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 make it easier for you to get your work done in CRM.

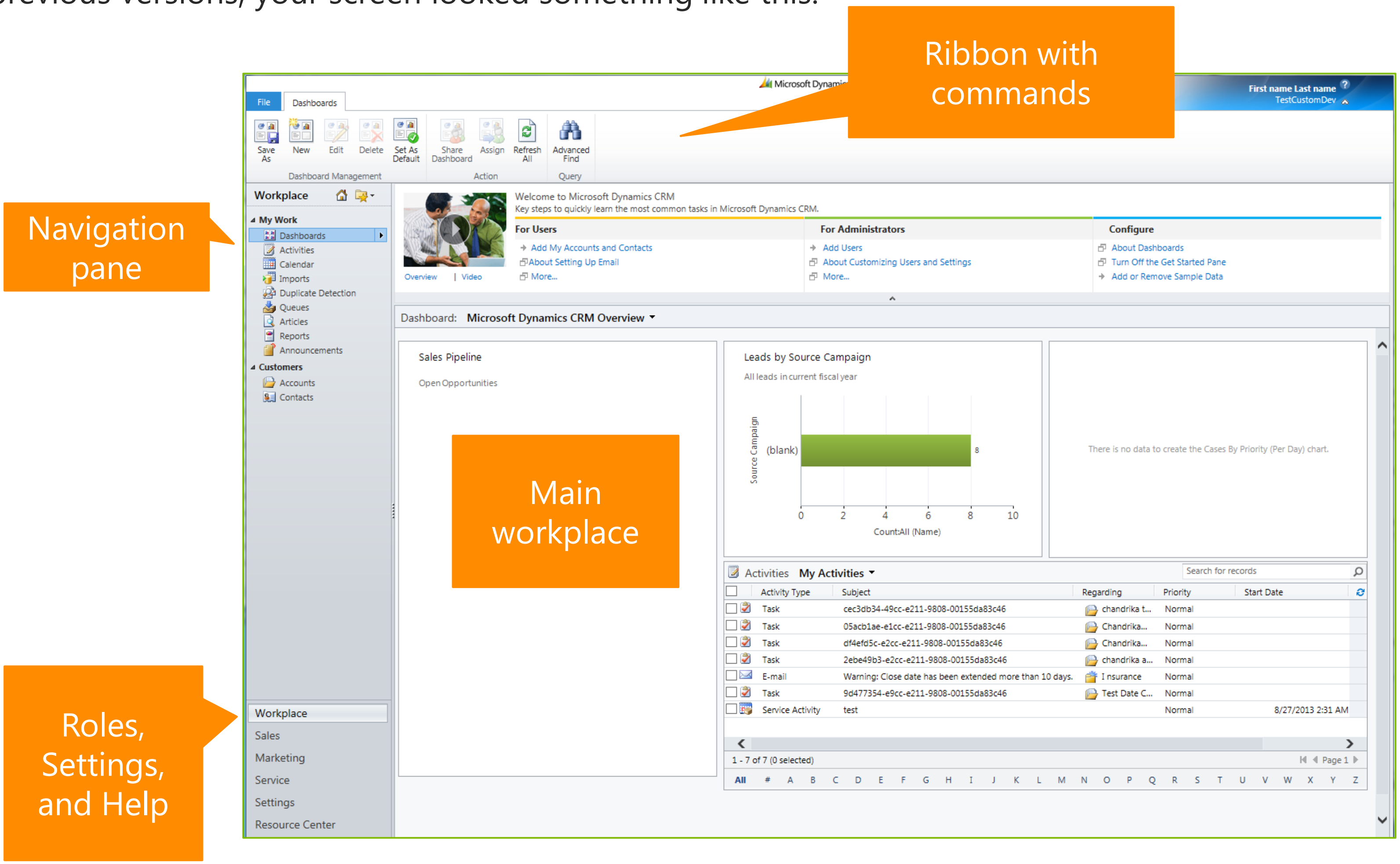
We think you'll like them!

Here are some highlights to help users who are familiar with previous versions get up and running quickly …

Applies to: Microsoft Dynamics CRM 2013 & Microsoft Dynamics CRM Online Fall '13

goodbye, navigation pane…

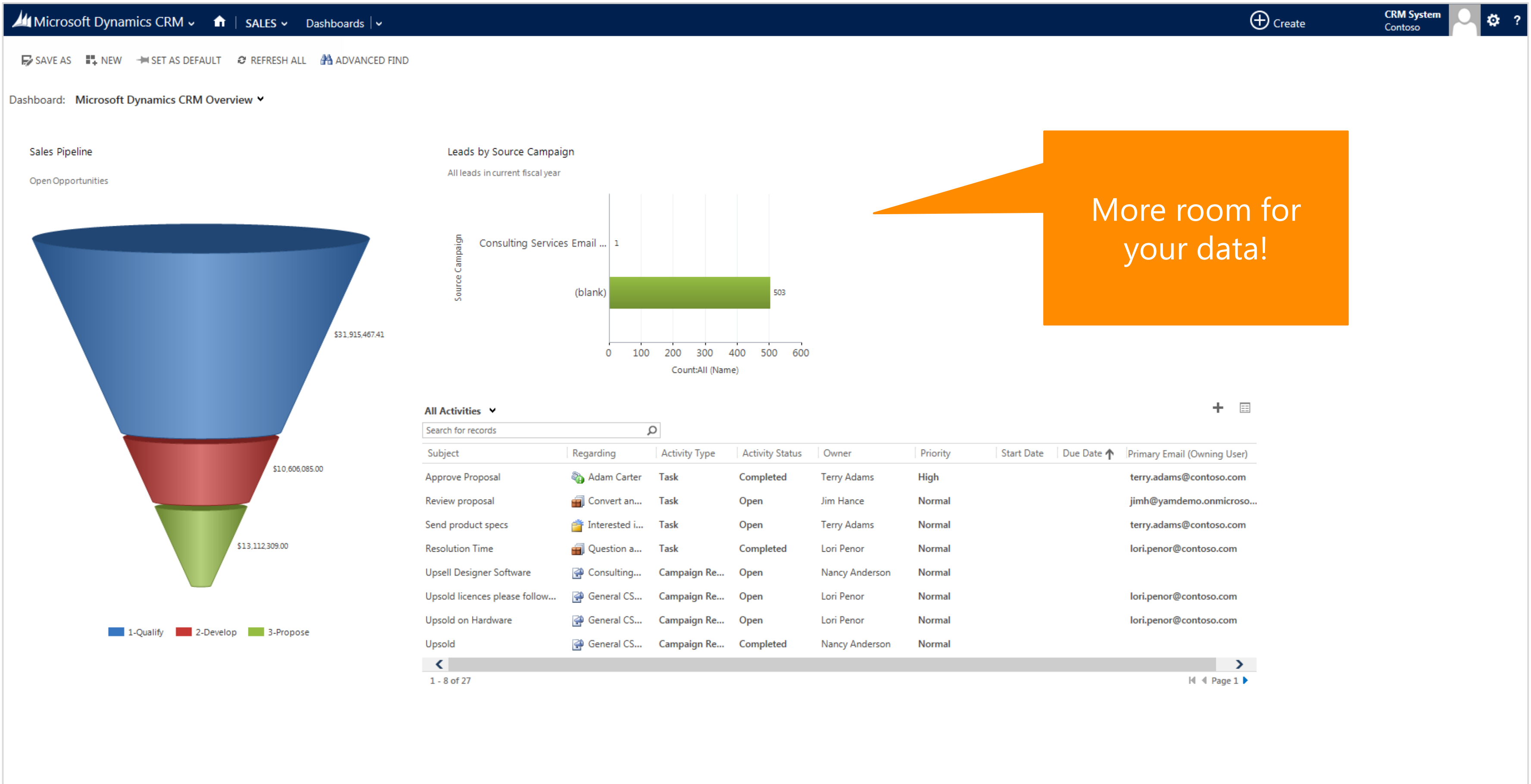
In previous versions, your screen looked something like this:



