

Microsoft



Microsoft Dynamics CRM 2011介绍

会议议程

1. “工作效率的威力”
2. 销售对话
3. 客户关照对话
4. 扩展 CRM 对话
5. 小结

工作效率的威力



竞争状况

- 客户具有超强的产品信息获取能力
- 防止客户转向的障碍在迅速消融
- 裁员让企业用更少人力完成更多工作
- 积极的客户体验是成功的关键所在

“随着产品和价格差异化的削弱，企业正转向客户体验来获得较竞争对手更大的市场份额。”

客户服务 Wave 报告
弗雷斯特研究公司

对员工变动的看法	占受访者百分比
IT部门裁员1%-15%	50.3
IT部门裁员>15%	12.4
IT部门增加员工1%-5%	7.6
IT部门增加员工>15%	0.5
保持不变	29.2

92%
认为不变或者裁员



8.1%
认为增加员工



再度重视工作效率

“以工作效率为重点改变我们的工作方式，以确保生产率提升和实现收益的唯一途径。生产率的提升需要改变人们的工作方式，这样他们就能够更加聪明地工作，获得更大成效，提升工作质量，实现他们工作的价值。”

Mark McDonald, 全球副总裁

Gartner

“工作效率的威力”

销售对话



工作效率是盈利能力的关键

卓有成效的销售有助于获得并保留可获利客户

销售效率

“高绩效的销售机构全年在行政管理工作上的时间削减 **30%**。”

销售成效

“高绩效的销售机构每年在最佳潜在客户身上的时间增加 **40%**”



在 **合适** 的客户和机遇上 **花更多的时间**

获准根据《推动有盈利能力的销售增长：2006年/2007年销售成效报告》重印
© 2008 Watson Wyatt Worldwide

微软对销售效率的承诺

增加销售产出和效率

增加花在消费者身上的时间

缩短销售周期

提升拿单率

实时掌握情况

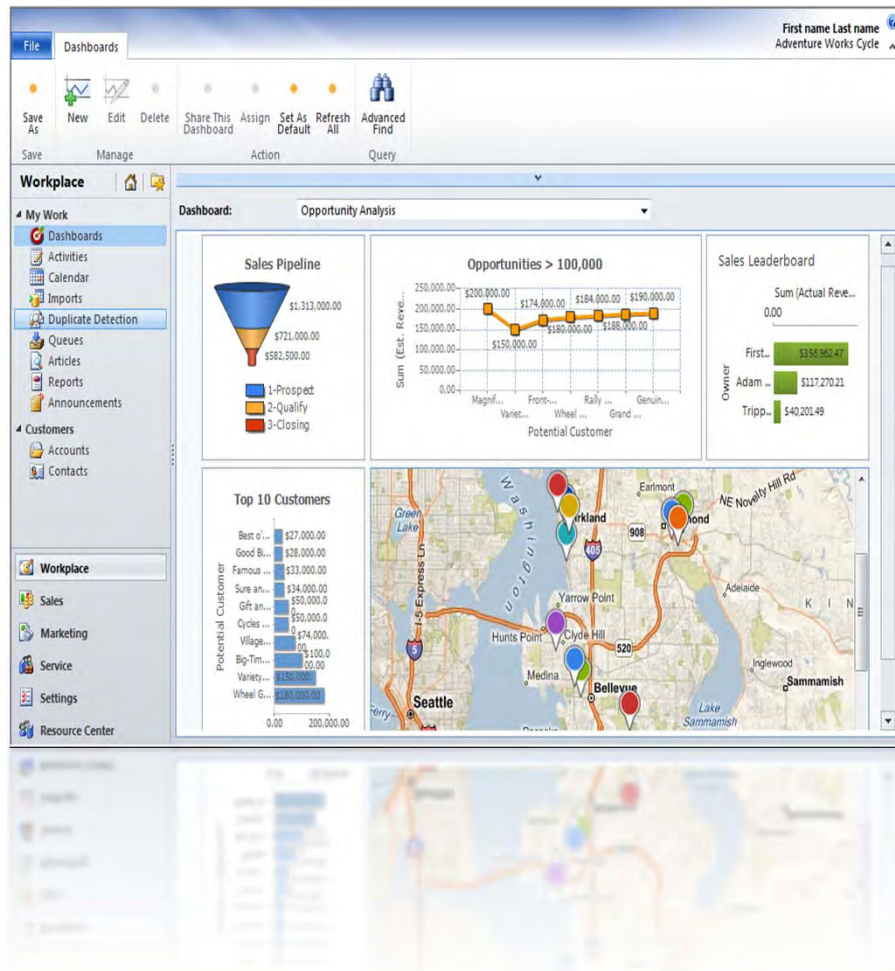
当今 SFA 的功能



差异化功能

- “销售线索成现金”
- 本机 Outlook 客户端
- 稳健的工作流
- 深入的分析
- 移动工作效率

利用 Microsoft Dynamics CRM 2011 实现销售效率



1. 减少“繁忙工作”
2. 智能销售机会管理
3. 改善团队销售
4. 实时销售绩效

实时过滤：减少繁忙工作



让销售人员立即找到所需数据

每列都采用类似 Excel 的过滤器

例如可以使用过滤器显示过去两个月的商机

Topic	Potential Customer	Est. Close Date	Est. Revenue
Will expand their offerin...	Variety Store (sample)	9/18/	
Interested in Product B (S...	Northwind Traders	10/29/	
Will be ordering about 1...	Litware Inc. (sample)	3/5/	
Very likely will order 18 P...	Elemental Goods (sample)	1/4/	
Will order some items so...	Variety Store (sample)	9/19/	
Needs to restock their su...	Best o' Things (sample)	12/2/	
They sell many of the sam...	Blue Company (sample)	2/7/	
6 orders of Product SKU J...	Basic Company (sample)	10/4/	

