Microsoft

WHAT'S NEW?

TOP 60 New Features in Microsoft Dynamics CRM 4.0

Microsoft Dynamics™ CRM

Microsoft Dynamics™ CRM 4.0 introduces fast, flexible, and familiar business software that empowers worldwide organizations to improve marketing, sales, and customer service efficiency and effectiveness.

MICROSOFT DYNAMICS CRM 4.0

Microsoft Dynamics CRM 4.0 provides organizations with a highly flexible customer relationship management (CRM) platform that can adapt, grow, and scale along with your business. Microsoft Dynamics CRM 4.0 is based on a commitment to providing organizations with the **Power of Choice** to make it easy for you to evolve your business unencumbered by technology limitations. With tools to enhance your company's marketing, sales, and customer service processes, a solid analytics platform, and native integration with the Microsoft® Office Outlook® messaging and collaboration client, Microsoft Dynamics CRM 4.0 helps you drive consistent and measurable improvement in everyday business processes.

Extensive research and modeling of real-world businesses and business processes guided the development of Microsoft Dynamics CRM 4.0. As a result, this release fits the needs of real people working in today's business environment while meeting the requirements of any size business, including global enterprises. All of these new capabilities are delivered on a flexible platform that can adjust and change as your business changes.

Microsoft Dynamics CRM 4.0 simplifies the ability to tailor business processes and data, enabling business-driven point-and-click customizations as well as point-and-click development of sophisticated applications beyond typical CRM. These features are delivered on a platform that fully supports global business and scales with a low total cost of ownership (TCO).

CONTENTS

Microsoft Dynamics CRM 4.0 delivers a wealth of new features and capabilities that can benefit your entire organization. With this new release, executives, managers, end users, and IT professionals will be able to do the following:

- **Enhance productivity:** Wider access to data and functionality and a streamlined user experience help your people get started right away and work more productively.

- **Streamline business processes:** New and enhanced design tools give end users, developers, and IT professionals the ability to create workflows to help ensure consistent and streamlined processes across the business.

- **Report with ease:** Improved reporting tools built for end users help people make better use of CRM data without the assistance of the IT department.

- **Manage data intelligently:** Data management capabilities empower people to import data rapidly while helping to preserve the integrity and accuracy of your CRM database.

- **Align business and technology:** A highly flexible and customizable platform means that you can more easily implement Microsoft Dynamics CRM 4.0 in a way that fits your business.

- **Support global business requirements:** With support for multiple languages, currencies, and time zones, Microsoft Dynamics CRM 4.0 meets the challenges of global business.

- **Effectively manage CRM:** Monitoring and diagnostic tools give you greater visibility into how the CRM system is functioning so you can identify and resolve issues before they become critical.

- **Improve management efficiency:** Centralized management tools and self-healing capabilities help IT staff work more efficiently so they can concentrate on strategic initiatives.

- **Deliver on availability, performance, and scalability requirements:** Microsoft Dynamics CRM 4.0 provides availability, performance, and scalability to meet the requirements of any organization.

- **Quickly develop, innovate, and deploy:** Developer tools and architectural enhancements help you innovate on your CRM platform quickly and efficiently so you can maintain your unique competitive advantage.

ENHANCE PRODUCTIVITY

When end users spend most of their time repeating manual processes, it not only reduces their efficiency, it lowers employee satisfaction and allows errors to be introduced into your business data and processes. Microsoft Dynamics CRM 4.0 provides features that match the way that people work so they can be more productive, escape repetitive tasks, and work with data accurately.

1 INTERNET-FACING DEPLOYMENT
Access your CRM application without a virtual private network (VPN).
Microsoft Dynamics CRM 4.0 gives you an easier, faster way to access your data over the Internet with Internet-Facing Deployments. Now end users can use Microsoft Office Outlook to access the CRM application using hypertext transfer protocol (HTTP) with Secure Sockets Layer (SSL) from home or while travelling.