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

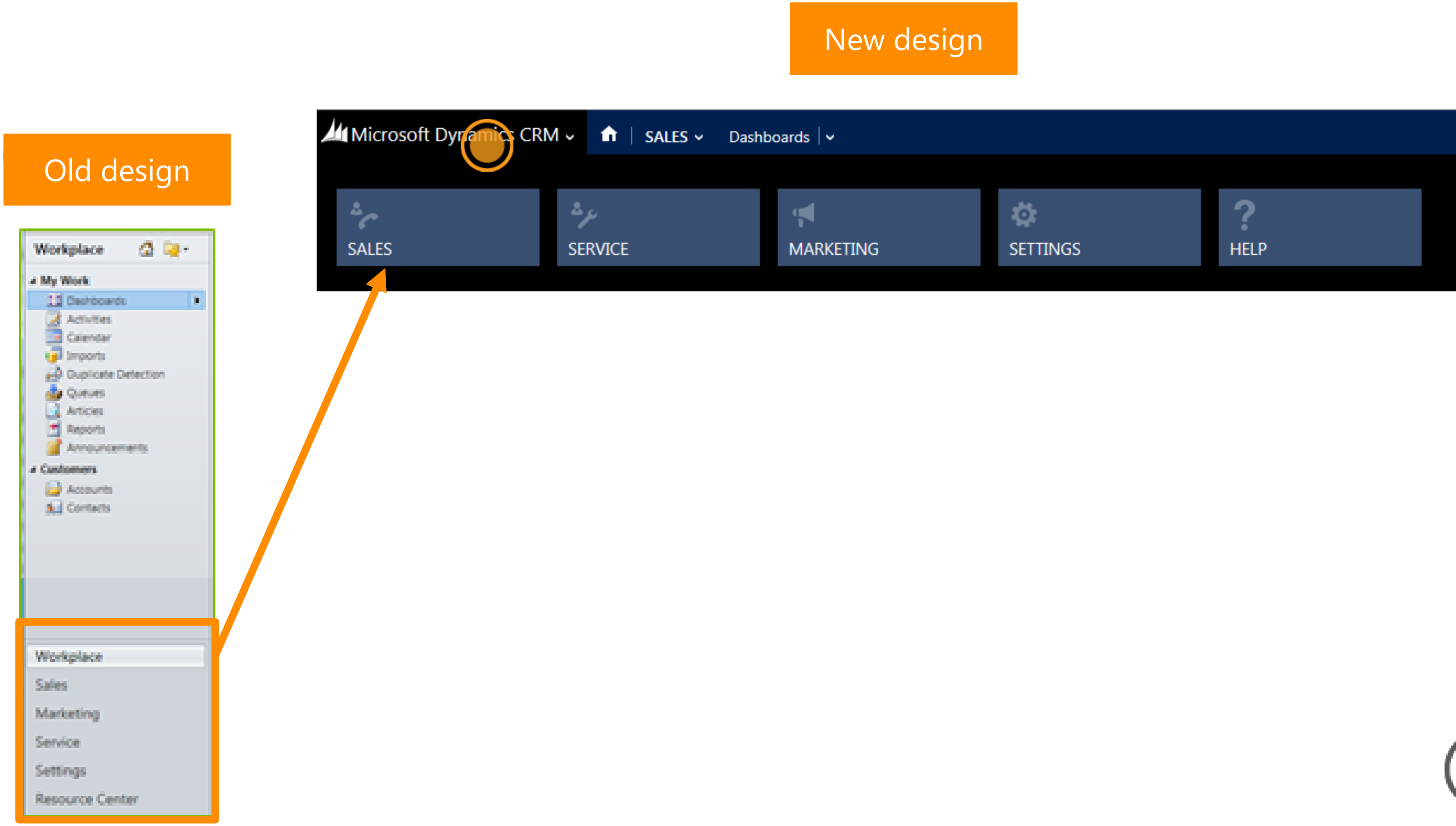
hello, customer data!

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.



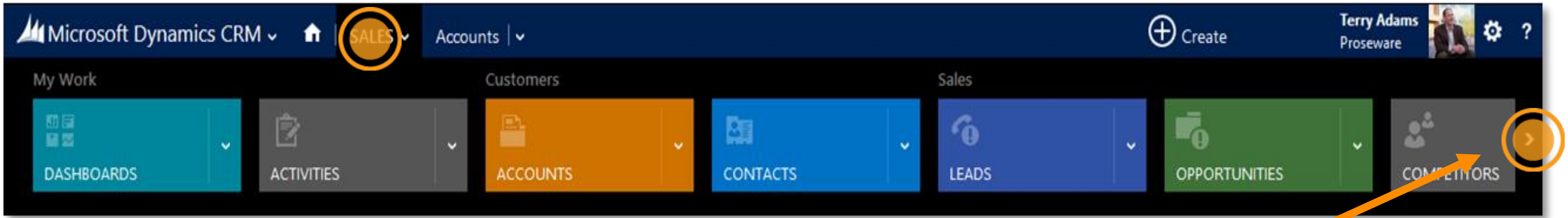
find work areas under the logo

Work area dashboards have moved under the Microsoft Dynamics CRM logo. Each work area gives you access to tools and info tailored for you, so you aren't distracted by things you don't need. Click or tap the logo any time to switch to a different work area.



find the different record types

You can quickly get to different record types—accounts, contacts, leads, opportunities, and so on. On the nav bar, click or tap a work area to see tiles for the record types you work with most often.