1 - 8 of 8 (1 selected) Page 1

Click on the chart to perform Drill Down

- 1-Prospect
- 2-Qualify
- 3-Closing

条件格式：即时销售线索评分



可以对任何主体适用格式化规则

线索评分示例：绿色字体为可能性高的销售线索

通过指导性向导轻松创建规则

Stage	Value
1-Qualification	\$106,000.00
2-Discovery	\$102,500.00
3-Proposal	\$315,000.00

Property	Value
Name	High Probability Opportunities
Font	10 pt. Segoe UI

Field	Value
Topic	6 orders of Product SKU JJ202 (sample)
Potential Customer	Basic Company (sample)
Priority	Med
Budget	

Excel 导入/导出：提高数据质量



使用 Excel 实现真正的双向同步

Excel 中的修改自动并入 Microsoft Dynamics CRM

销售人员可以录入机遇，导出给市场部，由市场部对销售线索进行调整，随后将调整导回 Microsoft Dynamics CRM

The screenshot displays the Microsoft Dynamics CRM interface. The 'Export Data to Excel' dialog box is open, showing options for worksheet types: 'Static worksheet with records from this page' (selected), 'Dynamic PivotTable', and 'Dynamic worksheet'. The 'Static worksheet with records from this page' option is selected. The dialog also includes a checkbox for 'Make this data available for re-importing by including required column headings' which is checked. The 'Export' and 'Cancel' buttons are visible at the bottom of the dialog. In the background, the 'Sales Pipeline' chart is visible, showing a funnel with three stages: 1-Prospect (\$300,000.00), 2-Qualify (\$85,000.00), and 3-Closing (\$36,000.00). The chart is inverted, with the largest section at the top.

Stage	Value
1-Prospect	\$300,000.00
2-Qualify	\$85,000.00
3-Closing	\$36,000.00

团队的所有权：提升团队销售业绩



客户记录的所有权

举例，可以构建一个由客户经理、销售代表、销售经理、CSS 代理等组成的“大客户”团队。

团队安全角色和汇总报告

Account: Affordable Equipment (sample)
Account Name: Affordable Equipment
Owner: Large Accounts
Street 1: Street 1
State/Province: TX
ZIP/Postal Code: 95486

Administration
Owner: Large Accounts
Originating Lead: [Field]

Billing Information
Credit Limit: \$ [Field]
Credit Hold: Yes No
Payment Terms: [Field]
Price List: [Field]

Contact Methods
Preferred: Any
E-mail: Allow Do Not Allow
Bulk E-mail: Allow Do Not Allow
Phone: Allow Do Not Allow
Fax: Allow Do Not Allow
Mail: Allow Do Not Allow

Marketing Information
Send Marketing Materials: Send Do Not Send
Last Date Included in Campaign: [Field]

Service Preferences
Status: Active

上下文文档：精简的建议书



The screenshot displays a SharePoint web application interface. The browser address bar shows the URL: `http://grtdemo/?etn=account&extraqs=_gridType%3d1%26etc%3d1%26id%3d%257bAD52C2E0-77B7-DF11-AF12 - Windows Internet Explorer`. The user is identified as Eric Davison, GRT Demo.

The main content area shows an account record for "Designer Goods (sample)". The account details include:

- Account Name: Designer Goods (sam)
- Owner: Eric Davison
- Street 1: 3397 Rancho View Dri
- State/Province: WA
- City: Redmond
- ZIP/Postal Code: 90000

The "Document Locations" section is expanded, showing a table of documents:

Name	Modified	Modified By
Quote	9/3/2010 3:50 PM	System Account

Annotations on the screenshot highlight specific features:

- A box labeled "SharePoint 的嵌入式文档管理功能" (SharePoint's embedded document management function) points to the document list.
- A box labeled "例如，销售团队可创建报价和建议书的中央知识库，用于更快的建议书创建" (For example, the sales team can create a central knowledge base for quotes and proposals to speed up proposal creation) points to the document list.
- A box labeled "检入/检出和锁定功能" (Check-in/check-out and lock functionality) points to the document list.

The interface includes a left-hand navigation pane with sections like "Information", "Related", "Common", "Sales", "Service", and "Marketing". The status bar at the bottom indicates "Status: Active" and "Page 1".

在线可视化：改善 KPI 跟踪



The screenshot displays a CRM interface with a top navigation bar, a left sidebar, and a main content area. The main content area is divided into a table of opportunities and a sales pipeline chart.

