



What's New in Microsoft Dynamics CRM 4.0

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Session | Agenda

- Introduction
- Dynamics CRM 4.0 Feature Areas
 - Use
 - Design
 - Report
 - Data
 - Manage
 - Deploy
 - Develop
- Demo
- In Conclusion



INTRO

Dynamics CRM 3.0 | Making A Splash

- Full suite of sales, marketing, and service
- Platform for basic business applications
- Integrated user experience with Outlook
- Improved reporting and analytics with SRS

Dynamics CRM 4.0 | Delivers Value For All

End User

IT Engineer

Power User

Developer

Productivity

Works the Way
You Do

Works the Way
Your Business
Does

Works the Way
Technology
Should

Insight



Empowerment

FAMILIAR

FLEXIBLE

FAST

4.0 Customer Model | Designing CRM for You



Example of a real company

Role-based user personas

Real business processes

Helps us design features for
you and your business



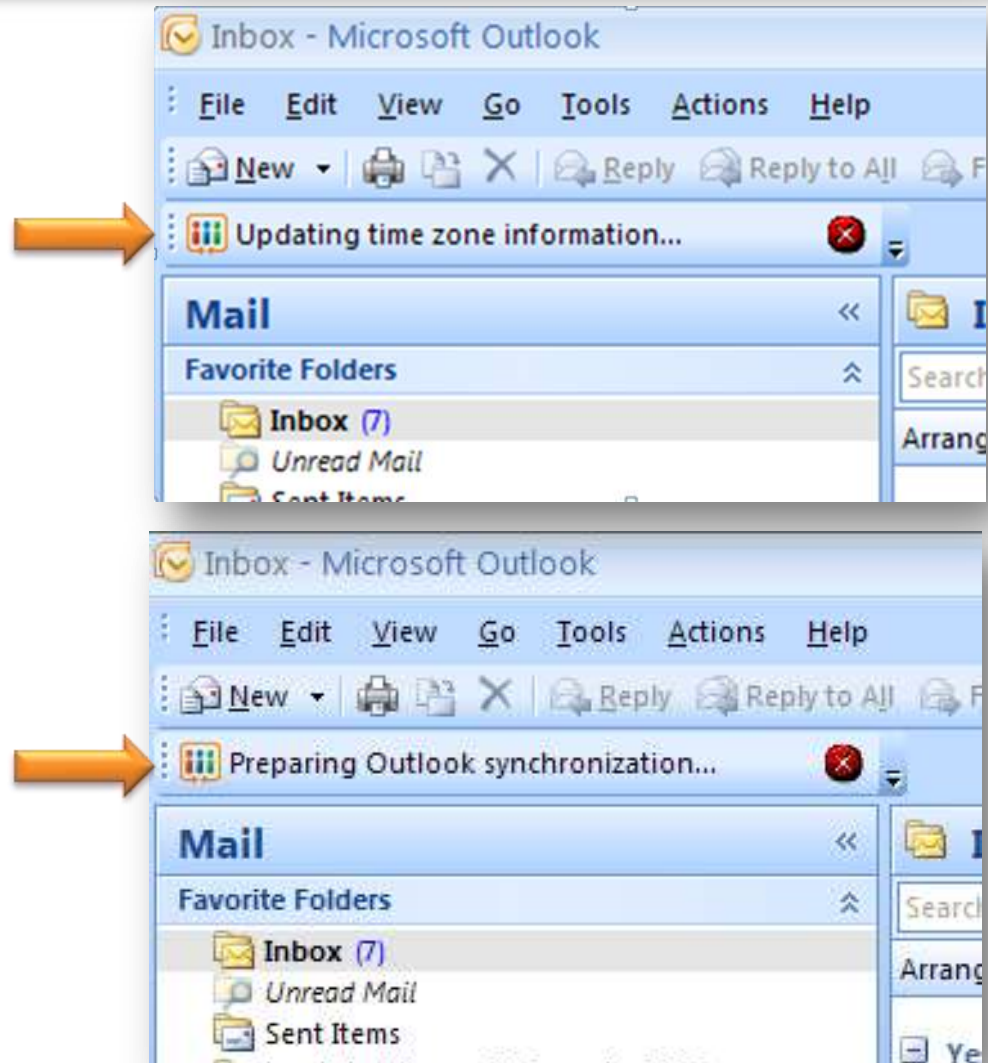
USE

Productivity | Throw Away the VPN

- Internet-facing Deployments
- Access to Dynamics CRM without a VPN
- Reports available

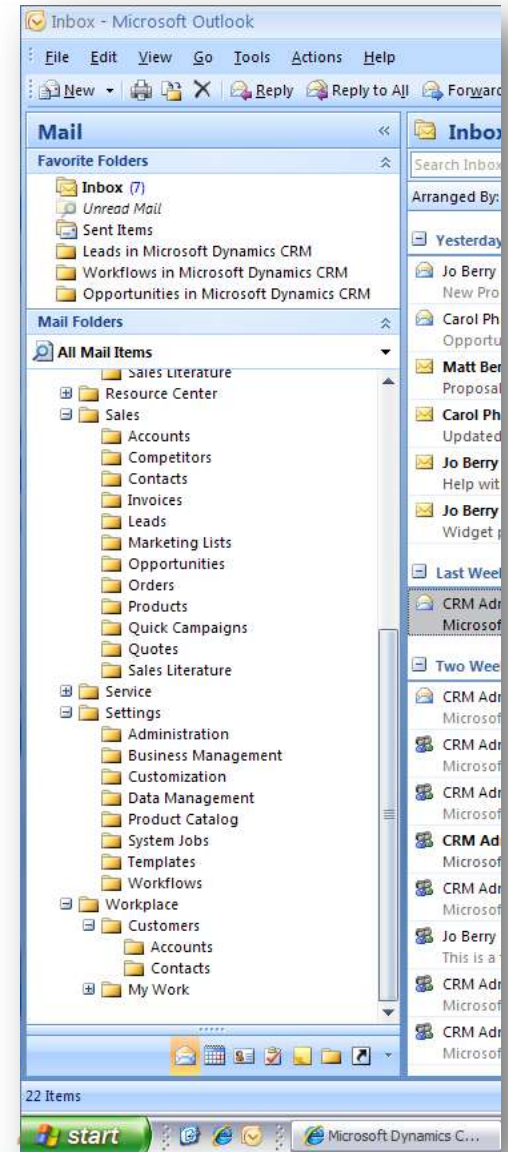
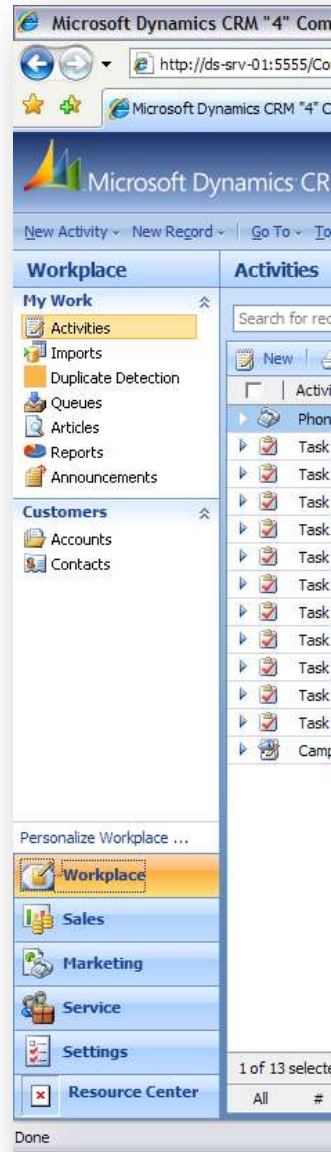
Insight| Smart Start

- Outlook CRM Load Status Bar
- Informs user of the process
- Users can cancel out of loading Dynamics CRM



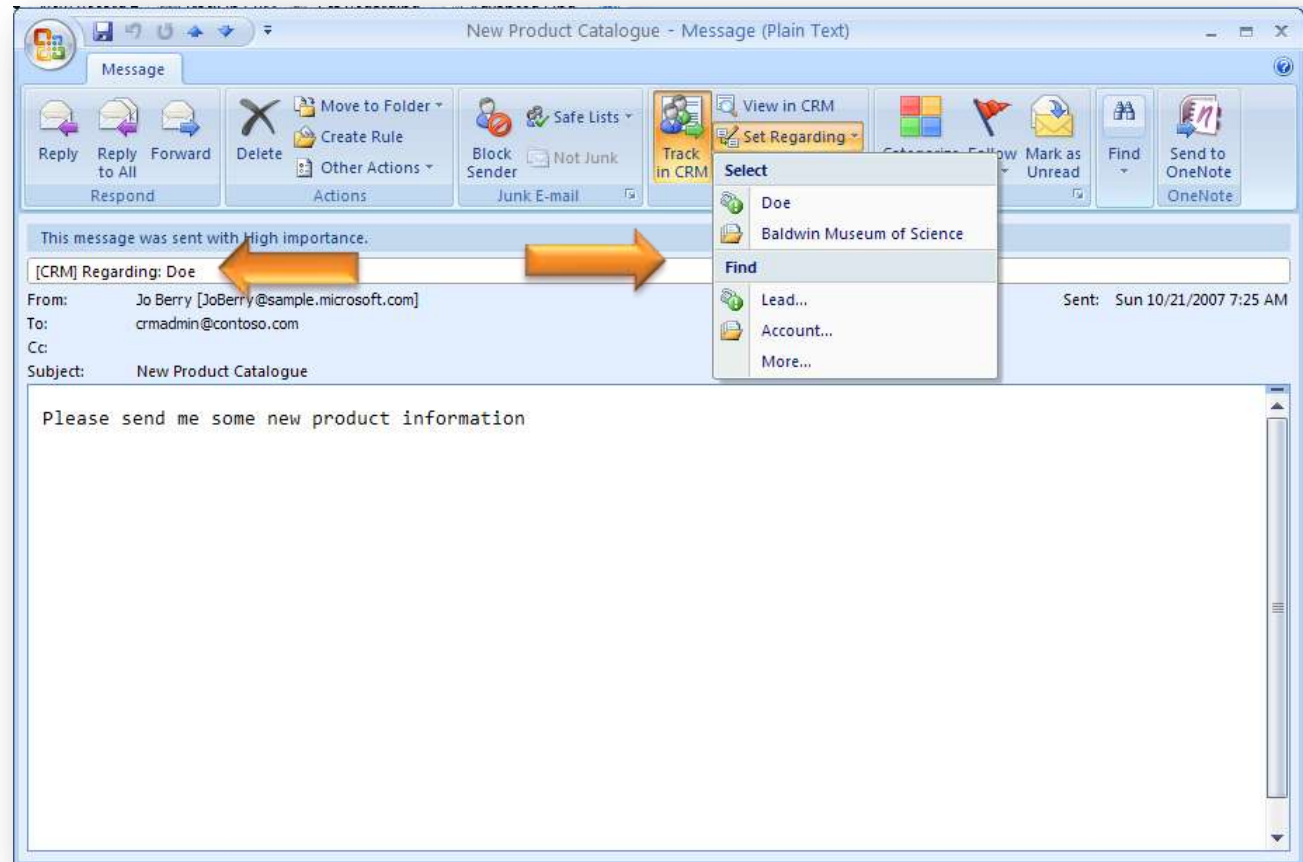
Productivity | How Smart is Your Nav?

- SmartNav – left-hand navigation
- Easier to customize and adjust to fit the needs of end-users
- Structured and simplified navigation through logical groupings



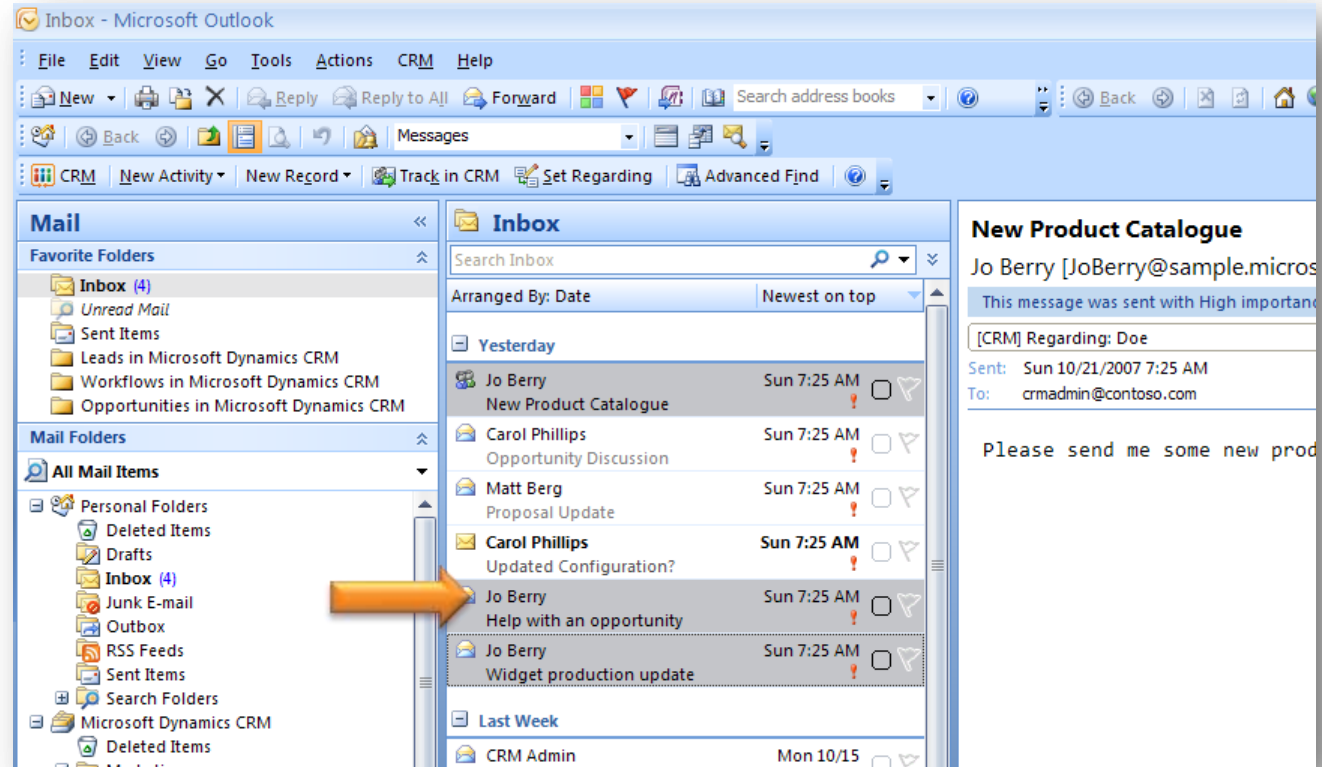
Productivity | Outlook Optimization

- Most recently selected & searched list
- Sync all activity types to Outlook (phone, letter, tasks...)



