

# 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 ...



# goodbye, navigation pane...

In previous versions, your screen looked something like this:

The screenshot shows the Microsoft Dynamics CRM interface. At the top is a ribbon with various command groups like 'Dashboard Management', 'Action', and 'Query'. On the left is a navigation pane with categories like 'My Work' and 'Customers'. The main area contains a dashboard with charts and a table of activities.

**Navigation pane**

**Ribbon with commands**

**Main workplace**

**Roles, Settings, and Help**

Activity Type	Subject	Regarding	Priority	Start Date
Task	cec3db34-49cc-e211-9808-00155da83c46	chandrika L...	Normal	
Task	05acbf1ae-e1cc-e211-9808-00155da83c46	Chandrika...	Normal	
Task	d44ef05c-e2cc-e211-9808-00155da83c46	Chandrika...	Normal	
Task	2ebe49b3-e2cc-e211-9808-00155da83c46	chandrika a...	Normal	
E-mail	Warning: Close date has been extended more than 10 days.			
Task	9d477354-e9cc-e211-9808-00155da83c46	Test Date C...	Normal	
Service Activity	test		Normal	8/27/2013 2:31 AM

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.

The screenshot displays the Microsoft Dynamics CRM interface with the following components:

- Navigation:** Top bar with 'Microsoft Dynamics CRM', 'SALES', and 'Dashboards' menus. Right side includes 'Create', 'CRM System Contoso', and user profile icons.
- Dashboard:** 'Microsoft Dynamics CRM Overview' with sub-sections for 'Sales Pipeline' and 'Leads by Source Campaign'.
- Sales Pipeline:** A funnel chart showing three stages: 1-Qualify (\$31,915,467.41), 2-Develop (\$10,606,085.00), and 3-Propose (\$13,112,309.00).
- Leads by Source Campaign:** A horizontal bar chart showing 'Consulting Services Email ...' with 1 lead and '(blank)' with 503 leads.
- All Activities:** A table listing activities with columns for Subject, Regarding, Activity Type, Activity Status, Owner, Priority, Start Date, Due Date, and Primary Email.

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			

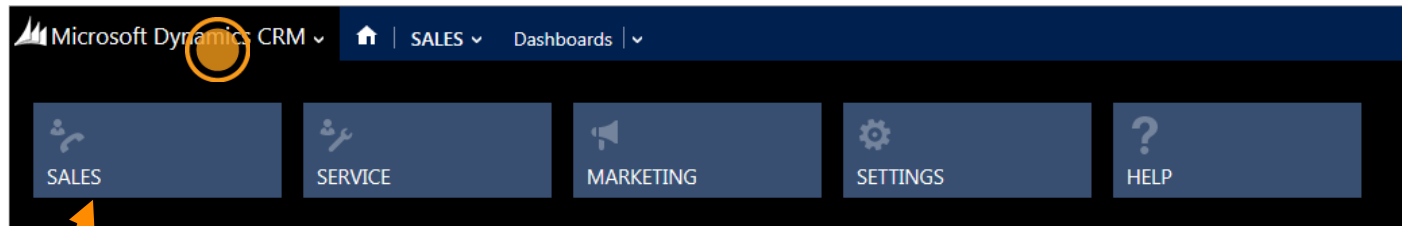
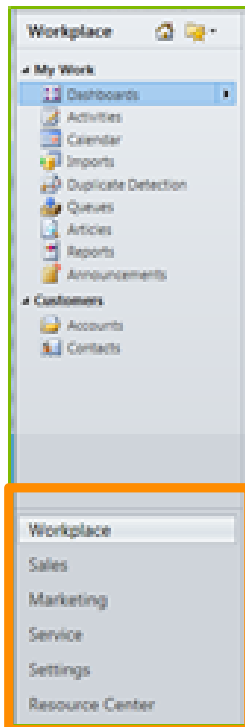


# find work areas under the logo

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.

