Release Preview Guide

Microsoft Dynamics CRM 2013 & Microsoft Dynamics CRM Online Fall '13

NOTE: The guidance included in this document reflects current release objectives as of August 2013. This document is not intended to be a detailed specification, and individual scenarios or features may be added, amended or deprioritized based on market dynamics and customer demand.



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September 2013

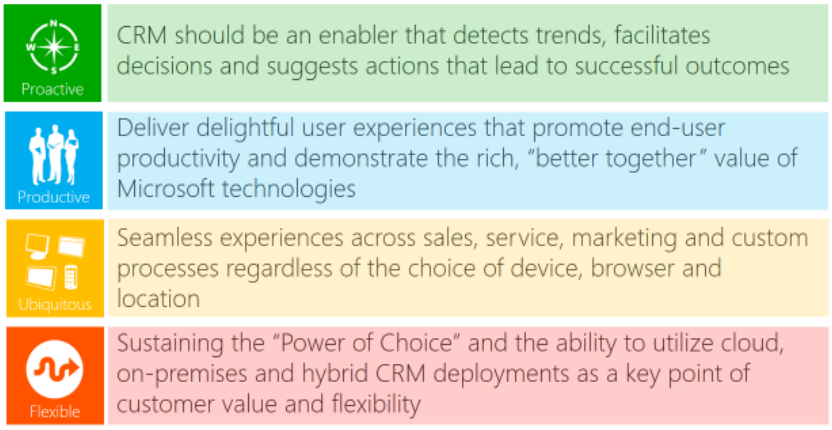
Introduction

In a socially connected, always-on world, it has never been more important for companies to deliver differentiated and compelling customer experiences. Microsoft Dynamics CRM is helping companies do just that. With a reimagined user experience that is simple and intuitive, actionable intelligence at their fingertips, and a pervasive connection to the people and resources they need, Microsoft Dynamics CRM makes work personal by helping people across sales, marketing, and customer care teams reignite the passion they feel for their jobs so they can deliver amazing customer experiences.

With a commitment to an agile release cycle, there are currently several releases in planning and development. The next release is Microsoft Dynamics CRM 2013 (on-premises) & Microsoft Dynamics CRM Online Fall '13 (Online) followed by releases code-named "Leo" and "Vega."

Charter

Our charter is to reimagine the business application experience and drive innovation. In so doing Microsoft is the strongest unifier of Microsoft technologies in the business applications space and specifically CRM. We reinforce our charter by adhering to the following principles: proactivity, productivity, ubiquity, and flexibility. These principles guide our investments.



Investment Areas

Microsoft Dynamics CRM is investing in capabilities that deliver modern, familiar and compelling user experiences. Our key focus is user adoption: building applications and experiences where users recognize value, opportunity and insight immediately — either on the road or in the office.

Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online Fall '13 are focused on delivering a business application that delights users through experiences that are modern, seamless and device optimized. To deliver upon this expectation we have focused this release around the following themes:



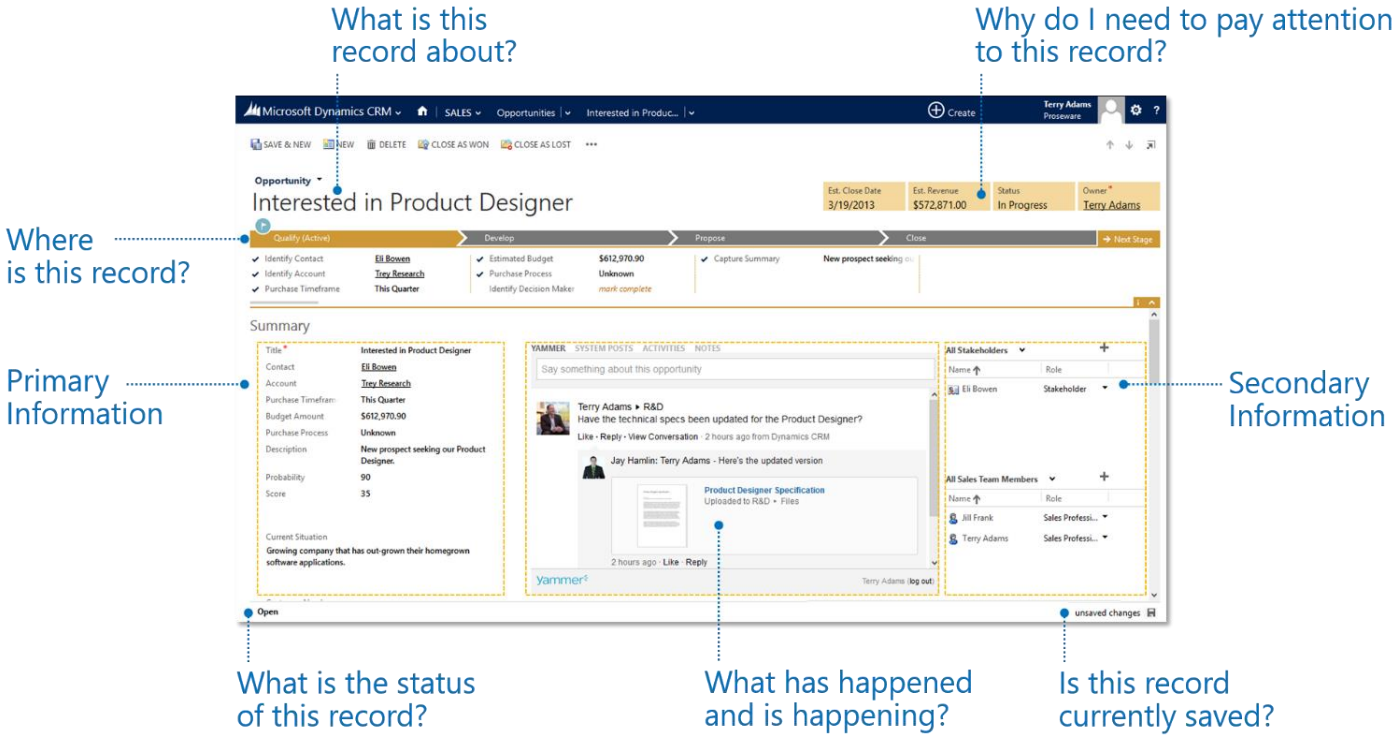
This document is organized to highlight the exciting innovations and capabilities across these themes included in Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online Fall '13.

