

# What's changed in this version?

Just updated?

Find out what's changed in  
Microsoft Dynamics CRM 2013 &  
Microsoft Dynamics CRM Online  
Fall '13

 Microsoft Dynamics CRM

Getting  
Started  
Series

4

# meet Microsoft Dynamics CRM 2013

You probably noticed—  
we've made some pretty  
significant changes to the  
ways you get your work done  
in this version of CRM.

We think you'll like them!

Here are some highlights to  
help experienced users get  
started in the new user  
experience...



# goodbye, navigation pane...

In previous versions, your screen looked something like this:

The screenshot shows the Microsoft Dynamics CRM interface. It features a ribbon at the top with various command groups like 'Dashboard Management', 'Action', and 'Query'. On the left, there is a navigation pane with categories like 'My Work' and 'Customers'. The main area contains a dashboard with charts and a table of activities. Four orange callout boxes highlight specific areas: 'Navigation pane' points to the left sidebar, 'Ribbon with commands' points to the top ribbon, 'Main workplace' points to the central dashboard area, and 'Roles, Settings, and Help' points to the bottom-left sidebar.

Navigation pane

Ribbon with commands

Main workplace

Roles, Settings, and Help

But the navigation pane and ribbon took up a lot of room on the page.



# hello, data!

So we redesigned the system to make more room for what's most important – your customer data. The new, streamlined navigation drops down from the top of the screen. No more navigation pane.

The screenshot displays the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with the Microsoft Dynamics CRM logo, a home icon, and a dropdown menu for 'SALES'. Below this is a secondary navigation bar with icons for 'SAVE AS', 'NEW', 'SET AS DEFAULT', 'REFRESH ALL', and 'ADVANCED FIND'. The main content area is titled 'Dashboard: Microsoft Dynamics CRM Overview'. It features three primary components: a 'Sales Pipeline' funnel chart, a 'Leads by Source Campaign' bar chart, and an 'All Activities' table. The funnel chart shows three stages: 1-Qualify (blue, \$31,915,467.41), 2-Develop (red, \$10,606,085.00), and 3-Propose (green, \$13,112,309.00). The bar chart shows leads from 'Consulting Services Email ...' (1) and '(blank)' (503). The activities table lists various tasks and their statuses.

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date	Primary Email (Owning User)
Approve Proposal	Adam Carter	Task	Completed	Terry Adams	High			terry.adams@contoso.com
Review proposal	Convert an...	Task	Open	Jim Hance	Normal			jimh@yamdemo.onmicroso...
Send product specs	Interested i...	Task	Open	Terry Adams	Normal			terry.adams@contoso.com
Resolution Time	Question a...	Task	Completed	Lori Penor	Normal			lori.penor@contoso.com
Upsell Designer Software	Consulting...	Campaign Re...	Open	Nancy Anderson	Normal			
Upsold licences please follow...	General CS...	Campaign Re...	Open	Lori Penor	Normal			lori.penor@contoso.com
Upsold on Hardware	General CS...	Campaign Re...	Open	Lori Penor	Normal			lori.penor@contoso.com
Upsold	General CS...	Campaign Re...	Completed	Nancy Anderson	Normal			