Opportunities Table:

Topic	Potential Customer	Est. Close Date	Est. Revenue
Will expand their offerin...	Variety Store (sample)	9/18/2010	\$150,000.00
Interested in Product B (S...	Northwind Traders	10/29/2010	\$125,000.00
Will be ordering about 1...	Litware Inc. (sample)	3/5/2011	\$25,000.00
Very likely will order 18 P...	Elemental Goods (sample)	1/4/2011	\$30,000.00
Will order some items so...	Variety Store (sample)	9/19/2010	\$30,000.00
Needs to restock their su...	Best o' Things (sample)	12/2/2010	\$25,000.00
They sell many of the sam...	Blue Company (sample)	2/7/2011	\$26,000.00
6 orders of Product SKU J...	Basic Company (sample)	10/4/2010	\$10,000.00

Sales Pipeline Chart:

The chart is a funnel-shaped bar chart showing the sales pipeline. The total revenue is \$300,000.00. The pipeline is divided into three stages:

- 1-Prospect: \$300,000.00 (Blue)
- 2-Qualify: \$85,000.00 (Red)
- 3-Closing: \$36,000.00 (Green)

Annotations on the screenshot:

- 与销售人员最相关的数据的即时可视化 (Real-time visualization of data most relevant to sales staff)
- 可使用预定义的图表，如销售流水线 (Can use predefined charts, such as sales pipeline)
- 内建向下挖掘功能 (Built-in drill-down functionality)
- 通过指导性向导即时创建定制图表 (Instantly create custom charts through a guided wizard)

灵活的仪表板：采集深入信息



Eric Davison
GRT Demo

File Dashboards

Save As New Edit Delete Set As Default Share This Dashboard Assign Refresh All Advanced Find

Dashboard Management Action Query

Workplace

My Work

- Dashboards
- Activities
- Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements

Customers

- Accounts
- Contacts

Workplace

- Sales
- Marketing
- Service
- Settings
- Resource Center

Dashboard: Opportunity Analysis

可用多个预先构建的仪表板

或者通过拖放控制装置创建个性化仪表板

轻松地导入诸如地图、财务数据等外部数据。

Sales Pipeline

Open Opportunities

(\$300,000.00)

(\$85,000.00)

(\$36,000.00)

(blank)

1-Prospect

Topic	Potential Customer	Est.
testtopp	Northwind Traders	
Will expand their offerin...	Variety Store (sample)	
Interested in Product B (S...	Northwind Traders	
Will be ordering about 1...	Litware Inc. (sample)	
Very likely will order 18 P...	Elemental Goods (sample)	
Will order some items so...	Variety Store (sample)	
Needs to restock their su...	Best o' Things (sample)	
They sell many of the sam...	Blue Company (sample)	

(Money)

Active Goals

600,000

400,000

200,000

0

Goal for ...

Goal for ...

Name

Computed target as of today...

Top 10 Customers

Open Opportunities

Potential Customer	Value
Basic Com	\$10,000.00
Best o' T	\$25,000.00
Litware I	\$25,000.00
Blue Comp	\$26,000.00
Elemental	\$30,000.00
Northwind	\$125,000.00
Variety S	\$180,000.00

Seattle

Kirkland

Redmond

Bellevue

Medina

Clyde

Yarrow Point

Beaux Arts Village

Mercer Island

Eastgate

Mountains To Sound Green

Samamish

NE Redmond-Fall City

NE Novaty Hill Rd

Lake Sammamish

Lake Washington

University of Washington

Green Lake

520

405

99

90

1-5 Express Ln

Bridle Trails State Park

Beauport

Eastgate

Page 1

WXYZ

Done

Unknown Zone (Mixed) | Protected Mode: Off

100%

客户关怀对话



客户关怀面临的挑战

- 呼叫中心资源减少
- 代理受多任务环境约束
- 对操作效率的要求高
- 不断提高的客户预期

“遭遇不良体验的客户中，平均有40%的客户会终止与该企业的合作。”