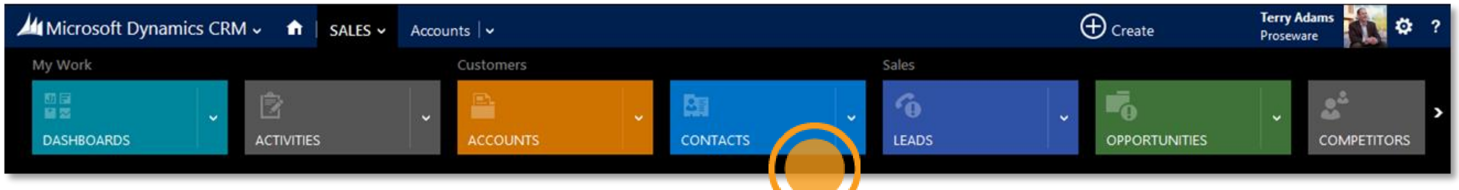


TIP

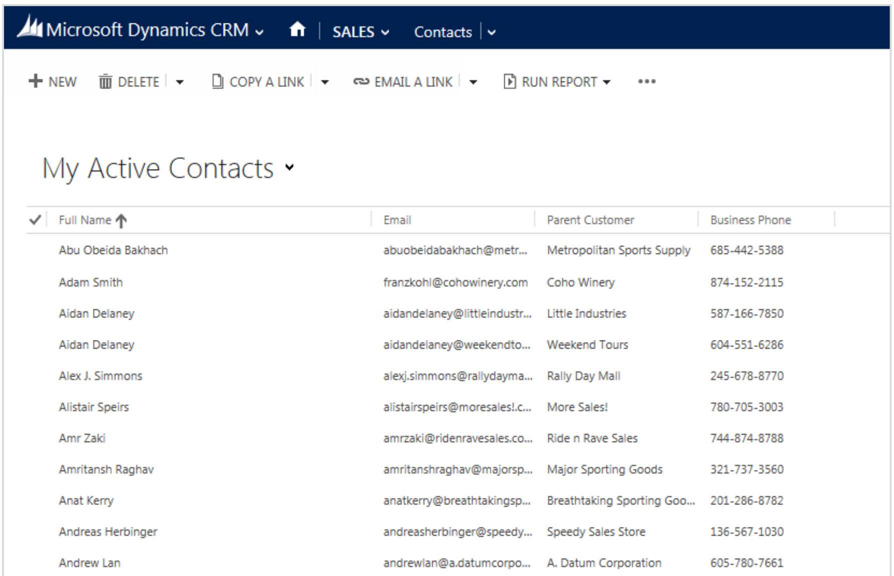
Click or tap this arrow to scroll right and see more tiles. Or point your mouse anywhere on the row of tiles, and use your mouse wheel to scroll.

find your records

1 On the nav bar, click or tap your work area,



2 and then click or tap the tile for the record type.

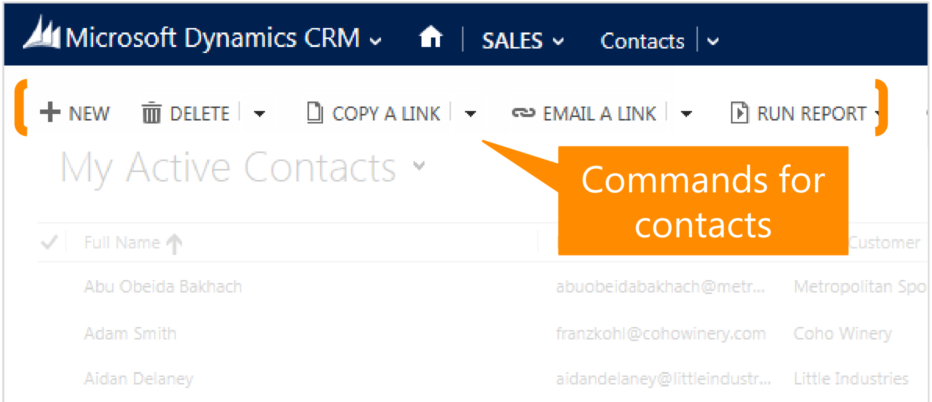


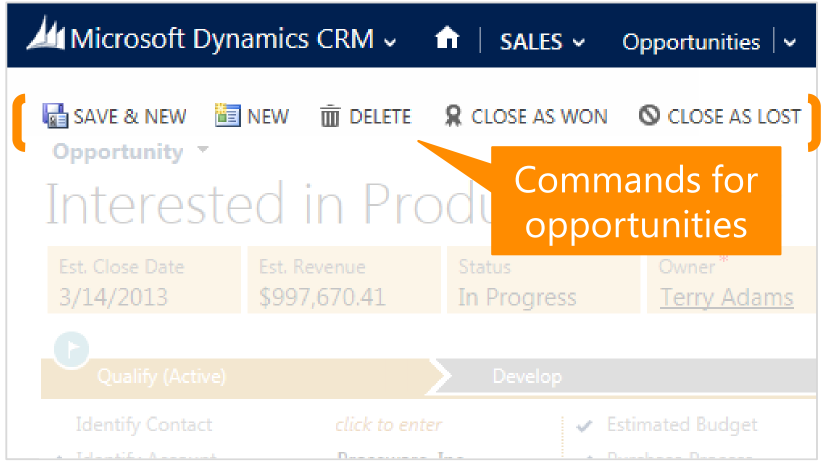
3 You'll see a list of records.

