

Building Microsoft Dynamics™ CRM 4.0

Top 25 Customer Capabilities

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Introduction

Microsoft Dynamics™ CRM 4.0 business software is a complete customer relationship management solution that provides the capabilities that organizations need to gain and retain the competitive advantage in today's business world.

We rely on our customers to guide us in product evolution as we strive to meet their expectations. To this end, the Microsoft Dynamics CRM team has spent significant time listening to our customers and studying how they've used Microsoft Dynamics CRM. We've monitored CRM application usage scenarios, business process flows, and levels of support and functionality. We pay close attention to user adoption and motivations for ongoing investment in CRM. The results of this research have helped us bring our customers Microsoft Dynamics CRM 4.0.

The improvements and enhancements in Microsoft Dynamics CRM 4.0 can be divided into three major areas:

- **Works the way you work** – Microsoft Dynamics CRM 4.0 helps drive user adoption, improve productivity, and empower users to take control of their data with tool that integrate seamlessly with the way you work.
- **Works the way your business works** – Microsoft Dynamics CRM 4.0 provides a flexible platform for CRM that fits the unique needs of your business and allows you to adapt over time as your business changes.
- **Works the way technology should work** – Microsoft Dynamics CRM 4.0 gives you an enterprise-class platform with tools, technologies, and flexible deployment options that help you get the best value out of your investment in technology.

The Microsoft Dynamics CRM product philosophy is based in a commitment to providing customers with the **Power of Choice**, enabling them to constantly evolve their business unencumbered by technology limitations. We regard a CRM solution choice as much more than a collection of features for customers to choose from. Rather true choice means CRM software that is both a best fit for their unique business needs and flexible enough to change when those needs change.

To this end, we strive to provide companies with:

1. CRM software that best fits their existing people, business and infrastructure
2. CRM software that can easily change as their people, business and infrastructure change
3. CRM software that limits or eliminates the compromises, consequences or organizational pain typically associated with the deployment, configuration, customization, integration, use and upgrades of CRM software, as well as required changes and ongoing management.

Works the way you work

Enhance desktop productivity

User interface improvements make Microsoft Dynamics CRM 4.0 even easier to use and enables users to complete tasks with fewer clicks, helping them to be more productive and raising job satisfaction.

When end-users have tools that are easy to use, it not only means they can work more efficiently, it helps them be happier with their work. We conducted extensive interviews with Microsoft Dynamics CRM 3.0 customers and used their feedback to improve the user experience in this version.

- Microsoft Dynamics CRM now supports AutoComplete, so that users don't have to type the same information over and over again.
- Fast searching enables users to find information much more rapidly. As a user types a search term, relevant results will begin to appear immediately.
- The Campaigns and Quick Campaigns features now support bulk execution and closure of many campaign activities.
- Mail merge has also been improved, with support for custom attributes, as well as central storage and sharing of mail merge templates. A new mail merge Web interface also provides the bulk of mail merge capabilities over the Web.
- The Navigation Pane in the Microsoft Dynamics CRM 4.0 client is now easily customizable and extensible, enabling organizations to provide users with easy access to functionality that's relevant to their work role.

Empower end-users to create and use reports

Microsoft Dynamics CRM 4.0 makes it easier for end-users to create reports from their CRM data without requiring IT intervention.

Microsoft Dynamics CRM 4.0 reduces barriers to information with a new reporting wizard that provides a user-friendly set of tools for creating reports. This new capability gives people simpler access to information and reduces the pressure on IT to respond to requests for reports.

Users can also create personalized views and filters on reports so they can focus on the information that's relevant to their work and share it with others. For example, an account manager might create a report showing all open opportunities related to a particular customer. Role-based report security helps to ensure that only the right people can access information.

Empower end-users with access to create and use workflows

Microsoft Dynamics CRM 4.0 puts advanced functionality in the hands of end-users with new tools that let them create, find, and use workflows.

Microsoft Dynamics CRM workflow allows companies to automate how they use and manage data. Microsoft Dynamics CRM 4.0 builds on this capability by empowering end-users to create workflows without IT involvement using a new Web-based workflow wizard.