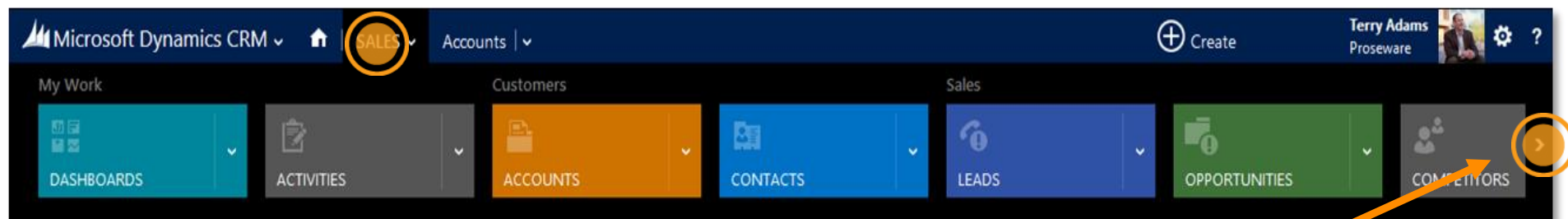
New design

Old design



# 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

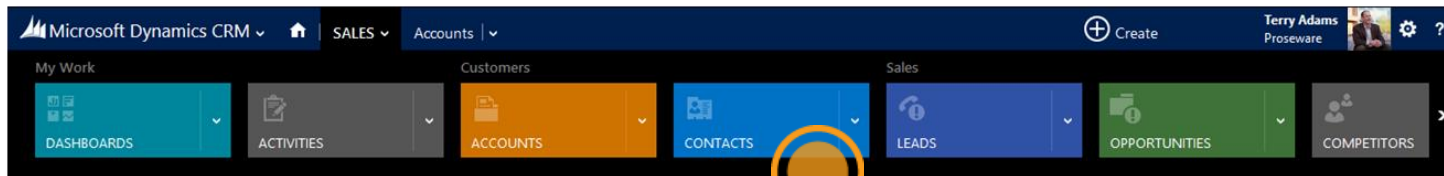
Click or tap this arrow to scroll right and see more tiles. Or point your mouse anywhere on the row of tiles, and use your mouse wheel to scroll.



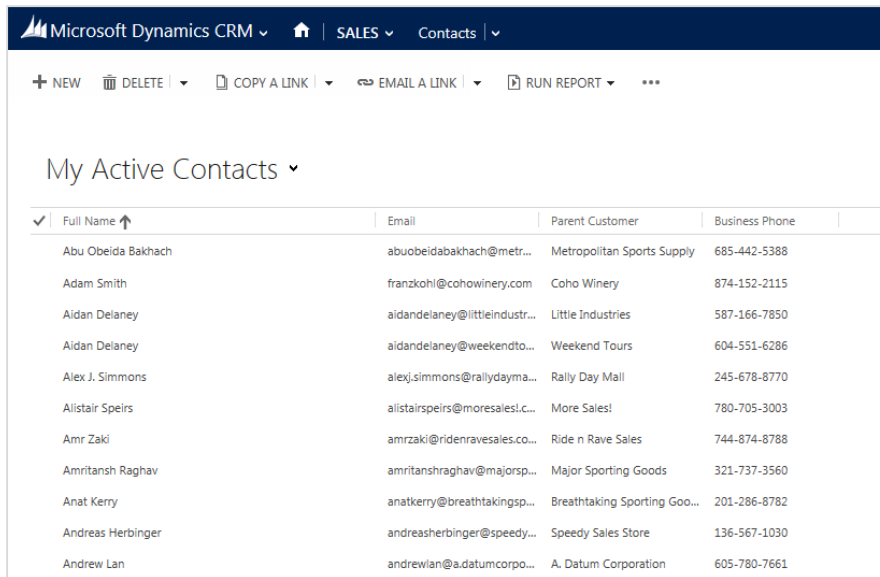
# find your records



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



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



Microsoft Dynamics CRM | SALES | Contacts

+ NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT

### My Active Contacts

Full Name	Email	Parent Customer	Business Phone
Abu Obeida 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	alexj.simmons@rallydayma...	Rally Day Mall	245-678-8770
Alistair Speirs	alistairspeirs@moresalesl.c...	More Sales!	780-705-3003
Amr Zaki	amrzaki@ridenravesales.co...	Ride n Rave Sales	744-874-8788
Amritansh Raghav	amritanshraghav@majorosp...	Major Sporting Goods	321-737-3560
Anat Kerry	anatkerry@breathtakingasp...	Breathhtaking Sporting Goo...	201-286-8782
Andreas Herbingler	andreasherbingler@speedy...	Speedy Sales Store	136-567-1030
Andrew Lan	andrewlan@a.datumcorpo...	A. Datum Corporation	605-780-7661

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.

