

What's New for Microsoft Dynamics CRM 2011

Microsoft Dynamics CRM 2011 and Microsoft Dynamics CRM Online provide new and enhanced features that help you to increase your organization's effectiveness and productivity.

Improved Microsoft Office Interface

Microsoft Dynamics CRM 2011 introduces a new Microsoft Office 2010 contextual ribbon for the Microsoft Dynamics CRM Online and Microsoft Dynamics CRM Web clients and for Microsoft Dynamics CRM Client for Microsoft Office Outlook. The new ribbon delivers a consistent, familiar navigation and user experience that helps you better integrate Microsoft Dynamics CRM with your Microsoft Office 2010 environment.

Extensibility and Developer Features

For developers, Microsoft Dynamics CRM 2011 provides the same flexibility to extend the application through Microsoft Visual Studio 2010 as well as leveraging Windows Workflow Foundation. There are a number of additional items exposed to developers that enable the delivery more dynamic solutions. Some of these enhancements include:

- New programming model using Windows Communication Foundation (WCF).
- Extended use of Windows Workflow Foundation 4.0.
- Inclusion of the REST Endpoint (Representational State Transfer) for ASP.NET AJAX and Microsoft Silverlight clients provides an alternative interface to work with Microsoft Dynamics CRM.
- Support for .NET Language-Integrated Query (LINQ) for writing queries.
- Running code on the Microsoft Dynamics CRM server.

Advanced User Personalization

Microsoft Dynamics CRM 2011 lets you configure a workspace that is personalized to meet your unique role and information needs. Personalizing a workspace means that you can set the default pane and tab that display when you open Microsoft Dynamics CRM. You also have control over what links appear in the workplace view, how many records appear in lists, how numbers and dates display, and the language for your user interface. Combine this personalization with the new dashboard feature to create a personalized dashboard for your default view.

Global Customizations

Microsoft Dynamics CRM 2011 enables you to create globally available option sets (formerly known as picklists). These option sets can be used on one or more forms. In addition, you can also create globally available JScripts that are made available to any entity within the Microsoft Dynamics CRM deployment.

Role-based Forms and Views

Microsoft Dynamics CRM 2011 displays forms and views based on user roles. This role-tailored design ensures that the business professionals in your organization have fast access to the information they need. Role-based forms and views also prevent users from viewing data that they are not authorized to view.

Inline Data Visualization

In Microsoft Dynamics CRM 2011, you can create and share inline charts with drill-down intelligence. By using these charts, you can visually navigate data and uncover new insights that contribute to your organization's success. You can view the charts that you create from the main list of records or from the list of associated records for an individual record. Share your charts with other users or teams in the organization. Import charts created by other users into your records.

Dashboards

Dashboards are a powerful feature in Microsoft Dynamics CRM 2011. Use a dashboard to see at a glance all the information you need to make key business decisions. Assemble and present information from several places in Microsoft Dynamics CRM in a quickly-read format. This means that you do not have to search multiple areas for the information you want. Dashboards are easy to create, and are easy to revise as your changing business needs require.

Better Office Outlook Experience

Microsoft Dynamics CRM 2011 improves the integration of Microsoft Dynamics CRM into Microsoft Office Outlook with Microsoft Dynamics CRM for Outlook. It takes full advantage of native Microsoft Outlook functionality, such as previews and conditional formatting, and presents Microsoft Dynamics CRM areas as sub-folders in Microsoft Outlook mail folders. With a few exceptions, these Microsoft Dynamics CRM areas in Microsoft Outlook include all of the same functionality as the browser clients. Customizing the Microsoft Dynamics CRM client for Microsoft Outlook is the same as customizing the Microsoft Dynamics CRM Web client.

Contextual Document Management

If your organization uses Microsoft SharePoint Server 2010, you can easily manage documents that are related to records within a particular entity. By using SharePoint Server as your document depository, the seamless interface in Microsoft Dynamics CRM 2011 allows you to add and edit documents that are associated with a particular record. When you set up document management, Microsoft Dynamics CRM creates the structure on your SharePoint Server site that works with the entities and records that you want for document management.

Goal Management

Microsoft Dynamics CRM 2011 gives you the ability to define key performance and business health indicators. This way you can track and measure results against your organization's goals or metrics, and easily and quickly define goals for a campaign or fiscal period. You can combine smaller goals, such as for specific teams or

territories, into the overall goals for your organization. Create a rollup of all the goals into the actuals that show how you are tracking.

Interactive Process Dialogs (scripts)

Microsoft Dynamics CRM 2011 expands its workflow capability by adding interactive dialogs. Dialogs present a consistent message to your customers. Also, dialogs collect and process information by using step-by-step scripts to direct users through every process. You can use dialogs to guide customer interactions and internal processes. You can also increase dialog performance and versatility by incorporating workflow logic. This logic invokes automated tasks by using the responses that a customer or user makes during the dialog script.