Dave Dougherty 与 Ajay Murthy 共同编著的《客户究竟想要什么样的服务》—
哈佛商务评论，2009年9月

微软的客户关怀承诺

愉悦您的客户，增强底线增长

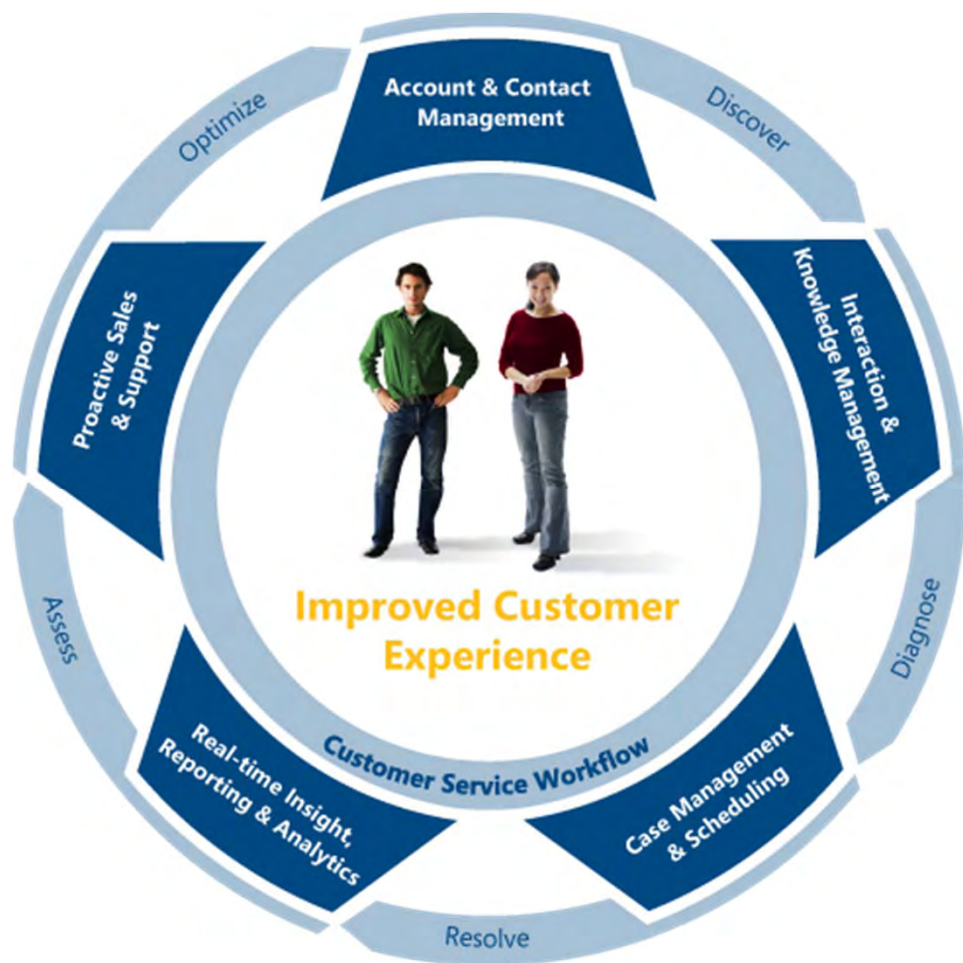
理顺问题解决要点

在不影响服务的情况下控制成本

提升操作效率

为每个行动提供充足的信息

当今的客户关怀功能

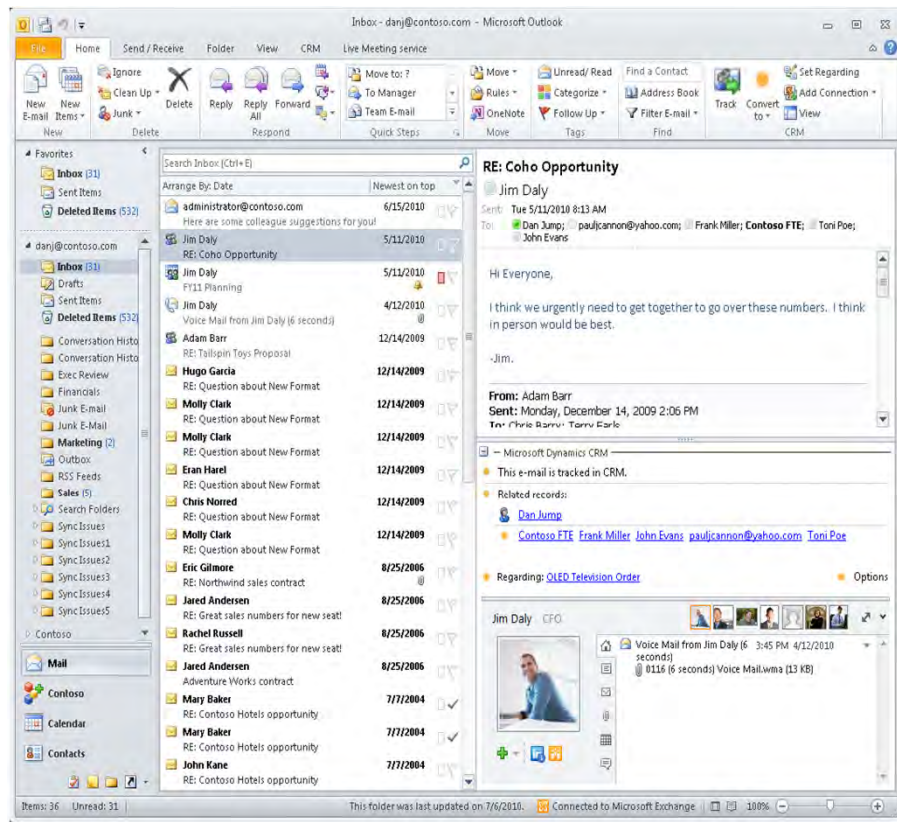


差异化功能:

- 全面审视客户
- 轻松处理案例
- 内置 KB 级容量
- 服务调度
- 精简流程

利用 Microsoft Dynamics CRM 2011 实现 客户关怀效率

1. 准确数据唾手可得
2. 更快解决问题
3. 简化工作管理
4. 端到端 KPI 跟踪



为近期使用的列表和记录建立标识： 尽量减少点击次数



全新特性可大幅度减少点击次数和窗口数量，大大节省呼叫中心代表的时间。

单击就可显示最近期使用的
项目

可以为最常用的记录创建标识
(联系、案例、客户等)

预先设定的主页提供最相关的
信息。

The screenshot shows the Microsoft Dynamics CRM Overview dashboard. The left sidebar contains navigation options like Service Calendar, Cases, Accounts, Contacts, Knowledge Base, Contracts, Products, Services, Goals, Goal Metrics, and Rollup Queries. The main area displays a 'Views' list on the left and a 'My Activities' table at the bottom. Two charts are visible: 'Leads by Source Campaign' and 'Cases By Priority (Per Day)'. The 'Leads by Source Campaign' chart is a horizontal bar chart showing the number of leads for various campaigns. The 'Cases By Priority (Per Day)' chart is a stacked bar chart showing the count of cases by priority (Low, Normal, High) over several days.