Microsoft Dynamics CRM | SALES | Contacts

+ NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT

My Active Contacts

Full Name ↑

Full Name	Customer
Abu Obeida Bakhach	Metropolitan Spo
Adam Smith	Coho Winery
Aidan Delaney	Little Industries

Commands for contacts

Microsoft Dynamics CRM | SALES | Opportunities

SAVE & NEW | NEW | DELETE | CLOSE AS WON | CLOSE AS LOST

Opportunity

Interested in Product

Est. Close Date	Est. Revenue	Status	Owner
3/14/2013	\$997,670.41	In Progress	Terry Adams

Qualify (Active) | Develop

Identify Contact | click to enter | Estimated Budget

Commands for opportunities

Microsoft Dynamics CRM | SALES | Activities

TASK | PHONE CALL | EMAIL | APPOINTMENT | CAMPAIGN RESPONSE

All Activities

Due: All

Subject	Regarding	Activity Type	Activity Status
Approve Proposal	Adam Carter	Task	Completed
Review proposal	Convert and...	Task	Open
Send product specs	Interested in...	Task	Open

Commands for activities

... 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.

Microsoft Dynamics CRM | SALES | Contacts |

NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | ...

Active Contacts

Full Name ↑

Full Name	Email	Parent Customer
Abu Obelda Bakhach	abuobeldabakhach@metr...	Metropolitan Sp...
Adam Carter	adamcarter@northwindtra...	Northwind Trade...

Export to Excel | Import Data | Advanced Find | Chart Pane | View | New System View | System Views

Commands for contacts

Microsoft Dynamics CRM | SALES | Opportunities | Interested in Product...

SAVE & NEW | NEW | DELETE | CLOSE AS WON | CLOSE AS LOSS | ...

Opportunity

Interested in Product

Est. Close Date: 3/14/2013 | Est. Revenue: \$997,670.41 | In Progress | Terry Adams

Qualify (Active) | Develop

Identify Contact | Identify Account | Purchase Timeframe | Estimated Budget | Purchase Process | Identify Decision Maker

Recalculate Opportunity | Assign | Share | Email a Link | Unfollow | Run Workflow | Start Dialog | Switch Process | Edit Process | Relationship | Form

Commands for opportunities

Microsoft Dynamics CRM | SALES | Activities |

TASK | PHONE CALL | EMAIL | APPOINTMENT | CAMPAIGN RESPONSE | ...

All Activities

Due: All

Subject	Regarding	Activity Type	Activity Status
Approve Proposal	Adam Carter	Task	Completed
Review proposal	Convert and...	Task	Open
Send product specs	Interested in...	Task	Open
Resolution Time	Question abo...	Task	Completed
Upsell Designer Software	Consulting Se...	Campaign Resp...	Open
Upsold licences please follow up	General CSR L...	Campaign Resp...	Open
Upsold on Hardware	General CSR L...	Campaign Resp...	Open
Upsold	General CSR L...	Campaign Resp...	Completed
Upsold	Consulting Se...	Campaign Resp...	Open

Letter | Fax | Service Activity | Delete | Copy a Link | Email a Link | Run Report | Export to Excel | Import Data | Advanced Find | Chart Pane | View | New System View | Customize Entity | System Views