Workflow enables end-users to capture and share best practices. For example, a sales person might perform a several tasks when generating a lead; making an opening call, following up after a period of time, and logging the results. By capturing these tasks in a workflow, this process can easily be shared with other users, enabling the organization to capitalize on the work habits of their best people.

Workflows can easily be shared using team, division, and system workflow libraries so that people can find workflows that are relevant to their work.

See who's online and communicate in real-time

Microsoft Dynamics CRM 4.0 provides inline presence information that shows when co-workers are online, busy, or away from their desk and makes it easy to initiate real-time communication.

In today's highly connected workplace, it is more important than ever that people be able to communicate quickly. For example, members of a virtual team working on a specific task, such as a proposal, may need to share information frequently on short notice. Microsoft Dynamics CRM 4.0 allows users to see who is online and initiate an instant messaging session from within their Microsoft Dynamics CRM user interface.

Expand desktop data visualization capabilities

Microsoft Dynamics CRM enhances Advanced Find by enabling users to create views based on any of their CRM data.

Advanced Find in Microsoft Dynamics CRM 3.0 gave users the ability to create personalized views of entities such as customers, contacts, or accounts. This capability is enhanced in Microsoft Dynamics CRM 4.0, allowing views to utilize fields from any type of entity in the system. This enables users to create incredibly sophisticated composite views of customer data. For example, a sales person could create a view of all satisfied customers, or every customer who purchased a particular product. These views can be shared on a team, division, or system basis, giving everyone better access to information and improving their understanding of the customer.

Help employees share best practices and learn from one another

The new Resource Center provides an online community for people to share information and best practices, and learn about using Microsoft Dynamics CRM.

Users want to get up and running quickly with Microsoft Dynamics CRM without having to search the Web or hunt around for the functionality they need. The new Resource Center provides self-help, documentation, and guidance for Microsoft Dynamics CRM, and enables people to share knowledge with one another. For example, a new Microsoft Dynamics CRM user could go to the Resource Center to request help or find information about a particular capability of the solution. A product support team might use the Resource Center to share support procedures and observations about new products as they become available. Hosting providers can also use the resource center to make easier for their customers to find self-support documentation.

Provide more consistency between online and offline user experience

Microsoft Dynamics CRM 4.0 offers a richer, more consistent offline user experience with offline reporting and customizations, as well as improved synchronization.

With Microsoft Dynamics CRM 3.0, most functionality was only available when a user was connected to the server. With Microsoft Dynamics CRM 4.0, the online and offline user experience are more consistent, helping your workforce be more productive when a connection is not available.

Users can take reports offline, giving mobile employees better access to information. For example, a sales person visiting a customer site could bring a report with them, work with the data, create a customer quote and print it, all without having to access the Microsoft Dynamics CRM server.

Background synchronization of data in Microsoft® Office Outlook® 2007 also makes transitions between online and offline work easier and lets users work with data even if they're disconnected.

Make it easier to use e-mail tracking

E-mail tracking has been improved in Microsoft Dynamics CRM 4.0 to provide a seamless user experience with greater flexibility.

E-mail tracking in Microsoft Dynamics CRM 3.0 enables users to track e-mails related to their customers, accounts, contacts. For example, a salesperson may wish to track responses to customer e-mails related to a particular sales campaign. This feature has been enhanced in Microsoft Dynamics CRM 4.0 to provide easier and more flexible tracking options, including automatic tracking and bulk selection of e-mails for tracking.

E-mail tracking no longer requires a tracking token. Instead, e-mails can be tracked based on a variety of criteria, including subject, sender, and recipient. Users can customize these settings to match their needs so that important e-mails are tracked automatically. This enables them to be more efficient in their work and gain better visibility into customer interactions.

Provide enhanced integration with Microsoft Office

Integration with Microsoft Office has been improved in Microsoft Dynamics CRM 4.0, giving users new ways to take advantage of their Office applications.

Microsoft Dynamics CRM 4.0 users will have a richer data experience in Microsoft® Office® Excel. When a user exports and works with Microsoft Dynamics CRM data in Excel, they have the option of re-importing any changes they made back into Microsoft Dynamics CRM. This makes it easier for users to enrich their data using the tools offered by Microsoft Office Excel.