2 SMART SEARCH
Search and find what you're looking for.
Smart Search makes it easier for you to find what you're looking for by eliminating clicks and removing the necessity for a separate lookup window. Search results will automatically display if an exact match is found. Relevant options are also displayed on partial matches when you type so you can easily select the relevant item, enabling you to spend your time on higher-value tasks.

3 LOAD STATUS BAR
Start up smarter.
Microsoft Dynamics CRM 4.0 starts up smarter so that you can make more efficient use of your CRM application. The new Load Status Bar in Office Outlook gives you direct visibility into what is happening while the CRM application starts up and provides the ability to be cancelled at any time.

4 MOST RECENTLY USED ENTITIES LIST
Quickly find recently used entities for e-mail tracking.
Users can now bulk-select e-mail messages for tracking, making it much easier to manage e-mail communications. The new Most Recently Used list in the Office Outlook CRM client helps end users find commonly used entities—such as individuals, accounts, or opportunities—when tracking interactions. Users spend less time looking for information so they can focus on doing their job.
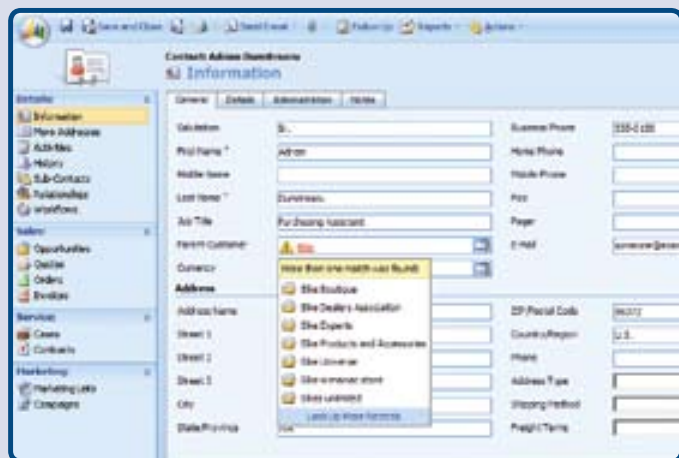
"With the improved knowledge Microsoft Dynamics CRM gives us about the customer and a more efficient information flow, we are improving our competitiveness, customer service, and saving costs due to higher efficiency."

PETER GLÜCK
IT Manager
Volvo Construction Equipment

5 TRACKING BREADCRUMB
Understand the relevancy of correspondence at a glance.
Understand the relevancy of correspondence at a glance with new user interface enhancements. The new breadcrumb bar in the Office Outlook CRM client makes it easy for end users to see at a glance how an e-mail message is relevant to their work. When an e-mail message is being tracked in CRM, the breadcrumb shows why that item is being tracked. For example, if an e-mail message is related to a particular case or lead, that lead will be shown along with the message in Office Outlook.

6 WEB MAIL MERGE
Create mail merges in a browser.
New and enhanced tools make it easier for users to manage and create mail merges. Create and share reusable templates with your coworkers so you can work more productively. A new Web-based tool for mail merges empowers users to work with mail merges through the Web.

7 ACTIVITY SYNCHRONIZATION
Track all your activities in one place.
All activity types in Microsoft Dynamics CRM 4.0 can be synchronized with Microsoft Exchange Server, making it easier for users and organizations to track their work. This allows users to track CRM activities, such as phone calls or letters, in addition to tracking e-mail messages, tasks, and other Exchange Server activities. This helps unify activities in one place so that users can work more productively.

