

Microsoft Dynamics CRM 2011 NEW FEATURE HIGHLIGHTS

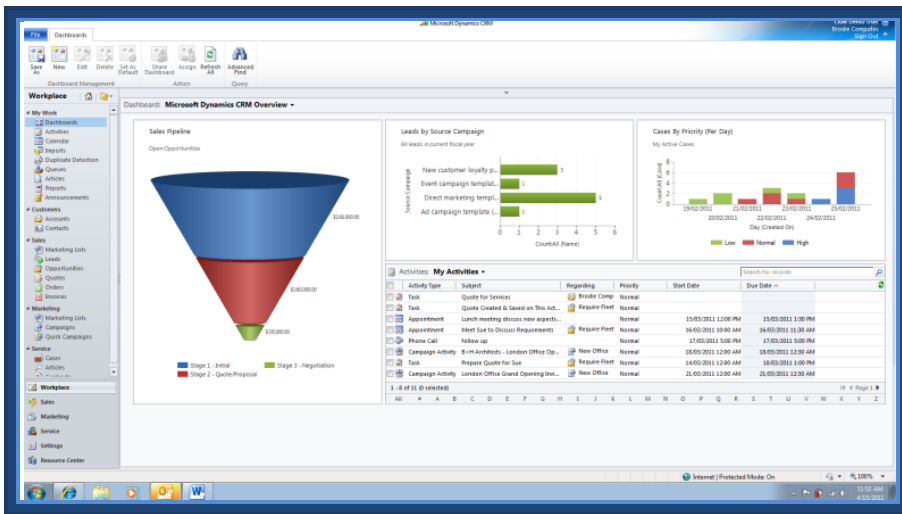


Microsoft Dynamics® CRM 2011 Visualize Your Data

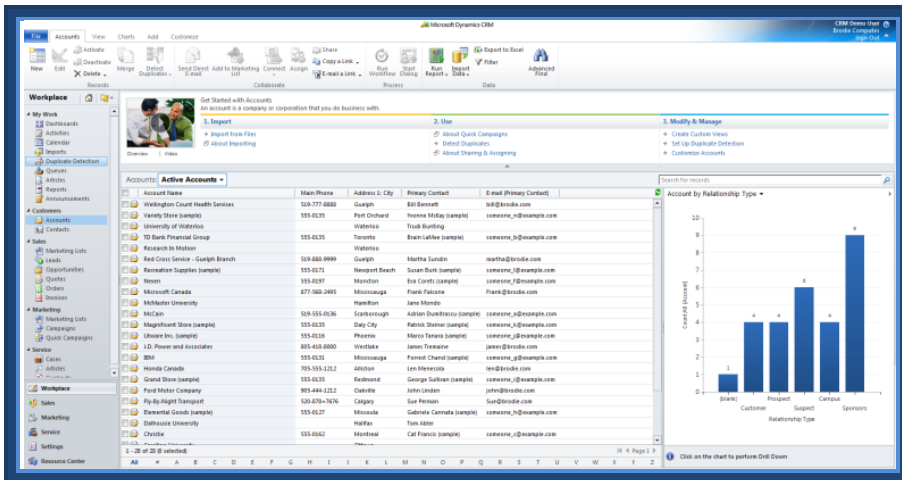
Users and Administrators can configure dashboards with charts, grids, web resources or iframes.

Highlights

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



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.