Source Campaign	Count
Product launch campa...	2
New customer loyalty...	13
New ad campaign(samp...	9
Event campaign templ...	1
Direct marketing tem...	19
Co-branding with lar...	12
Charity event(sample...	14
Ad campaign template...	1
(blank)	46

Day (Created On)	Low	Normal	High
9/3/2010	1	5	2
9/7/2010	0	4	0
9/10/2010	0	1	0
9/13/2010	0	1	0
9/14/2010	0	1	0

扁平化用户界面：简化案例跟踪



全新扁平化用户界面可以大幅度减少窗口数量和标移情况，从而节省呼叫时间

对希望跳至特定数据点的用户，仍将供左侧导航栏

上下文字表

可方便下拉以获取所需信息

定制工作：改善现场服务



Service: New - Microsoft Dynamics CRM - Windows Internet Explorer
http://grtdemo.grtdemodom.extest.microsoft.com/GRTDemo/main.aspx?etn=service&extraqs=etc%3d4001&pagetype=entityrecord

Chad Hamblin
GRT Demo

File Service Customize
Save Save & Close Delete
Deactivate Service Copy a Link Run Workflow Start Dialog
Collaborate Process

Information
General
Required Resources

Related
Common
Processes
Workflows
Dialog Sessions

Service
New

Required resources have not been selected for one or more selection rules. To complete the rules, click Required Resources.

General
Name: Onsite Repair Initial Status Reason: Reserved
Description: Machine damaged during shipment. Customer wants it fixed onsite.

Scheduling
Default Duration: 1 hour
Start Activities Every: 15 minutes
Beginning At: 8:00 AM

Required Resources
Common Tasks
Add a Selection Rule
Add Resources
Add Resource Groups
Edit Selected Item
Remove Selected Item

Choose 1 From The same site From < Click to select Quantity >
Click to add Resources, Resource Groups or a Selection Rule

现在具有高度的灵活性，可创建任何活动

举例来说，可以创建“现场维修”以及与现场服务相关的活动

可为活动即时添加新的任务、资源和资源组

支持定期约会

Internet | Protected Mode: On 100%

指导性对话: 指导性问题解决



Process: Troubleshooting - Windows Internet Explorer
http://grtdemo.grtdemodom.extest.microsoft.com/GRTDemo/sfa/workflow/edit.aspx?id=%7bD5954465-D3B4-4163-8BD1-D83019CCBE6C%7d

File Save and Close Activate Show Dependencies Actions Help

Process: Troubleshooting Information Working on solution: Default Solution

General Administration Notes

Hide Process Properties

Process Name: Troubleshooting Entity: Case

Activate As: Process Dialog

Available to Run

As an on-demand process

As a child process

指导性对话提供稳健可靠的呼叫脚本功能

可根据预设的规则执行行动/任务

脚本故障排除示例

Add Step Insert Delete this step.

Input Arguments

Variables

Steps

Is this a Broken Item query?

If Case:Case Category equals [Broken Item], then:

Page: Initial Questions

Get problem details

Prompt and Response: Set Properties

Prompt: Hi Customer (Contact):First Name, my name is Created By (User):First Name and I'd like to help you with your service case. To begin with, what product is broken?

Response: Widget A

Response: Widget B

Response: Widget C

Description of the problem

Prompt and Response: Set Properties

Prompt: What is the exact problem with the product?

Refund or Replacement?

Prompt and Response: Set Properties

Prompt: Would you like a refund or a replacement?

Response: Refund

Response: Replacement

Gold Customer Treatment

If Customer (Contact):Customer Category equals [Gold], then:

Page: \$50 Gift Certificate

Explain Gift Certificate

Prompt and Response: Set Properties

Prompt: Customer (Contact):First Name, as a very valued customer we'd like to convey our sincere apologies for the broken item you have received. We are therefore sending you a \$50 gift voucher which you can spend at one of our stores online. We hope that this shows how important you are to us as a valued customer. You will receive the voucher in the mail in the next few days!

Status: Draft

Done Internet | Protected Mode: On 100%

队列：理顺工作管理



The screenshot shows the Microsoft Dynamics CRM interface in Internet Explorer. The main window displays the 'Queues' section with a list of queue items. The interface includes a navigation pane on the left, a top menu bar, and a main content area with a table of queue items.

Annotations:

- 可为数据库中任何主体创建队列** (Can create queues for any entity in the database) - points to the 'New' button in the queue list.
- 可创建个别或团体队列** (Can create individual or group queues) - points to the 'VIP Case Escalation Queue' item.
- 例如，可为重要客户创建案例升级队列** (For example, you can create a case escalation queue for important customers) - points to the 'VIP Case Escalation Queue' item.
- 可锁定队列直至完成顺序工作管理行动** (Can lock queues until sequential work management actions are completed) - points to the 'VIP Case Escalation Queue' item.

Name	E-mail
<Barry Givens>	
<Bill Patterson>	
<Bryan Nielson>	
<Chad Hamblin>	
<Eric Boocock>	
<First name Last name>	
<GRT Demo>	
<Karen Smith>	
<Matt Valentine>	
<Nikhil Hasija>	
<Reuben Krippner>	
Broken Item Cases	
Large Accounts	
VIP Case Escalation Queue	

目标管理：操作效率



Goal Metric: High Priority Case Quota - Microsoft Dynamics CRM - Windows Internet Explorer

http://grtdemo.grtdemodom.extest.microsoft.com/GRTDemo/main.aspx?etn=metric&extraqs=_gridType%3d9603%26etc%3d9603%26id%3d%257b5259C059-9ABA-DF11-8E6A-00155DBE201F%257d%26rskey%3d493667704&id=%7b5259C059-9ABA-DF11-8E6A-00155DBE201F%7d&pagetype=entityrecord

Chad Hamblin
GRT Demo

File Goal Metric Create Related Customize

Save Save & Close Deactivate Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