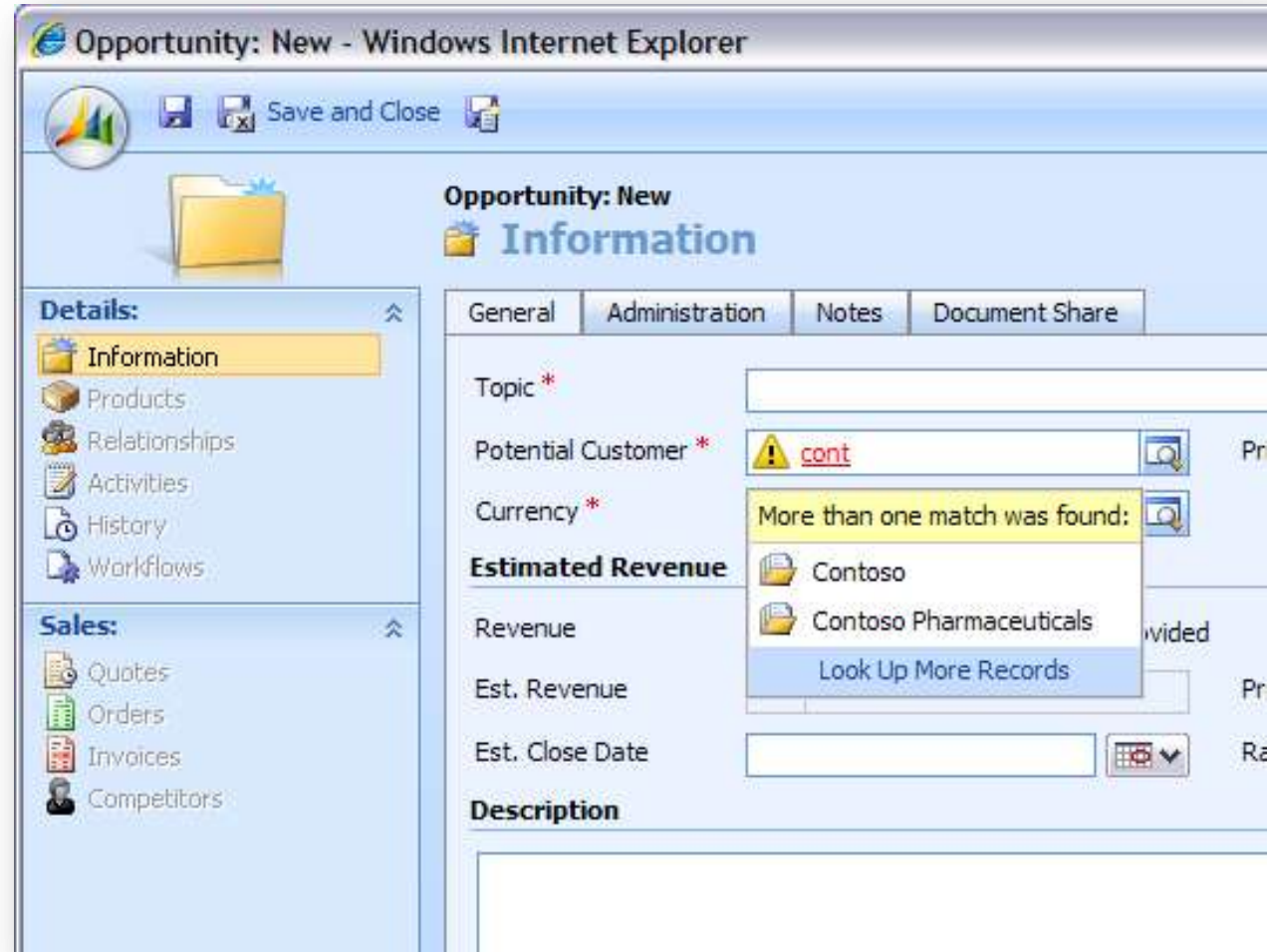
Productivity | Email Made Easy

- Bulk email selection & tracking in CRM
- Smart Email Matching (eliminates dependency on token)



Productivity | Be Smart About Search

- Smart Search
- Auto-completes if one match is found
- Displays options if multiple matches are found
- All look-up fields



Empowerment | Currency For Any Country

- Financial transactions in two currency types:
 - Base currency
 - Transaction Currency
- Pricelists in multiple currencies
- Exchange Rates
 - Web-service accessible
 - Manual



Microsoft CRM

Select the organization's base currency for this installation of Microsoft CRM Server

Country/Region	Currency	Code	Symbol
United Kingdom	UK Pound Sterling	GBP	£
United States	US Dollar	USD	\$
Uruguay			
Uzbekistan			
Venezuela			
Vietnam			
Yemen			
Zimbabwe			

Look Up Records -- Webpage Dialog

Look Up Records

Type the information you are looking for in the Look for box and click Find. Then, select the record you want and click OK.

Look for: Currency

	Currency Name	ISO Currency C...	Currency Symbol	Exchange Rate
	Australian Dollar	AUD	\$	1.16030
	Canadian Dollar	CAD	\$	1.00110
	Danish Krone	DKK	kr	5.29770
	Euro	EUR	€	0.71060
	Israeli New Shekel	ILS	₪	4.05350
	Japanese Yen	JPY	¥	114.63000
	Mexican Peso	MXN	\$	8.02470
	New Zealand Dollar	NZD	\$	1.35340
	Real	BRL	R\$	1.87150
	Singapore Dollar	SGD	\$	1.50430
	Swedish Krona	SEK	kr	6.53950
	UK Pound Sterling	GBP	£	0.49740

1 of 13 selected.

Properties

OK Cancel Remove Value

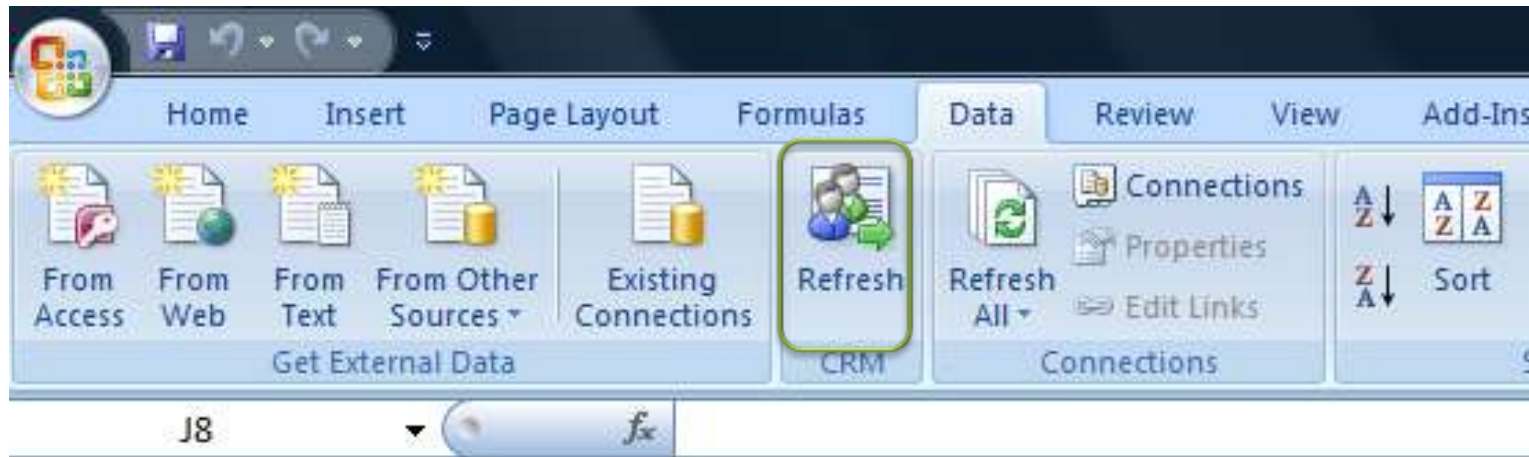
http://ds-srv-01:5555/Contoso/_controls/lookup/lookupsingle.aspx?class=null&obje Local intranet

Empowerment | Mail Merge Magic

- Web-based access to Mail Merge capability
- Mail merge template creation and usage
- Mail merge enhancements for custom entities

The image displays two overlapping web application windows. The top window, titled 'Create Quick Campaign Wizard -- Webpage Dialog', features a blue header and a list of activity types: Phone Call, Appointment, Letter, Letter via Mail Merge (highlighted), and Fax. The bottom window, titled 'Mail Merge Template: New Template - Windows Internet Explorer', shows a form for creating a new template. The form includes sections for 'Details' (Name: New Template, Description), 'Categorization' (Associated Entity: Contact), 'Ownership' (Ownership: Individual, Owner: CRM Admin), and 'Language' (Template Language: English). Below these sections is a 'Select data fields:' area with a 'Data Fields' button and a 'File Attachment' section showing a file named 'Mail Merge Template.doc' (12,489 Byte(s)). The status at the bottom is 'Active'.

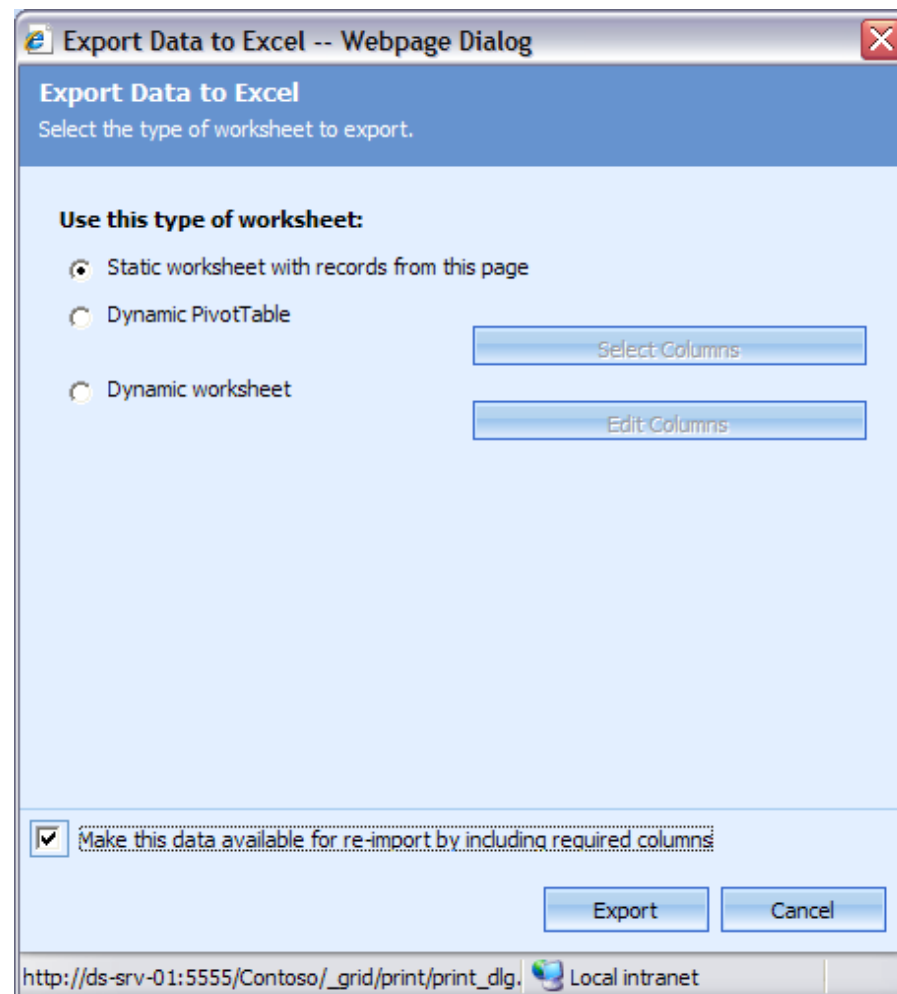
Productivity | CRM Is Refreshing Within Excel



- Dynamic connection
 - Direct ODBC/IQY
 - Refresh CRM

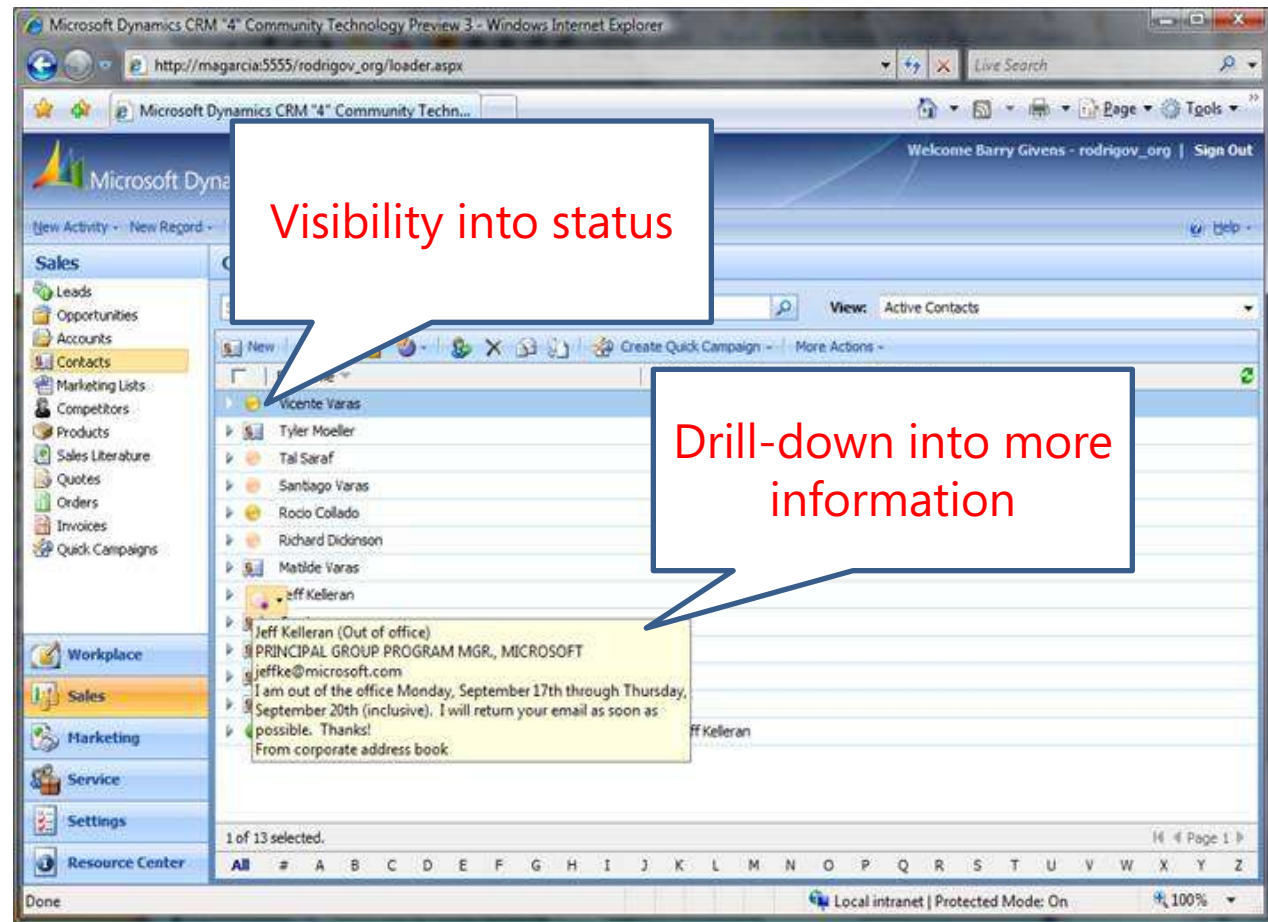
Productivity | CRM Excels Within Excel

- Export for Import
 - Export to Excel on any view
 - Makes data available for re-import by including required columns (referential data hidden)
 - Data can be updated and created in Excel spreadsheet
 - Re-Import updates



Empowerment | Connect with Presence

- Office Communication Server Integration
- Visibility into Status and additional information
- Kick-off Interaction from interface



Productivity | Automate Email Activities

- Quick Campaign Wizard Option
- Auto-send emails
- Close corresponding email activities
- Eliminates need for manually sending emails and closing activities

Create Quick Campaign Wizard -- Webpage Dialog

Select the Activity Type and Owners

Select what type of activity to create.

Activity Type:

- Phone Call
- Appointment
- Letter
- Letter via Mail Merge
- Fax

Select who will own these new activities.

Assign these activities to:

- ☒ Me
- ☐ The owners of the records that are included in the quick campaign
- ☐ Assign to another user or queue

Select whether e-mail activities should be closed.