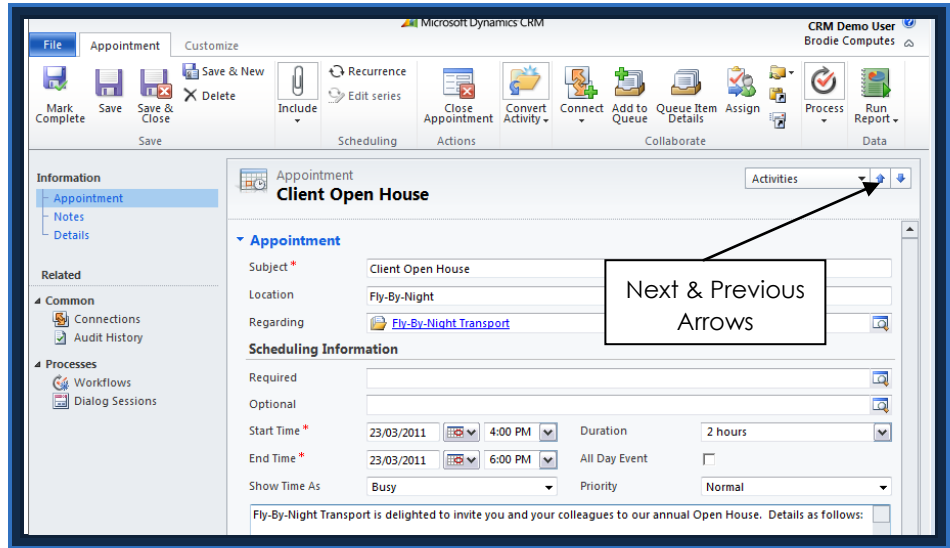


View Your Lists as Existing and Tailored Charts

Scroll forward and Back with Next & Previous Buttons

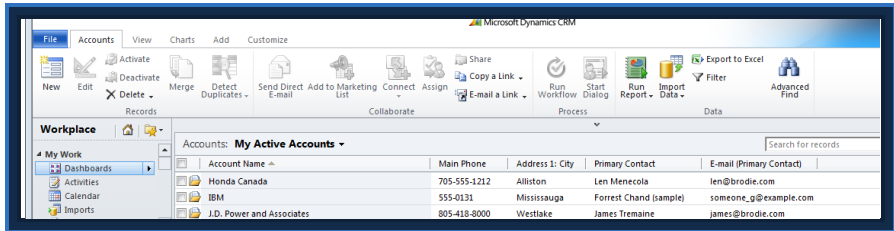
NAVIGATION IMPROVEMENTS

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



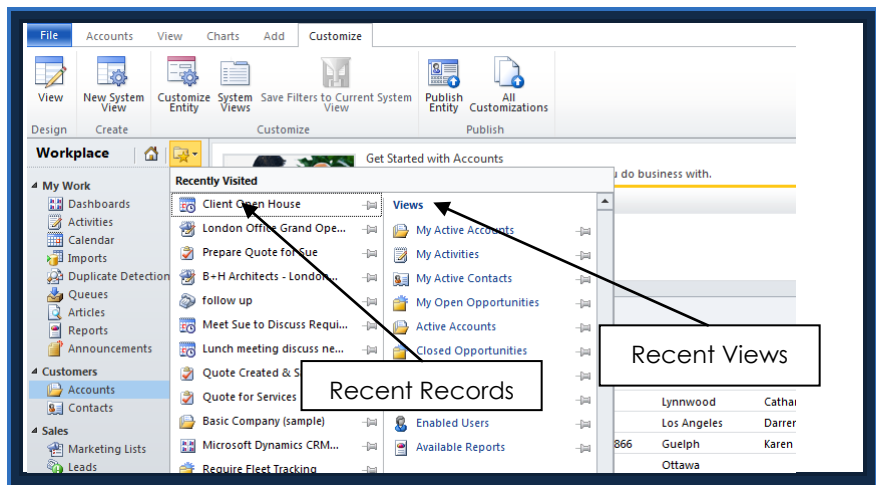
CRM 2011 includes the contextual ribbon interface for improved ease-of-use and consistency with other Microsoft Office applications.