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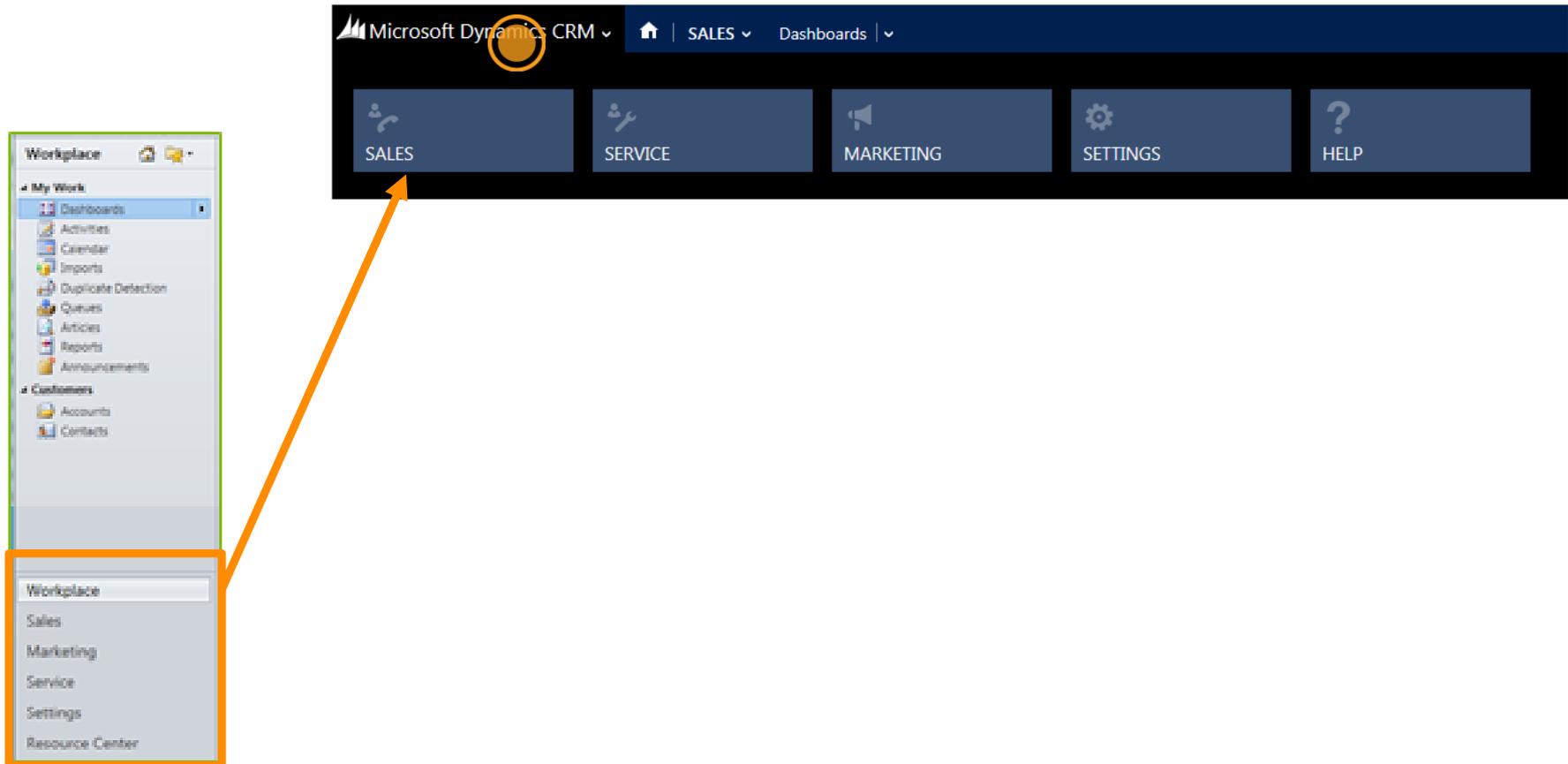
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More room for your data!



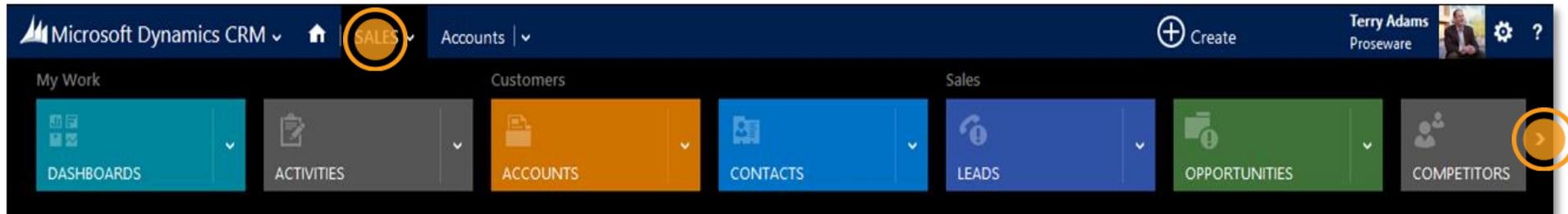
# find work areas under the logo

Work area dashboards have moved under the Microsoft Dynamics CRM logo. Just click or tap the logo any time to switch between work areas.



# find the different record types

You can quickly get to different record types with a single touch. On the nav bar, just click or tap a work area to see tiles for the types of records you work with most often.



