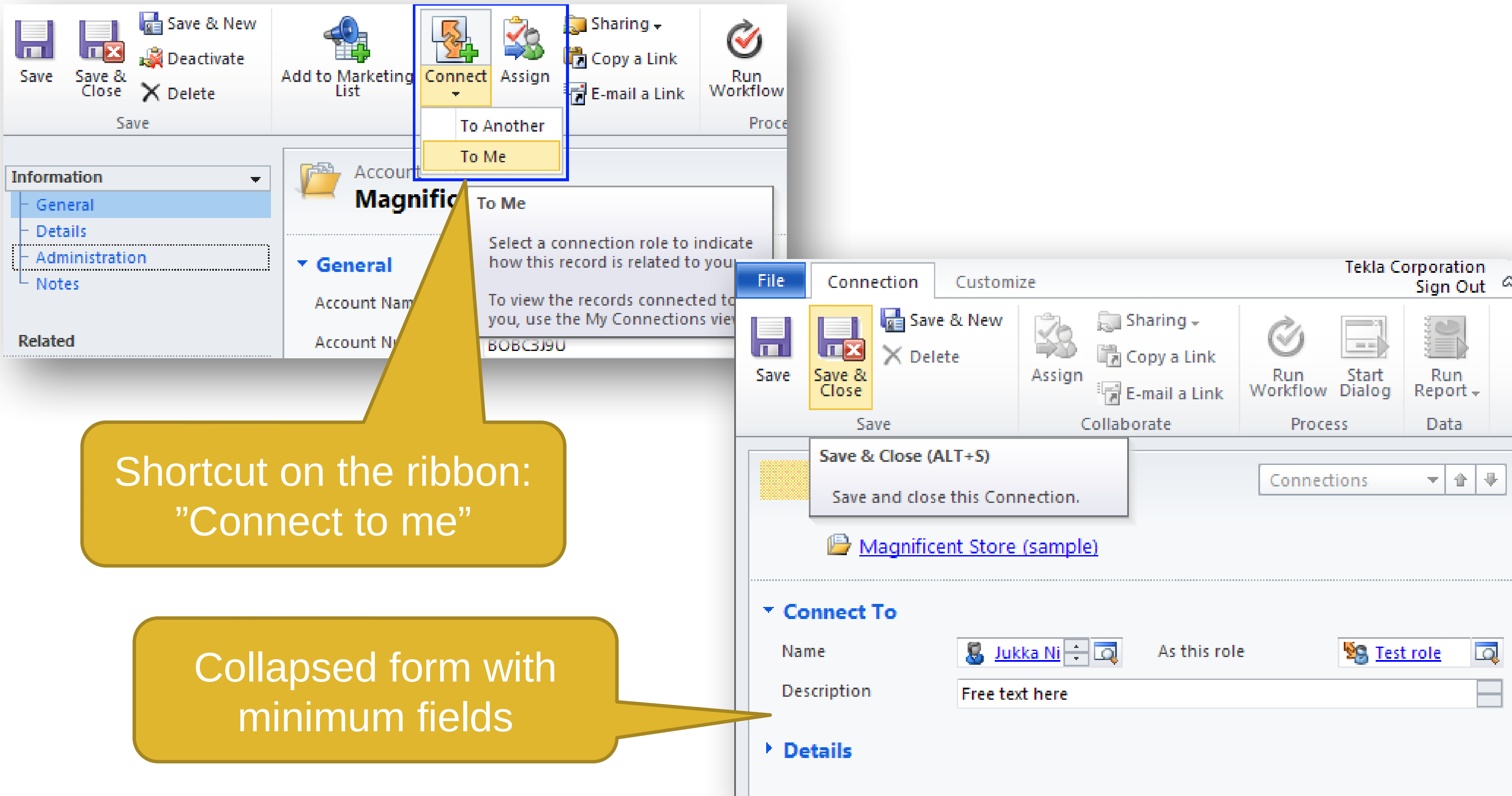
- Audit data is not available in Advanced Find queries, nor for reporting
- FilteredAudit view does not surface all relevant fields from the tables
- Audit records and record details can be retrieved through SDK
- Some system fields do not allow changing auditing settings other than on per entity level