Ribbon Interface



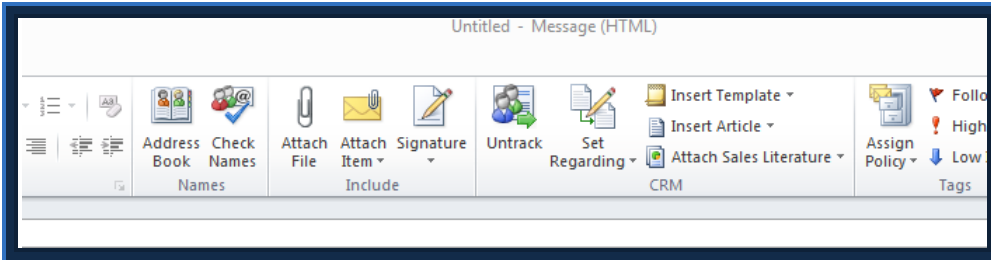
Quickly move to records and views recently viewed.

Recently Viewed Pages and Views



DEEPER OUTLOOK INTEGRATION

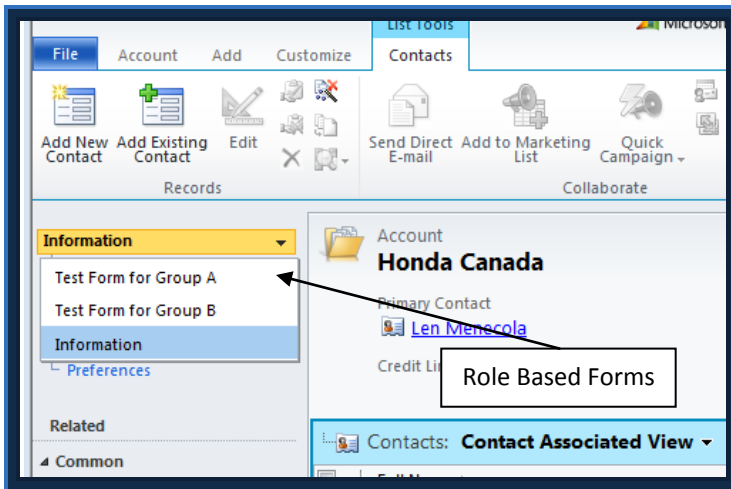
When creating email in Outlook, click the “Track in CRM” button and utilize CRM Templates or attach Sales Literature. Use Outlook features such as filtering and conditional formatting on CRM data.



Deeper Outlook Integration

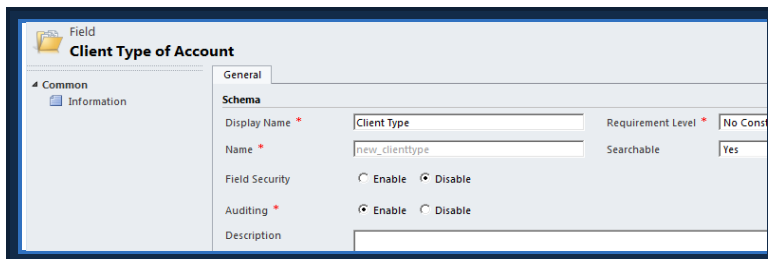
IMPROVED TAILORING / CUSTOMIZATION CAPABILITIES

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. User 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 to Track Changes on Specific Fields / Record Types

SharePoint Integration

Team Record Ownership

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.

The screenshot displays the Microsoft Dynamics CRM interface for an Account record titled "Honda Canada". The left-hand navigation pane shows the "Audit History" option under the "Related" section. The main content area shows a table of audit events. The table has columns for "Changed Date", "Changed By", "Event", "Changed Field", "Old Value", and "New Value".

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
18/04/2011 10:26 AM	CRM Demo User	Update	Department	Purchasing	Incentives
14/03/2011 10:05 AM	CRM Demo User	Update	Description	Acura	Testing history recording
11/03/2011 9:18 AM	CRM Demo User	Entity Audit Sta...	OEM Brand		Honda
11/03/2011 9:18 AM	CRM Demo User	Audit Enabled	Relationship Type		Customer

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 works with Office 2003, 2007 and 2010.

Microsoft Dynamics CRM 2011 requires a 64 bit server.