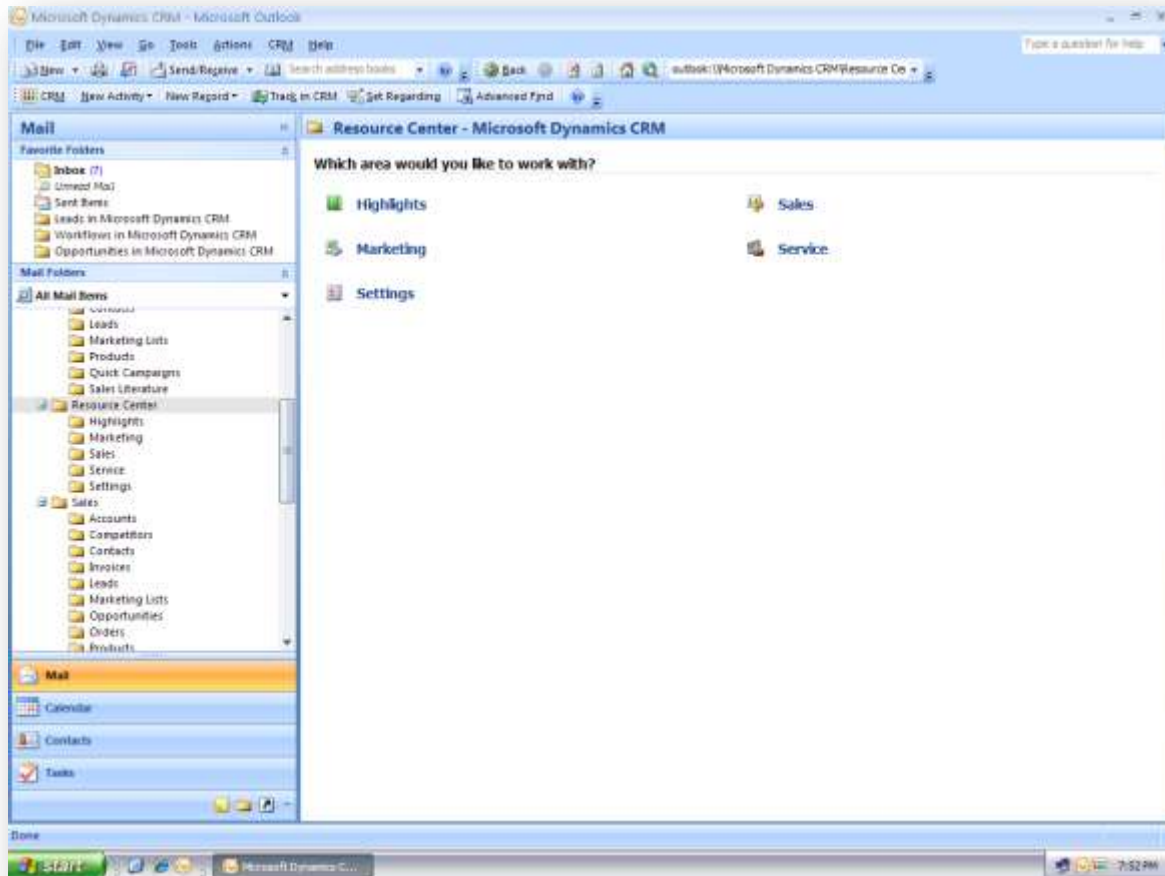
☒ Send e-mail messages automatically and close corresponding e-mail activities.

<Back Next> Cancel

http://ds-srv-01:5555/Contoso/MA/MiniCampaign/MiniCampaign.aspx Local intranet

Empowerment | Connect The Community

- Resource Center available to On-Premise, Live & Hosted CRM customers
- Aggregates content/best practices
- Community-building

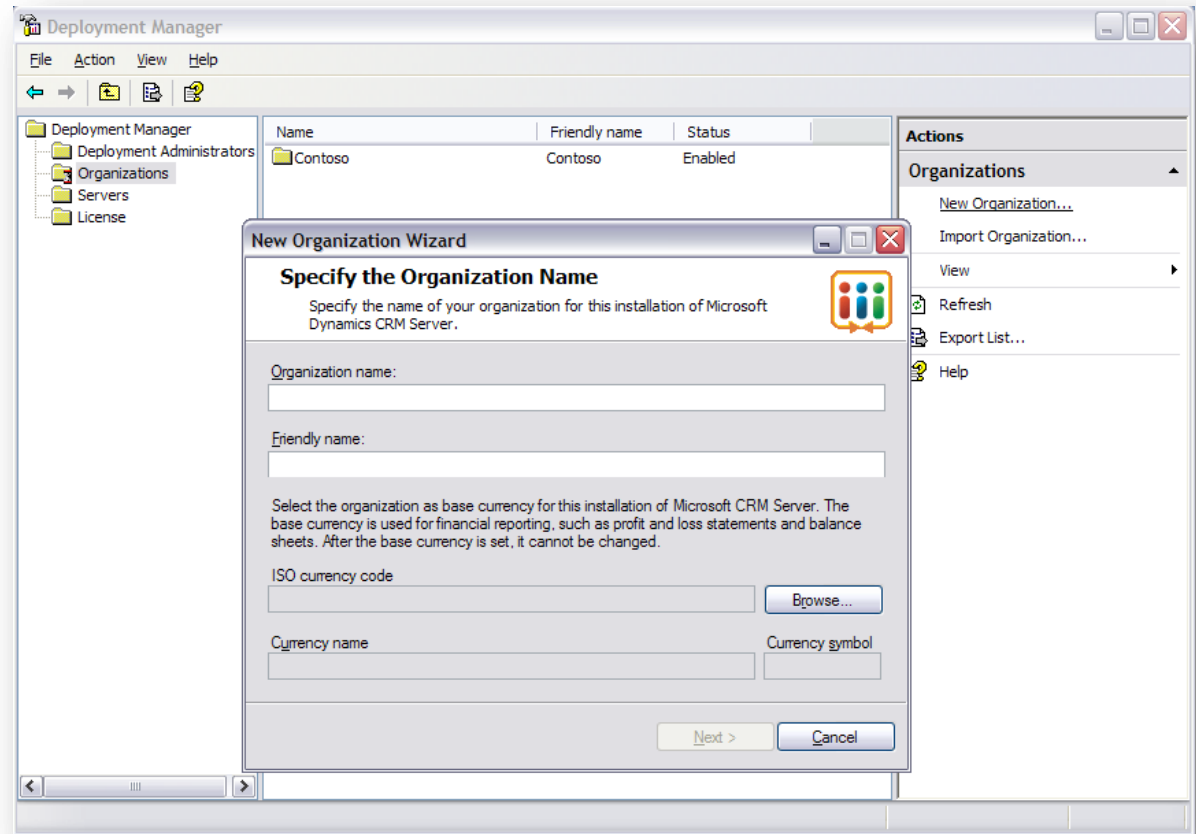




DESIGN

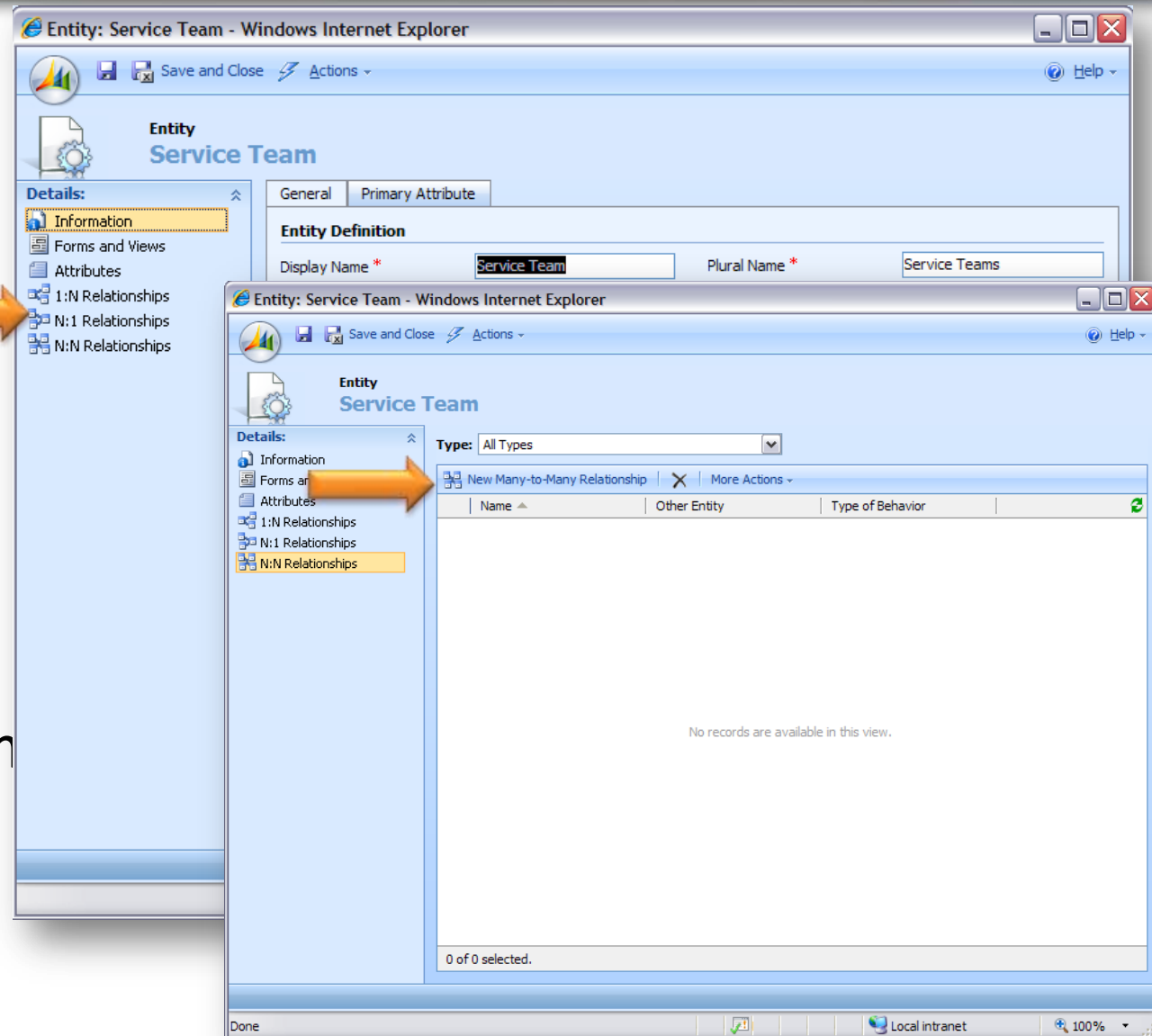
Empowerment | Host With Multi-Tenancy

- Multiple secure tenants per server
- Each tenant has a separate database instance (on same db) server)
- Ideal for hosting.
 - Internal IT hosting
 - Partner hosting
 - SaaS Architecture



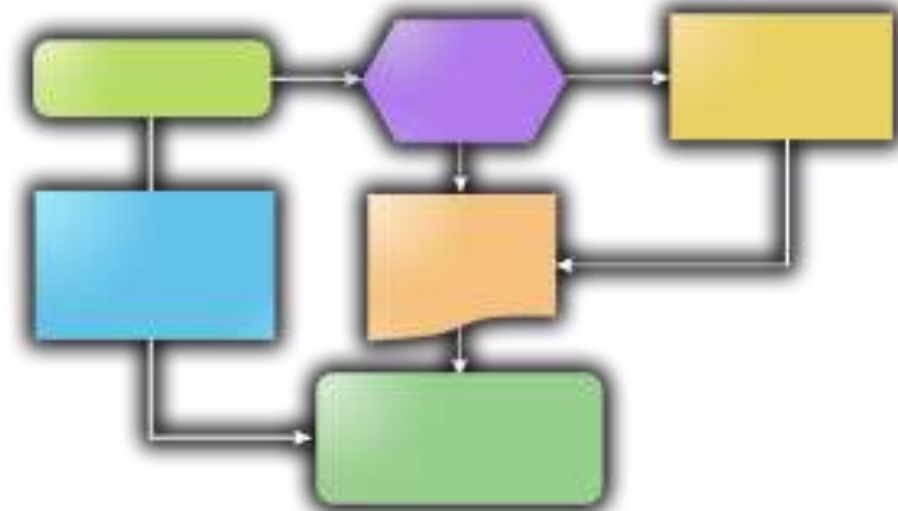
Empowerment | Design Your Relationships

- Entity Relationship Modeling
- Multiple Relationships
- Many to many Relationships
- System to System Relationships
- Self-Referential Relationships



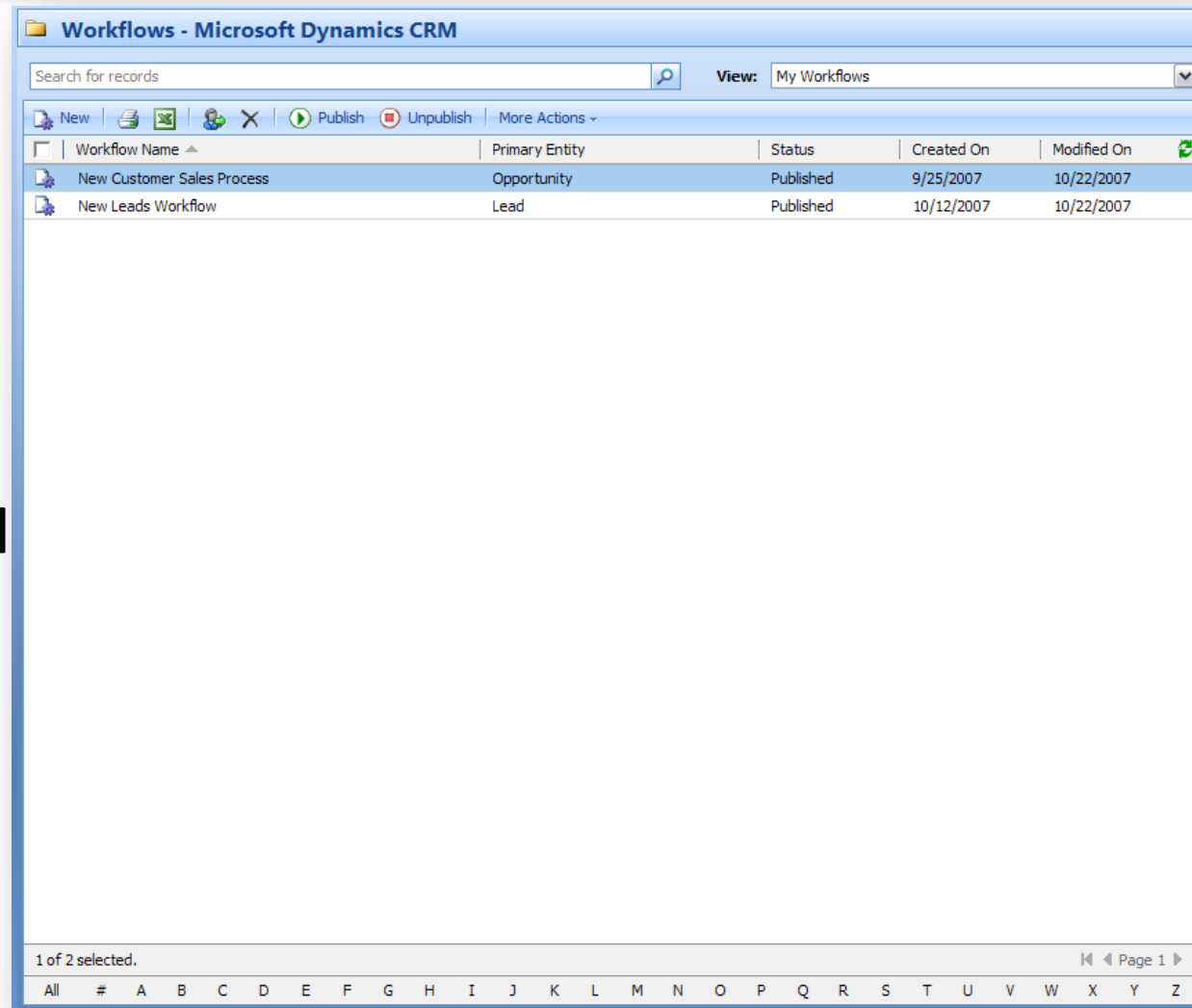
Empowerment | The Foundation For Workflow

- Windows Workflow Foundation embedded
- 3.0 Workflow continue to work in 4.0
- Key components:
 - **Activity Library** for out-of-the-box and Custom
 - **Runtime Engine** for Workflow execution and state management
 - **Runtime Services** for hosting flexibility and communication
 - **Visual Designer** provides graphical and code-based construction