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

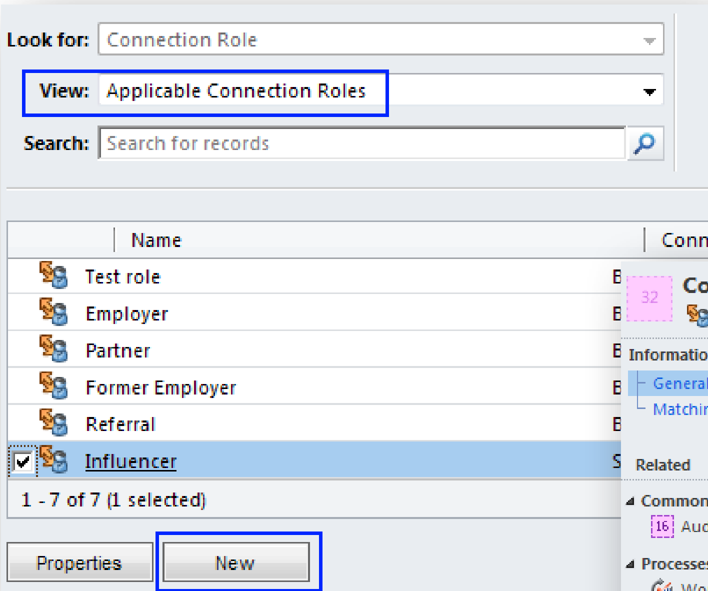
Quick-create a Connection



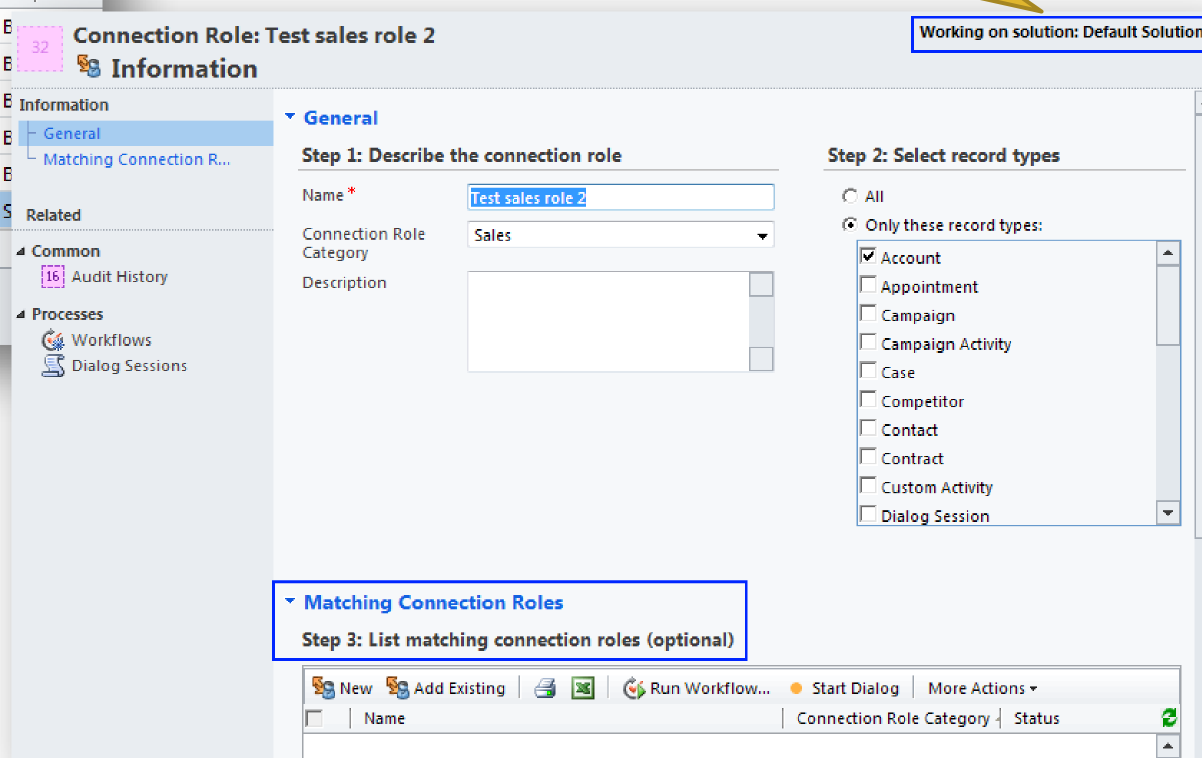
Shortcut on the ribbon: ”Connect to me”

Collapsed form with minimum fields

Relationship roles



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



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

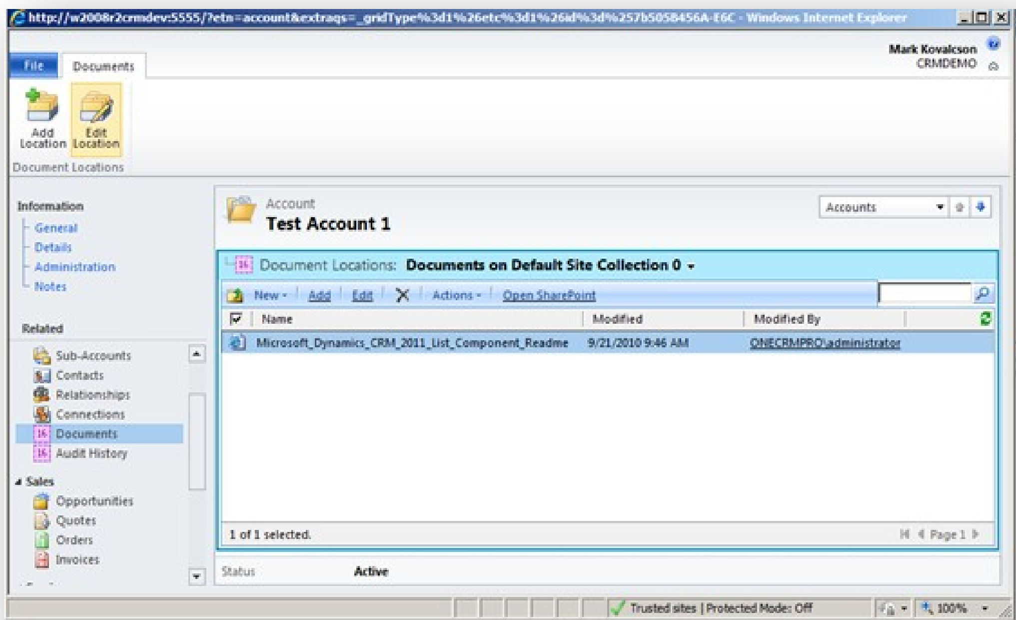
SharePoint Integration

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

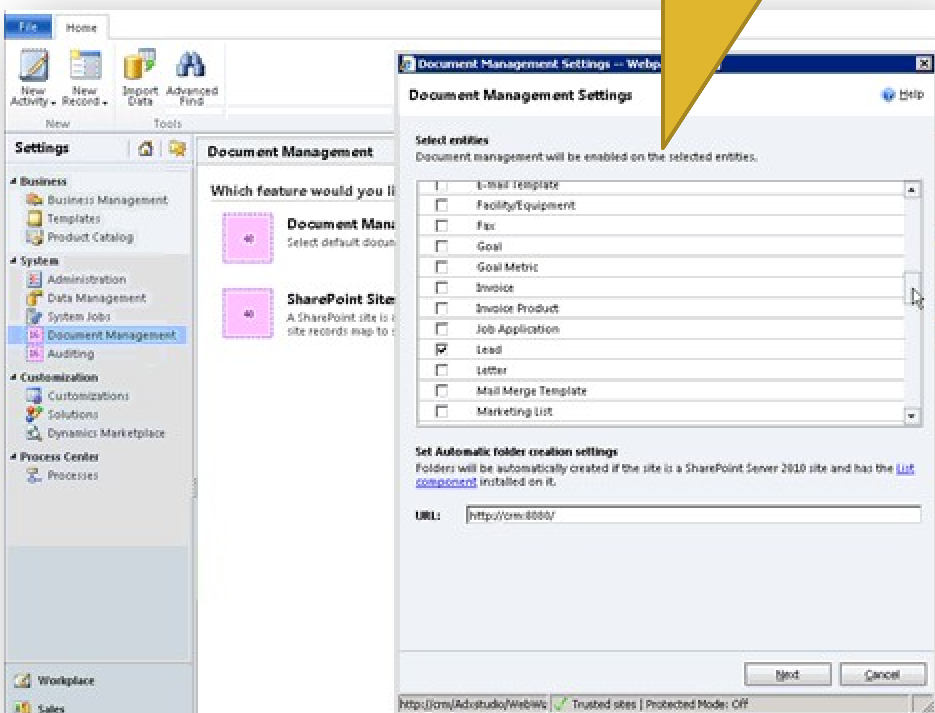
- See blog post by Mark Kovalcson on the component installation process:
  - http://crmscape.blogspot.com/2010/09/ms-crm-2011-sharepoint-list-component.html