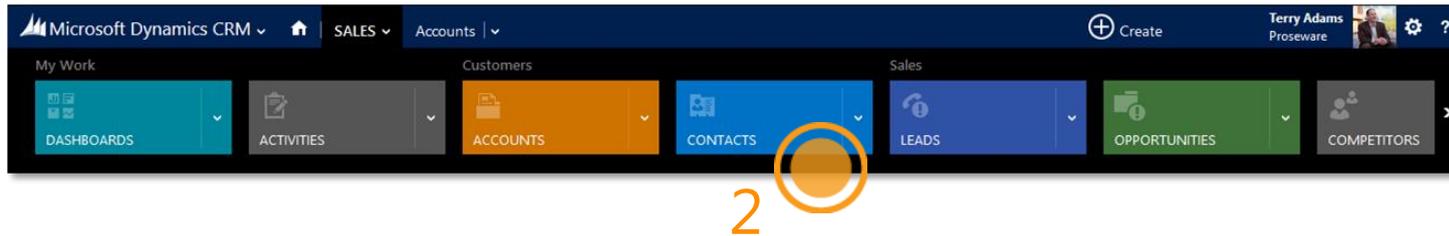
**TIP**  
Click or tap this  
arrow to scroll right  
and see more tiles



# find your records



On the nav bar, click or tap your work area



then click or tap the tile for the record type.

Full Name ↑	Email	Parent Customer	Business Phone
Abu Obelda Bakhach	abuobeidabakhach@metr...	Metropolitan Sports Supply	685-442-5388
Adam Smith	franzkohl@cohowinery.com	Coho Winery	874-152-2115
Aidan Delaney	aidandelaney@littleindustr...	Little Industries	587-166-7850
Aidan Delaney	aidandelaney@weekendto...	Weekend Tours	604-551-6286
Alex J. Simmons	alex.simmons@rallydayma...	Rally Day Mail	245-678-8770
Alistair Speirs	alistairspeirs@moresales.c...	More Sales!	780-705-3003
Amr Zaki	amrzaki@ridenravesales.co...	Ride n Rave Sales	744-874-8788
Amritansh Raghav	amritanshraghav@majorsp...	Major Sporting Goods	321-737-3560
Anat Kerry	anatkerry@breathtakingsp...	Breathtaking Sporting Goo...	201-286-8782
Andreas Herbinger	andreasherbinger@speedy...	Speedy Sales Store	136-567-1030
Andrew Lan	andrewlan@adatumcorpo...	A. Datum Corporation	605-780-7661

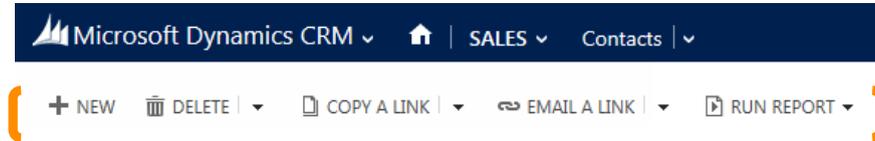
3 You'll see a list of records.

**TIP** These steps work for any record type.

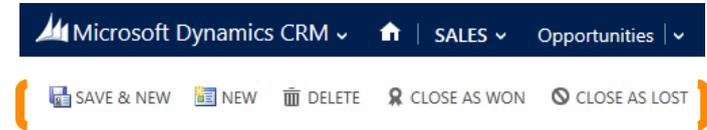


# find commands where you're working

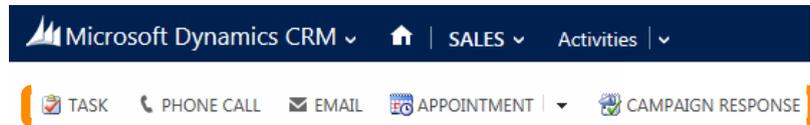
No more ribbon. Instead, you'll see just the commands related to the things you're working on.



Commands for contacts



Commands for opportunities



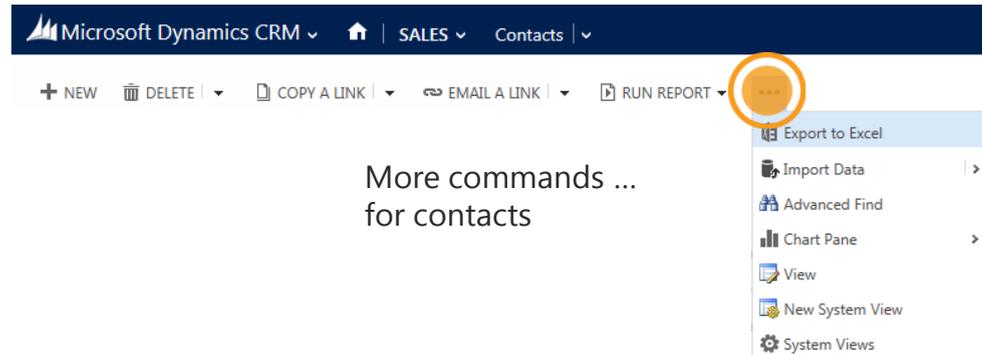
Commands for activities

... and so on!