Cloud Development

Microsoft Dynamics CRM 2011 is at the leading edge of cloud computing (a type of computing that uses groups of servers and scalable resources, generally a platform as a service and software as a service, over the Internet). Developers can take advantage of the Windows Azure platform to develop and deploy custom code for Microsoft Dynamics CRM Online by using powerful tools, such as Microsoft Visual Studio. By using the Microsoft .NET Framework 4, developers can also incorporate Microsoft Silverlight, Windows Communication Foundation (WCF), and .NET Language-Integrated Query (LINQ) into their cloud solutions. Cloud development for Microsoft Dynamics CRM 2011 is a powerful tool for customizing your Microsoft Dynamics CRM solution for optimal performance and business results.

Solution Management

Solutions in Microsoft Dynamics CRM 2011 are a new way to save customizations and share them with other users. You can create a solution or import a solution created by a developer outside your organization. You can share a solution with other users. A managed solution can be edited only by specific users. An unmanaged solution can be edited by any user with the appropriate user role. A solution can have version numbering, relationships with entities and other components, and security features based on user roles.

Microsoft Dynamics Marketplace

Microsoft Dynamics Marketplace is your online solutions catalog. These solutions help you accelerate and extend your Microsoft Dynamics CRM implementation. Quickly discover and apply industry-specific applications and extensions from Microsoft and its partners. Then, Microsoft Dynamics Marketplace distributes your solution directly to you. Microsoft Dynamics Marketplace is fully integrated with Microsoft Dynamics CRM 2011. Find your solution directly from Microsoft Dynamics CRM.

Connections

In previous versions, Microsoft Dynamics CRM users had the ability to make loosely coupled connections between accounts, contacts, and opportunities. While this provided a level of value, users were limited only to these three entities. In Microsoft Dynamics CRM 2011, users now have the ability to make their own connections between entities. While users will still have the ability to use the relationship functionality between accounts, contacts, and opportunities, use will be deprecated moving forward.

Recurring Activities

In addition to the new connection functionality, users can now create recurring activities Microsoft Dynamics CRM 2011. This functionality is similar to what an end user would experience in Microsoft Outlook.

Opportunities

Creating an opportunity is an important part of the sales process. It represents a potential sale to new or established customers. In Microsoft Dynamics CRM 2011, opportunities have a much closer parity with quotes, invoices, and orders. The shared data includes user and product information, product prices, discounts, freight amount, total costs, and tax. All shared data, including write-in products, is transferred from an opportunity to a quote, an invoice, or a sales order during conversion.

Queues

In Microsoft Dynamics CRM 2011, queues have been improved, bringing the queue and queue item entities to the front as first class entities. Queues are primarily used for customer service in a work management capacity. Items such as incidents (cases), activities, and e-mails can be added to queues. Once an item is in a queue, different users can be assigned to work on the item. This provides a central location for all work to be aggregated and distributed, it also provides visibility to items to make sure that items are not forgotten or missed. In this release, queues have full featured security, work with a rich selection of entity types, and can participate in searches and workflow.

Field Level Security

In Microsoft Dynamics CRM 2011 and Microsoft Dynamics CRM Online, you can use field-level security to restrict access to high business impact fields to specific users and teams. For example, you use this to enable only certain users to read or update the credit score for a customer. For this release, field security can be applied to custom fields only.

Teams

The existing support for teams has been enhanced by making a team a security principal that can own and manage records.

Auditing

Microsoft Dynamics CRM 2011 and Microsoft Dynamics CRM Online provides customizers the ability to configure the auditing for an entity or an attribute within that entity. You can then view the audit history for a particular record.

Web Resources

Web resources are “virtual files” that are stored in the Microsoft Dynamics CRM database and can be retrieved by using a unique URL address. These virtual files can be used to extend the Microsoft Dynamics CRM Web application such as html files, Jscript, and Silverlight applications. You can use Web resources in form customizations, the Sitemap, or the application ribbon because they can be referenced by using URL syntax.

Summary

The new and enhanced features in Microsoft Dynamics CRM 2011 offer new levels of user productivity and collaboration. These features help you meet your specific business needs with a low total cost of ownership. Microsoft Dynamics CRM 2011 delivers familiar, intelligent, and connected experiences to increase the productivity and effectiveness of people inside and outside your organization.

Microsoft Dynamics CRM 2011 and Microsoft Dynamics CRM Online unlock new opportunities and provide a single development environment for cloud-based and on-premise deployments. Partners, including independent software vendors, global system integrators, and value-added resellers, can quickly create, package, and distribute Microsoft Dynamics CRM extensions and custom solutions.