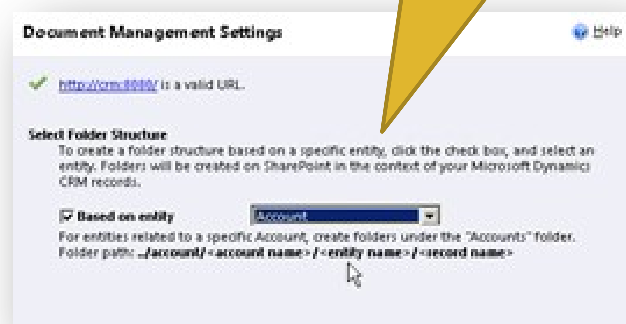


Document management settings

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 no 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 wil 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

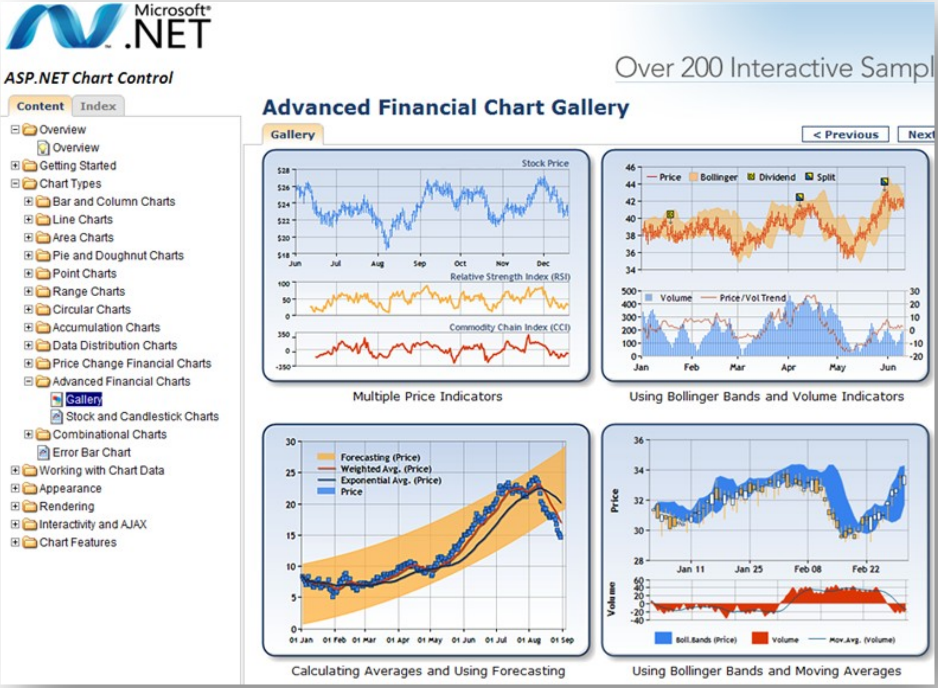
Visualizations

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