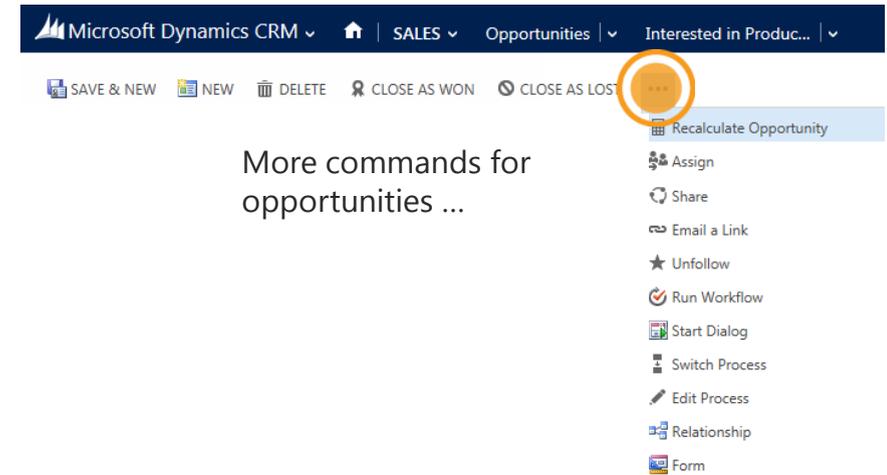


# check what's under More commands ...

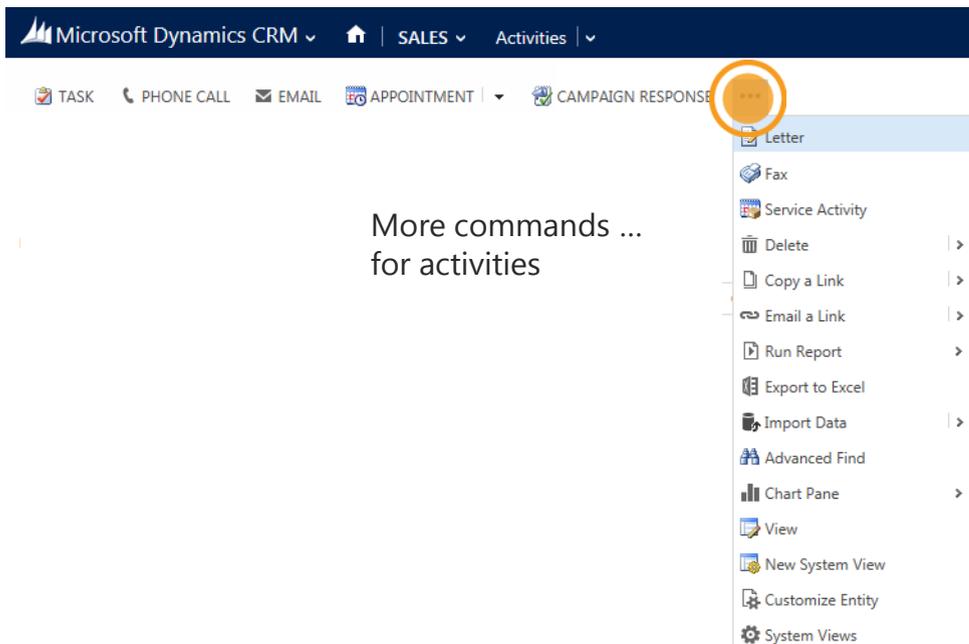
Don't see the command you want? Click or tap the **More commands** dots ... to see what else is available. You'll find it on most screens where you work on records.



More commands ...  
for contacts



More commands for  
opportunities ...



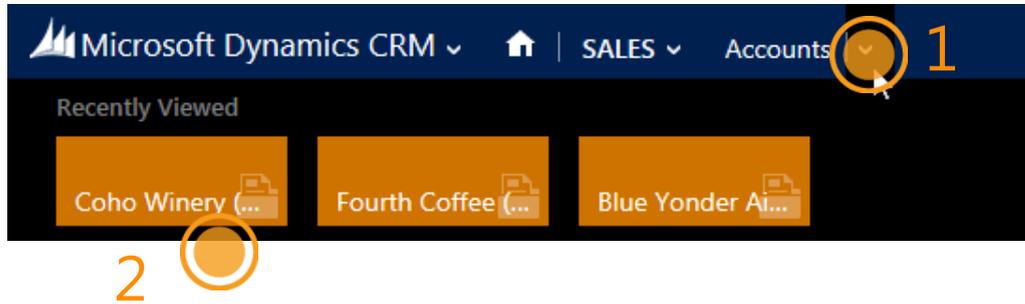
More commands ...  
for activities

... and so on!