单击就能生成目标达成报告

可跟踪任何主体的目标

Information

- General
- Rollup Fields
- Description

Related

Common

- Audit History

Goal Metric

High Priority Case Quota

Goal Metrics

General

Step1: Define the metric

Name * High Priority Case Resolution Goal

Metric Type * Count Amount

Amount Data Type

Track Stretch Target

Rollup Fields

Step2: Define the rollup fields for this metric to track the target's actual and in-progress values

<input type="checkbox"/>	Rollup Field	Source Record Type	Source Field	Source Record Type State	Source Record Type Status	Date Field
<input checked="" type="checkbox"/>	Actual (Integer)	Case	Resolved	Problem Solved	Modified On	
<input checked="" type="checkbox"/>	In-progress (Integer)	Case	Active	In Progress	Record Created On	

1 - 2 of 2 (0 selected)

Description

Description

Status Active

对需要跟踪平均呼叫时间、首次呼叫解决率及其他关键指标的呼叫中心非常有用

简便的设置流程

Internet | Protected Mode: On 100%

审核：提升问责能力



http://grtdemo/?etn=opportunity&extraqs=_gridType%3d3%26etc%3d3%26id%3d%257b96FB9EB9-41B8-DF11- - Windows Internet Explorer

File Opportunity **系统范围内的审核**

Save Save & Close Delete Save & New Close as Won Close as Lost Reopen Opportunity Recalculate Opportunity Connect Assign Copy a Link Sharing - E-mail a Link Run Workflow Start Dialog Run Report -

Eric Davison

Information
General
Line Items
Notes & Activities
Quotes
Preferences

Related
Common
Activities
Closed Activities
Relationships
Connections
Documents
Audit History
Sales
Orders
Invoices
Competitors
Processes
Workflows
Dialog Sessions

Opportunity
Restock of JJ202 - need 10
Potential Customer [Trey Research](#) Est. Revenue **\$85,000.00** Est. Close Date **9/10/2010**

Filter on: All Fields

Changed Date	Changed By	Action	Changed Field	Old Value	New Value
9/4/2010 9:33 AM	Eric Davison	Update	Est. Close Date		9/10/2010 12:00 AM
9/4/2010 9:32 AM	Eric Davison	Update	Modified By (Delegate)	SYSTEM	
9/4/2010 9:32 AM	Eric Davison	Create	Modified By (Delegate)		SYSTEM
			Total Detail Amount	0.0000	85000.0000
			Total Amount	0.0000	85000.0000
			Total Pre-Freight Amo...	0.0000	85000.0000
			Revenue	System Calculated	System Calculated
			Pricing Error	None	None
			Total Discount Amount	0.0000	0.0000
			Est. Revenue	0.0000	85000.0000
			Total Line Item Discou...	0.0000	0.0000
			Total Tax	0.0000	0.0000
			Total Discount Amou...	0.0000	0.0000
			Total Detail Amount (...)	0.0000	85000.0000
			Total Tax (Base)	0.0000	0.0000
			Total Line Item Discou...	0.0000	0.0000
			Total Amount (Base)	0.0000	85000.0000
			Total Pre-Freight Amo...	0.0000	85000.0000
			Est. Revenue (Base)	0.0000	85000.0000

1 - 11 of 11 (1 selected) Page 1

Status **Open** Pipeline Phase **3-Proposal**

Trusted sites | Protected Mode: Off 100%

对有严格的 SLA 要求的呼叫中心非常重要

可以看到记录级或字段级的任何修改

可以创建预定义的审核规则

扩展 CRM 对话



从 CRM 向扩展 CRM 发展

扩展 CRM 充分利用灵活的 xRM 框架，允许组织轻松地配置和扩展 Microsoft Dynamics CRM 的功能。

扩展 CRM 是核心 CRM 的延伸，允许组织跟踪和最大化其他关系和资产的价值，从而扩展 CRM 的功能。



微软扩展 CRM 的承诺

改善解决方案的相关性和业务影响力

增强所有关系的
价值

提升业务的针对性

实现一流操作

提高业务敏捷性

当今扩展 CRM 的功能



差异化功能:

- 稳健的工作流引擎
- 多渠道沟通
- 强大的商业智能功能
- 点击配置
- 强大的合作伙伴解决方案

利用 Microsoft Dynamics CRM 2011 实现 扩展 CRM 的效率

The screenshot shows the Microsoft Dynamics Marketplace interface. At the top, there are navigation links for 'All Marketplaces', 'Microsoft Dynamics', 'System Center', 'Windows Azure Platform', 'Microsoft Online', and 'more'. The current location is set to 'United States'. Below the navigation bar, the 'Microsoft Dynamics Marketplace' logo is displayed, along with 'Sign in or Register', 'Get Listed', 'Help', and 'About' links. The main search area has a search bar containing 'Lease Management' and a dropdown menu set to 'Microsoft Dynamics CRM'. The search results are categorized into 'Solutions found: 76' and 'Service Providers found: 340'. The 'Solutions' section lists several products with their respective logos, names, and brief descriptions, including 'ARGUS Lease CRM', 'Commercial Property Management for Microsoft Dynamics CRM', 'Real Estate Advantage for Microsoft Dynamics CRM', and 'SalesMatrix - Microsoft CRM for the Oil and Gas Industry'. The 'Service Providers' section shows a map of Washington, DC, with a marker for 'ePlus Technology Inc.' and a brief description of their services.