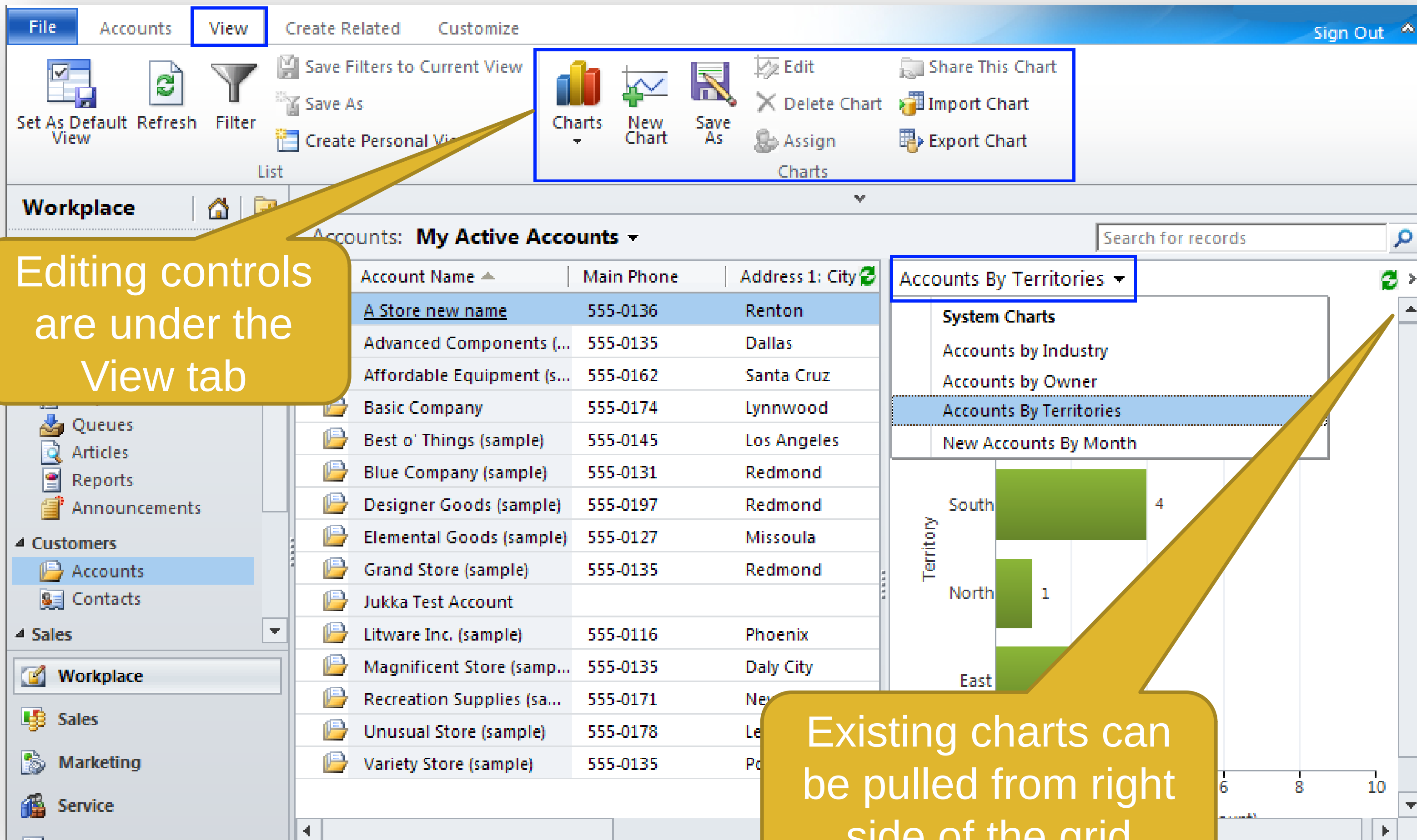
Chart controls

- 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

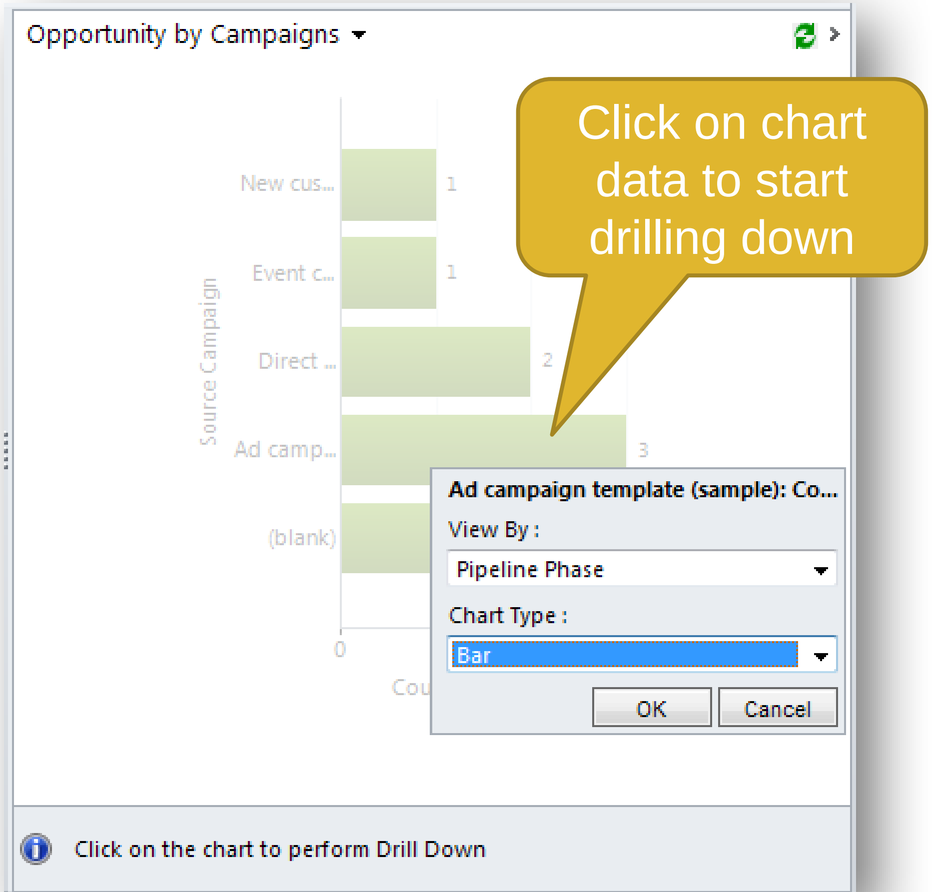
Viewing charts on grids

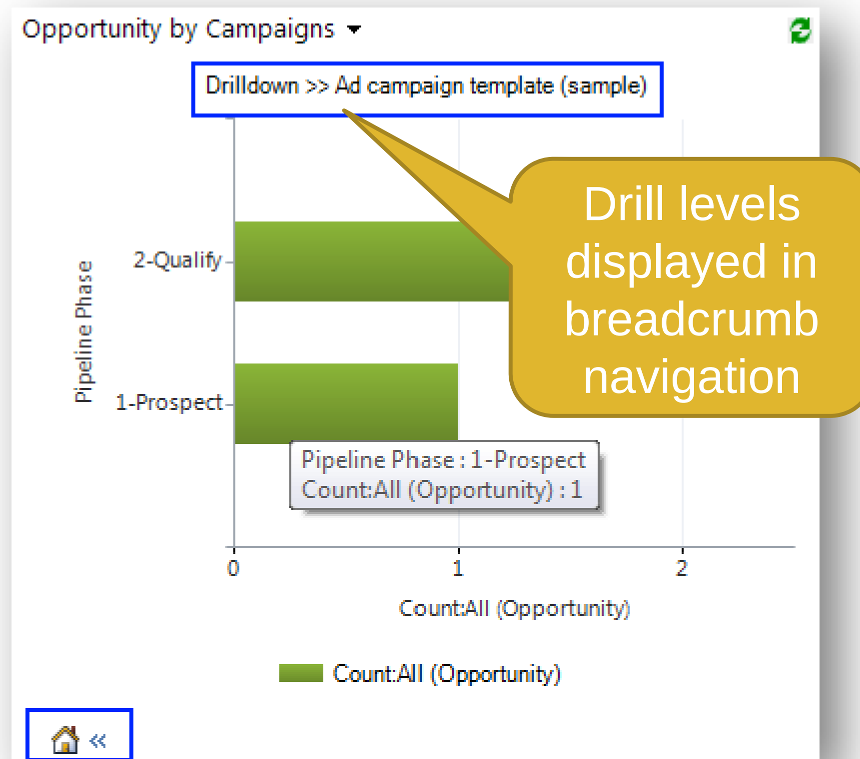


Editing controls are under the View tab

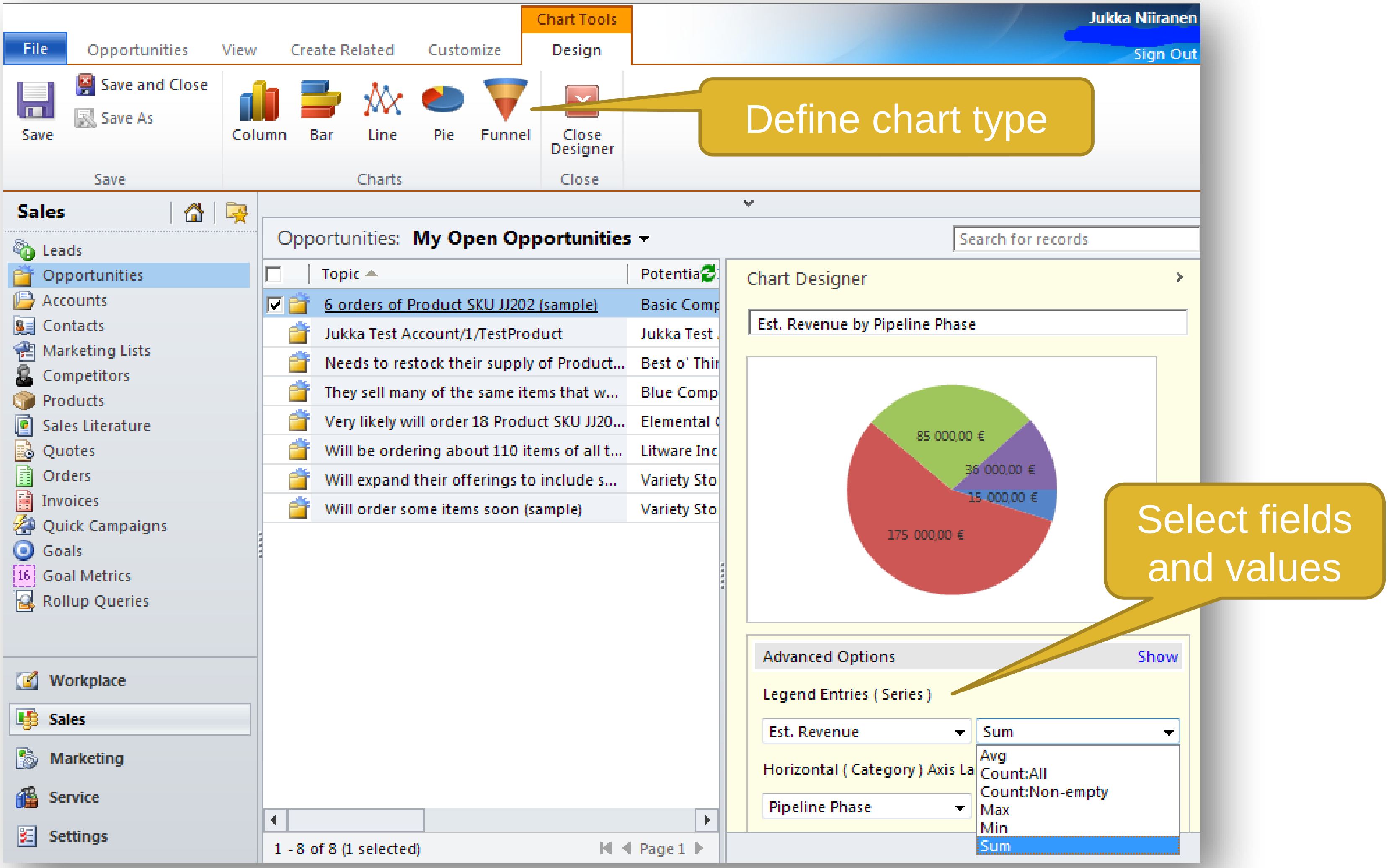
Existing charts can be pulled from right side of the grid