# pick up where you left off

It's easier to get back to the work you did most recently.



On the nav bar, next to the name of the record type, click or tap 

Click or tap a tile, and then get right back to what you were doing.



# enter data in new ways

There are several improvements that make entering data faster and easier.



# quickly create new records

Now, you can quickly capture key data points when you enter new records with **Quick Create**.

On the nav bar, click or tap **Create**, and then select the type of record you want. Enter data for a few fields, or more if you have it. You can come back and fill in the gaps later when you have more time.

The screenshot shows the Microsoft Dynamics CRM interface for creating a new Contact record. The top navigation bar includes the Microsoft Dynamics CRM logo, a home icon, and menu items for SALES, Contacts, and Adam Smith. A 'Create' button with a plus icon is highlighted with an orange circle and the number '1'. Below the navigation bar, the 'Contact' form is displayed with three columns: Details, Contact Information, and Address. The 'Details' column contains fields for First Name (Marcia), Last Name (Douglas), Job Title, and Parent Customer. The 'Last Name' field is highlighted with an orange circle and the number '2'. The 'Contact Information' column contains fields for Email, Mobile Phone, Business Phone, and Description. The 'Address' column contains fields for Street 1, Street 2, City, and ZIP/Postal Code. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

Details	Contact Information	Address
First Name* Marcia	Email --	Street 1 --
Last Name* Douglas	Mobile Phone --	Street 2 --
Job Title --	Business Phone --	City --
Parent Customer --	Description --	ZIP/Postal Code --



# edit contact info inline

You can click or tap a field to update info for a contact right inline. No flipping to another screen.

Microsoft Dynamics CRM | SALES | Contacts | Adam Smith | Create | CRM System Contoso

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN

Contact: Adam Smith | Owner: CRM System

Summary

CONTACT INFORMATION

Full Name: Adam Smith  
Job Title: Concrete-Mixing-Truck Driver  
Parent Customer: Coho Winery  
Email: franzkohl@cohowinery.com  
Business Phone: 874-152-2115  
Mobile Phone: 425-283-8503  
Fax: --  
Preferred Method of Contact: Any  
Address: 4 Anfield Road, Liverpool, L4 0TH, United Kingdom

POSTS | ACTIVITIES | NOTES

Enter post here | POST

Both | Auto posts | User posts

Request for help with Factory Designer  
Case: Closed by CRM System for Contact Adam Smith.  
On Request for help with Factory Designer's wall  
8/3/2013 11:10 AM

Problem with Building Designer  
Case: Closed by CRM System for Contact Adam Smith.

Street 1: 4 Anfield Road  
Street 2:   
Street 3: --  
City: Liverpool  
State/Province: --  
ZIP/Postal Code: L4 0TH  
Country/Region: United Kingdom

Company: Coho Winery

Recent Cases

Case Title	Priority	Status	Created
Problem with Building...	High	Resolved	8/3/2013
Request for help with F...	Low	Resolved	8/3/2013
Request for help with P...	Normal	Resolved	8/3/2013
Question about Plotters	High	Active	8/3/2013
Problem with 3D Comp...	Low	Active	8/3/2013

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Recent Opportunities

Title	Status	Actual Close Da...	Actual Re
No Opportunity records found.			

Click or tap a phone number to call via Skype or Lync  
Click or tap an email to send a message

Click or tap the address to see the fields you can edit

Have a lot going on?

You might need to scroll up and down or left and right to see everything



# add or edit product line items inline

Product fields are now editable right on the screen where you're working. Enter details like price, quantity, and discount directly in the fields.

Products					
Product Name	Price Per Unit	Quantity	Discount	Extended Amount	
✓  Product Designer	 \$17,500.00	 20	0.00	 \$350,000.00	  

## TIP

Click or tap here to add a product



# records are saved automatically

You no longer need to click or tap **Save** when you're editing. By default, the system automatically saves any edited records every 30 seconds, or when you navigate to another record.