1. 有影响力的联系
2. 角色定制体验
3. 增强行业相关性
4. 增值解决方案

联系：影响有影响力的人



扩展 CRM 的主要实现方式

在面向律师、咨询师、税务专家等多个有影响力的人的销售周期中特别有用

Name	Connection Role Category	Status
Problems	Business	Active
Lawyer (in-house)	Business	Active
Tax Expert (in-house)	Business	Active
Accountant (outside agency)	Business	Active
Former Employee	Business	Active
Employer	Business	Active
Partner	Business	Active
Former Employer	Business	Active
Stakeholder	Business	Active
Colleague	Business	Active
Referral	Business	Active
Employee	Business	Active
Referred by	Business	Active
Child	Family	Active
Spouse	Family	Active
Parent	Family	Active
Champion	Sales	Active
Account Manager	Sales	Active
Decision Maker	Sales	Active
Economic Buyer	Sales	Active
Influencer	Sales	Active
Technical Buyer	Sales	Active
Friend	Social	Active

每个角色都有鲜明的属性

可以创建任何类型的角色，并用于任何主体

社交连接器：引入社交环境



The screenshot displays the Microsoft Outlook interface with the following elements:

- Toolbar:** Includes 'File', 'Home', 'Send / Receive', 'Folder', 'View', 'Design', and 'CRM' tabs. Action buttons include 'New E-mail', 'Delete', 'Reply', 'Forward', 'Convert To', 'Add Connection', 'View in CRM', 'Find a Contact', and 'Address Book'.
- Navigation Pane (Left):** Shows 'Favorites' (Inbox, Sent Items, Deleted Items) and 'eboocock@crmpmg.micro' (Inbox, Drafts, Sent Items, Deleted Items, Junk E-mail, Outbox, RSS Feeds, Search Folders). Below is the 'GRT Demo' section with 'Marketing', 'Resource Center', and 'Sales' (Leads, Opportunities, Accounts, Contacts, Marketing Lists).
- Mail Section (Bottom Left):** Includes 'Mail', 'Solutions', 'Calendar', and 'Contacts'.
- Search and List:** 'Search Inbox (Ctrl+E)' and 'Arrange By: Date | Newest on top'. A list of emails from 'Kim Akers' is shown, including one from 'Today' and two from 'Yesterday'.
- Email Content (Center):** Subject: 'RE: Quote for Woodgrove.docx CRM:0007003'. From: 'Kim Akers <kakersdemo@hotmail.com>'. Sent: 'Mon 9/6/2010 10:16 AM'. To: 'Eric Boocock'. Body text: 'This looks great. We'll take them. Process the order. Kim'. Headers: 'From: eboocock@crmpmg.microsoftonline.com', 'To: kakersdemo@hotmail.com', 'Date: Mon, 6 Sep 2010 09:52:31 -0700'.
- CRM Integration (Bottom Center):** A yellow-bordered box contains the text: 'Microsoft Dynamics CRM', 'Regarding: [Need to restock on SKU JJ202](#)', 'Options', 'This e-mail is being tracked in CRM.', and 'Related records: Kim Akers, Eric Davison'.
- Contact Card (Bottom Right):** For 'Kim Akers', showing a profile picture, a status 'Working away...' with a clock icon, and a timestamp '3:40 PM 9/5/2010'.
- Right Side:** A vertical taskbar shows 'Mon 9/13 9:54 AM Review...', 'Today: 14 Tasks', and 'Quick Contacts'.

Outlook 客户端中的社交连接器能够无缝地引入社交数据

能让用户在线衡量联系人的影响力

举例来说，可以立即看到给定联系人的 LinkedIn 或 Facebook 简介

角色定制表单：量身定制



The screenshot shows a web application interface for editing a form. The main window is titled "http://grtdemo/?etc=1&extraqs=formtype%3dmain%26action%3d-1&pagetype=formeditor - Form: Account - Windows Internet Explorer". The interface includes a menu bar (File, Home, Insert), a toolbar with various editing tools, and a sidebar with a tree view of the form's structure. The main area displays the form fields, including "Header" and "General" sections. A dialog box titled "Assign Security Roles: Sales Manager - Account Form" is open, showing a list of security roles and their business units. The dialog has two radio buttons: "Display to everyone" and "Display only to these selected security roles". The second option is selected, and a list of roles is shown with checkboxes. The roles listed are: CEO-Business Manager, CSR Manager, Customer Service Representative, Delegate, Marketing Manager, Marketing Professional, Sales Manager, Salesperson, Schedule Manager, Scheduler, and System Administrator. The "Sales Manager" role is selected. Below the list, it says "1 - 14 of 14 (4 selected)". There is also a "Fallback" section with a checked box for "Enabled for fallback" and a note: "This form will be displayed to users with roles that don't have any forms explicitly assigned." Buttons for "Help", "OK", and "Cancel" are at the bottom of the dialog. The status bar at the bottom shows "http://c Trusted sites | Protected Mode: Off".

