Microsoft Dynamics CRM 2011 Visualize Your Data

Users and Administrators can configure dashboards with charts, grids, web resources or iframes.

Inline charts allow users to quickly create charts that display next to records in a grid. For example, view by relationship type or industry including count.

Highlights

Visualize Your Data with Out-of-the-Box & Build Your Own Dashboards

View Your Lists as Existing and Tailored Charts
NAVIGATION IMPROVEMENTS

The Web Browser client has next and previous buttons allowing for easy scrolling through Activities, Cases, Opportunities ...

Scroll forward and Back with Next & Previous Buttons

CRM 2011 includes the contextual ribbon interface for improved ease-of-use and consistency with other Microsoft Office applications.

Ribbon Interface

Quickly move to records and views recently viewed.

Recently Viewed Pages and Views
DEEPER OUTLOOK INTEGRATION
When creating email in Outlook, click the “Track in CRM” button and utilize CRM Templates or attach Sales Literature. Use Outlook features such as filtering and conditional formatting on CRM data.

IMPROVED TAILORING / CUSTOMIZATION CAPABILITIES
CRM 2011 allows Administrators to create multiple forms for each record type. For example, finance division will see customer data related to revenue while customer service users view the same customer record but with data fields specific to support and service. Users with multiple roles will be able to set their default view and choose alternate views. Create Global Option Sets of values (i.e. one country pick list for Leads, Accounts and Contacts)

Role Based Forms and Views

Apply role based field level security on custom fields.

Field Level Security for Custom Fields
ENABLE AUDITING
Enable Auditing on a field by field basis to capture the date and time of the change along with the old and new values of the specified fields.

DOCUMENT MANAGEMENT
Microsoft Dynamics CRM 2011 has out-of-the box integration with Microsoft Office SharePoint Server 2011. For example, you could open an Account record in CRM and access a SharePoint document library with the contracts and other documents related to the Account.

TEAMS
Teams can own records in Microsoft Dynamics CRM 2011, whereas only users could own records in previous versions of the software. This opens new options for teamwork and collaboration in the Microsoft Dynamics CRM security model.

MICROSOFT DYNAMICS CRM 2011
Microsoft Dynamics CRM 2011 requires a 64 bit server.