Key Investment Overview

The following topics summarize the investments that will be delivered in Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online Fall '13.

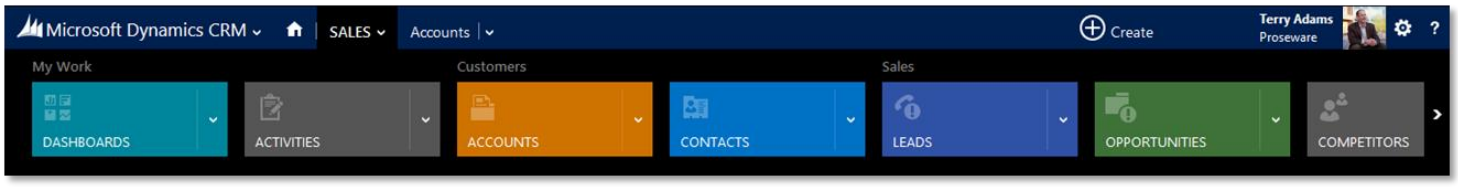
Reimagined User Experience

With an entirely new user experience, Microsoft Dynamics CRM allows you to view everything you need in one spot – fast and fluid, and relevant to the work at hand. No pop-ups. No flipping from one application to the next. What you need, where you need it. Get in, get going and get done. So you can focus on what is most important – your customers.



It's all about efficiency

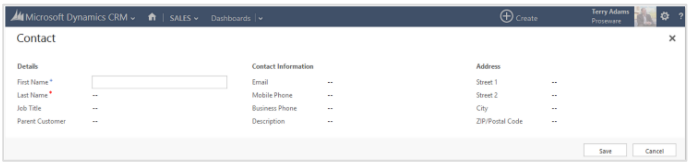
We've designed the new form with productivity in mind by presenting key business data and related activities in a style that maps to the way that people actually work. The **new user experience** organizes information in a clean, consistent and easy-to-access manner. By giving you all the information you need at one time, you don't get distracted and you stay on task. The **streamlined navigation** experience drops down from the top of the screen with a single touch:



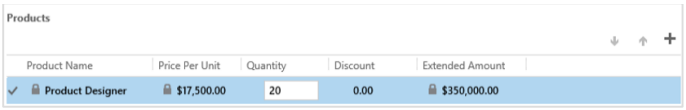
This new navigation model means access to any record is just a touch away. This allows us to display more of what you want – your business data.

Simplified Data Entry

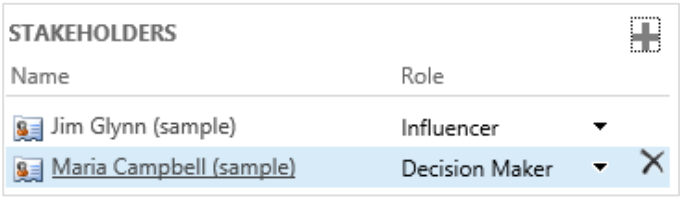
Your people are busy – working multiple accounts and opportunities all the time. To keep them productive and focused on the task at hand, we've introduced new data entry capabilities. Allow your users to easily create any record with **Quick Create** – an optimized experience to capture key data points for the record being entered.



Quickly add and edit Product line items to your Opportunities, Quotes, Orders and Invoices with **inline editable grids**. You can input Product details such as price, quantity and discount directly in the grid on the form.

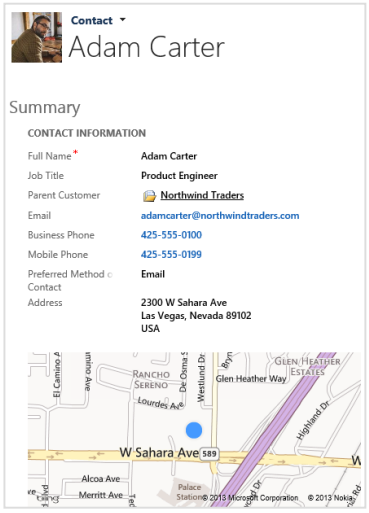


Track and manage the key people such as **stakeholders** and **sales team members** for your deals. Inline lookup and editing makes it easier to understand at a glance who is connected to the record and their role. Your people can even create "New" records inline from within the lookup screen.