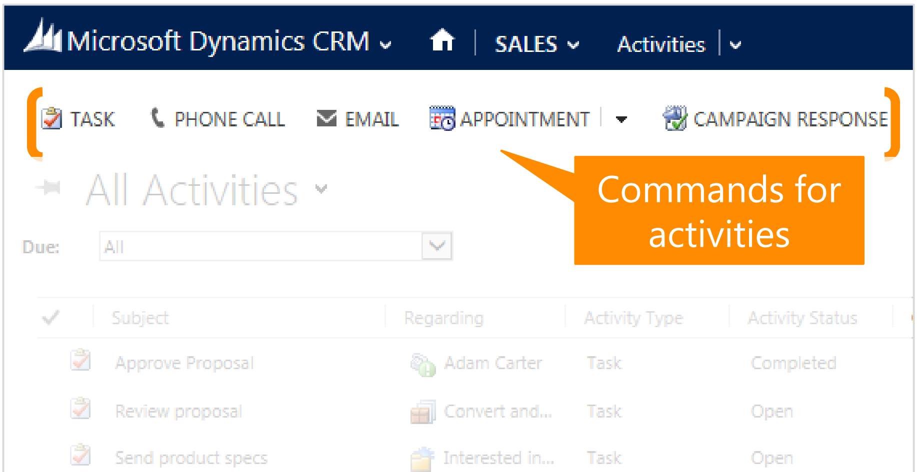
TIP This example shows how to find contacts, but these steps work for any record type—like leads or accounts. Give it a try!

find commands where you're working

No more ribbon. Instead, at the top of the screen, you'll see the commands related to what you're working on.



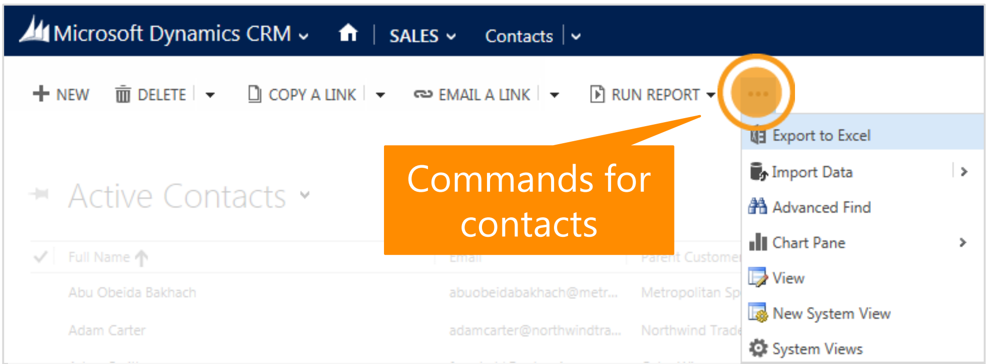


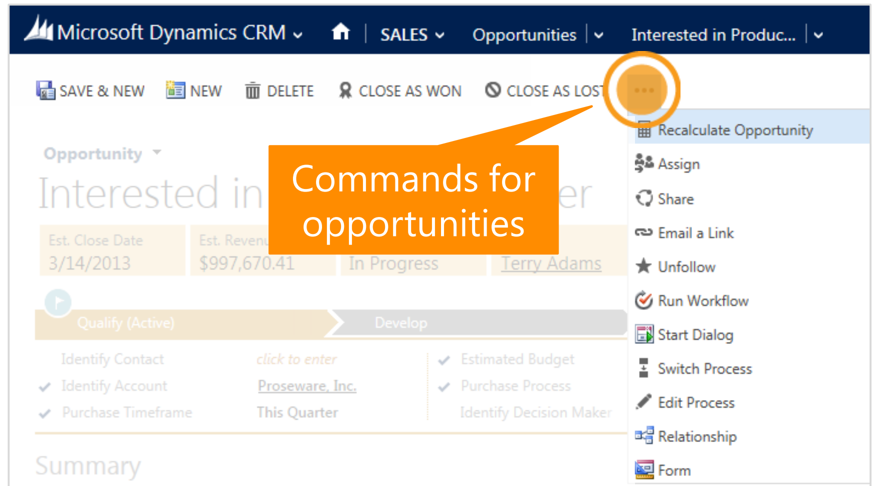


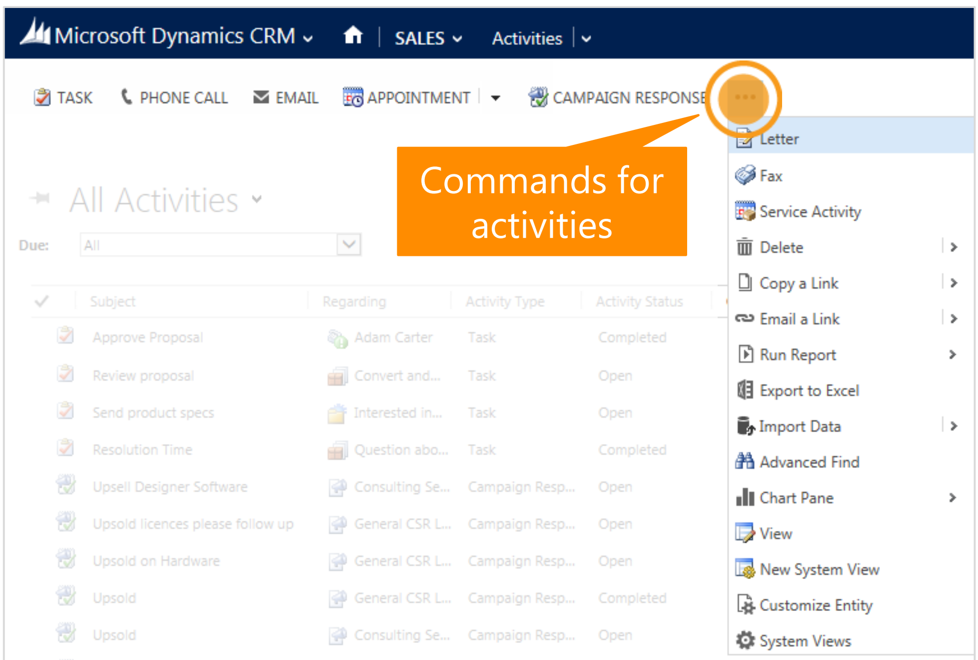
... and so on!

check what's under More commands ...

Don't see the command you want? On most screens, just click or tap **More commands** (...) to see what else is available.