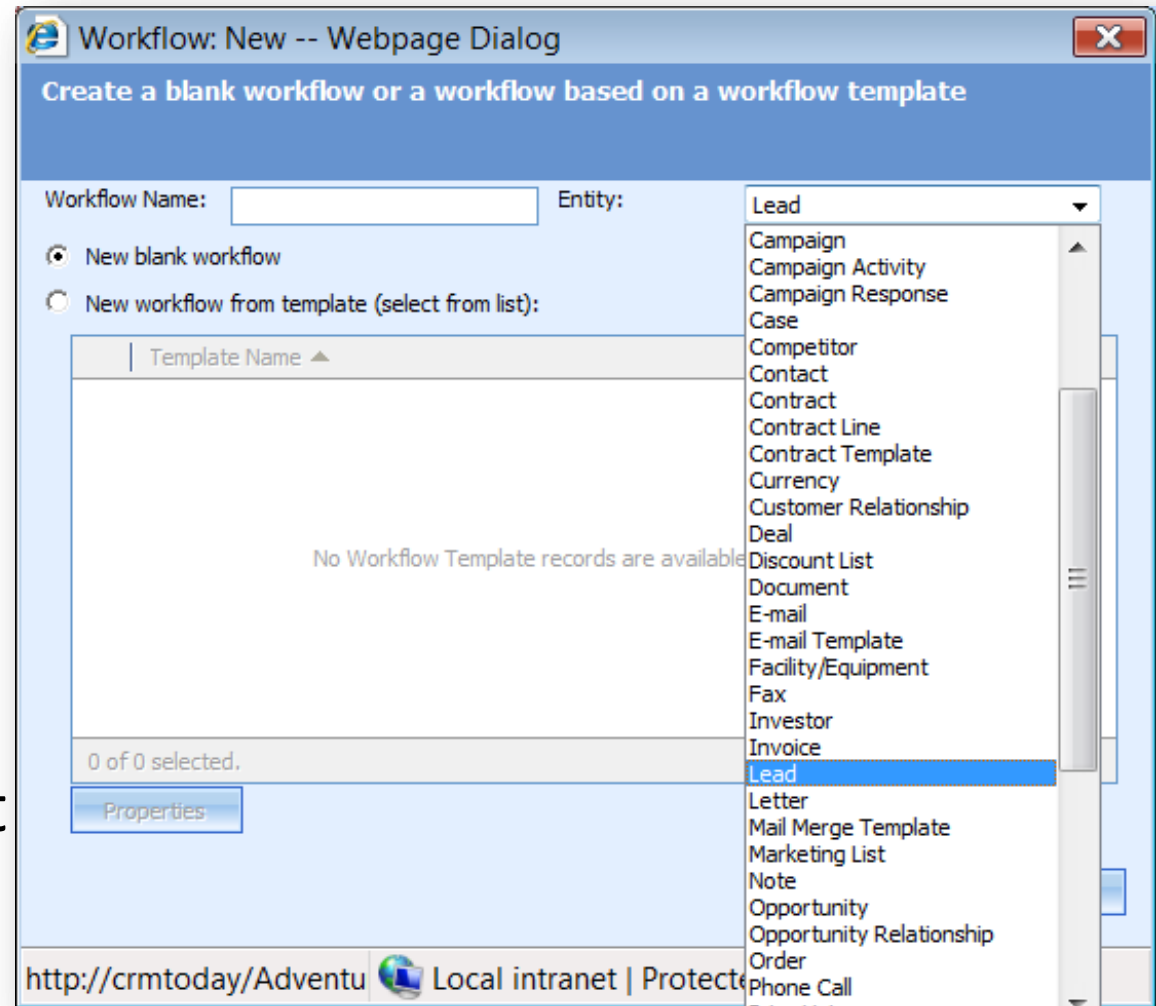
Empowerment | Access Your Workflow

- Embedded Windows Workflow Foundation
- Now with Web UI & Outlook client access
- Workflow publishing



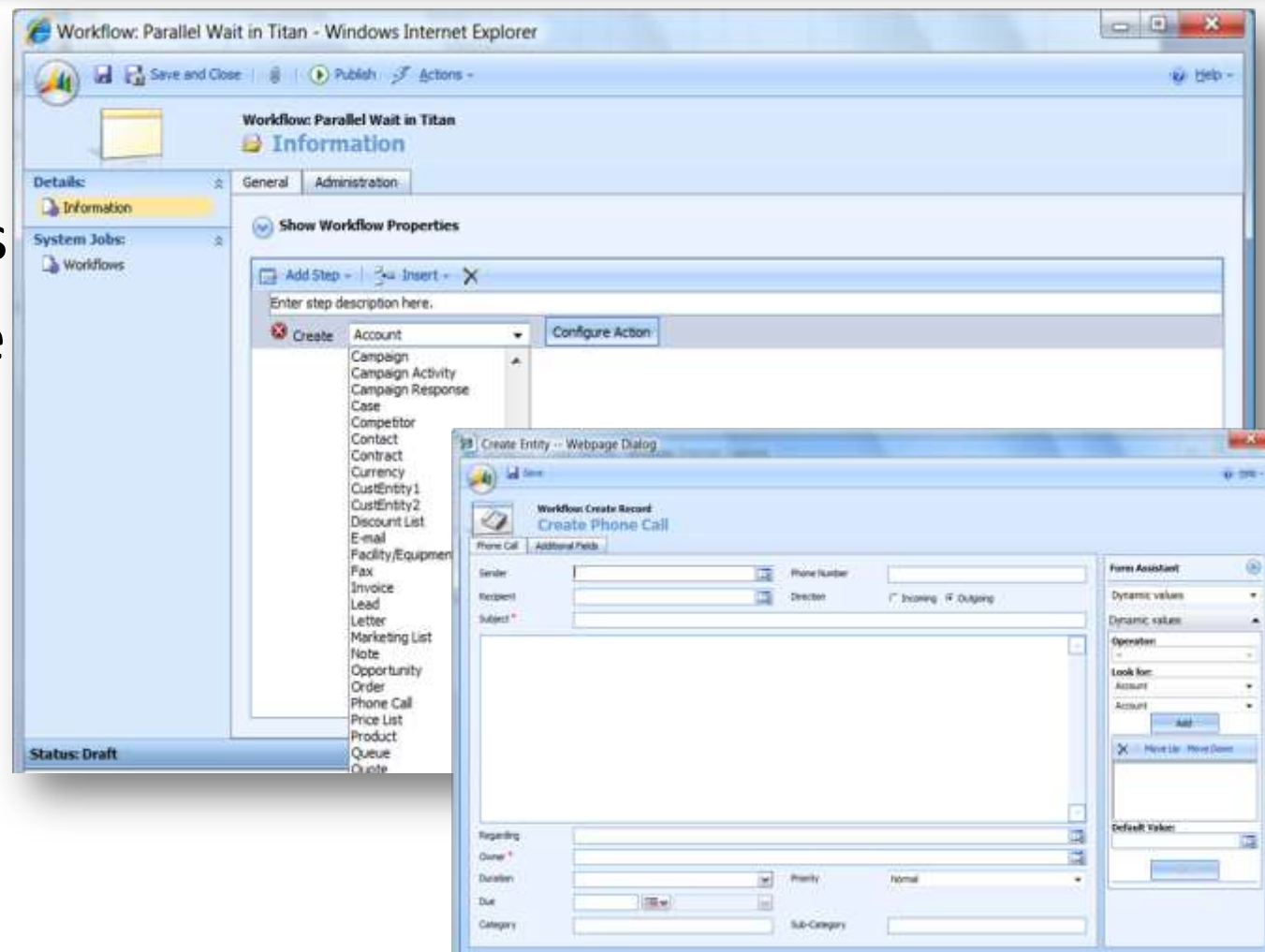
Empowerment | Wizardly Workflow

- Workflow Wizard For Easy Creation
- Build from Workflow Template
- Multiple Entities (including Custom)
- End-User ready but Power User enabled



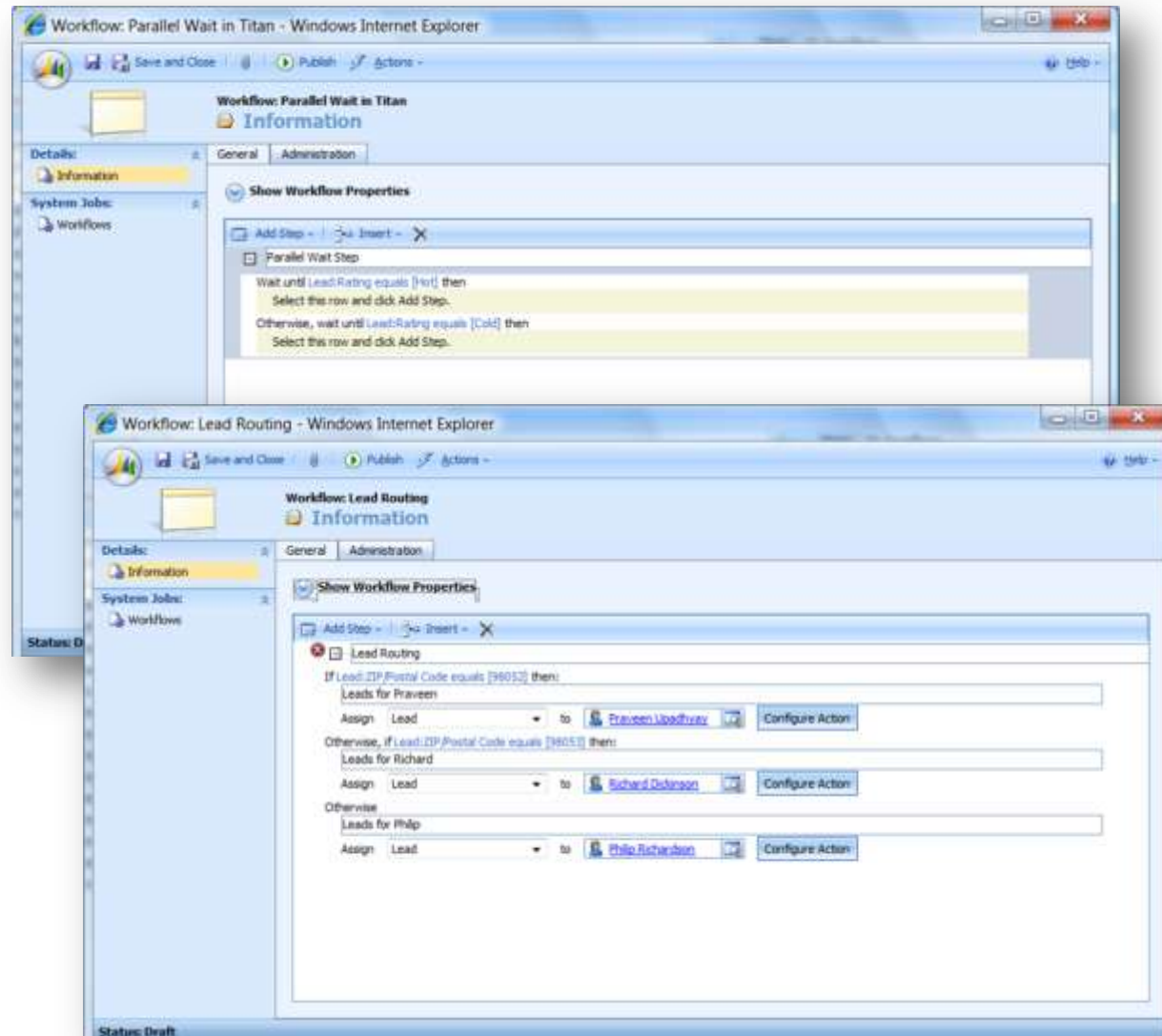
Empowerment | Automatic Actions

- Default and Custom Actions
- Create Multiple Record Types
- Smart Action Form-Based Configuration
- Workflow Step Validation

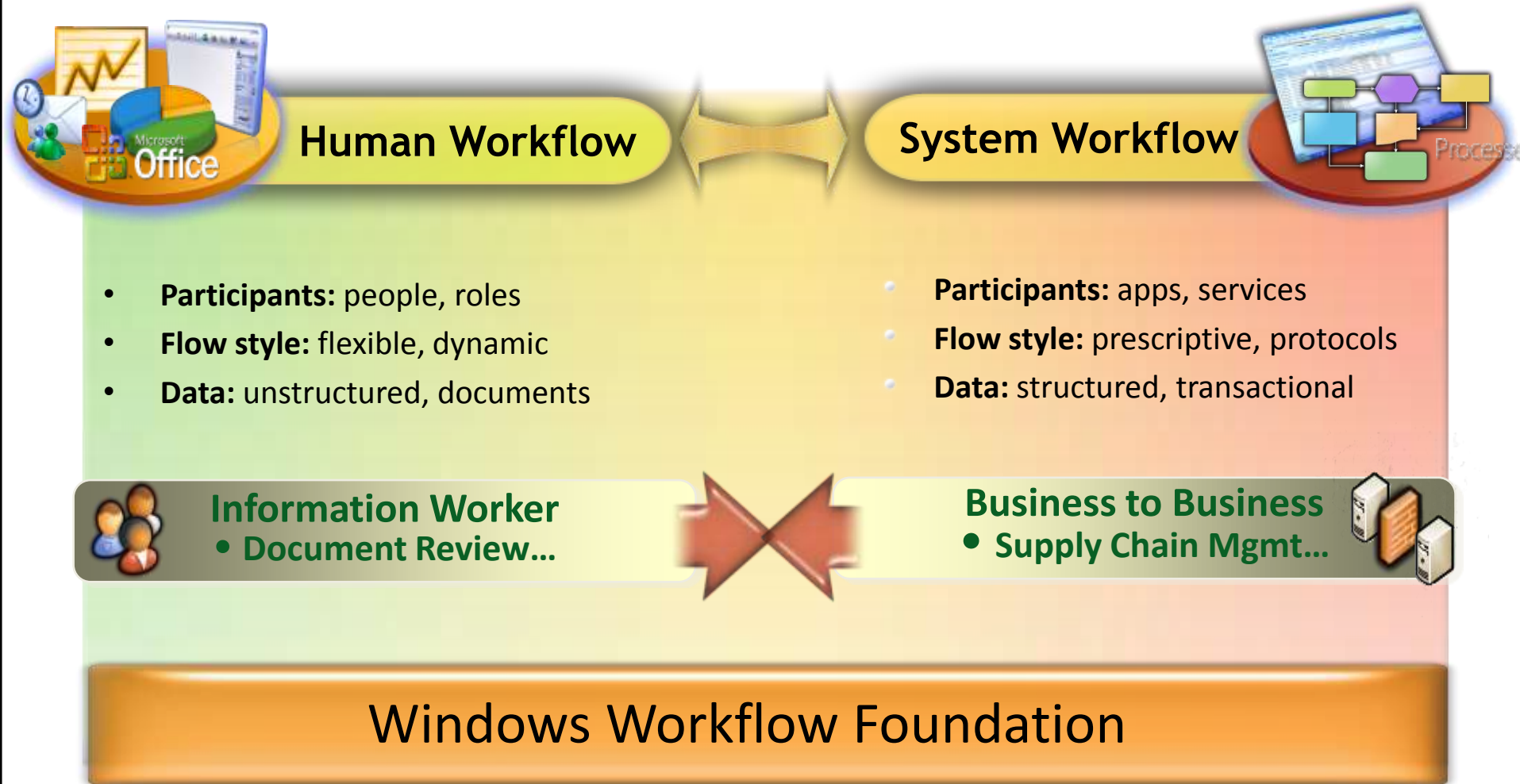


Empowerment | Improve Your Process

- Workflow Scope Improvements
 - More entities
 - More events
- Workflow Expression Improvements
 - Traverse relationships
 - Richer date/time expressions in conditions / actions
- Workflow Branching Improvements
 - ELSE branches
 - Wait conditions