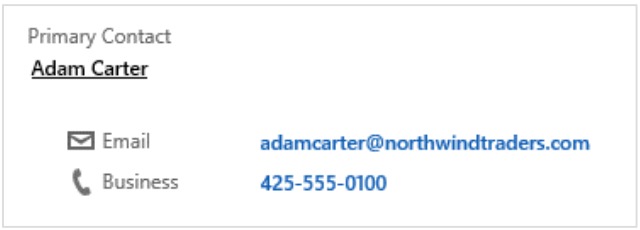


Customer Summary

CRM systems are built upon the foundation of relationships. Your CRM system should help you build these relationships with your customers. We've made CRM more personal by adding the ability to store **images** and display location using **Microsoft Bing Maps. Images** are stored within the CRM database using a new Image attribute type. Each entity can have an **image attribute**. This attribute is designed to allow a record to store a single image that can be displayed in entity forms that are enabled to display it.

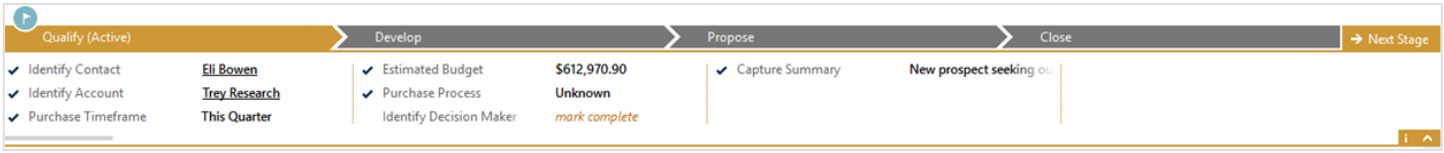


We have introduced a **Quick View form** that surfaces important Customer information on related forms so you always have your customer data at your fingertips.



Process Excellence & Agility

With guided processes there is no more guessing what to do next. You always know what has been completed, where you are in the process, and what still remains to be done. With the ability to quickly create and modify business processes, your organization can easily adapt to changes in the market.



Drive effectiveness through pre-defined and configurable processes and enhanced collaborative selling. Each stage of a process is clearly outlined, identifying the recommended steps to completion. Users can move forward and backward in a process, and as they do, they will be presented with a new suggested list of steps.

This is a fresh, intuitive and guided means for users to work through a business process toward a defined outcome. This is a departure from the traditional transactional CRM application to a more process-centric, outcome-oriented and guided experience. This is a deliberate move to focus on outcomes rather than transactions.

A new way to get things done

Organizations can have multiple processes for each entity. Role-specific process assignment sets the default process and a user can then switch to another process if better suited. Required steps within a stage can be enforced so that users are prevented from progressing to the next stage in the process. The user is notified so it is clear what step they need to complete in order to move forward.

Span multiple entities

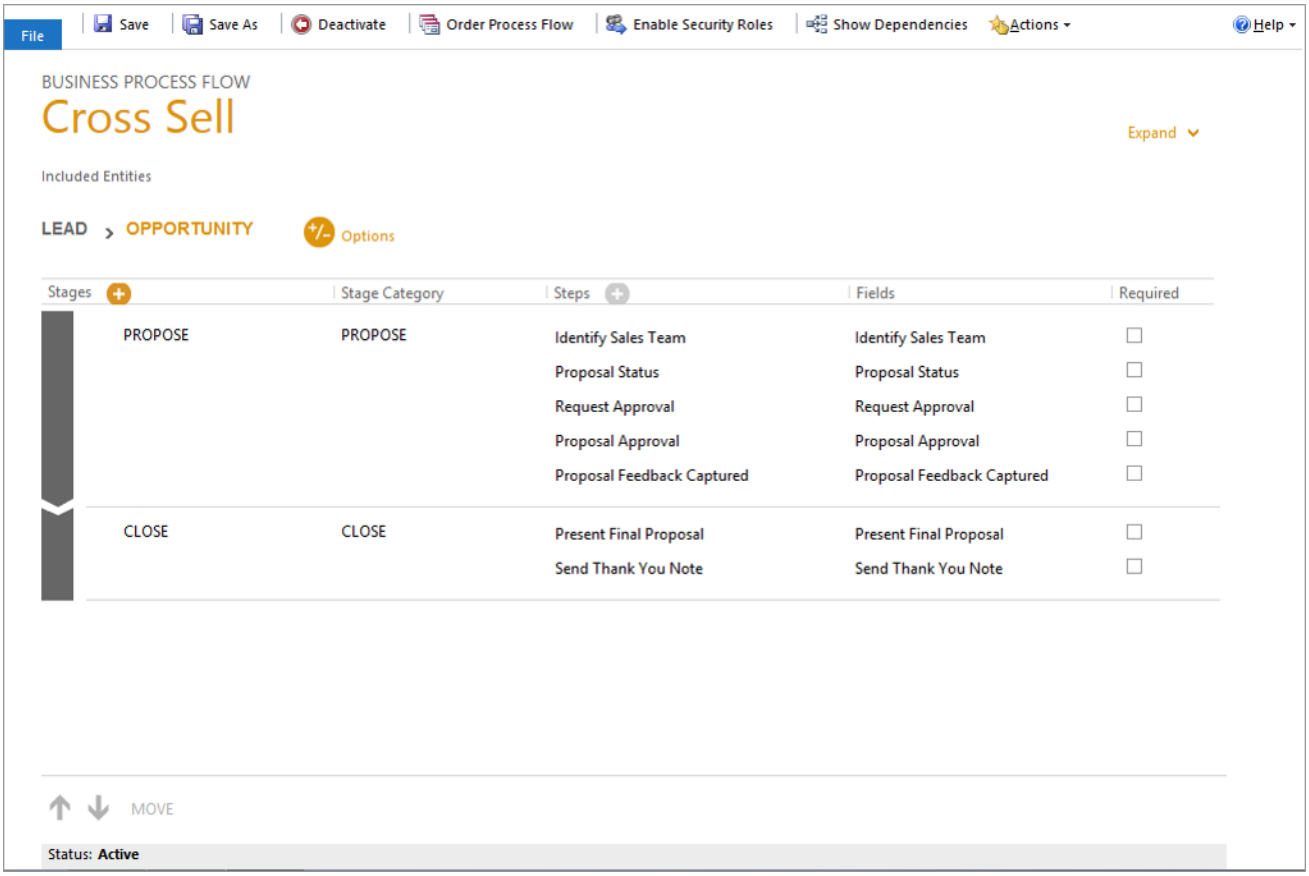
A single Process can span multiple entities (e.g. Lead to Opportunity to Quote to Order to Opportunity), including custom entities. The process helps users navigate across multiple records within the context of the desired outcome. This new approach changes the traditional CRM focus from records and lists to verifiable outcomes.