Drilling down

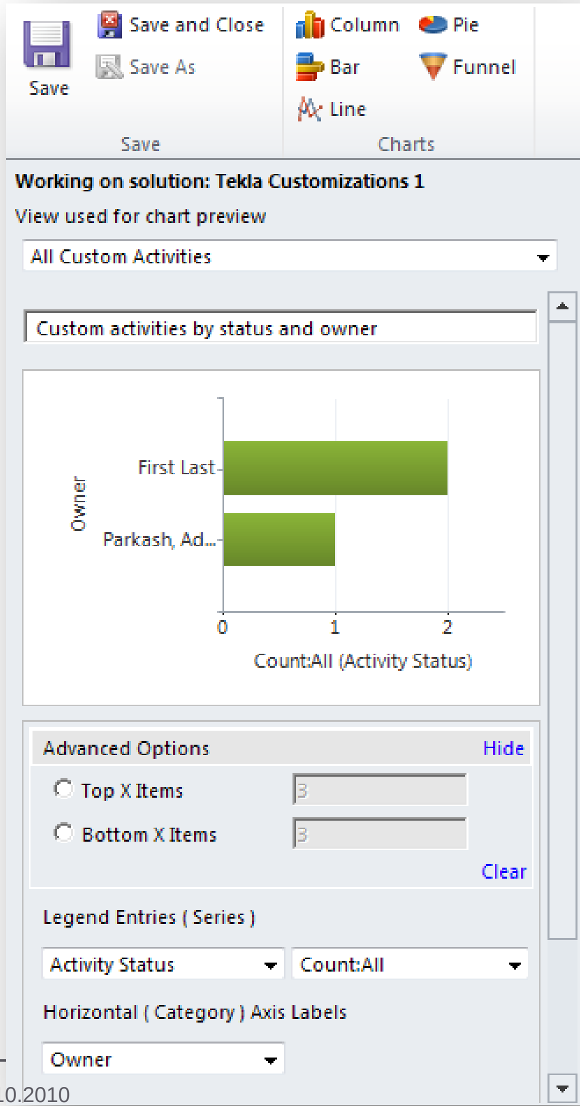




Creating new personal charts

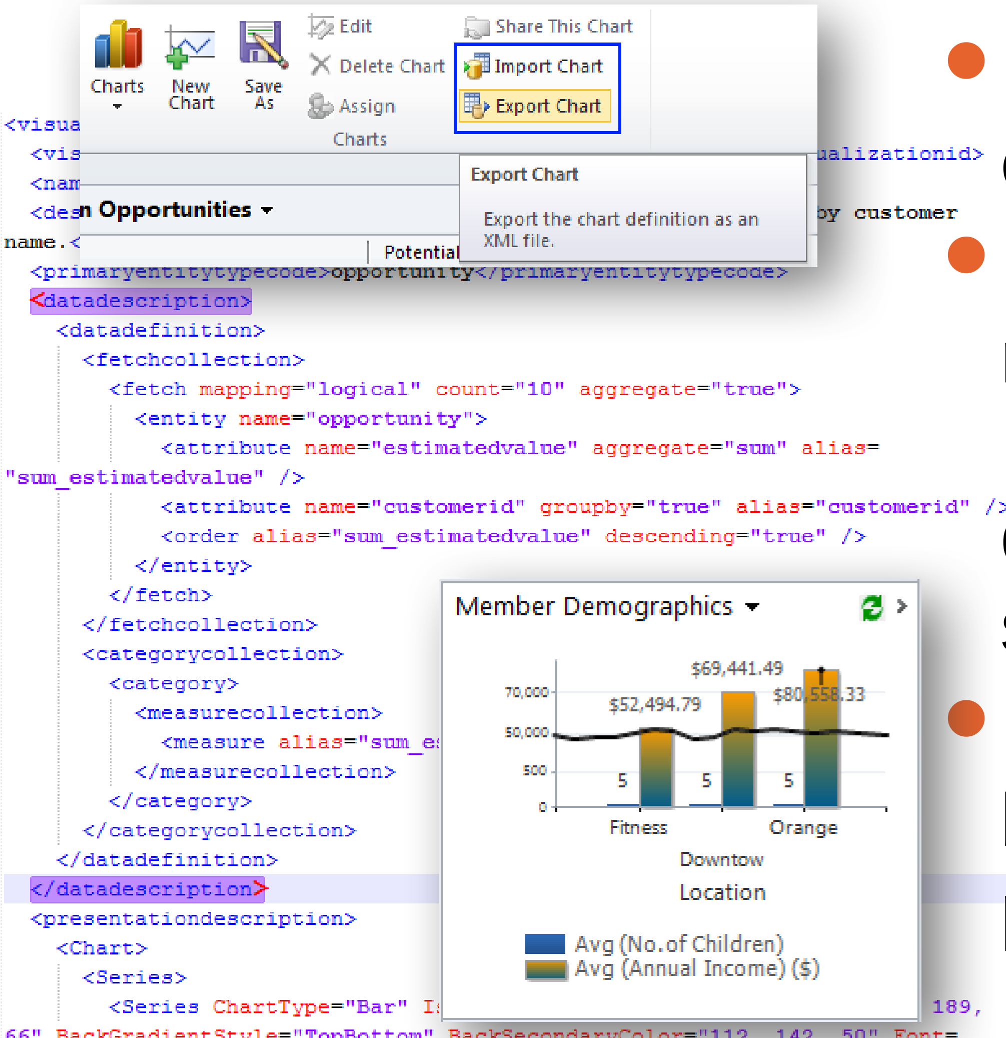


Creating new system charts



- 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

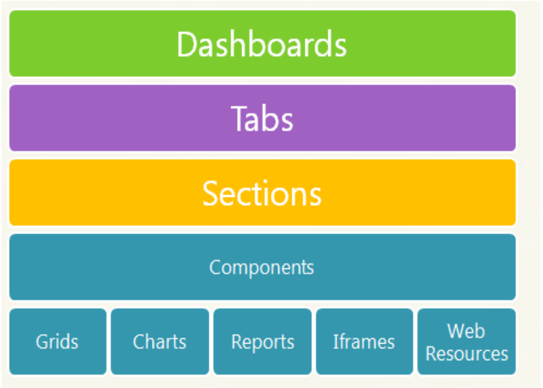
Custom charts



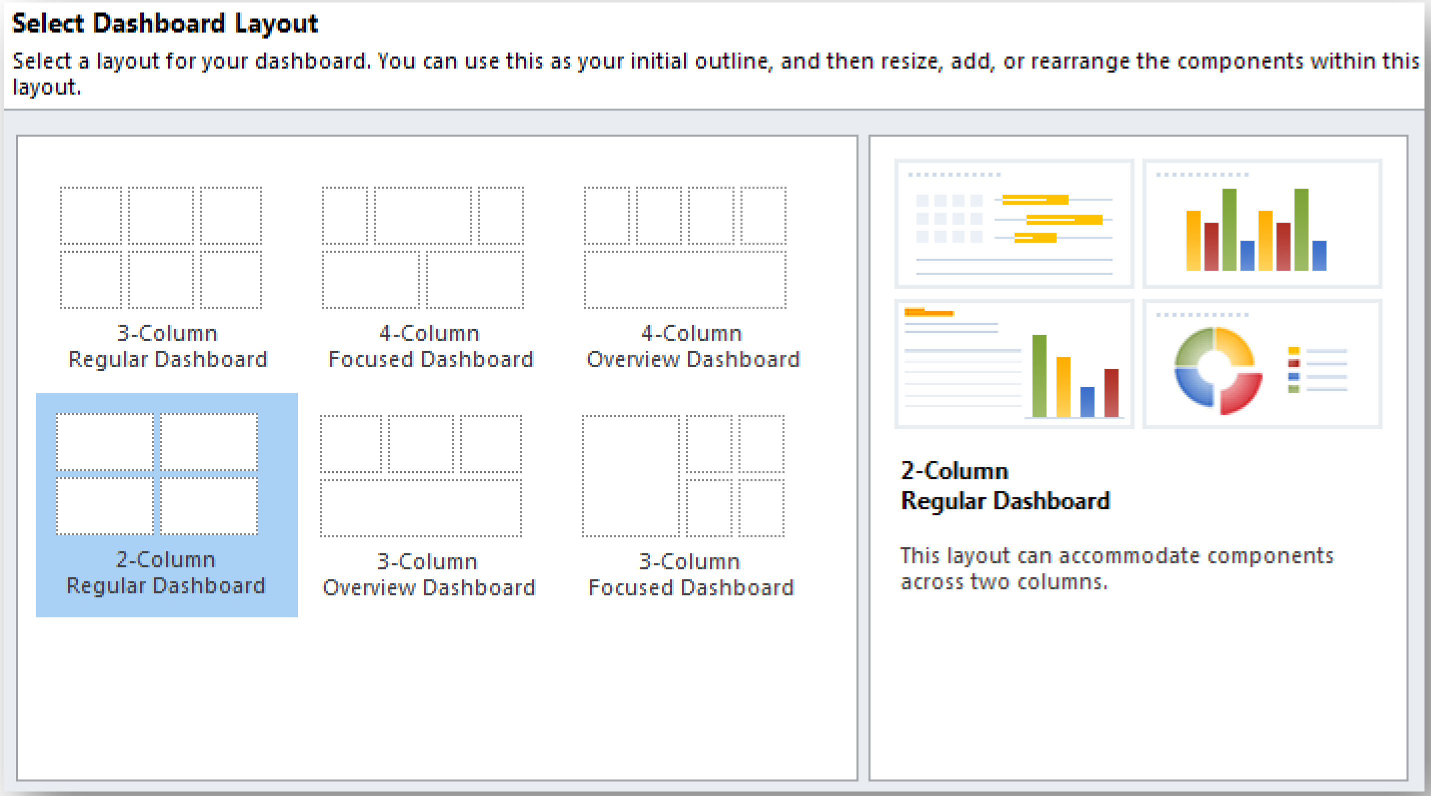
- Chart definitions can be exported and imported
- Query criteria can be modified using FetchXML to retrieve data not allowed by the simplified chart designer
- Also presentation can be modified with parameters in the XML

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…)