真正基于角色的表单可确保数据与每位用户相关联

每个主体可以有多个表单

通过表单实现完全的控制

拖放定制

拖放用户界面：轻松定制



The screenshot shows the Microsoft Dynamics CRM Form Editor interface. The browser address bar indicates the URL: `http://grtdemo/?etc=1&extraqs=formtype%3dmain%26action%3d-1&pagetype=formeditor - Form: Account - Windows Internet Explorer`. The interface includes a ribbon with tabs for File, Home, and Insert. The Home tab is active, showing various editing tools like Save, Undo, Redo, Change Properties, Remove, Header, Footer, Navigation, Form Properties, Preview, Assign Security Roles, Show Dependencies, and Managed Properties. A central workspace displays the form layout for 'Form: Account', with sections for Header, General, and Interactions. A left-hand navigation pane is visible, listing various entities like Information, Common, Sales, Service, and Marketing. A right-hand pane titled 'Field Explorer' shows a list of fields, with 'Account Rating' selected. Several red text annotations are present: '可配置每个主体的正文、页眉和页脚' (Configurable body, header, and footer for each entity) points to the ribbon; '有用的“点击定制”特性' (Useful 'click to customize' feature) points to the 'Body' button; '拖放用户界面' (Drag and drop user interface) points to the main form area; and '使用导航编辑器定制左边的导航栏' (Use the navigation editor to customize the left navigation bar) points to the left-hand navigation pane.

可配置每个主体的正文、页眉和页脚

有用的“点击定制”特性

拖放用户界面

使用导航编辑器定制左边的导航栏

市场：应用的一站式服务



Microsoft Dynamics Marketplace | Sign In | United States | Dashboard | Free CRM Trial

为 Microsoft Dynamics 的补充解决方案提供中央知识库

最新优化的搜索逻辑

AutoNumbers for CRM 4.0 ★★★★★ (24)
By: CRM Innovation
AutoNumber is an add-on product that can create a unique, easy to read reference number for records in the CRM system. This tool allows system customizers to add AutoNumbering to CRM entities that are not supported by the built-in numbering system.
Learn More

完全整合到 Microsoft Dynamics CRM

New to the Microsoft Dynamics Marketplace?
The Microsoft Dynamics Marketplace is the complete marketplace for cloud computing. Discover and evaluate 1000+ solutions and service providers that extend your use of Microsoft Dynamics CRM and the Windows Azure platform.

Free Trial
Experience your 30-day trial now!
Get Started

Get Listed
Get your Solutions on the Microsoft Dynamics Marketplace.
Learn More

Connect With Us: Twitter, Facebook, LinkedIn

Resources: Microsoft Dynamics Home, Microsoft Dynamics CRM Home, Microsoft Dynamics Communities

用户生成评级和评审

Top Rated Companies	Top Rated Apps	Top Rated Services
Website Pros Anaheim, CA ★★★★★	Ektron CMS400.NET Web Content Management Solution Online Software ★★★★★	Custom Designed Silverlight Website + Online Marketing Package Web Design ★★★★★
Emerald City Digital Seattle, WA ★★★★★	mojoPortal Content Management (CMS) by Source Trees Solutions Online Software ★★★★★	FrontLook Component Effects for Microsoft Expression Web Software Offering ★★★★★
Ralph's Installation Portland, OR ★★★★★	FrontLook Component Effects for Microsoft Expression Web Plug-in ★★★★★	PortalApp Content Management Hosting Service ★★★★★
Minneapolis Tech Gurus Minnesota, MN ★★★★★	PortalApp Content Management Software ★★★★★	Visibility Online Complete Marketing Package Web Design ★★★★★
Pacific Networking Company Bellevue, WA ★★★★★	IT Services and Software CRM System Web Service ★★★★★	All-in-one Website + Online Marketing Package Hosting Service ★★★★★

powered by Microsoft Pinpoint | Contact Us | Terms of Use | Trademarks | Privacy Statement | Microsoft © 2010 Microsoft

解决方案：集中化解决方案管理



Microsoft Dynamics CRM

Michael Graff Woodgrove

File Home

New Activity New Record Import Data Advanced Find

Settings

Business Management Templates Product Catalog

System Administration Data Management System Jobs Document Management Auditing

Customization Customizations Solutions Dynamics Marketplace

Process Center Processes

Workplace Sales Marketing Service Settings Resource Center

Get Started with Solutions
Solutions are packages of software that you install on your Microsoft Dynamics CRM application.

1. Understand
 - About Managed & Unmanaged Solutions
 - About Solution Components
2. Find & Use
 - Solutions Marketplace
 - Import or Upgrade a Solution
 - Customize a Solution
3. Develop
 - Key Concepts for Developers
 - Solutions SDK

Solutions: All Solutions

New Import Export Import Translations Export Translations Publish All Customizations

Get Solutions from Marketplace More Actions

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
Eric	Eric	1.0.0.0	8/30/2010	Unmanaged	Eric Boocock	
MySolution	My Solution	1.0.0.0	8/11/2010	Unmanaged	My Company	
CustomSolution	Custom Solution	0.1	8/10/2010	Unmanaged	Default Publisher for Wood	A custom sol
Default	Default Solution	1.0	7/30/2010	Unmanaged	Default Publisher for Wood	Solution that

1 - 4 of 4 (1 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

多应用服务器功能

托管的解决方案的属性

小结



Microsoft Dynamics CRM 2011

提升工作效率

1. 熟悉的智能化互联体验
2. 2011 版提供丰富的新特性
3. 为 SFA、CC 和扩展 CRM 提供显著的商业价值

用Microsoft Dynamics CRM 2011
武装您的员工吧!

Microsoft®

© 2010 年微软公司版权所有。保留所有权利。Microsoft、Microsoft Dynamics、Microsoft Dynamics 标识以及[列出的其他商标]均为微软集团公司的商标。

该信息仅供参考，代表微软在演示日的现时观点。

由于微软必须响应不断变化的市场行情，该演示不应被视为微软的某种承诺，微软也不对本演示日后提供的信息的准确性提供保证。

微软在本演示中不做任何明示或暗示的担保。