Easily configurable

The simplified point and click process designer, makes it easy to model even the most complex business processes. Organizations may easily package, export and import processes between systems.

This release includes a ready-to-use Sales and Customer Service business process as well as some easily installable sample processes[1]. These processes for common sales, service, and marketing scenarios – help you ensure that staff follow consistent steps every time they work with customers.

These business processes help you run phone and email campaigns, create targeted marketing lists, handle service cases, schedule appointments, upsell products, and increase orders.



In addition, there will be a library of business processes available for download on the Dynamics Marketplace.

[1] Installable sample processes available in English only

CRM on the Go

Mobile applications keep salespeople connected to data, team members, and customers. With access to your CRM solution on your Windows 8 tablet or iPad as well as your mobile phone, you have the tools you need to not only look smarter but also to be smarter.

Powerful Tablet Applications

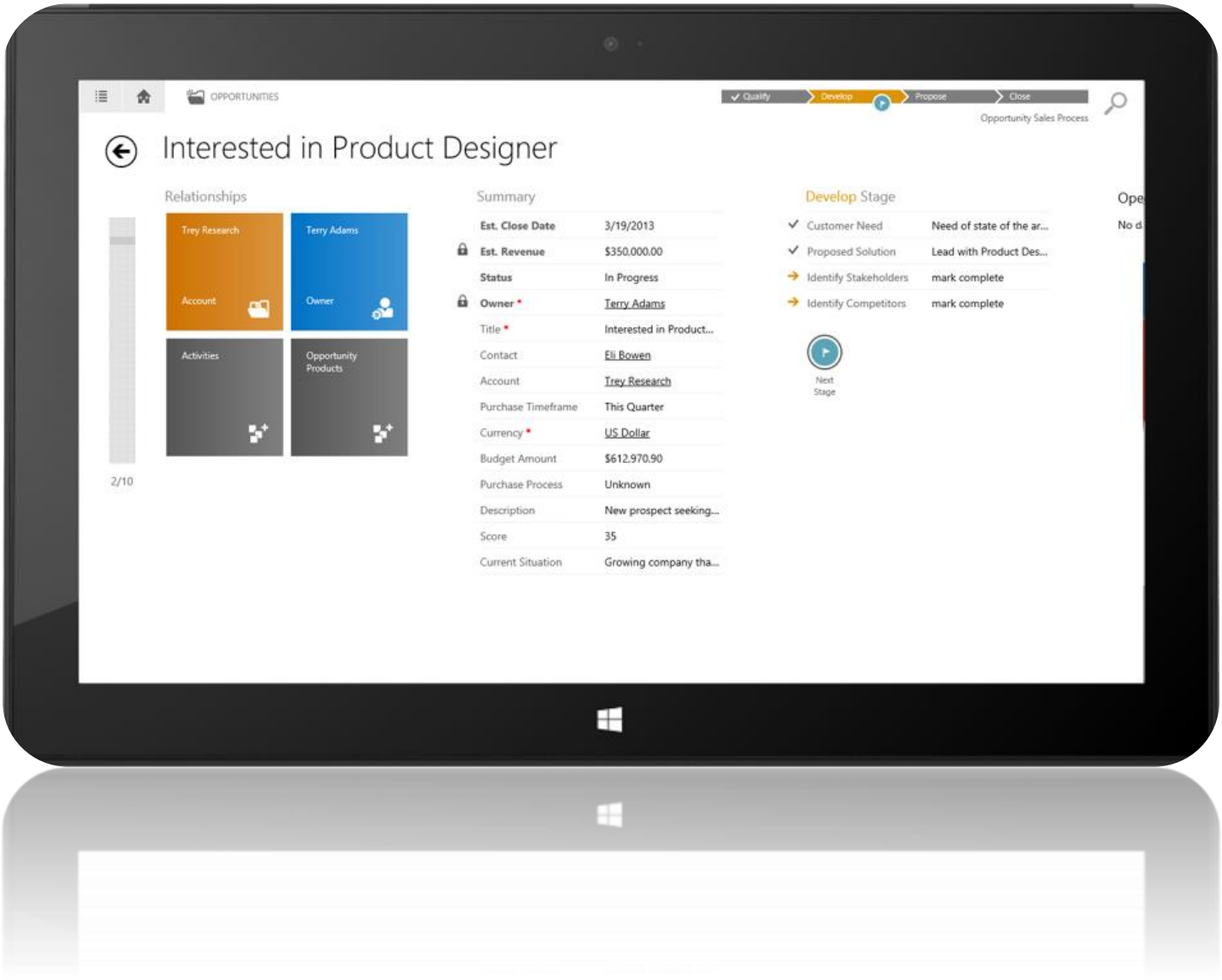
Microsoft Dynamics CRM for tablets helps you stay connected and productive wherever you are. Use your iPad or Windows 8 tablet to stay up to date with your customer info—even when you're on the go. Arrive prepared for every appointment, and update your notes, tasks, contacts, accounts, and leads while the details are still fresh in your mind. Data is cached for offline viewing so you can still access key data if connectivity is lost.