Empowerment | Extended Scenario Solutions



Empowerment | Workflow Design for Designers

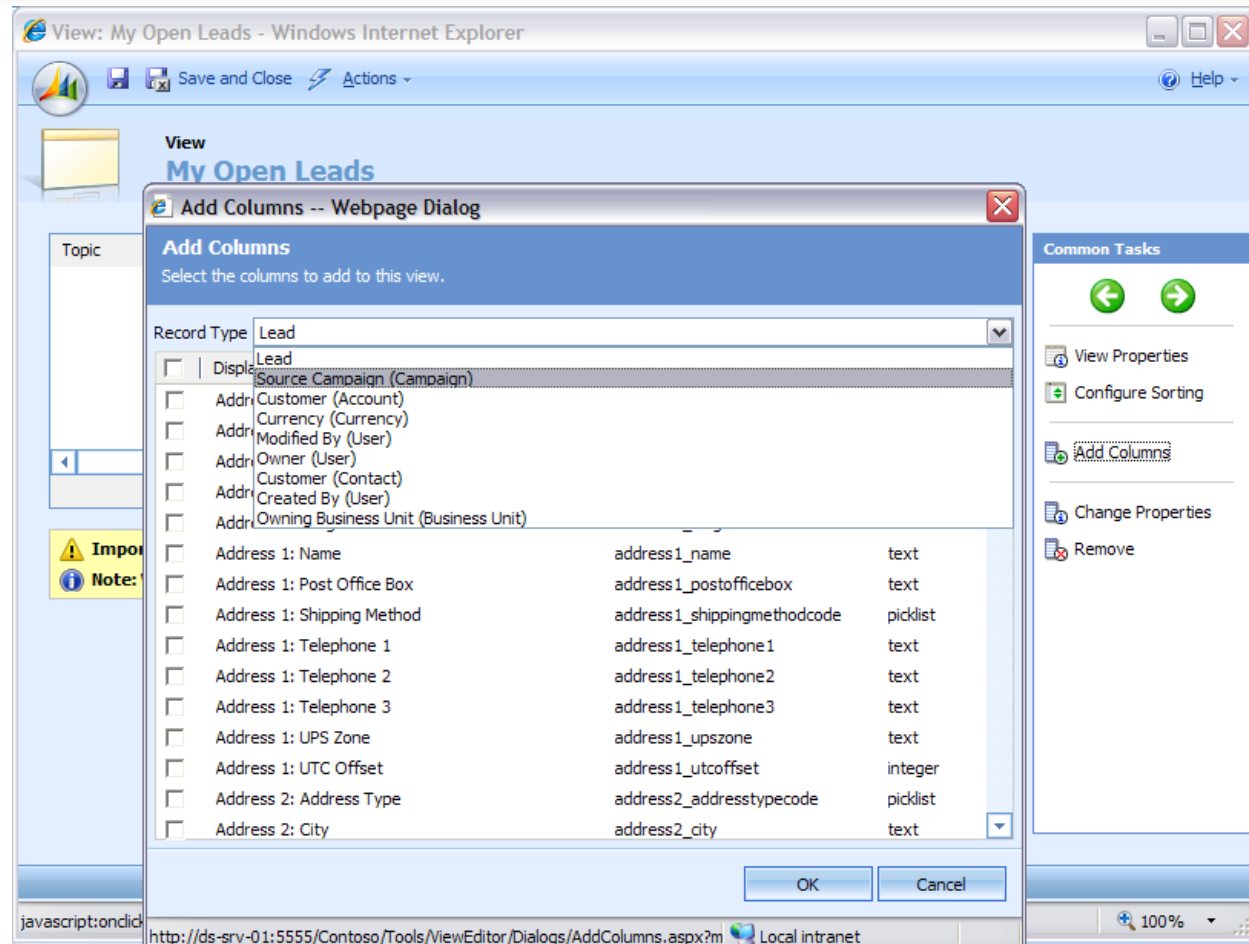
- CRM Application Generated
- Code
- Markup and Code
- Markup Only “Declarative”



REPORT

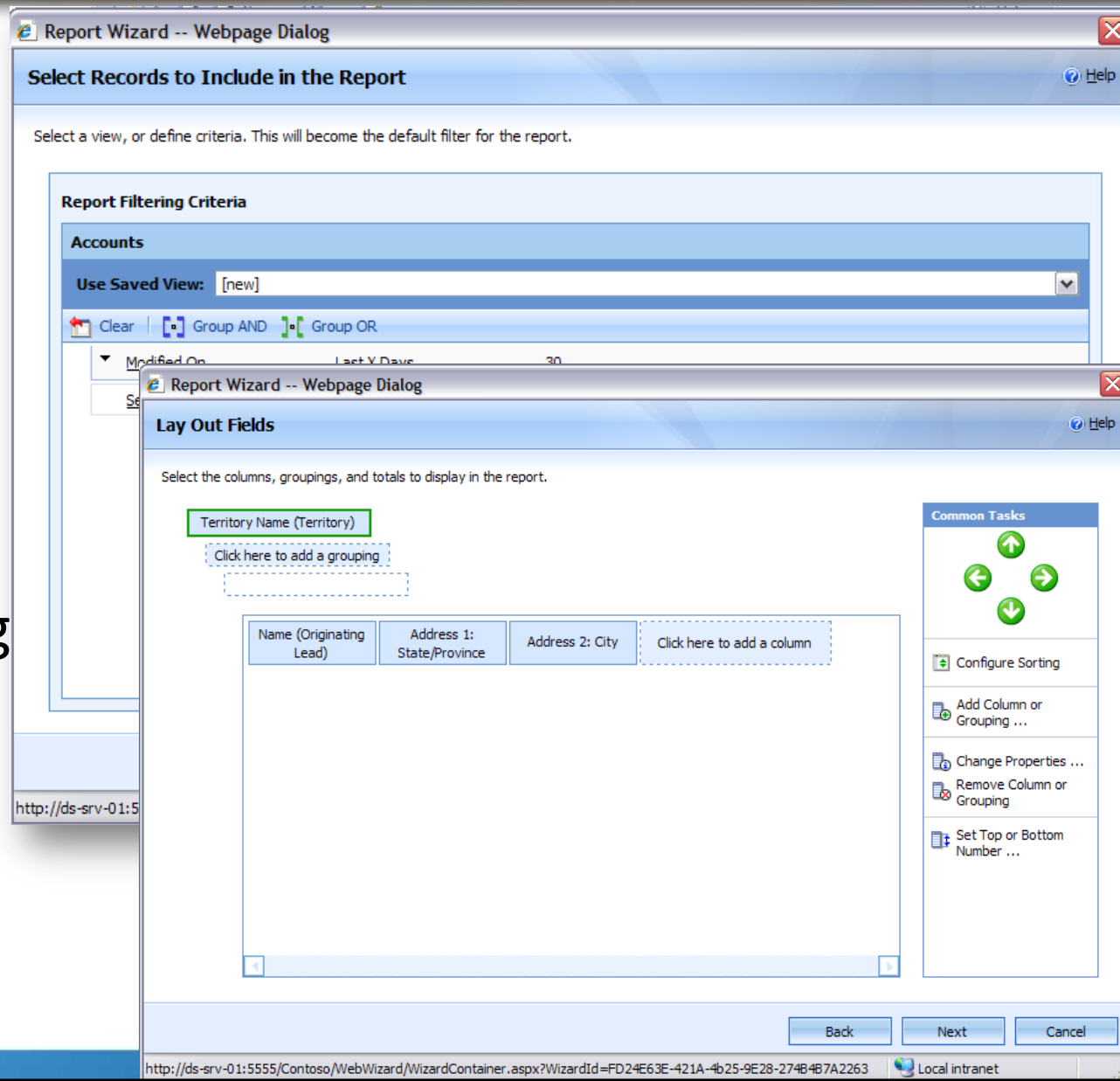
Insight| Enhance Your Users Views

- Cross-entity views
- Allows “joins” to other entities to be displayed in views
- Advanced find creation
- Enhances quick campaigns



Empowerment | Become A Reporting Wizard

- End user created RDL based reports
- No direct access to SQL required
- Removes IT from the report-writing process
- Tabular and chart based reports



Productivity | Scheduled Insight

- Scheduled & Recurring
- Provides report snapshots
- Report scheduling wizard
- On demand or on a schedule

The screenshot shows the 'Report Scheduling Wizard -- Webpage Dialog' window. The title bar includes a close button (X). The main heading is 'Select Frequency' with the instruction 'Select how often and when to create snapshots.' Below this, the report is identified as 'Invoice Status'. A note states: 'Specify the frequency, and then specify the required details for the selected frequency. Times are displayed using the time zone of the Reporting Server.'

On the left, there are radio buttons for frequency selection: 'Once', 'Hourly', 'Daily', 'Weekly', and 'Monthly'. The 'Monthly' option is selected.

The 'Monthly Schedule' section contains the following options:

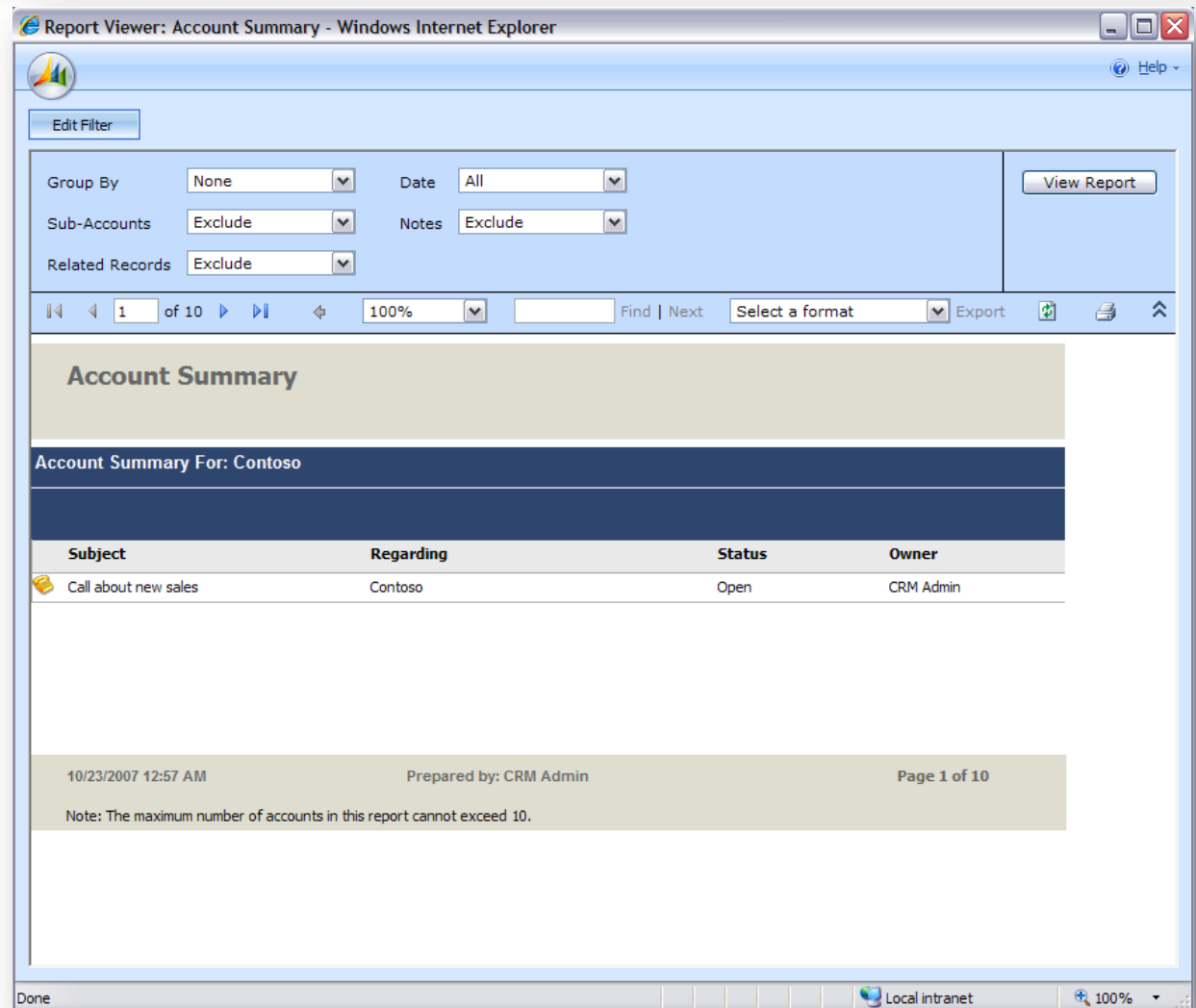
- 'Run report on:' with two choices:
 - 'Day 30 of every month' (unselected)
 - 'The last Friday of every month' (selected, with 'last' and 'Friday' in dropdown menus)
- 'Start time:' set to '12:00 AM' in a dropdown menu.

At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

The status bar at the bottom shows the URL 'http://crmtoday/AdventureWorksCycle/CRMReports/ReportSchedule/Sci...', the environment 'Local intranet', and 'Protected Mode: On'.

Empowerment | Take Your Reporting Offline

- Users execute reports against their local data stores (SQL Express).
- Reports are republished in offline mode
- Filtered Views are available offline



Empowerment | Reports As Entities

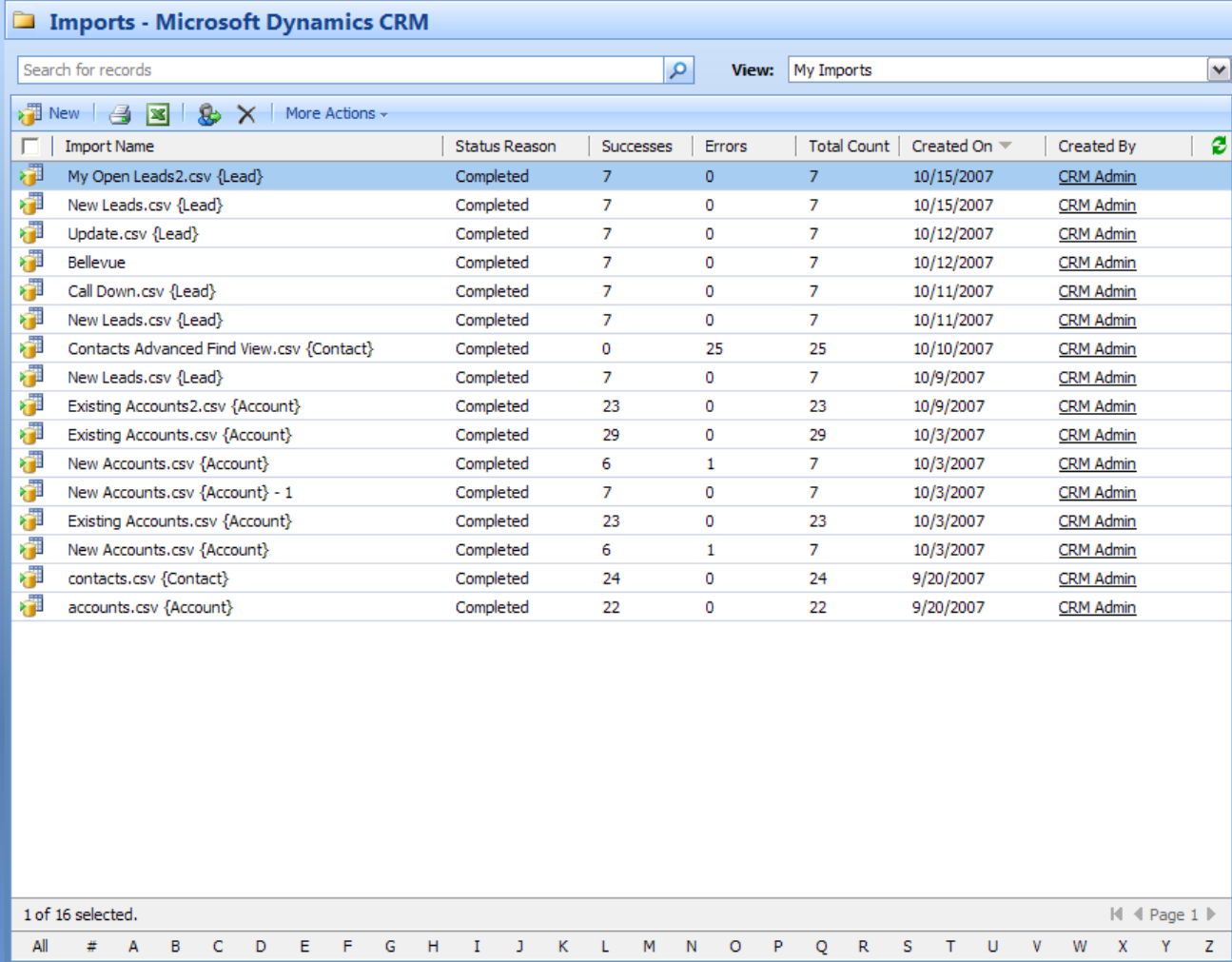
- Reports are now entities within Microsoft Dynamics CRM 4.0
- Managed & administered with the same security roles and rules as other entities in CRM.
- No need for additional authentication mechanisms to access reports.
- Non-LAN users and internet users no longer have to subscribe to exterior security measures in order to be able to access reports.