# track key decision-makers for your deals

Inline editing and lookup makes it easier to understand at a glance who is connected to an opportunity and their role. You can even create new records inline from within the lookup screen.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity record titled "Interested in Large format printers". The interface includes a navigation bar, a ribbon with tabs for "Quality (Active)", "Develop", "Propose", and "Close", and a summary section. The summary section shows fields for Title, Contact, Account, Purchase Timeframe, Currency, Budget Amount, Purchase Process, and Description. The Budget Amount field is set to \$422,359.74. A callout box highlights the "STAKEHOLDERS" lookup field, showing a dropdown menu with the following roles: Champion, Decision Maker, Economic Buyer, End User, Influencer, Stakeholder (highlighted), and Technical Buyer. An orange arrow points from the callout box to the "STAKEHOLDERS" field in the summary section.

Est. Close Date	Est. Revenue	Status	Owner
3/30/2013	\$410,058.00	In Progress	CRM System

Quality (Active)	Develop	Propose	Close
Identify Contact <i>click to enter</i>	Estimated Budget <b>\$422,359.74</b>	Capture Summary <i>click to enter</i>	
Identify Account <b>Latest Sports Sales</b>	Purchase Process <b>Individual</b>		
Purchase Timeframe <b>Next Quarter</b>	Identify Decision Maker <i>mark complete</i>		

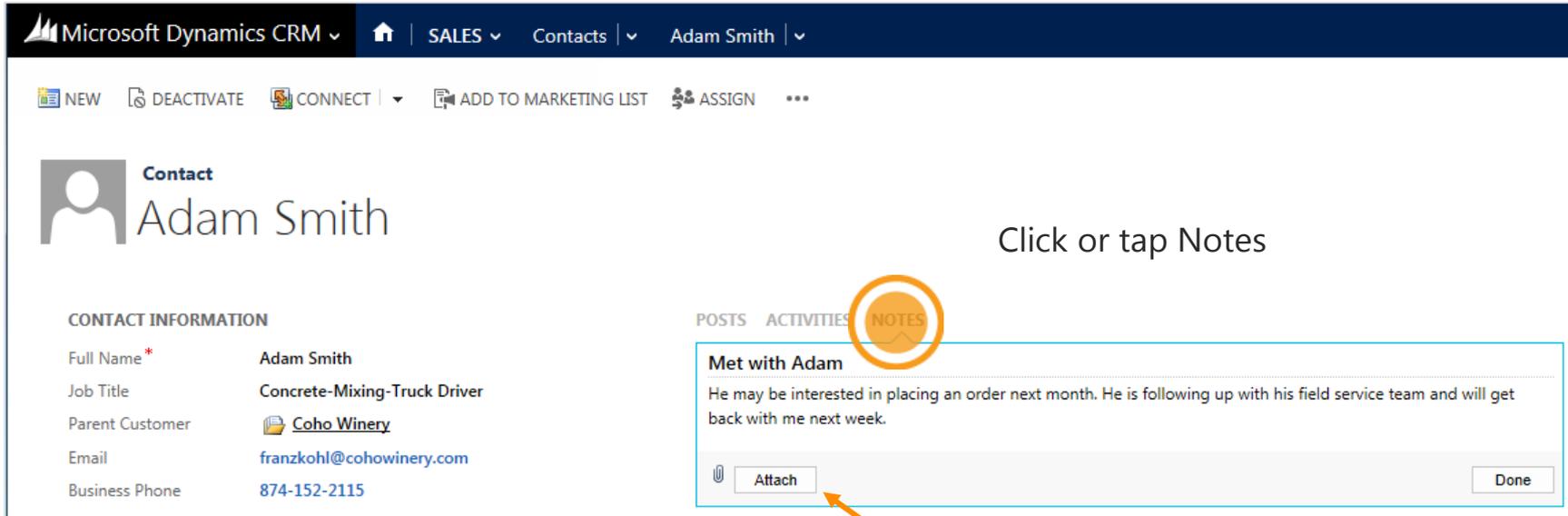
Name ↑	Role
Aidan Delaney	Stakeholder

Name ↑	Role
Aidan Delaney	Champion
	Decision Maker
	Economic Buyer
	End User
	Influencer
	Stakeholder
	Technical Buyer



# add notes

When you're viewing the details for a record, click or tap **Notes**, then type away.



The screenshot shows the Microsoft Dynamics CRM interface for a contact named Adam Smith. The top navigation bar includes 'Microsoft Dynamics CRM', a home icon, 'SALES', 'Contacts', and 'Adam Smith'. Below the navigation bar are action buttons: 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', and 'ASSIGN'. The contact's name 'Adam Smith' is displayed prominently. On the left, the 'CONTACT INFORMATION' section lists: Full Name (Adam Smith), Job Title (Concrete-Mixing-Truck Driver), Parent Customer (Coho Winery), Email (franzkohl@cohowinery.com), and Business Phone (874-152-2115). On the right, there are tabs for 'POSTS', 'ACTIVITIES', and 'NOTES'. The 'NOTES' tab is selected and highlighted with an orange circle. Below the tabs, a note is visible with the title 'Met with Adam' and the text 'He may be interested in placing an order next month. He is following up with his field service team and will get back with me next week.' At the bottom of the notes section, there is an 'Attach' button with a paperclip icon and a 'Done' button. An orange arrow points from the text 'Attach documents or photos, if you like' to the 'Attach' button.