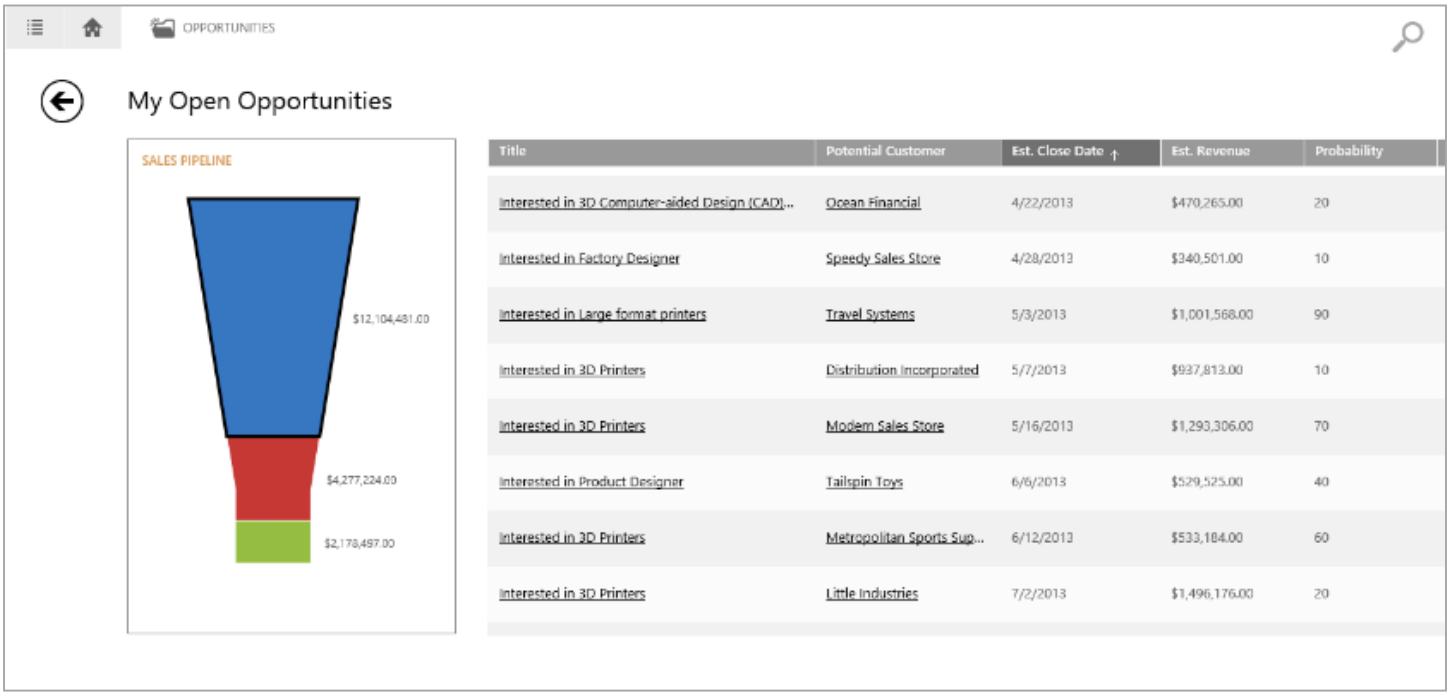
Seamless Experience

Delivering a CRM experience that is consistent across web, client and device is key to driving productivity and adoption. Always know where you are within your sales process, easily complete key tasks and advance the process to reveal what's next. Embedded Skype calling allows you to stay connected with your Customers. Native device capabilities provide familiar tools and actions to get things done.