Users of Microsoft® Office® OneNote® can also now take notes created in OneNote and assign them to Microsoft Dynamics CRM users with a single click.

Customer requests

Communication with our customers is very important to us, and we take customer requests seriously. Microsoft Dynamics CRM 4.0 addresses a large percentage of the feature and capability requests submitted by customers since the release of Microsoft Dynamics CRM 3.0.

Works the way your business works

Choose from flexible licensing options that match your business

Microsoft Dynamics CRM 4.0 introduces new options that let you match your licensing agreement with your buying criteria and deployment preferences.

Every business has different needs and different ways of using CRM. Since the release of Microsoft Dynamics CRM 3.0, we've enhanced our licensing model better match how different companies use Microsoft Dynamics CRM.

The new device CAL allows organizations to license Microsoft Dynamics CRM on a per-device basis rather than a per-user basis. This can help organizations save money in scenarios, such as call centers, where multiple users access Microsoft Dynamics CRM using the same device.

Many organizations have users who require access to Microsoft Dynamics CRM data but don't need the full functionality of the solution. For example, analysts may need to use CRM data to make sales projections, even though they don't usually work inside the Microsoft Dynamics CRM system. The new limited use CAL gives these workers read-only access to Microsoft Dynamics CRM data at a reduced price, enabling organizations to make better use of Microsoft Dynamics CRM while reducing costs.

Many companies are gaining additional value from their Microsoft Dynamics CRM data by making that data available to external systems. For example, an organization might want to expose select data on an external partner, customer, or distributor portal. In order to make it easier for companies to do this, the price of the external connector license has been reduced for Microsoft Dynamics CRM 4.0.

Import and migrate data with greater intelligence

Microsoft Dynamics CRM 4.0 includes improved data import and migration capabilities, so that your organization can work with data more efficiently.

When data is imported into the CRM system, either by an end-user or a system administrator, it is critical that it be stored in a way that matches the businesses' needs. For example, if customer contacts are lacking important fields, or if data fields are incorrectly matched, it can make it hard to find the information again later.

The new Data Migration Wizard and monitor provides a full-featured migration and import solution that is easy to use so that data can be imported more efficiently and accurately. The system includes built-in data maps for many common scenarios, including migration from 3rd party products. Bulk delete capability makes it easier to perform maintenance and cleanup actions by deleting multiple entities at once. With new performance enhancements, data imports can run as much as four times faster in Microsoft Dynamics CRM 4.0.

Enhanced end-user tools also make it easier for people to import small sets of data into Microsoft Dynamics CRM. Real-time duplicate detection helps eliminate redundant data during imports. Users may build and re-use data maps for common import tasks. For example, a sales person importing multiple new contacts from a trade show visit might create a reusable map to help with this task. Smart mapping helps reduce user error by predicting which data fields to match to data. Users can also test an import, review it, and cancel it if they find errors.

Help preserve the quality and integrity of data

Microsoft Dynamics CRM 4.0 helps ensure the quality of your data by providing duplicate detection when adding data to the system or during a regular maintenance cycle.

When the quality of CRM data is low, this has a direct adverse effect on the quality of the work that can be accomplished using that data. For example, when a sales person creates a mail campaign, any customer with duplicate records in the database could receive multiple mailings. Duplicate detection helps to maintain and improve the quality of data in Microsoft Dynamics CRM 4.0 by making it easier to identify and resolve duplicate records.

With real-time duplicate detection, an alert is generated when a user enters duplicate data into the system. For example, a sales person might import multiple new contacts, some of which are duplicates. During the import, an alert is raised, allowing the salesperson to remove or merge the duplicate records. A simple, wizard-based tool makes it easy for users to detect and resolve duplicates in their CRM data.

Microsoft Dynamics CRM 4.0 also includes duplicate detection during bulk imports, making it easier for administrators to maintain the quality of data.

Each organization is likely to have its own policy and procedure for detecting and resolving duplicates. Microsoft Dynamics CRM 4.0 provides administrative control over duplicate detection, allowing an organization to decide what qualifies as a duplicate record and how to treat it.