Microsoft Dynamics CRM | SALES | Contacts | Adam Smith

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN

Contact  
Adam Smith

Click or tap Notes

CONTACT INFORMATION

Full Name*	Adam Smith
Job Title	Concrete-Mixing-Truck Driver
Parent Customer	Coho Winery
Email	franzkohl@cohowinery.com
Business Phone	874-152-2115

POSTS | ACTIVITIES | **NOTES**

**Met with Adam**

He may be interested in placing an order next month. He is following up with his field service team and will get back with me next week.

Attach Done

Attach documents or photos, if you like



# follow guided business processes

Now, you'll see a process bar at the top of the screen for many of the record types. With these new business processes, each stage for working with a customer is clearly outlined. Steps to complete your work are easy to follow.

Qualify (Active)	Develop	Propose	Close	Next Stage
✓ Identify Contact <u>Eli Bowen</u>	✓ Estimated Budget \$612,970.00	✓ Capture Summary	New prospect seeking ou	
✓ Identify Account <u>Trey Research</u>	✓ Purchase Process Unknown			
✓ Purchase Timeframe This Quarter	Identify Decision Maker mark complete			

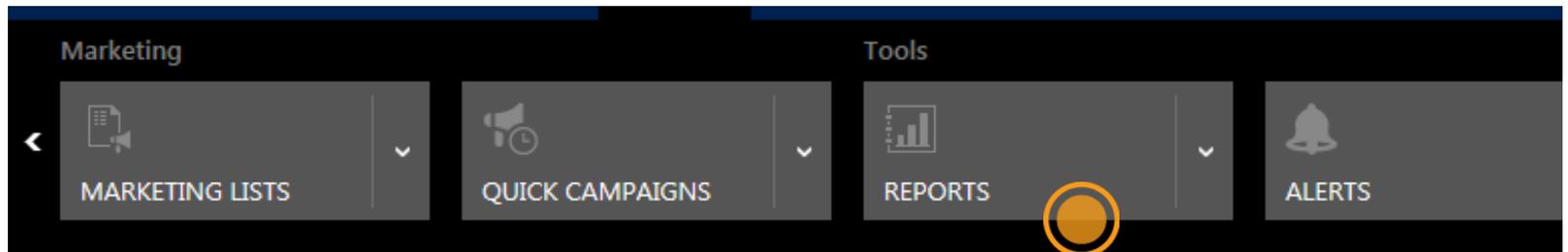
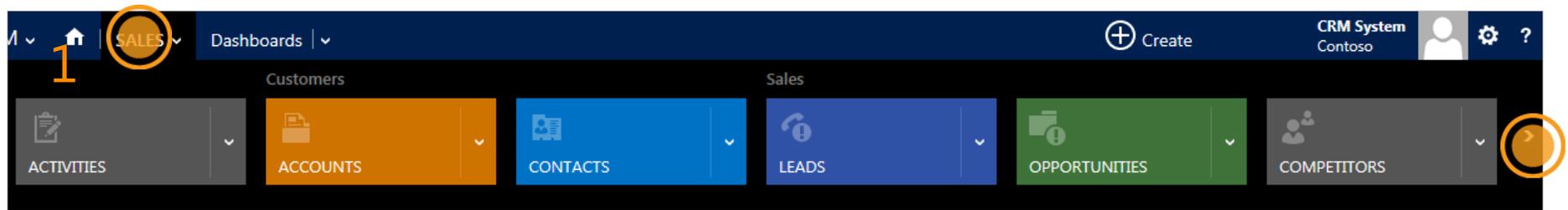
1 Click or tap to enter data