8 E-MAIL SMART MATCHING
Manage and track correspondence simply and seamlessly.
Tracking correspondence is now easier than ever before, thanks to tracking enhancements in Microsoft Dynamics CRM 4.0. E-mail smart matching evaluates your incoming messages and automatically matches them with the appropriate conversation, without a visible tracking token. This capability streamlines communications, helping you improve customer response and build loyalty.
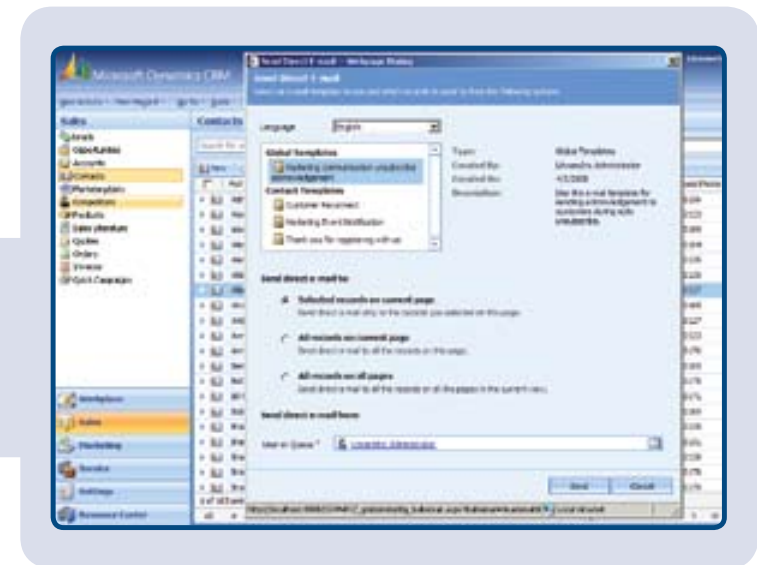
"We've been able to provide our customers with same-day responses, reducing wait times that used to range up to three days."

ROSALEE ALLAN
Sr. VP and Chief Operations Officer
PAML

"Microsoft [Dynamics] CRM has definitely delivered the customer data visibility we needed in our company to increase our efficiency and effectiveness in landing new business."

MIKE KRUSE
VP of Marketing
Heidtman Steel Products

9 **E-MAIL PROMOTION TO LEAD OR CASE**
Automatically generate leads and cases from e-mail messages.
E-mail messages can be promoted into leads or cases automatically, helping you do your work more efficiently. This reduces the amount of manual work required to manage these types of activities and speeds customer communications.

10 **PRESENCE VISIBILITY**
Connect with coworkers.
Integration with Microsoft Office Communications Server empowers quick communication and collaboration. Users can now see who is online or offline, free or busy, and launch a Microsoft Office Communicator session without leaving Microsoft Dynamics CRM 4.0. This makes it even easier for teams to work together quickly whether they're in the same office or different geographical regions.

11 **CAMPAIGN AUTOMATION**
Automate manual activities.
Campaigns are streamlined in Microsoft Dynamics CRM 4.0 so that users can create, launch, and complete campaigns more quickly and with fewer clicks. When a user creates a campaign, they can send campaign e-mail messages and close campaign activities automatically. Automating these manual tasks helps users spend less time on manual processes.

12 **RESOURCE CENTER**
Connect and share information with your community.
Microsoft Dynamics CRM 4.0 provides a community-centered approach to information sharing with the new Resource Center, a Web-based community for creating and sharing CRM information and best practices between companies. The Resource Center will also be populated with role-relevant content so that users can get up to speed with CRM faster.

Ensuring that business processes are executed consistently and rapidly is an ongoing challenge for any organization. Microsoft Dynamics CRM 4.0 provides unprecedented access to design tools built for end users, power users, and administrators so they can build solutions that streamline everyday processes and capture best practices.

13 WINDOWS WORKFLOW FOUNDATION
Build workflows on a unified foundation.
Microsoft Dynamics CRM 4.0 makes it easier to unify business processes across the business with Microsoft Windows® Workflow Foundation, a set of tools and technologies for creating and integrating data and processes from your CRM solution with other Microsoft line-of-business systems. Workflows built in Microsoft Dynamics CRM 3.0 are forward-compatible and will continue to function in Microsoft Dynamics CRM 4.0.

14 WORKFLOW WIZARD
Create workflows easily with the Workflow Wizard.
The new Workflow Wizard empowers end users to create workflows more quickly and easily with a visual design environment. Templates are provided for many common business processes, and workflows can be launched from multiple entity types, including custom entities. Workflow tools include deep functionality to appeal to a range of users including those new to workflows as well as experienced power users.