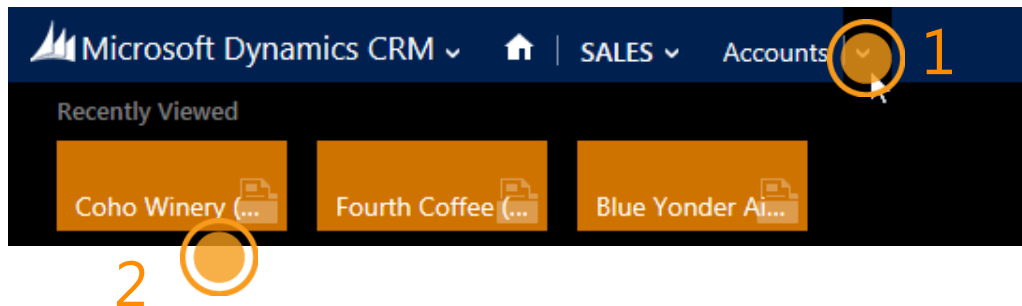
Commands for activities


... and so on!



# pick up where you left off

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



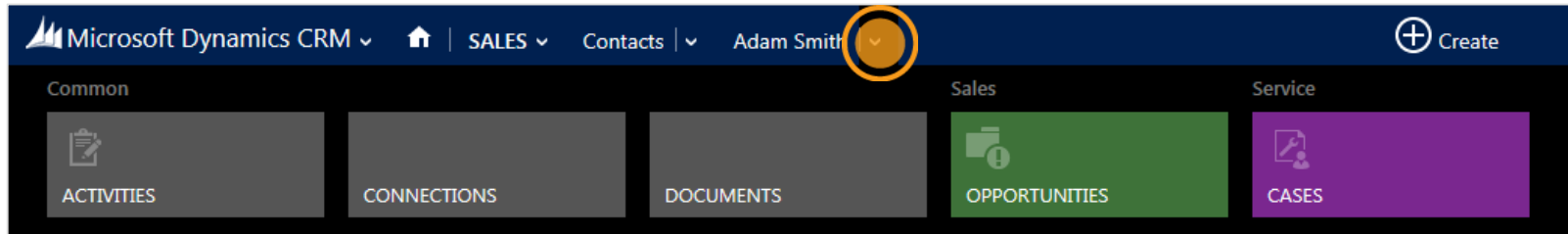
On the nav bar, next to the name of the record type, click or tap .

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



# 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.

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: [input field]  
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 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.

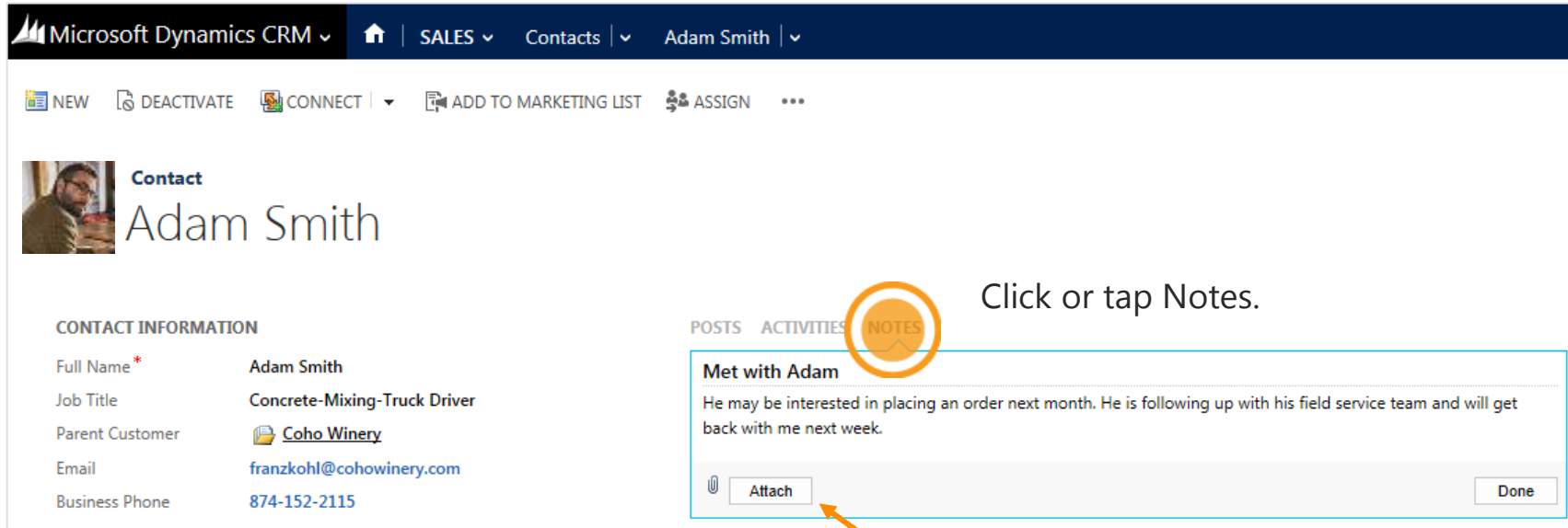
The screenshot shows the Microsoft Dynamics CRM interface for creating a new Contact record. The top navigation bar includes the Microsoft Dynamics CRM logo, a home icon, and menu items for SALES, Contacts, and Adam Smith. The 'Create' button is circled in orange with the number '1'. The main form is titled 'Contact' and is divided into three sections: Details, Contact Information, and Address. The 'Details' section has the following fields: First Name (Marcia), Last Name (Douglas), Job Title (--), and Parent Customer (--). The 'Last Name' field is circled in orange with the number '2'. The 'Contact Information' section has fields for Email, Mobile Phone, Business Phone, and Description, all with '--' values. The 'Address' section has fields for Street 1, Street 2, City, and ZIP/Postal Code, all with '--' values. At the bottom right, 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 --