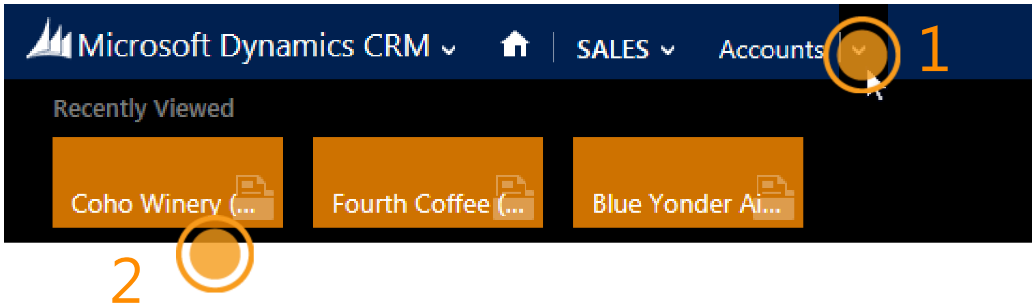




... and so on!

pick up where you left off

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

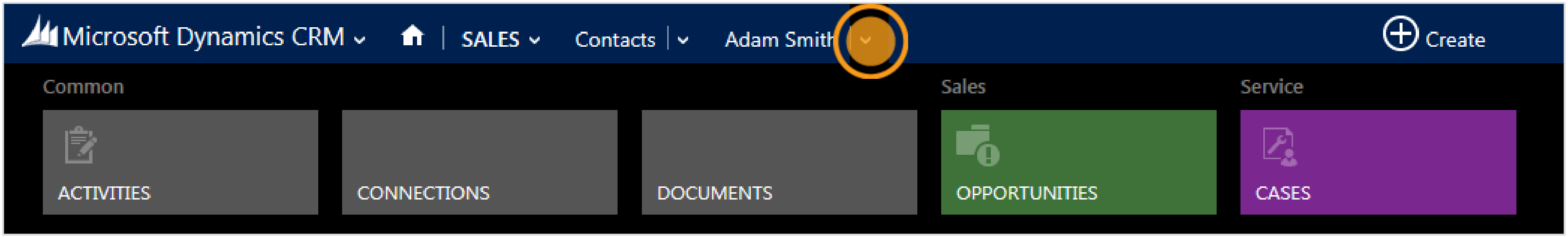


On the nav bar, next to the name of the record type, click or tap .

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

quickly navigate to other related info

To get to other info related to the record you're viewing, on the nav bar, click or tap the arrow next to the name.



TIP

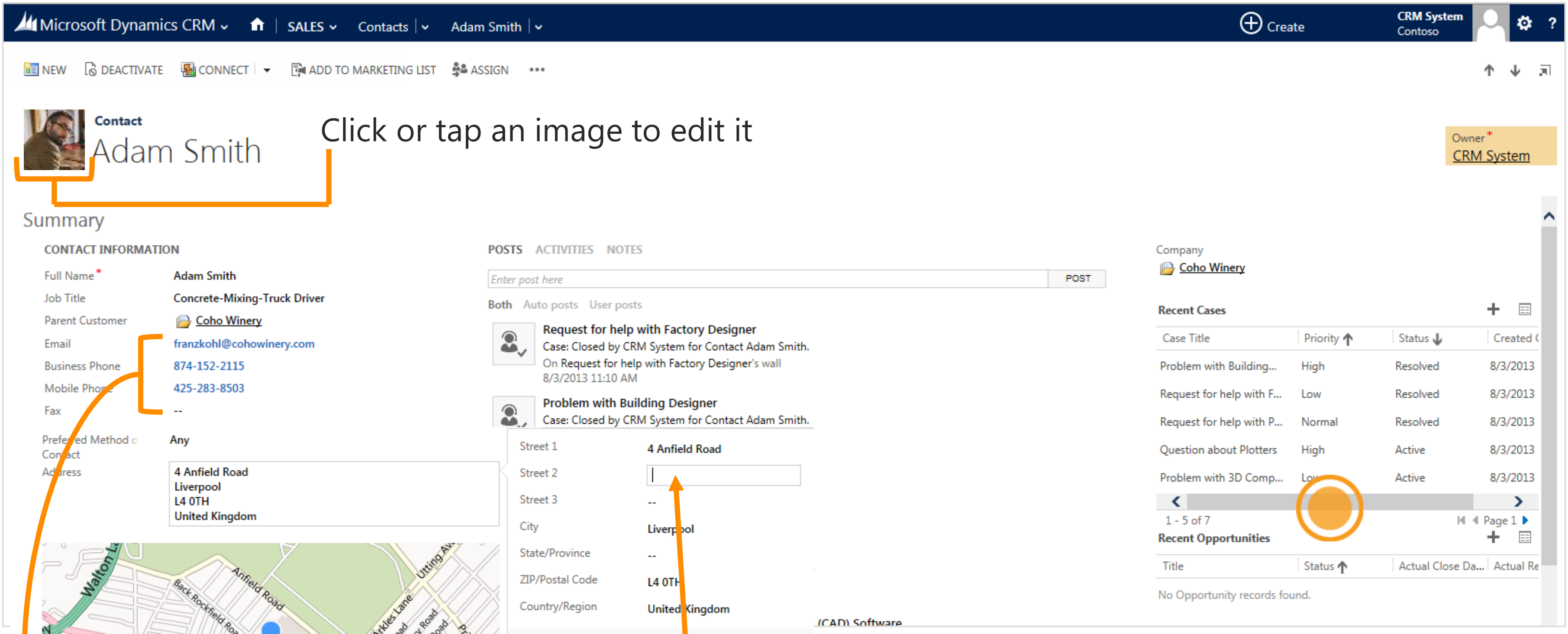
This example shows how to get to related info for a contact, but this works for any record type—like leads or accounts. Give it a try!

enter data in new ways

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

edit info inline

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



Click or tap an image to edit it

Click or tap a phone number to call via Skype or Lync.

Click or tap an email address to send a message.