2 Click or tap the process bar to move back and forth to another stage



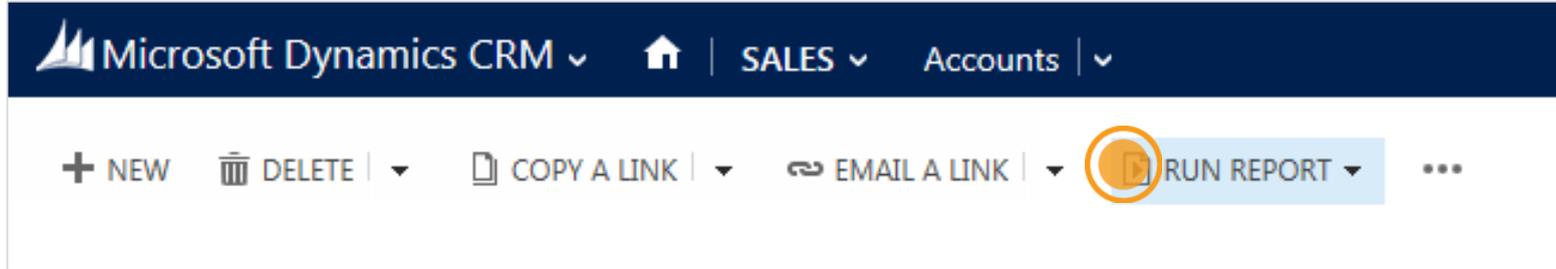
# looking for your reports?

Now, you'll find a tile for reports in your work area, instead of in the Workplace. On the nav bar, click or tap the work area, then click or tap the right arrow to scroll and find **Reports**.



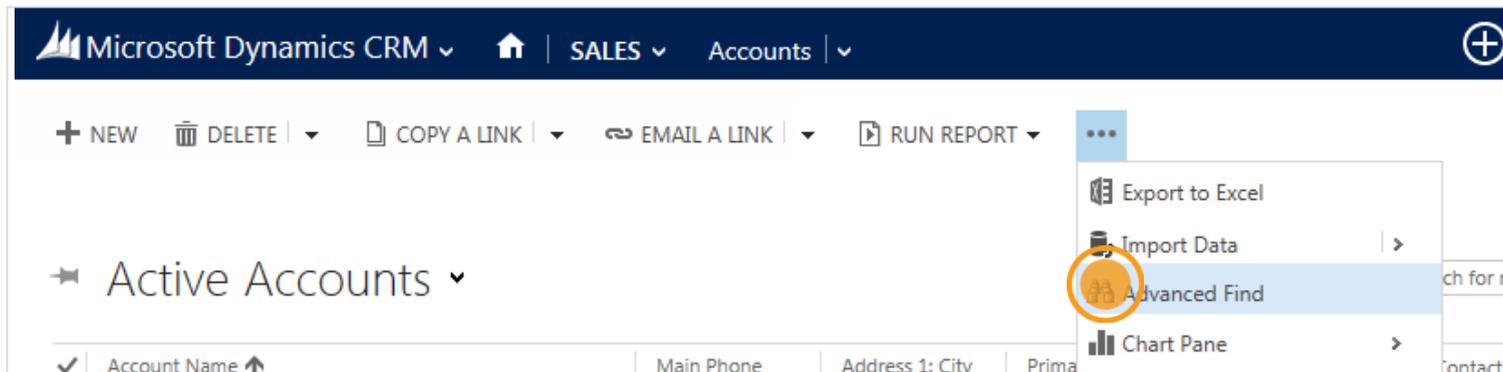
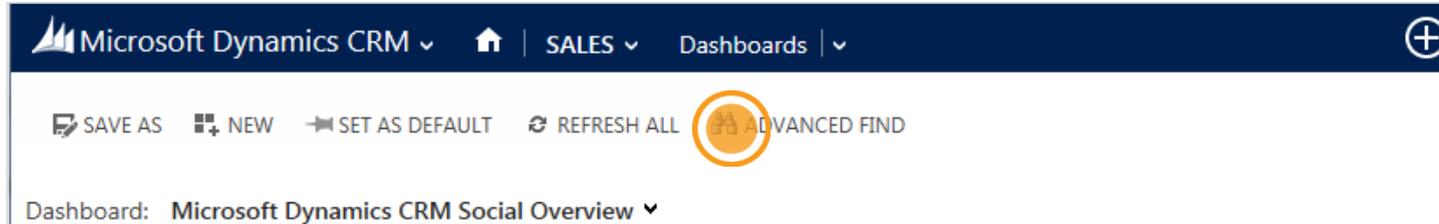
# find the Run Reports command

Or, you can run reports from the command bar when you're working on records.



# locate the Advanced Find command

So you can find info quickly, **Advanced Find** is now on the dashboard.



You'll also find it under the **More commands ...** dots when you're working on records.



Thanks for reading!

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We'd love to know what you think.

[Customer Center](#)