Interactive Business Intelligence

Work smarter with interactive charts. Click within the chart to analyze your sales data allowing you to find and access your most important information for quick insights.



Write Once Deploy Everywhere

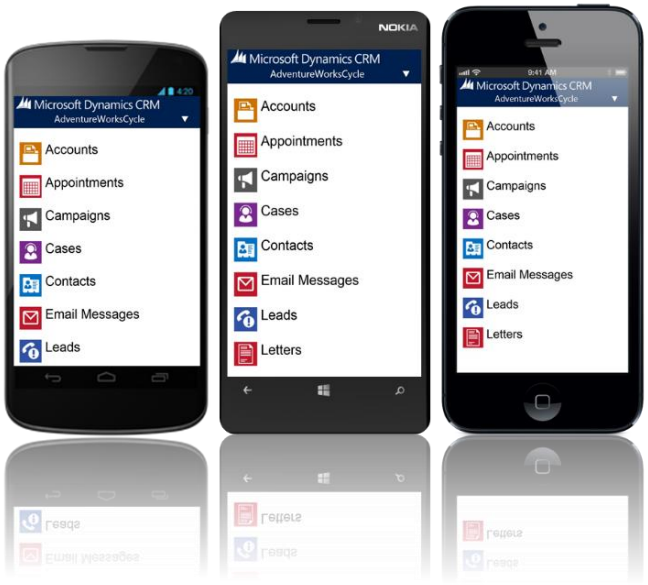
No need to hire a mobile developer to change your mobile solution every time your business requirements change. Configurations to tailor the CRM web interface will persist in the tablet application. Leveraging configuration work that you've already done, Microsoft Dynamics CRM optimizes your web forms for the tablet layout. Even client-side logic is supported on the mobile device to deliver rich experiences. Data is cached for offline viewing.

Touch-optimized Phone Applications

Your users are on the go. They have many devices and expect experiences that work across these various device types. The Microsoft Dynamics CRM phone applications will complete the mobility story by providing a touch-enabled mobile phone application experience for Windows 8, Android and iPhones. Phone applications will be launched following the General Availability of CRM 2013. They will not be available at launch.

Access Your CRM Data

View Contact, Account, Lead, Opportunity, Appointment and other relevant information on your phone. Work Offline and View Social Activity Feeds on Windows Phone.



Easy Interaction

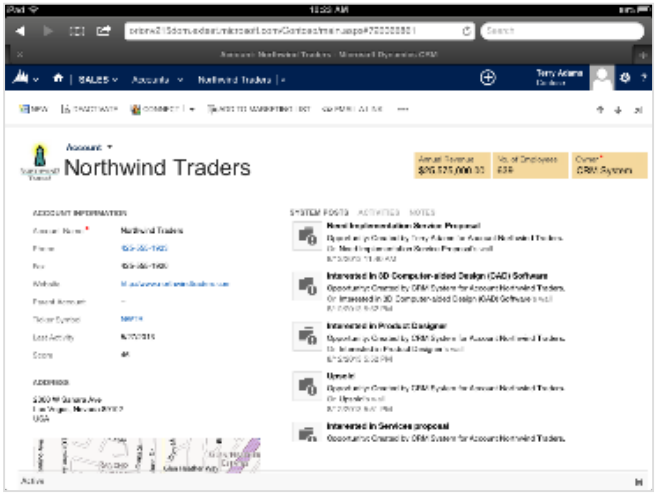
Add and modify Contacts, Tasks and Notes as well as other relevant data. Make phone calls and Map address information using native device capabilities.

Tailor Your Experience

A customizable experience, allowing organizations to configure custom entities for display on the phone apps.

Tablet-optimized Web Browser Experience

Users that access CRM from the web browser on their mobile device will be presented with a web browsing experience optimized for the device. The "liquid layout" scales to optimize the viewing experience, adjusting for various screen shapes and resolutions (landscape, portrait, 1, 2, 3 column). This browsing experience adds flexibility in how the mobile employees access their CRM data.