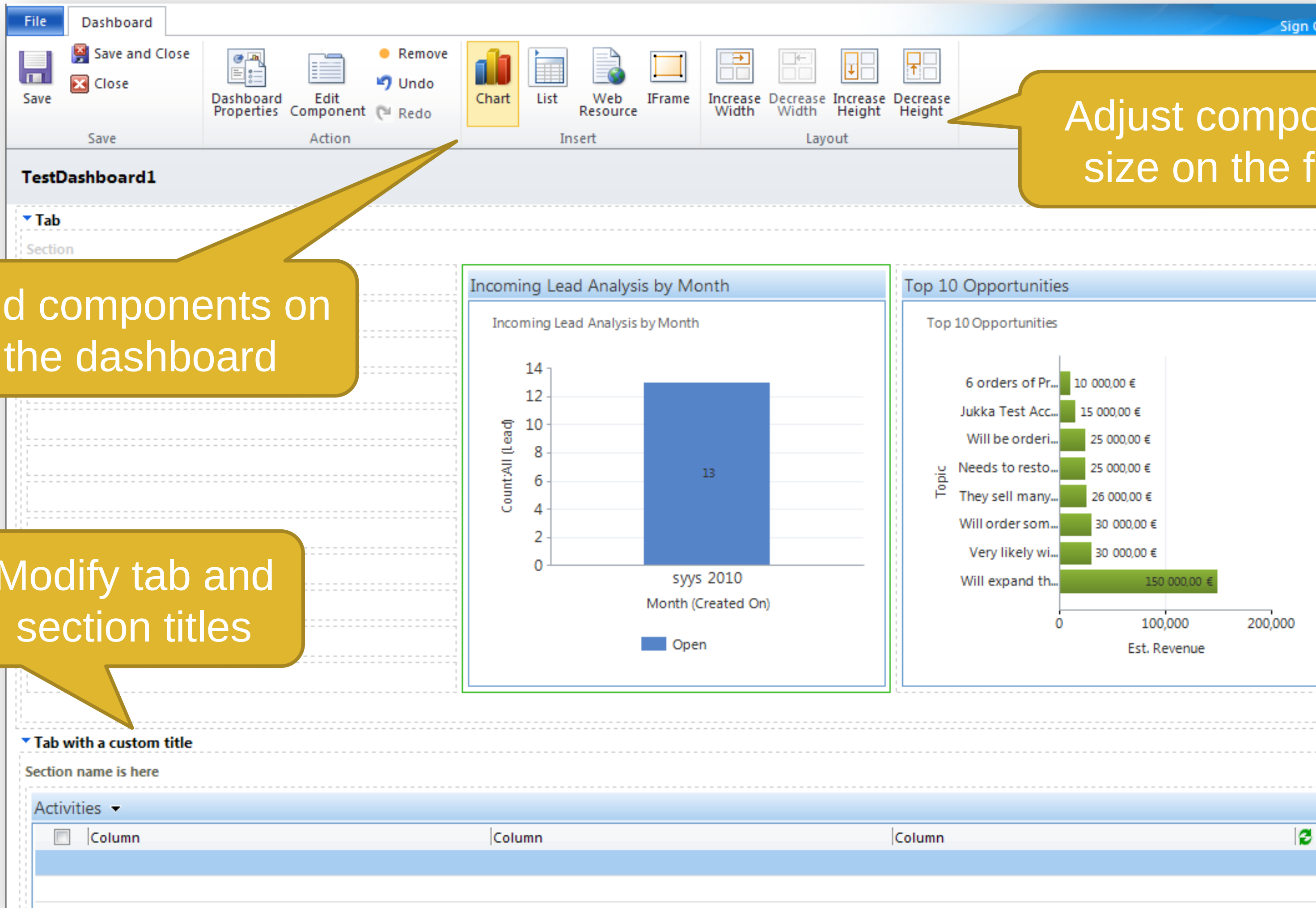


Creating a new dashboard (1)



- Select from predefined layout options

Creating a new dashboard (2)



Adjust component size on the form

Add components on the dashboard

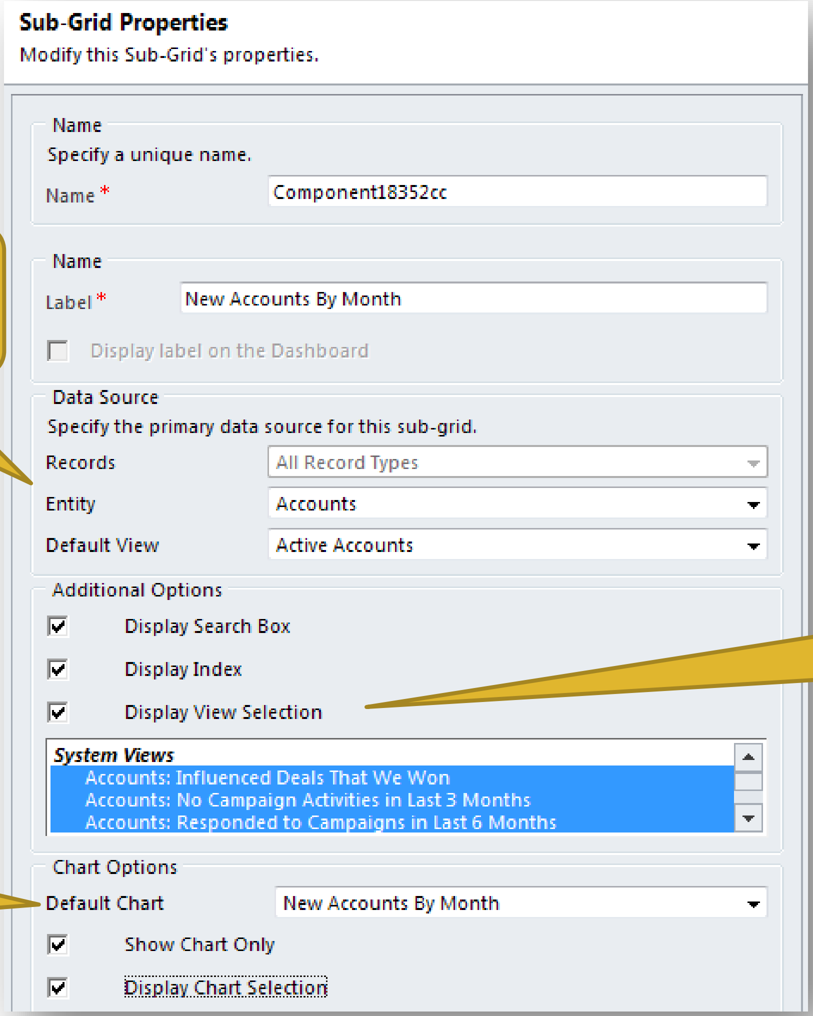
Modify tab and section titles

Creating a new dashboard (3)