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

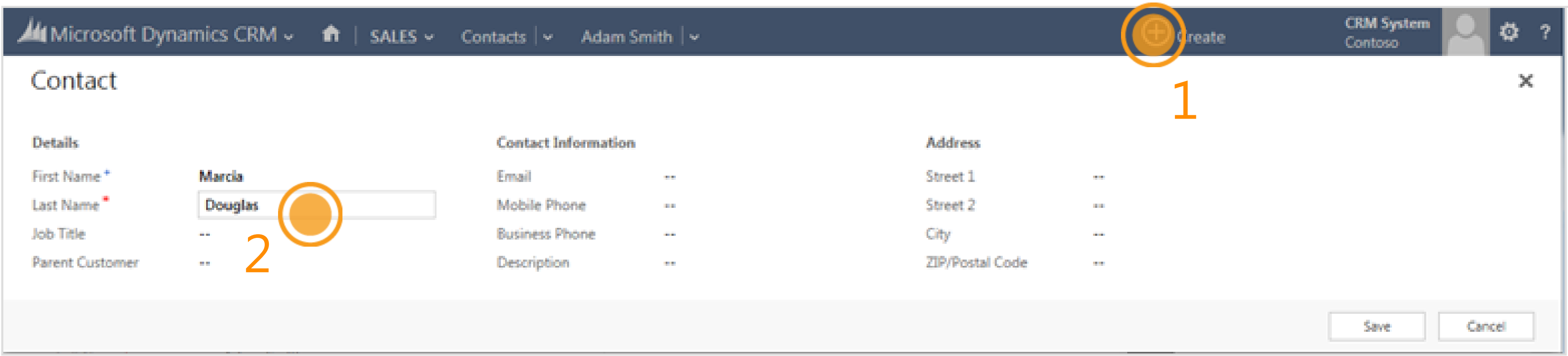
Have a lot going on?

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

quickly create new records

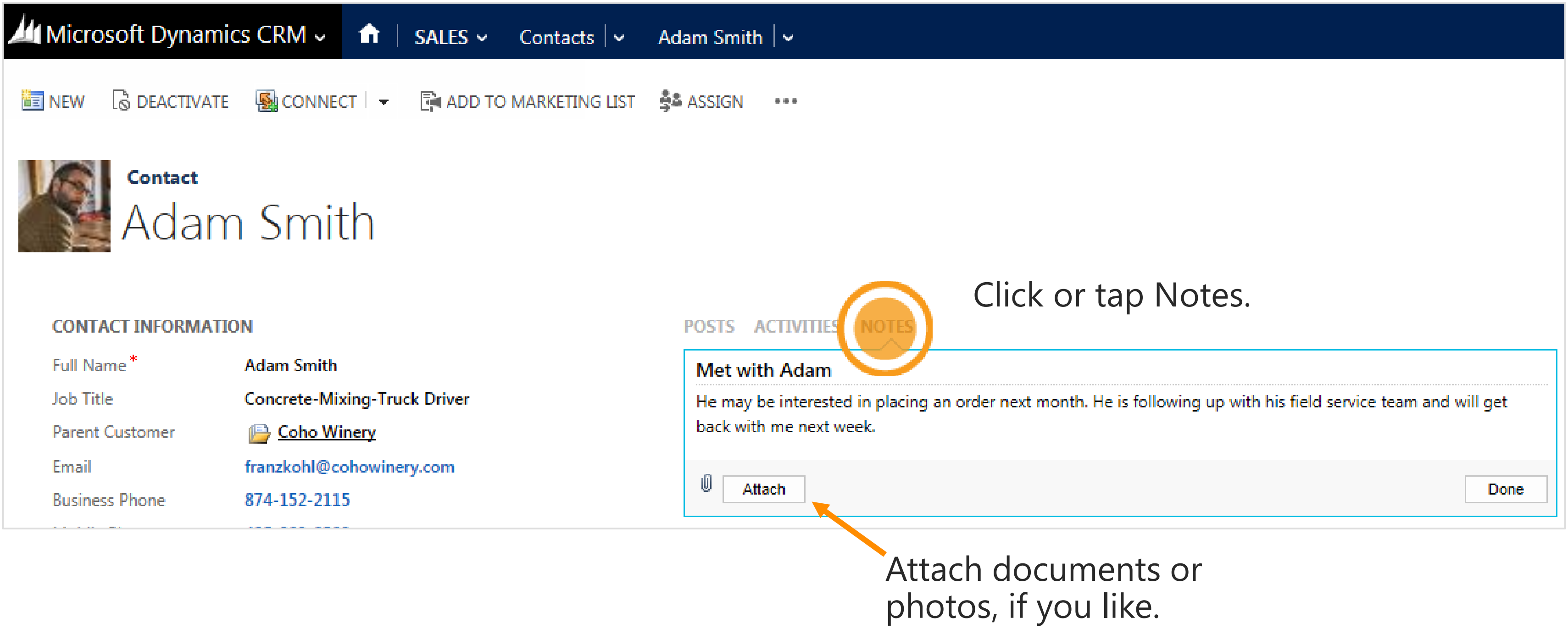
Now, you can quickly capture key data points when you enter new records.

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.