Support multinational deployments

The Microsoft Dynamics CRM 4.0 client provides improved support for multiple languages and currencies, making multinational deployments for Microsoft Dynamics CRM much easier.

Microsoft Dynamics CRM 4.0 supports multi-language deployments, so users can work and share data in seamlessly the language of their choice. Users can also create and store reports in their native language. Reports can also easily be shared between users working in multiple languages.

Microsoft Dynamics CRM 4.0 also allows transactions to be recorded in localized currencies. The CRM system maintains a list of international exchange rates and automatically converts currency amounts to a base currency for reporting purposes.

Connect line of business applications using workflow

Workflow platform enhancements make it easier to share data between Microsoft Dynamics CRM and other systems and line of business applications.

Microsoft Dynamics CRM 4.0 workflow enables organizations to proactively manage data and automate business processes. For example, workflow can be used to automatically provision new sales leads based on criteria such as territory or opportunity size. This makes business processes more predictable, improves efficiency, and helps remove errors resulting from manual processes.

Microsoft Dynamics CRM 4.0 adds support for the Windows Workflow Foundation (WWF), providing a single standard for workflows across systems. For example, the creation of a customer quote document in a Microsoft[®] Office SharePoint[®] Server document library could launch a workflow that executes actions in Microsoft Dynamics CRM. This helps businesses put their enterprise data to work more quickly and consistently.

Support a wide range of business relationships out of the box

Microsoft Dynamics CRM 4.0 makes relationships between entities more flexible, providing out of the box support for a wider range of business scenarios.

Microsoft Dynamics CRM 3.0 customers requested the ability to model more complex business relationships easily. For example, a manufacturing company might have to support customers who buy multiple products through different resellers. Previously, this kind of relationship required some custom configuration.

Microsoft Dynamics CRM 4.0 provides support for many-to-many relationships as well as relationships between system entities and self-referential relationships. This makes it easier for organizations to configure Microsoft Dynamics CRM in a way that matches their business.

Create applications that take advantage of rich offline functionality

A new offline Software Developer Kit (SDK) enables developers to create applications with rich offline functionality.

In order to create Microsoft Dynamics CRM applications that can take advantage of offline functionality, developers need to be able to connect and disconnect the client and server during the development process. The new offline SDK for Microsoft Dynamics CRM 4.0 functions in both online and offline environments. The SDK supports data synchronization to ensure data integrity when switching between online and offline states. This enables developers to create applications that take full advantage of offline data access.

Support a wide range of e-mail platforms

Microsoft Dynamics CRM 4.0 allows organizations to choose from a wide range of e-mail platforms.

In Microsoft Dynamics CRM 4.0, the e-mail router supports POP3 e-mail stores as well as Microsoft[®] Exchange Server, giving administrators and users greater choice of e-mail technologies. Microsoft Dynamics CRM 4.0 also provides full support for Microsoft[®] Exchange Server 2007.

Works the way technology should work

Preserve your customization investment when you upgrade

Microsoft Dynamics CRM 4.0 preserves your investment in technology by providing forward compatibility for virtually all configurations and customizations.

Traditionally, upgrades to line of business applications have been difficult and painful, often requiring customizations to be discarded or converted, possibly at considerable cost. In Microsoft Dynamics CRM 4.0, the configuration and customization model is forward compatible from the previous version. This allows a seamless upgrade, including migration of custom workflows, reports, data schemas, and other customizations. All editions of Microsoft Dynamics CRM 3.0 can be upgraded using a simple wizard-based setup process, reducing the time and costs associated with the upgrade.

Deploy in a way that matches your business needs

Microsoft Dynamics CRM 4.0 supports multiple deployment scenarios giving IT departments more flexibility in how they manage the product.

Deploying line of business applications can require significant investment of IT resources. Microsoft Dynamics CRM provides flexible deployment options to help IT reduce the cost and complexity of deployment.

Microsoft Dynamics CRM 4.0 deployment can be automated and managed using Microsoft Systems Management Server or Microsoft System Center Configuration Manager 2007. Microsoft Dynamics CRM 4.0 also supports Microsoft Terminal Services installation with roaming profiles.