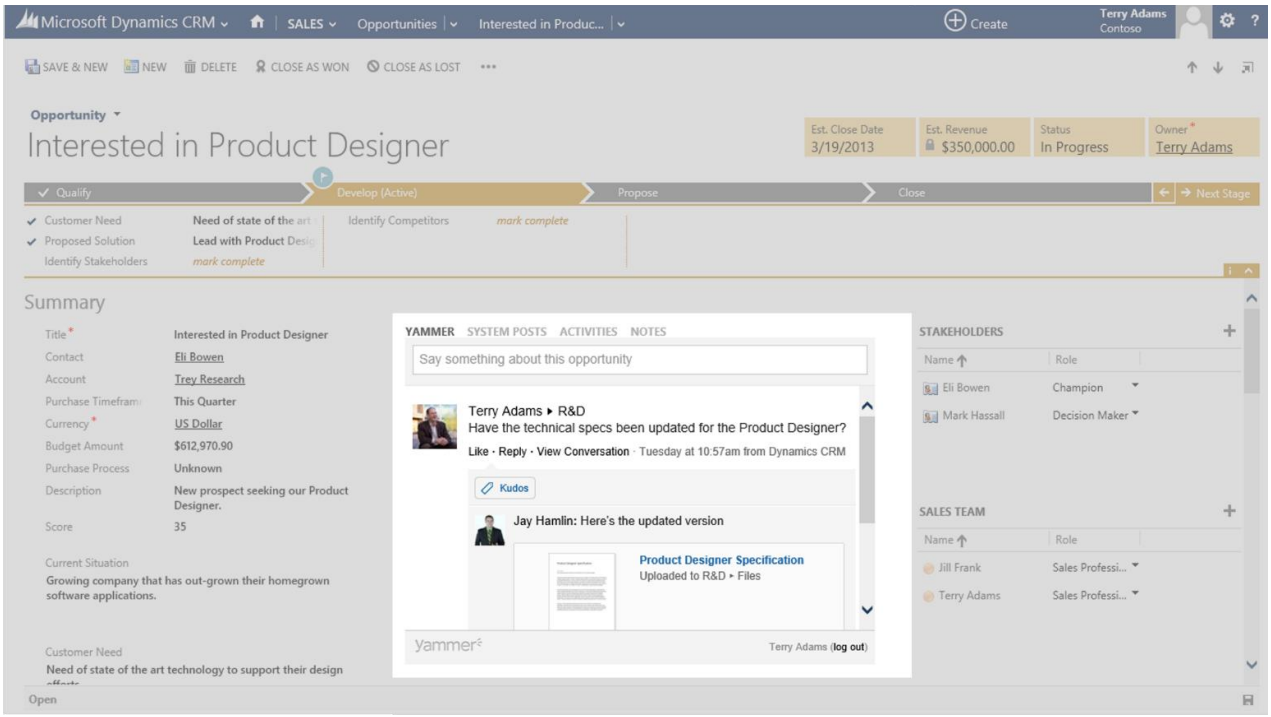


Enterprise Collaboration

Having the power to collaborate with social technologies embedded in the context of what you are doing, be it working an opportunity, executing a campaign, or resolving a case, gives you access to the people and resources you need to get things done at the speed of business.

Social in context

Get the information you need from the right people, in the right place at the right time. Using the Enterprise power of Yammer, your team can quickly comment on posts or start contextual conversations from within Microsoft Dynamics CRM (on-premises and online) or Yammer. Yammer extends across your organization bringing all your people into the conversation – including non-licensed CRM users from within Yammer.



Users can participate in social conversations directly within Microsoft Dynamics, through the Yammer web and desktop applications as well as apps running on Microsoft (Windows Phone), Apple (iOS) and Google (Android) mobile devices.

Server-side Synchronization

Stay productive and up to date no matter where you are or what device you're on. With server-side synchronization, administrators can easily manage the synchronization of email, tasks, appointments and contacts between on-premises versions of CRM and Exchange.

The following synchronization scenarios will be supported following the General Availability of CRM 2013. They will not be available at launch:

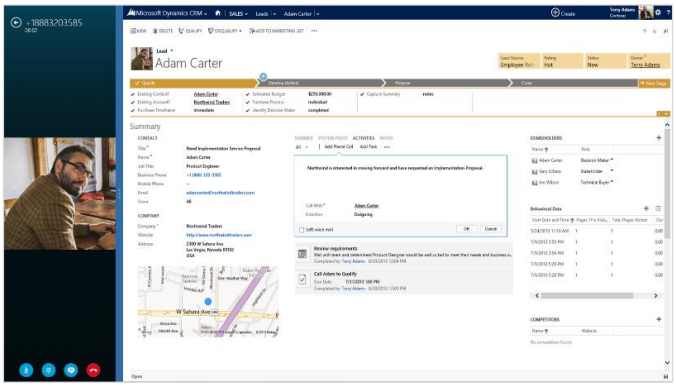
- CRM Online and Exchange Online for Email, tasks, appointments and contacts
- CRM Online or CRM 2013 (on-premises) and POP3/SMTP[2] for Email

Synchronization using the Email Router and Outlook client will continue to be supported.

Communicate with Ease

Connect with your colleagues with real-time visibility into their availability. Within embedded[3] presence from **Microsoft Lync** your people can call, IM or meet with colleagues or customers directly from CRM.

Facilitate simpler collaboration and engagement between employees and customers with embedded communication capabilities. Users can click the **Email** address to send an Email using their default mail provider or the **phone number** to make outbound calls using **Lync** or **Skype** directly from the CRM web forms[4]. When the call is initiated, CRM creates a Phone Call activity so your people can quickly and easily capture call notes. Your customers are now just a click away.



[2] Supported POP3/SMTP providers include: Gmail, Hotmail, Yahoo, MSN, Live, and Outlook.com
[3] Integrated Lync presence available solely on Microsoft Internet Explorer.
[4] Calling capabilities requires installation of the Lync or Skype application on the device.