DATA

Empowerment | Direct Data Imports

- Wizard-based UI
- Unattended - Asynchronous
- Create new entities, attributes
- View status, successful records imported

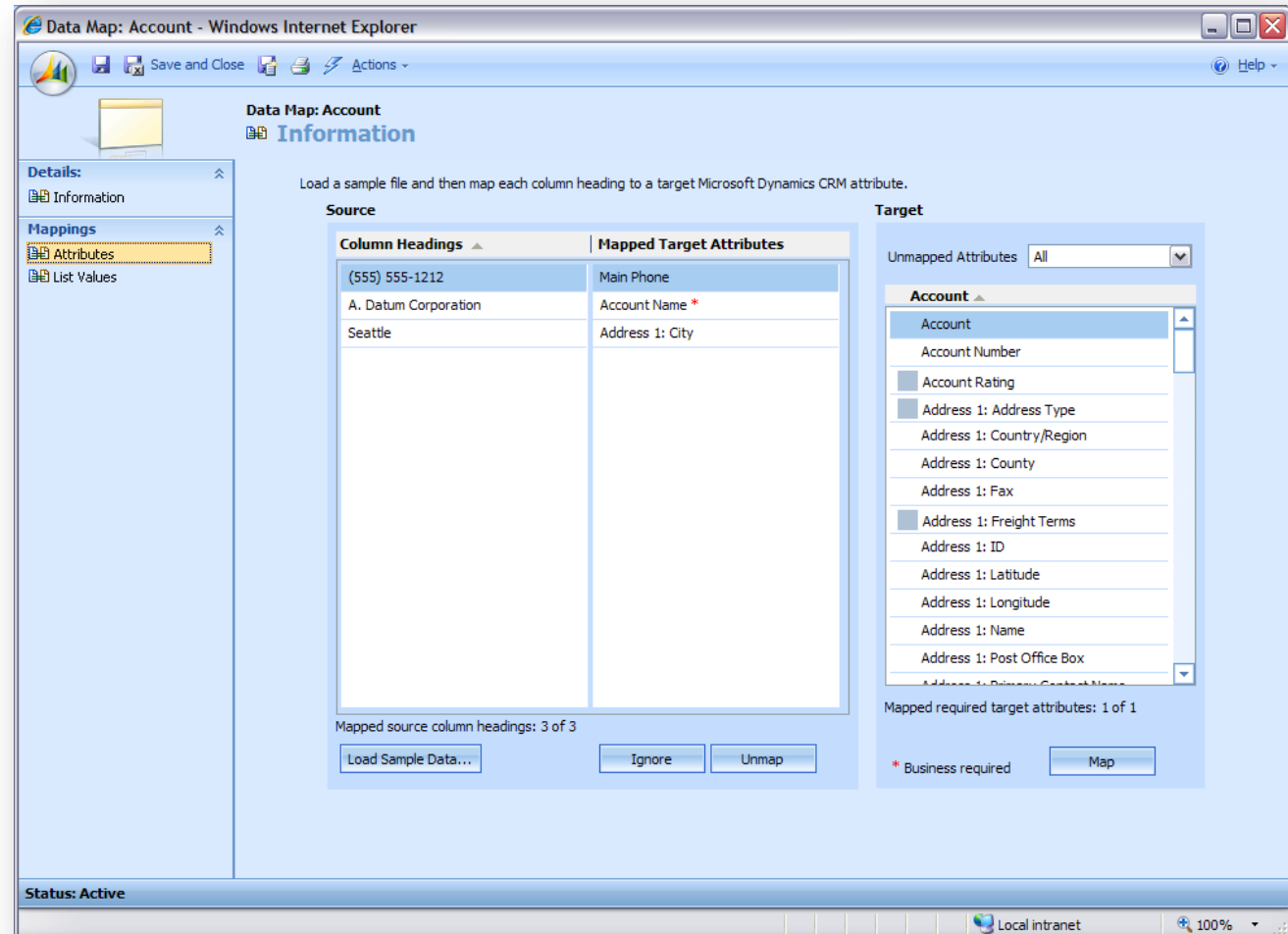


The screenshot shows the 'Imports - Microsoft Dynamics CRM' window. It features a search bar, a 'View' dropdown set to 'My Imports', and a toolbar with icons for New, Print, Export, and More Actions. Below the toolbar is a table with columns: Import Name, Status Reason, Successes, Errors, Total Count, Created On, and Created By. The table lists 16 import records, all with a status of 'Completed'. The records include various CSV files for Leads, Accounts, and Contacts, with their respective success and error counts. At the bottom, it indicates '1 of 16 selected' and shows a page navigation bar.

Import Name	Status Reason	Successes	Errors	Total Count	Created On	Created By
My Open Leads2.csv {Lead}	Completed	7	0	7	10/15/2007	CRM Admin
New Leads.csv {Lead}	Completed	7	0	7	10/15/2007	CRM Admin
Update.csv {Lead}	Completed	7	0	7	10/12/2007	CRM Admin
Bellevue	Completed	7	0	7	10/12/2007	CRM Admin
Call Down.csv {Lead}	Completed	7	0	7	10/11/2007	CRM Admin
New Leads.csv {Lead}	Completed	7	0	7	10/11/2007	CRM Admin
Contacts Advanced Find View.csv {Contact}	Completed	0	25	25	10/10/2007	CRM Admin
New Leads.csv {Lead}	Completed	7	0	7	10/9/2007	CRM Admin
Existing Accounts2.csv {Account}	Completed	23	0	23	10/9/2007	CRM Admin
Existing Accounts.csv {Account}	Completed	29	0	29	10/3/2007	CRM Admin
New Accounts.csv {Account}	Completed	6	1	7	10/3/2007	CRM Admin
New Accounts.csv {Account} - 1	Completed	7	0	7	10/3/2007	CRM Admin
Existing Accounts.csv {Account}	Completed	23	0	23	10/3/2007	CRM Admin
New Accounts.csv {Account}	Completed	6	1	7	10/3/2007	CRM Admin
contacts.csv {Contact}	Completed	24	0	24	9/20/2007	CRM Admin
accounts.csv {Account}	Completed	22	0	22	9/20/2007	CRM Admin

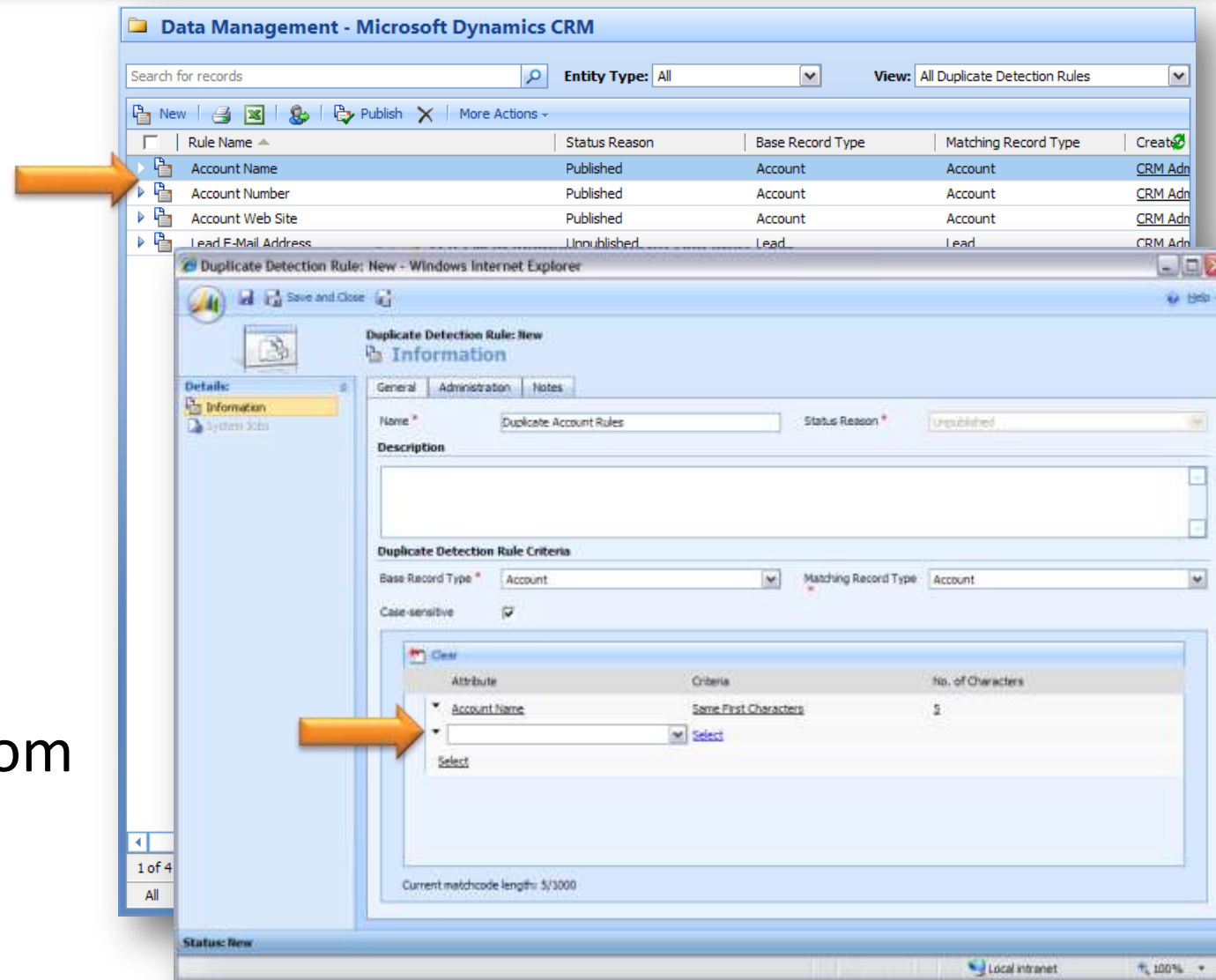
Productivity | The Map to Successful Imports

- Data Maps
- No programming required to create maps
- Save/Export & Import maps for reuse
- Enforces entity's required fields



Empowerment | Destroy Duplicate Data

- Data De-Duplication
- Customizable rules
- Covers data entry, bulk import & promotion from Outlook

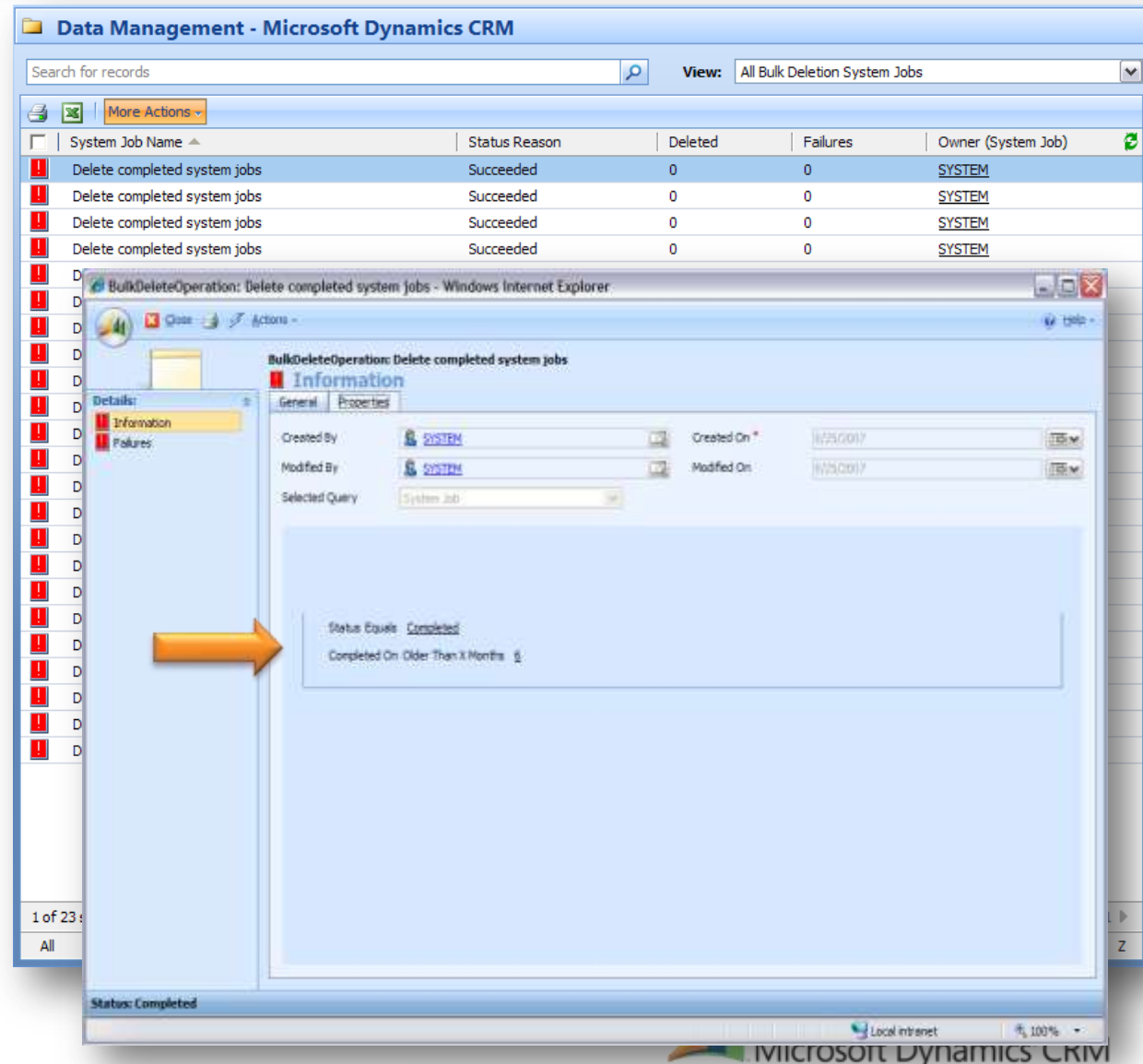




MANAGE

Insight | Track Your Data Management Jobs...

- UI interface provides visibility for administrators
- Detailed information provides information
- View job criteria
- View failures



Insight| ...And Monitor Your System Jobs

- System Job Monitoring
- Data Mgmt, Workflow...
- Actions from UI include Cancel, Resume, Postpone and Pause
- Visibility + Empowerment

System Job	Regarding	Status Reason	Started On
Duplicate De...	Account	Succeeded	9/25/2007 5:01 PM
Duplicate De...	Account	Succeeded	9/25/2007 5:35 PM
Duplicate De...	Account Name	Succeeded	9/25/2007 5:42 PM
Duplicate De...	Account Number	Succeeded	10/3/2007 5:05 AM
Duplicate De...	Account Number	Succeeded	10/3/2007 6:59 AM
Duplicate De...	Account Web Site	Succeeded	9/25/2007 5:42 PM
Duplicate De...	Accounts with the same e-mail address	Failed	8/23/2007 4:42 PM
Import File Parse	accounts.csv {Account}	Succeeded	9/20/2007 6:20 PM
Transform Pars...	accounts.csv {Account}	Succeeded	9/20/2007 6:20 PM
Import	accounts.csv {Account}	Succeeded	9/20/2007 6:20 PM
Import File Parse	Bellevue	Succeeded	10/12/2007 2:12 PM
Transform Pars...	Bellevue	Succeeded	10/12/2007 2:12 PM
Import	Bellevue	Succeeded	10/12/2007 2:12 PM
Import File Parse	Call Down.csv {Lea}	Succeeded	10/11/2007 12:32 PM
Transform Pars...	Call Down.csv {Lea}	Succeeded	10/11/2007 12:33 PM
Import	Call Down.csv {Lea}	Succeeded	10/11/2007 12:33 PM
Import File Parse	Contacts Advanced Find View.csv {Contact}	Succeeded	10/10/2007 6:46 PM
Transform Pars...	Contacts Advanced Find View.csv {Contact}	Succeeded	10/10/2007 6:46 PM
Import	Contacts Advanced Find View.csv {Contact}	Succeeded	10/10/2007 6:46 PM
Duplicate De...	Contacts with the same e-mail address	Failed	8/23/2007 4:42 PM
Import File Parse	contacts.csv {Contact}	Succeeded	9/20/2007 6:20 PM
Transform Pars...	contacts.csv {Contact}	Succeeded	9/20/2007 6:20 PM
Import	contacts.csv {Contact}	Succeeded	9/20/2007 6:20 PM
Workflow	Contoso-specific Sales Process	Canceled	9/25/2007 4:52 PM
Workflow	Contoso-specific Sales Process	Paused	10/19/2007 3:26 PM
Workflow	Contoso-specific Sales Process	Paused	10/19/2007 4:08 PM
Workflow	Contoso-specific Sales Process	Paused	10/19/2007 4:22 PM
Workflow	Contoso-specific Sales Process	Paused	10/19/2007 4:34 PM

Empowerment | Seamless Upgrade from 3.0

Fast & Smooth

Comprehensive upgrade within a weekend using wizard-driven setup

Upgrades all Customizations

Upgrades all supported customizations, workflows, emails, reports, SDK code, etc.