Configure data sources for charts

Configure options visible on the dashboard

Configure chart type



Goals

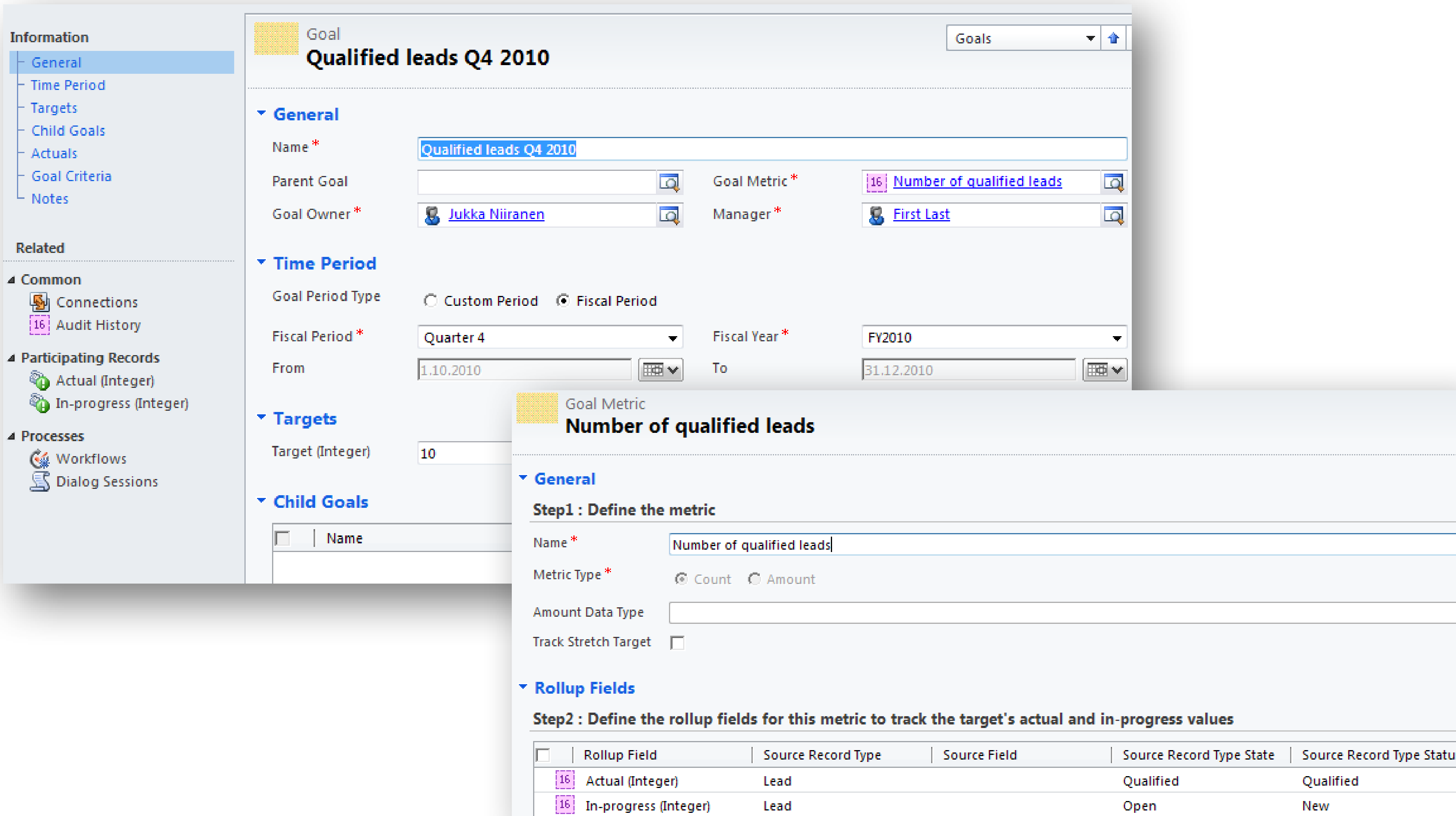
Features

- 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

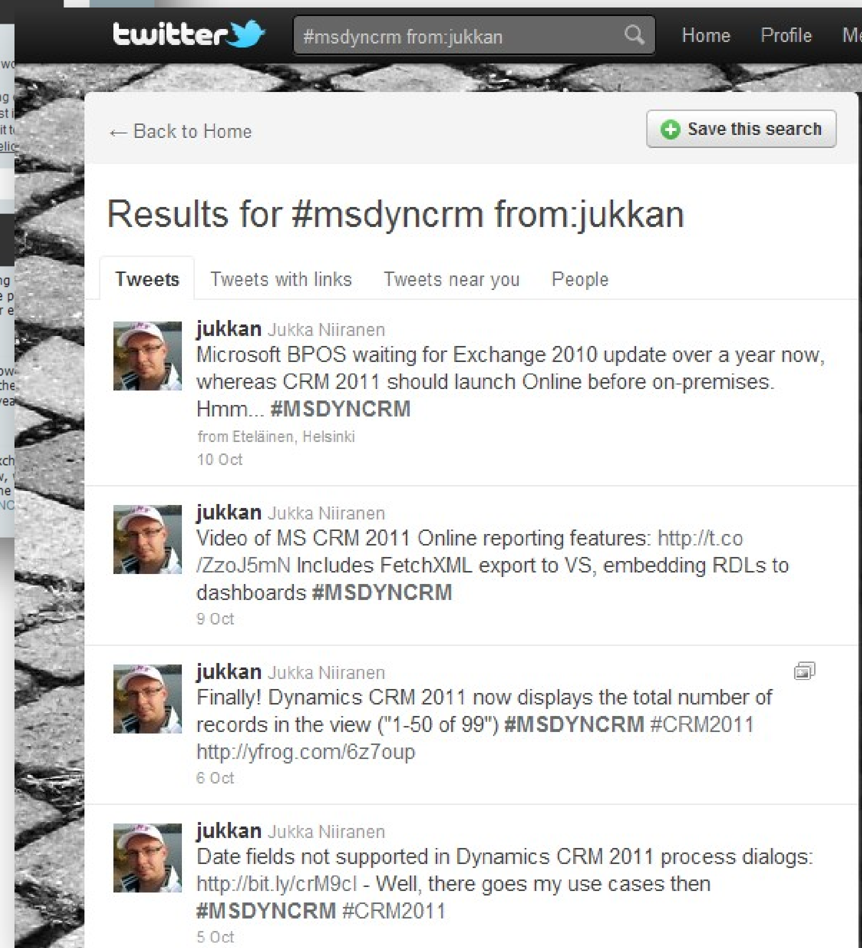
- Goal: target figures
  - ”X qualified web leads in period Y”
- Goal Metric: target data type (amount or count)
  - ”Lead records, by status, per creation date”
- Rollup Query: record set to calculate the metric from
  - ”All leads where source = web”

Goals and goal metrics records



To be continued in part 2…

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



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