# 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 record. The top navigation bar includes the Microsoft Dynamics CRM logo, a home icon, and dropdown menus for SALES, Contacts, and Adam Smith. Below the navigation bar, there are action buttons: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, and ASSIGN. The main content area displays the contact's profile picture and name, Adam Smith. To the left, under the heading "CONTACT INFORMATION", there is a table of contact details. To the right, there are tabs for POSTS, ACTIVITIES, and NOTES. The NOTES tab is selected and highlighted with an orange circle. Below the tabs, there is a text area containing a note: "Met with Adam" followed by "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 note area, 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.

CONTACT INFORMATION	
Full Name*	Adam Smith
Job Title	Concrete-Mixing-Truck Driver
Parent Customer	 <a href="#">Coho Winery</a>
Email	<a href="mailto:franzkohl@cohowinery.com">franzkohl@cohowinery.com</a>
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 documents or photos, if you like.



# 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.

Qualify (Active)	Develop	Propose	Close
✓ 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 <i>mark complete</i>		

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.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity titled "Interested in Large format printers". The interface includes a navigation bar at the top with "Microsoft Dynamics CRM", "SALES", and "Opportunities" menus. Below the navigation bar, there are action buttons: "SAVE & NEW", "NEW", "DELETE", "CLOSE AS WON", and "CLOSE AS LOST". The main content area shows the opportunity details, including a progress bar with stages: "Quality (Active)", "Develop", "Propose", and "Close". The "Quality (Active)" stage is highlighted in orange. Below the progress bar, there are several task cards: "Identify Contact" (click to enter), "Identify Account" (Latest Sports Sales), "Purchase Timeframe" (Next Quarter), "Estimated Budget" (\$422,359.74), "Purchase Process" (Individual), and "Identify Decision Maker" (mark complete). A "Summary" section on the left lists fields like Title, Contact, Account, Purchase Timeframe, Currency, Budget Amount, Purchase Process, and Description. The "Budget Amount" field is highlighted with an orange circle and a text box containing "\$ 422,359.74". An orange arrow points from this field to a "STAKEHOLDERS" lookup list on the right. The lookup list is titled "STAKEHOLDERS" and has a table with columns "Name" and "Role". The table contains one entry: "Aidan Delaney" with the role "Stakeholder". A dropdown menu is open next to the "Stakeholder" role, showing a list of roles: "Champion", "Decision Maker", "Economic Buyer", "End User", "Influencer", "Stakeholder" (highlighted in blue), and "Technical Buyer".

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.

Products					
Product Name	Price Per Unit	Quantity	Discount	Extended Amount	
✓  Product Designer	\$17,500.00	<input type="text" value="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 a record. By default, the system automatically saves any edited records every 30 seconds, or when you navigate to another record.