Upgrades all Versions & SKUs

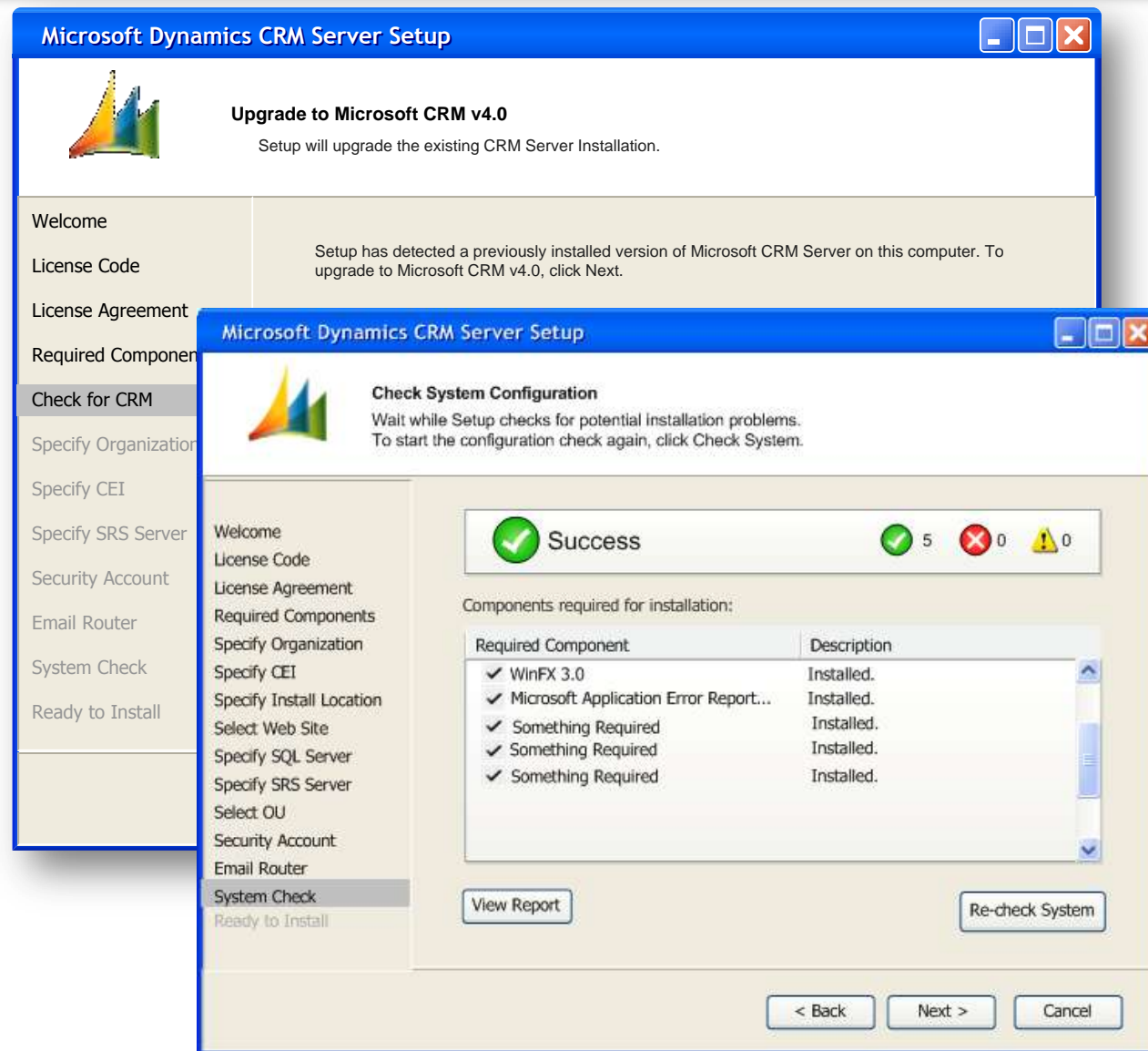
All language versions, on-premise and SPLA, Pro and SBE, v3 and v3c

Upgrades all Deployments

Handles all supported deployment configurations

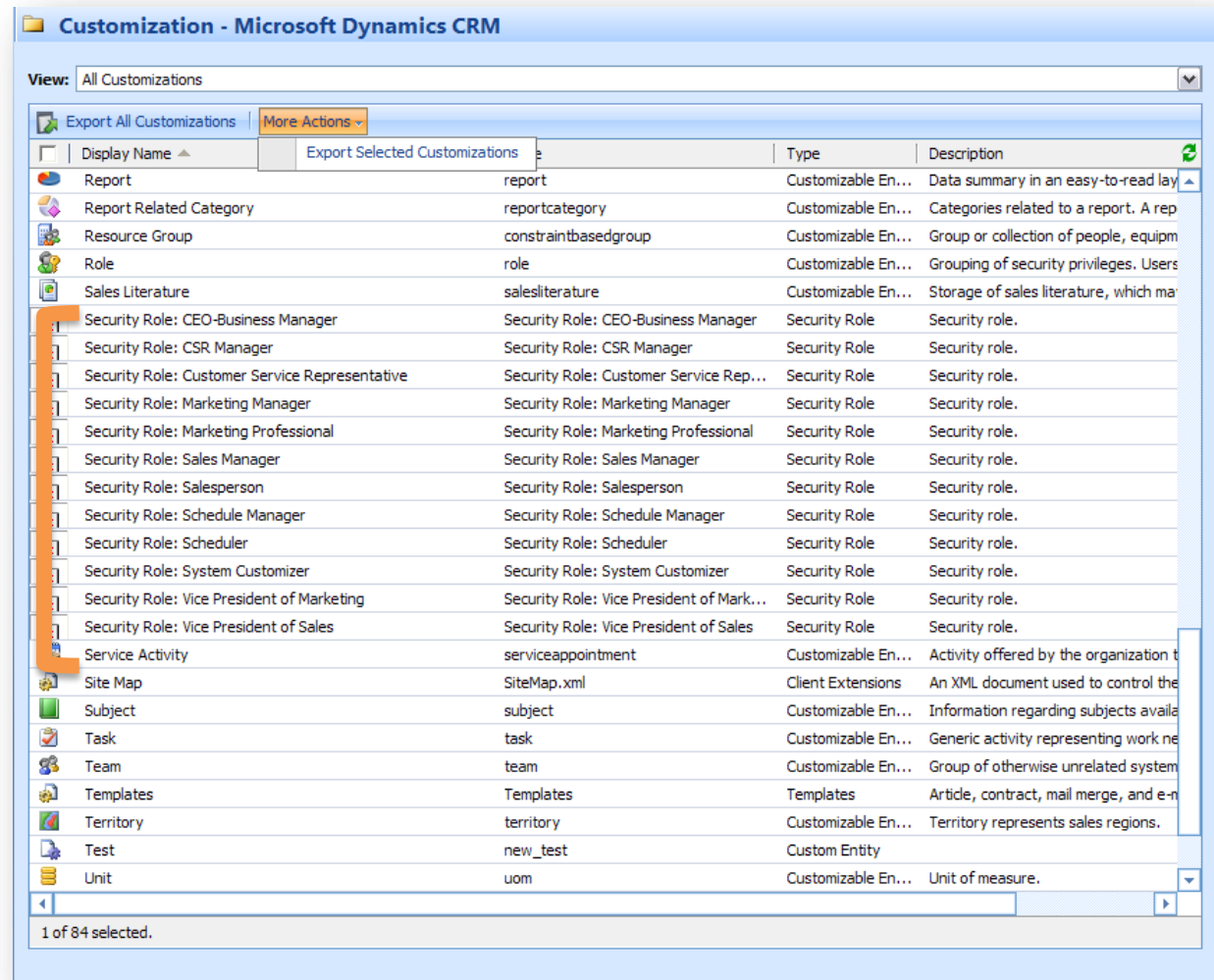
Productivity | Sleep-Inducing Upgrades

- Wizard-driven
- Auto-detects existing CRM installation
- Detects problems and proposes resolutions prior to upgrade
- Upgrades to 4.0



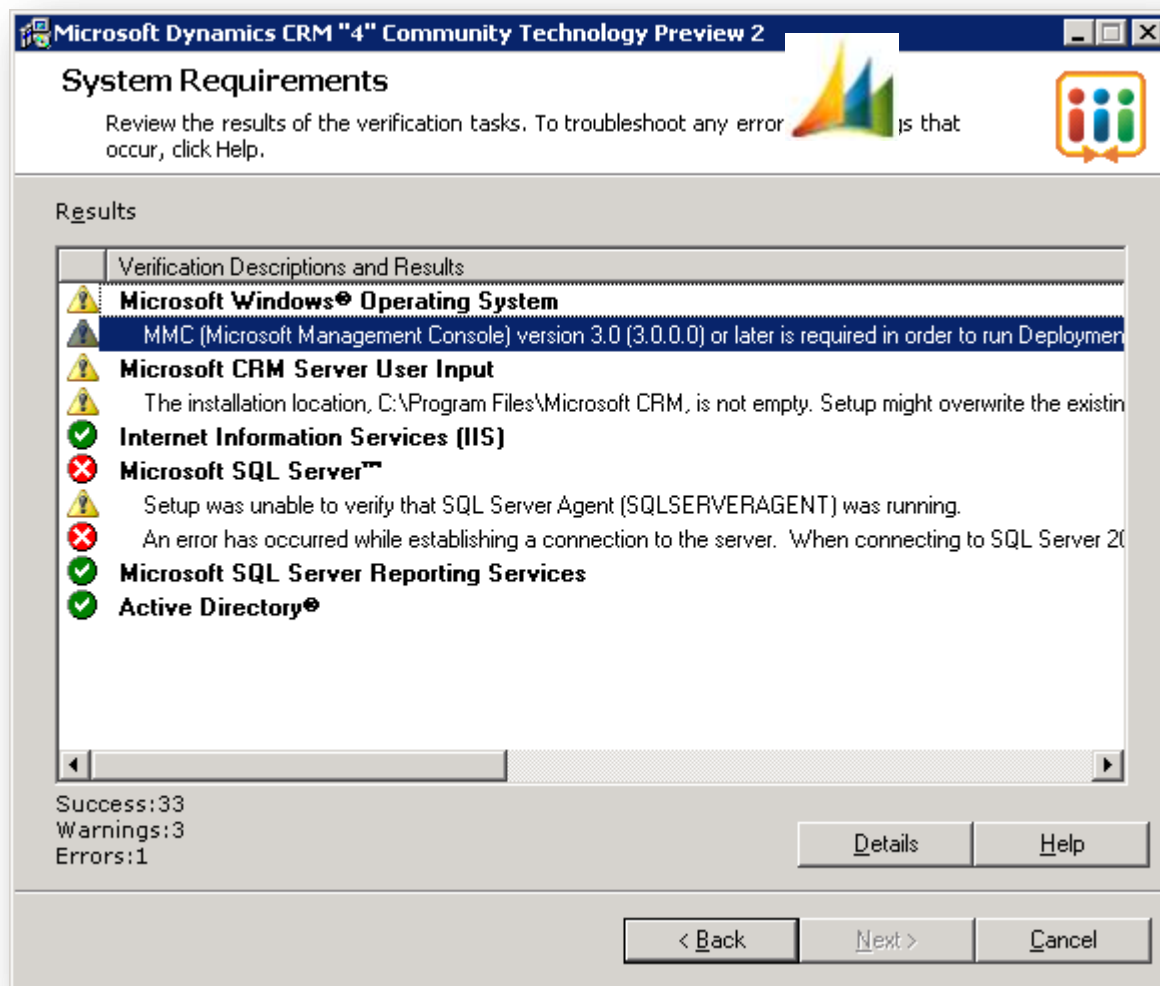
Productivity | Expanded Portable Application

- Import & Export CRM
 - Security roles
 - Workflow
 - Organization settings
 - Multi-language UI settings
- Move from development to testing to production



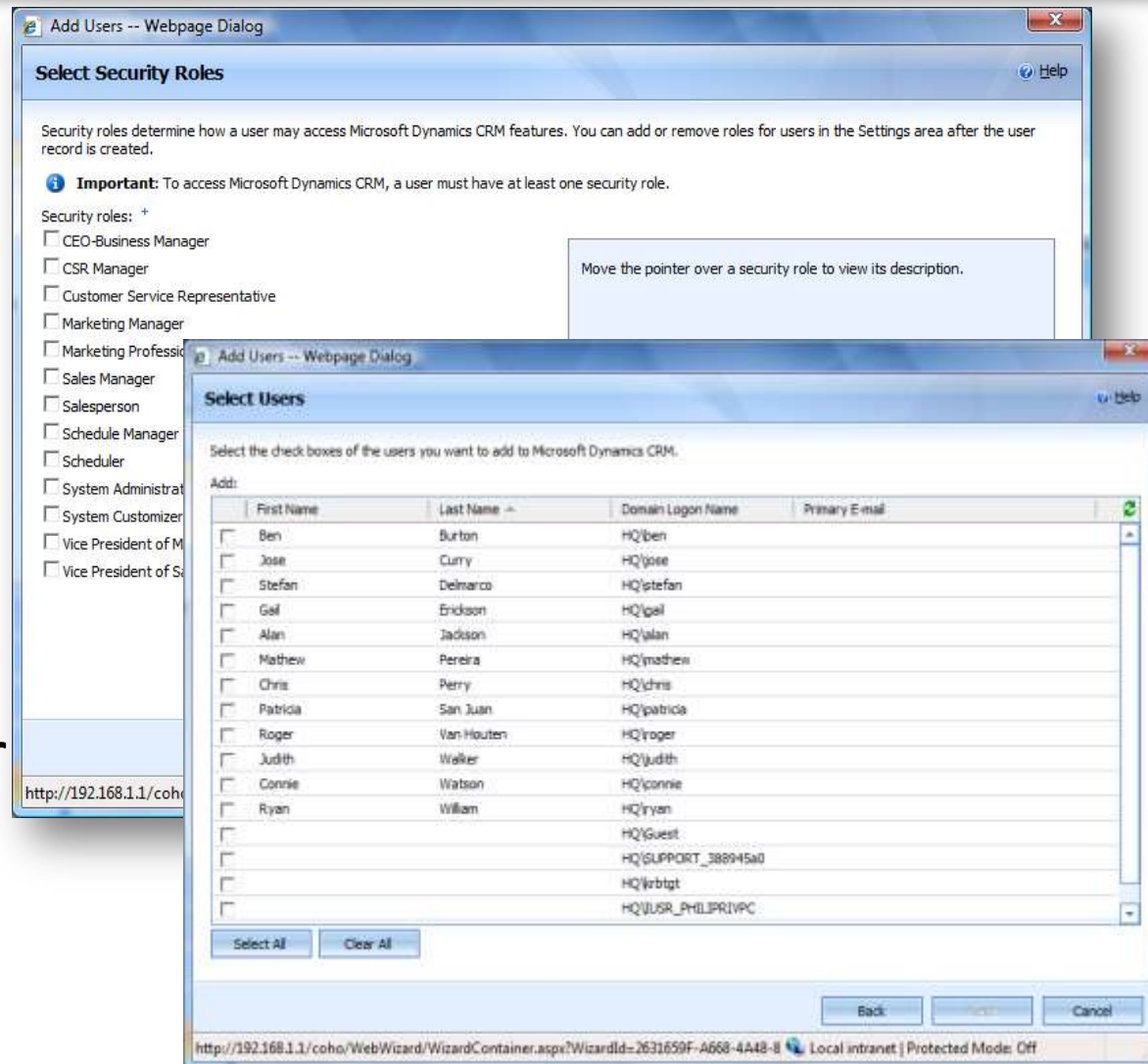
Productivity | Diagnose Your Environment