Platform Enhancements

Powerful tools allow you to tailor Microsoft Dynamics CRM to meet your unique business requirements. Microsoft Dynamics CRM facilitates the delivery of rapid business value with an agile solution framework that can be easily tailored and configured. The Microsoft Dynamics CRM platform provides a declarative paradigm that ranges from defining the data model to providing integrated persistence, security, API access, user experience and programming paradigms based on a modern open architecture. This release will introduce several new investments in our platform capabilities to further our commitment to an open, customizable and extensible online service.

Customer-driven Update

Companies that utilize cloud-based technologies have the advantage of having the latest technology available for their business applications. With this rapid cadence, some organizations need the flexibility to prepare their systems and train their users on the latest update. With Microsoft Dynamics CRM Online Fall '13, we are introducing the flexibility to schedule when you receive these updates. Administrators will receive in-product and Email notifications of their update schedule and include instructions to reschedule the update, if necessary. Email reminders will be sent 90, 30, 15, and 7 days before the update begins.

Business Rules

Deliver tailored, rule-driven actions across devices without the need of a developer. Business Rules provide a simple declarative interface to implement and maintain fast changing, commonly used business rules that will be applied to CRM forms (Main and Quick Create) for both the web application and CRM for tablets. Set field values, field requirement levels, show or hide fields, enable or disable fields and validate data and show error messages without writing a line of JavaScript code.

Access Teams

Collaboration is key in today's fast-paced business environment. Your sales teams need to collaborate with a unique set of people within their organization for each Opportunity. Traditional role-based security does not give users this level of flexibility. With a record-based access team, you can add a user to the record and give them access. The access team is a new type of team that doesn't own records, but, has access to records. Unlike with owner teams, you can create one or more access teams to work on the same records and have team members with different levels of access rights to the record.

Real-time Workflow

The existing workflow execution model that supports asynchronous workflows has been extended to support real-time (synchronous) workflows. Real-time workflows are not queued, as was the case with asynchronous workflows, but execute immediately on-demand or in response to a message being processed by the execution pipeline. Real-time workflows participate in the database transaction and perform similar functionality to plug-ins, yet can be created by a non-developer through the web application workflow designer. Developers can still create real-time workflow through code.

Actions

Developers can extend the functionality of the standard Microsoft Dynamics CRM system by creating custom messages, with associated request/response classes, known as actions. Actions are new type of processes to expand the vocabulary available for developers to express business processes. With core verbs like Create, Update, Delete, Retrieve, Associate and Assign provided by the system, an action uses those core verbs to create more expressive verbs like Escalate, Approve, Route, and Schedule. If the definition of the action needs to change due to changing business priorities, someone who is not a developer can edit the action using the application workflow designer. Since these actions are available through web service calls, they can be used from both inside the application using a command action or from external applications.

Auto Save

Any of the updated forms now have auto save enabled by default. With auto save enabled there is no Save button displayed in the command bar on the form. Records that have changed data are automatically saved every 30 seconds or when people navigate to a new record. The auto save behavior can be disabled at the organization level in System Settings or at the form level through code.

Enable Custom Mobile Applications

Today's workforce is mobile and they expect their business application to give them what they need where they need it. This release includes several enhancements to provide flexibility to deliver these powerful mobile applications. Added support for OAuth protocol that is RESTFUL and easier to support for Mobile/Tablet applications. These applications, once they are authenticated through OAuth, can then use either the SOAP endpoint or the REST OData endpoint. The OData web service endpoint has been enhanced with the addition of authentication support for external mobile and rich client applications. Previously, the OData web service endpoint supported only pre-authenticated client (script) code provided in web resources.

Trustworthy Computing Updates

Microsoft continues its commitment to trustworthy computing by complying with the Federal Information Processing Standard (FIPS 140-2).

Microsoft Dynamics CRM encrypts the credentials stored in CRM to access services such as Yammer or Email providers supported for server-side synchronization.

Office 2013 Compatibility

Continuing our commitment to deliver CRM functionality through familiar productivity tools such as Microsoft Outlook, Word and Excel, Microsoft will provide support for integration with Microsoft Office 2013. Microsoft Dynamics CRM for Outlook will be supported in Microsoft Outlook 2013 providing contextual capabilities directly within the Outlook experience. Word merge for documents and emails will be supported in Microsoft Word 2013, and the powerful ability to export data to Microsoft Excel for analysis and reporting will be supported in Microsoft Excel 2013. This continues our commitment to delivering the right user experience for the hundreds of millions of Microsoft Office users.

Conclusion

Microsoft has a powerful vision for CRM. It is defining and delivering a connected and forward-looking enterprise — the successful enterprise of the future, an enterprise that connects its employees, partners and customers to what they need, in the right context, using the device and channel they prefer — enabling each of our customers to run a Dynamic Business. As Microsoft looks toward the Microsoft Dynamics CRM 2013 launch, it is committed to delivering on its Dynamic Business vision with lasting investments across robust applications, great experiences, and platform strength and flexibility.

It is truly an exciting time to be engaging with Microsoft Dynamics CRM! Microsoft looks forward to keeping you informed of the innovations and exciting capabilities that Microsoft Dynamics CRM will deliver for you now and into the future!

The Microsoft Dynamics CRM Team



Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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