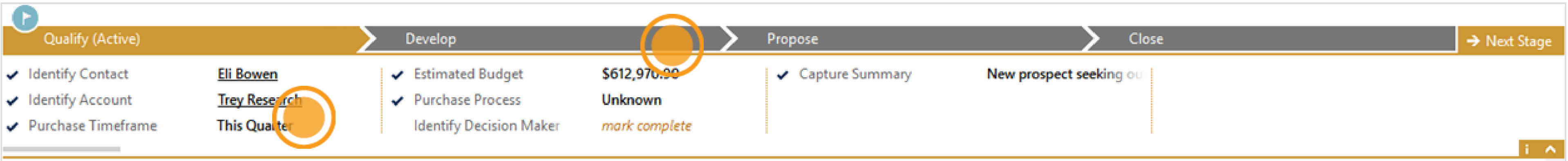
add notes

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



follow guided business processes

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

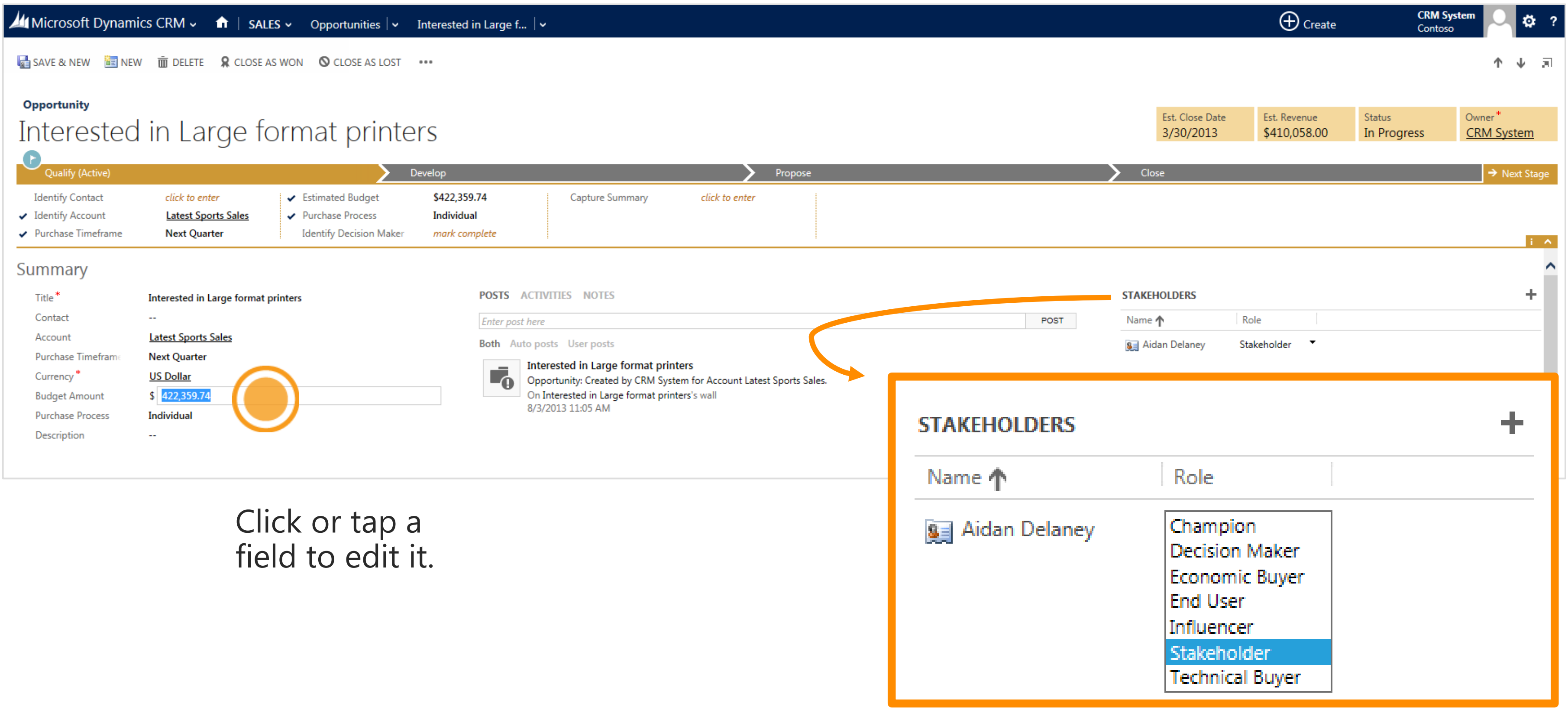


1 Click or tap to enter data.

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

track key decision makers for your deals

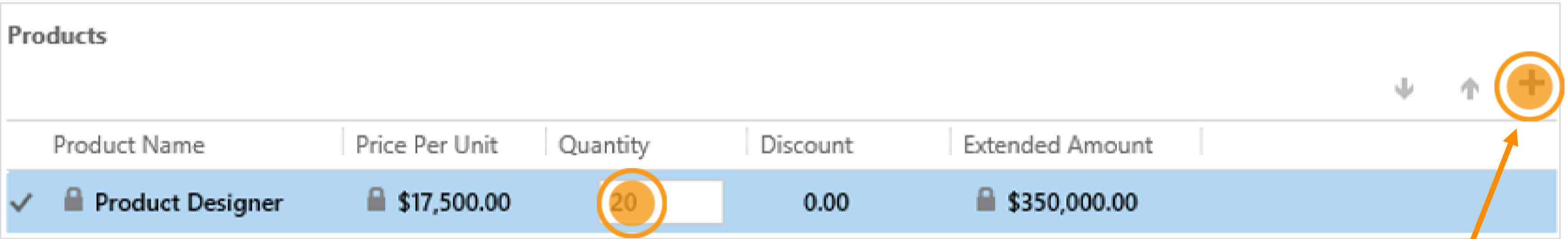
Inline editing makes it quick and easy to keep data current. Lookup lists help you identify key players and the parts they play in your opportunities.



Click or tap a field to edit it.

add or edit product line items inline

You can edit product fields on the screen where you're working. Easily enter details like price, quantity, and discount.



TIP
Click or tap here to add a product.

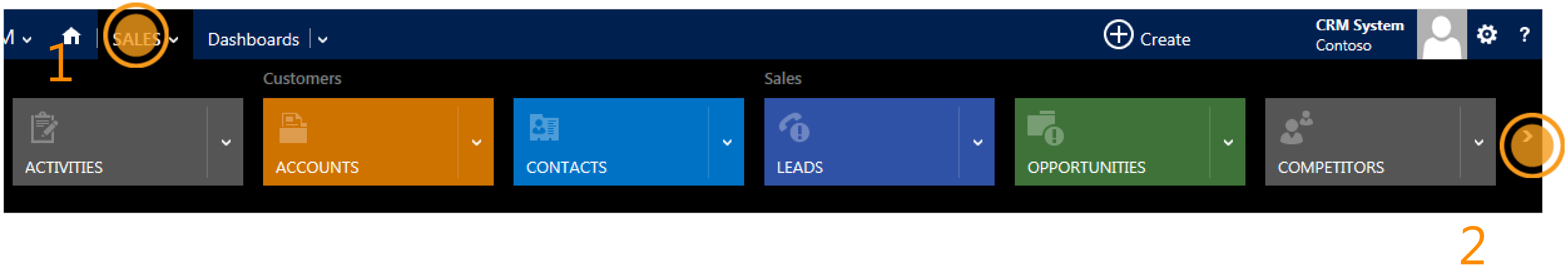
records are saved automatically

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

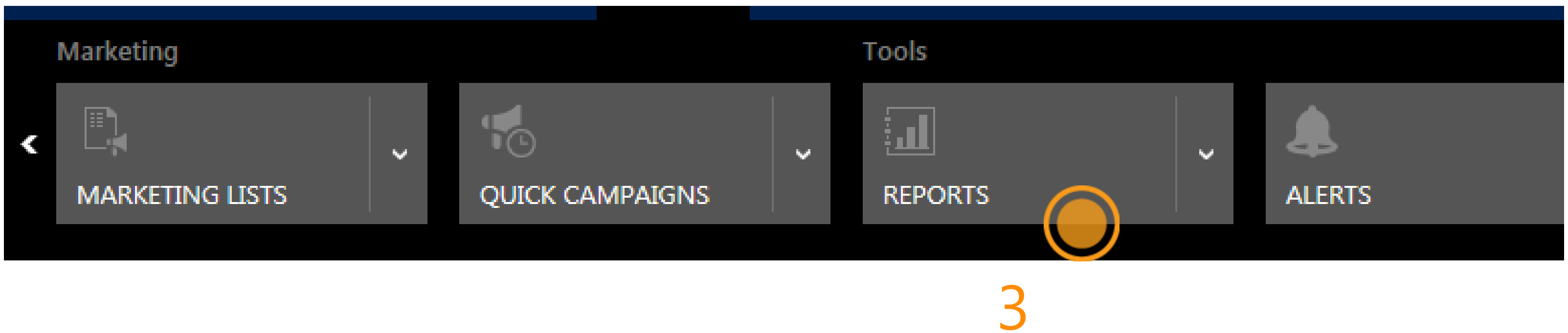
NOTE
You still need to click or tap **Save** when you create a new record. Auto-save applies only to records that you've changed.

looking for your reports?