- Improved unsupported configurations detection
- Better and more warnings



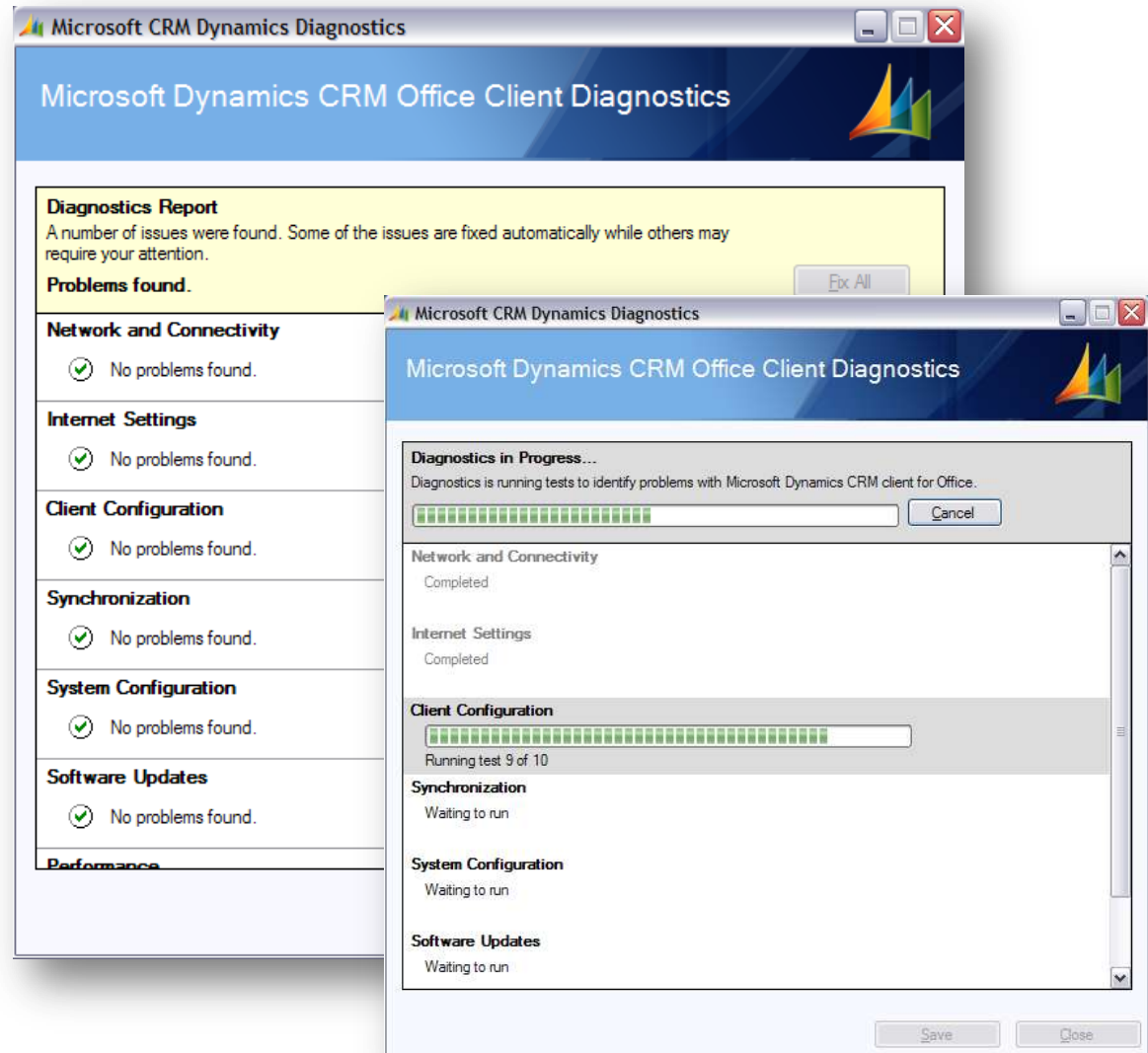
Productivity | Multiply Your Users

- Bulk-add users from AD to CRM 4.0
- Reduce time/effort required to create users
- Select role, select AD users, select 1 or more users and create users



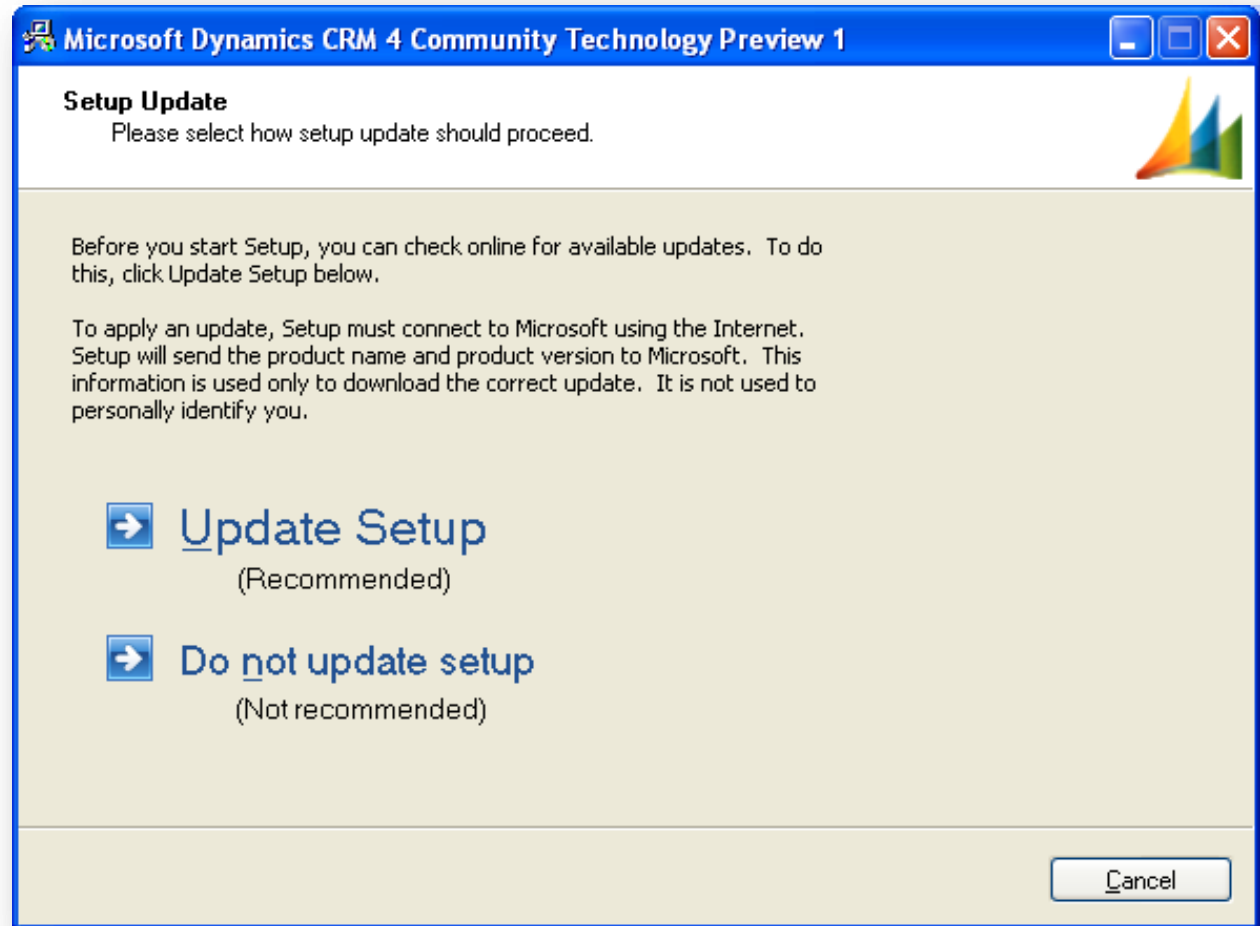
Empowerment | Office Client Diagnostics

- Office Client Diagnostics Tools
- Diagnostics Report
- Series of Tests (Network, Connectivity, Configuration...)
- Issues highlighted and offers FIX option on many different issues



Productivity | Heal Your Clients

- Update setup to latest version
- Enterprise Deployment-Friendly
- Customizable via Config





DEPLOY

Empowerment | Performance. Availability. Scale

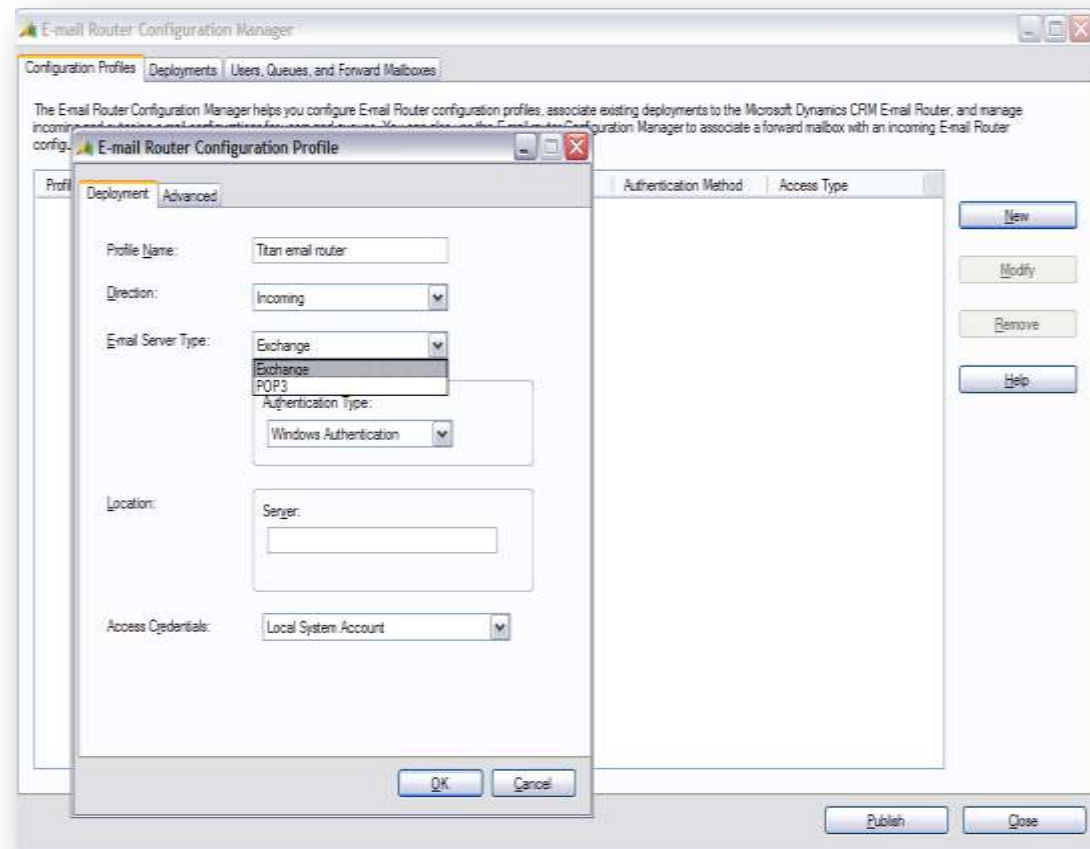
- SQL mirroring support
- E-mail router performance and scalability
- Better wide area network (WAN) performance
- Asynchronous processing
- Clustering
 - SQL clustering
 - Reporting Service clustering
 - Exchange clustering
 - Web Farm clustering
 - Load Balanced clustering

Empowerment | Cluster Services To Scale

	 Application Server	 Platform Server
Web Application Service		
Help Content Service		
SDK Service		
Asynchronous Service		
Discovery Service		
Deployment Service		

Empowerment | Email That Works For You

- Exchange
 - Forward Mailbox
 - Rule Deployment Wizard
 - Direct Mailbox Access
 - Native Exchange Server 2007 Support
- POP3
- SMTP for Outbound
- Custom E-mail Provider (In/Out)





DEVELOP

Empowerment | Leverage Expanded Metadata API

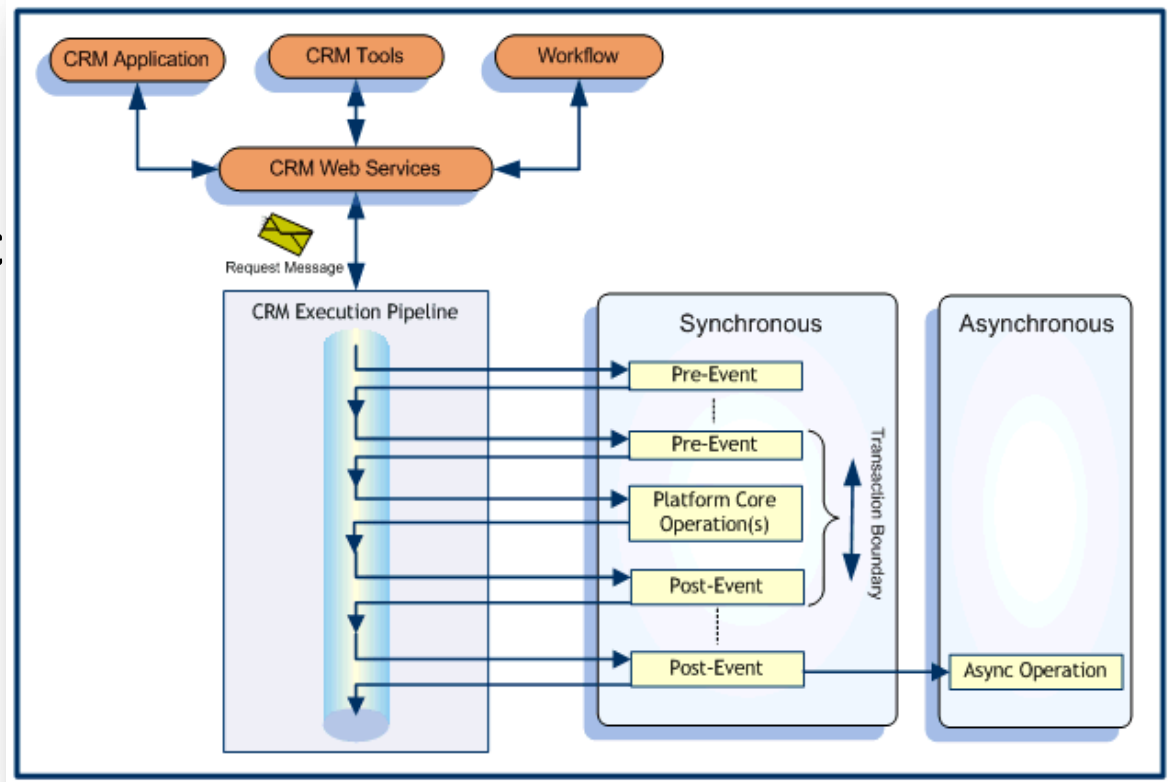
- Not just read-only!
- Create, read, update, and delete metadata
- Entities, attributes, and relationships
- A separate end-point with the same connection pattern as the main web service
- The CRM 3.0 Metadata API is still available in Titan for backward compatibility.

Empowerment | Take Your Customizations Offline

- Laptop Client Programmability
- Offline Web Services
- Offline Plugins
- Offline Reporting
- Data Migration Programmability

Empowerment | Plug it in the Eventing Framework

- Callouts upgraded to Plug-Ins
- Ability to embed sophisticated logic in CRM 4.0
- Plug-Ins can be configured to execute while Offline
- Dynamic Plug-in Registration





DEMO

What's New in 4.0

Productivity | Insight | Empowerment

...And Finally... 10 or so features in 10 or so seconds...

1. Email to Lead
2. Email to Case
3. Outlook CRM Breadcrumbs
4. Terminal Services with Roaming Profiles
5. Citrix support
6. Deployment Security Roles
7. “Activity” Reporting
8. Parallel Email Inbox Processing
9. Asynchronous System Jobs
10. Pop-up blocker detection
11. Advanced Quote Printing
12. Path-based URLs
13. Visually-impaired accessible

Dynamics CRM 4.0 | Breaking New Ground

- Extending 'Power of Choice'
- Easy to tailor business processes and data
- Solutions for an international audience
- Complex applications beyond classic CRM
- Deployments that scale with a low TCO

Dynamics CRM 4.0 | What Now?

- Learn More
 - Partner Source
 - Customer Source
 - Launch Content Coming Soon to CRM Website
<http://www.microsoft.com/crm>

Microsoft[®]

Your potential. Our passion.[™]