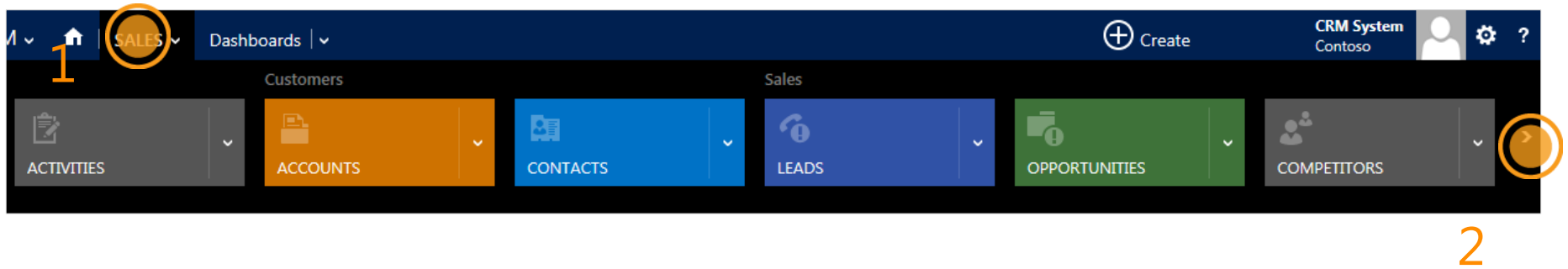
## **NOTE**

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



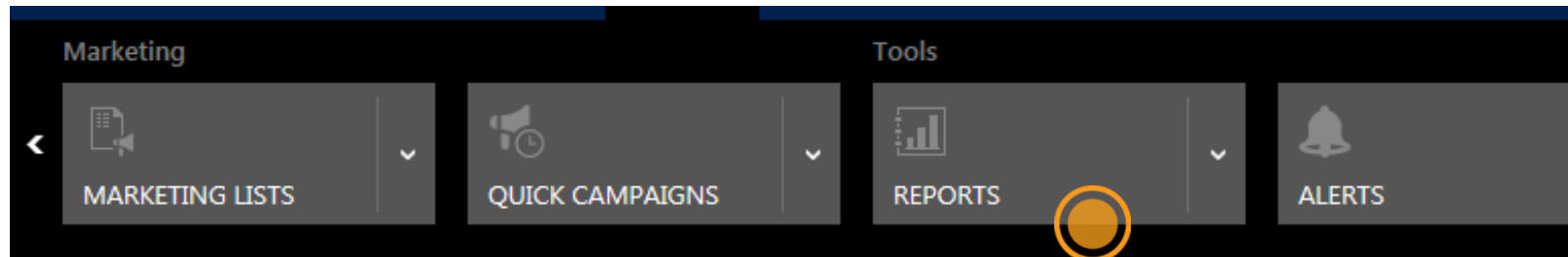
# looking for your reports?

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.