The Microsoft Dynamics CRM 4.0 client is also self-healing, and can automatically download and apply the latest patches and updates, making client deployments easier to maintain. The client can also be deployed concurrently with all updates, removing the need to spend time patching the client immediately after deployment.

Provide flexible hosting scenarios with multi-tenant installations

Microsoft Dynamics CRM 4.0 employs a multi-tenant architecture, allowing an organization to run multiple distinct instances of Microsoft Dynamics CRM on a single server.

Many CRM scenarios require an organization to support multiple groups of CRM users while keeping their data distinct. For example, a hosting company may have multiple customers using Microsoft Dynamics CRM, or a company with an affiliate model might require each affiliate to keep their data separate from the others. In the past, a separate server installation of CRM was required for each customer.

Microsoft Dynamics CRM 4.0 supports multiple instances of the product installed on the same physical hardware, allowing multiple customers to have their own Microsoft Dynamics CRM implementations. This not only makes it easier to manage those customers, it makes better use of server hardware, further reducing the cost of supporting Microsoft Dynamics CRM.

Provide access to Microsoft Dynamics CRM over the Internet without a VPN connection

Microsoft Dynamics CRM 4.0 allows mobile or travelling users access to the CRM system using the Microsoft Office Outlook client over the Internet without requiring a Virtual Private Network (VPN) connection.

The revolution in portable computing has created new challenges to IT departments seeking to give mobile users more secure access to resources. The new Internet Facing Deployment capability in Microsoft Dynamics CRM 4.0 makes it easier for organizations to configure on-premise servers to be accessed over the Internet, reducing the burden on IT. Users can now access Microsoft Dynamics CRM using their Outlook client over hypertext transfer protocol (HTTP) using Sockets Layer (SSL) from home or while travelling without requiring a VPN connection.

Streamline creation and configuration of new users

User management has been streamlined in Microsoft Dynamics CRM 4.0, making it easier to add users in bulk.

The process of adding users to Microsoft Dynamics CRM can involve a number of steps for each user. Microsoft Dynamics CRM 4.0 streamlines the process for adding users with bulk automation of tasks such as importing user information from the Microsoft Active Directory® directory service, setting user roles, and assigning licenses.

Gain better visibility into CRM administration and processes

Microsoft Dynamics CRM 4.0 gives administrators superior visibility into the functioning of system and workflow processes as well as new diagnostic tools for Microsoft Office Outlook.

Some Microsoft Dynamics CRM tasks require longer processing and time to execute than others. Customers requested better monitoring of these processes so they could gain greater visibility into the ongoing performance of Microsoft Dynamics CRM.

Microsoft Dynamics CRM 4.0 adds process status viewers that allow administrators to monitor the functioning of asynchronous processes; including data imports, workflows, and duplicate checking.

New Outlook diagnostics also make it easier to troubleshoot end-user problems. An administrator can view information about the functioning of the Microsoft Dynamics CRM client, including network connectivity, connection quality, user role, credentials, and synchronization status.

Provide improved performance, scalability, and availability

Line of business applications must be able to support business requirements without downtime or loss of data. When mission-critical applications go down, the impact can be significant and may include missed opportunities, dissatisfied customers, and lost employee productivity.

Microsoft Dynamics CRM 4.0 further enhances the performance, scalability, and availability of the product with new and improved technologies:

- Microsoft Dynamics CRM 4.0 supports clustering of all solution components, including Microsoft Exchange Server, the CRM Web Service, and load balancing.
- The Microsoft Dynamics CRM 4.0 e-mail router has received several performance and scalability enhancements, including parallel processing of inboxes and better support for enterprise deployment scenarios.
- Microsoft Dynamics CRM 4.0 has also been tuned to provide better performance in Wide Area Network (WAN) environments, transferring only the data that needs to be transferred over slow connections.
- With support for SQL mirroring, an additional copy of the Microsoft Dynamics CRM database is maintained, so that in case of database failure, the Microsoft Dynamics CRM system can switch databases automatically with minimal disruption.

- In Microsoft Dynamics CRM 4.0, bulk transactions and other long running tasks can be executed asynchronously to minimize their impact on other processes.