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**.

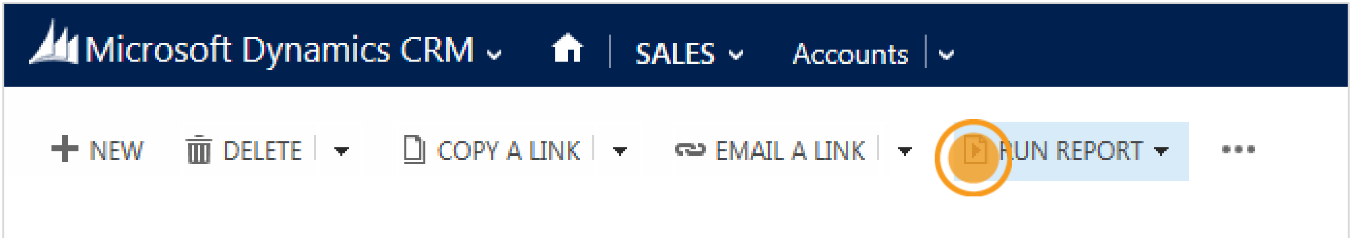


TIP
Point your mouse anywhere on the row of tiles, and use your mouse wheel to scroll.



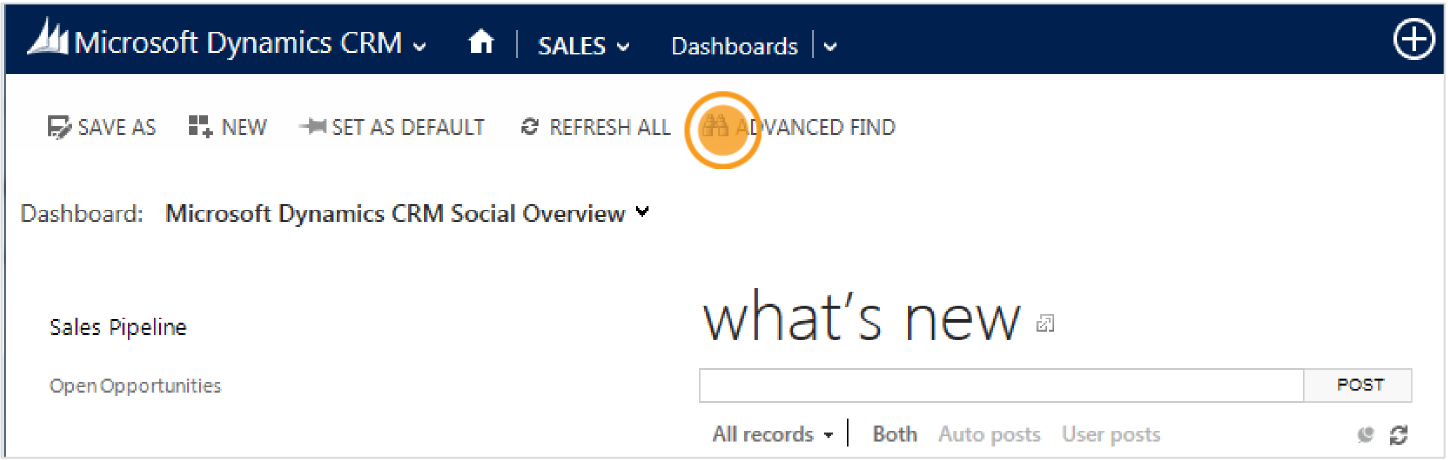
find the Run Reports command

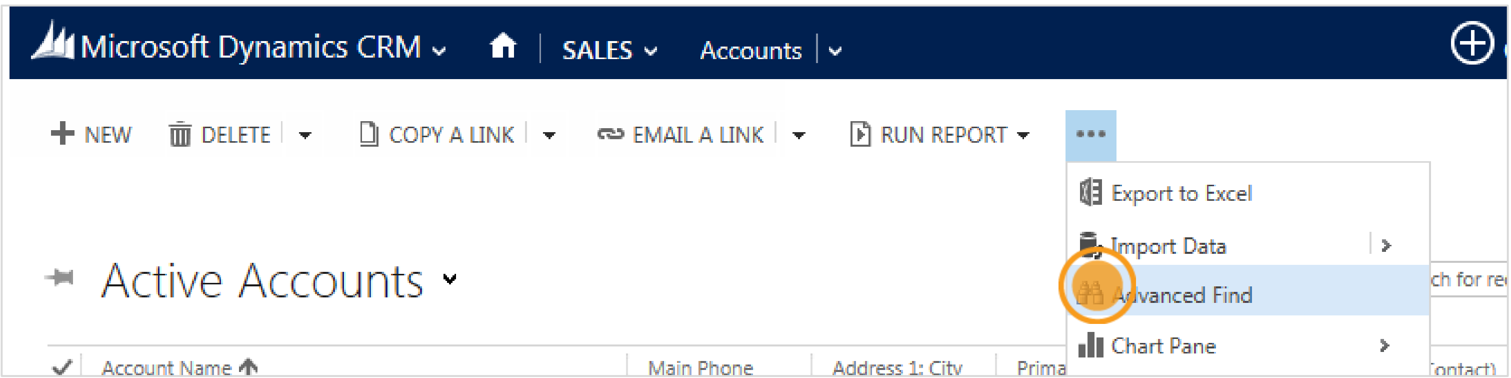
Or, you can run reports from the command bar when you're working on records.



locate the Advanced Find command

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





You'll also find it under **More commands** (…) when you're working on records.

We hope you enjoy
the new user interface!

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We'd love to know what you think.

Customer Center

Version 6.0.0

Microsoft