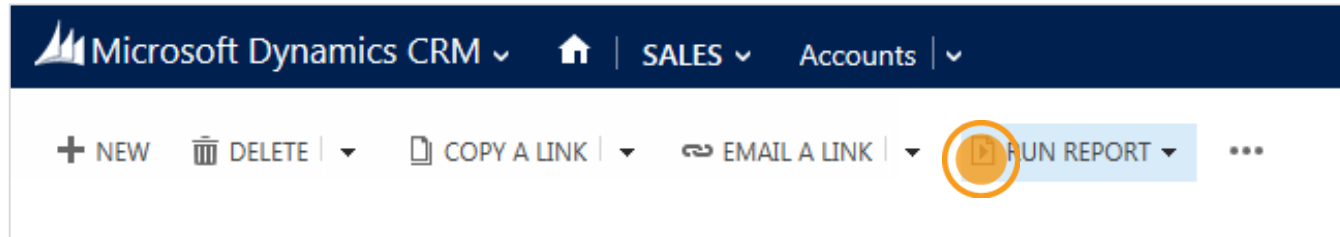


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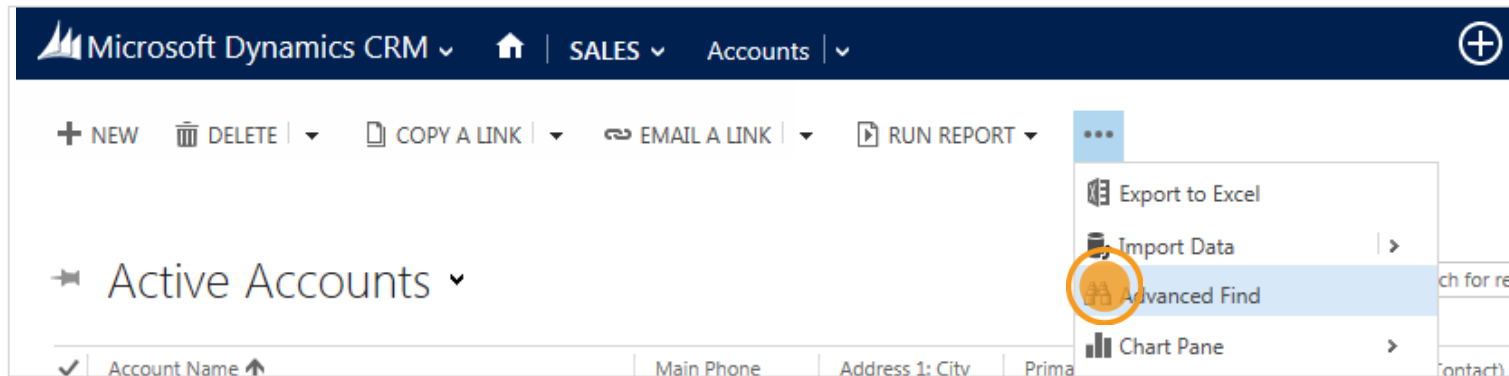
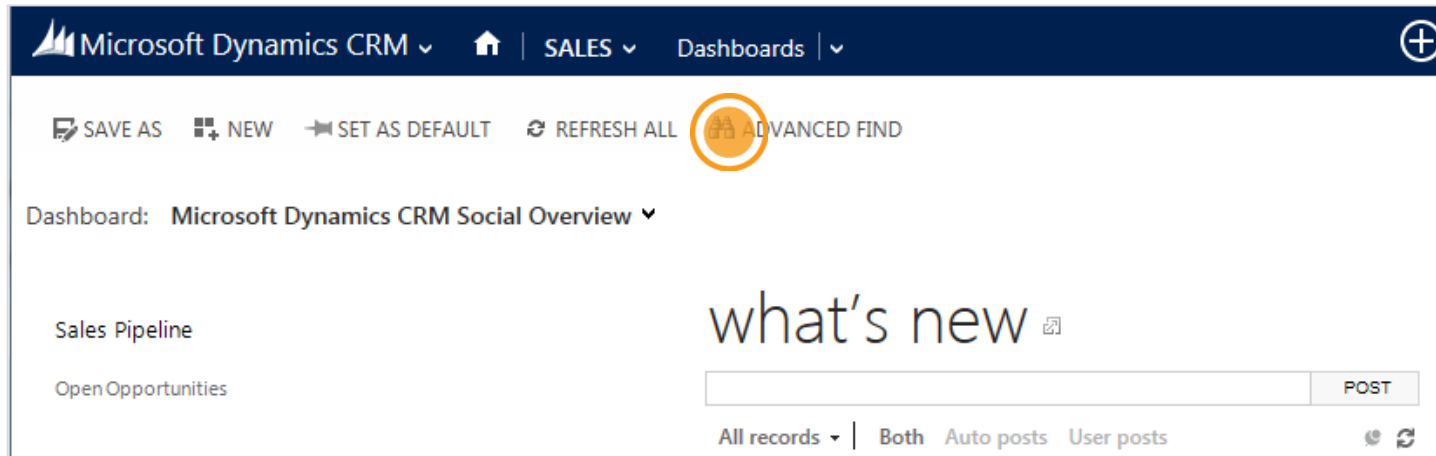
# find the Run Reports command

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!

Did this eBook help you?  
Send us a quick note.  
We'd love to know what you think.

Customer Center

Version 6.0.0