15 WORKFLOW ACCESSIBILITY
Broaden access to workflow capabilities.
End users can access workflow functionality in Office Outlook or through the Microsoft Dynamics CRM 4.0 Web client, giving them broader access to business automation tools. Workflows can be published to a shared workflow library for others to find and use. This enables users to capture and share their business processes with others without requiring the intervention of an IT professional.

16 EXPANDED WORKFLOW ACTIONS
Automate processes unique to your business.
Workflow flexibility has been expanded to include more actions as part of workflow execution. Workflows support a wide range of default actions, and new actions can quickly be created to model your business's unique processes. Form-based configuration, multiple record types, and step validation also provide additional capabilities for workflow design.
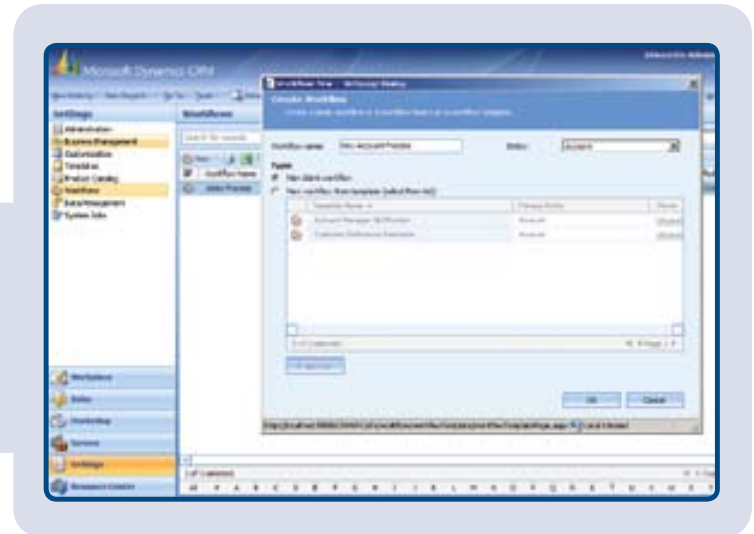
"Microsoft [Dynamics] CRM leads our sales people through the process. It was a no-brainer to go with Microsoft Dynamics CRM because an increase in efficiency alone will more than make up for the costs."

ADRIAN FORBES-BLACK
Vice President
Total Structures, Inc.

STREAMLINE BUSINESS PROCESSES

17 DYNAMIC DATA ACCESS FOR WORKFLOW DESIGN
Deliver contextual data in workflow forms.
The workflow forms designer gives users access to dynamic data so they can easily create workflows that provide rich contextual CRM data. Forms can be easily created that show data values based on live data in your CRM database. Incorporating dynamic data into workflows helps users deliver context-sensitive relevance alongside workflow functionality.

18 MULTI-STAGE WORKFLOWS
Model and track multistage processes.
New tools in Microsoft Dynamics CRM 4.0 make it easier to create multi-stage workflows such as a sales cycle or customer retention process. Microsoft Dynamics CRM 4.0 also provides visibility into running workflow stages, enabling users to see and track the progress of business processes. End users can also see the status of workflows that are running, giving them greater insight into their customers.

19 CHOICE OF DESIGN ENVIRONMENTS
Provide design tools for any user.
A variety of workflow design tools and methodologies are available to appeal to any kind of designer. Wizard-based tools put workflow power in the hands of end users. Power users can design workflows using a combination of code and markup. Developers can create and manipulate workflows in code using the Microsoft Visual Studio® development system.

20 ADVANCED WORKFLOW EXPRESSIONS AND TRIGGERS
Model business processes intelligently.
Workflow additions and enhancements help eliminate limitations so companies and end users can create a wide range of sophisticated automation solutions. The scope of workflow has been expanded to include more events and entities, workflow expressions now include support for transverse relationships, and improved branching conditions make workflows more flexible. Workflows can be triggered automatically when a data value or flag reaches a specific level. The end result is a workflow platform and tool set for sophisticated and intelligent modeling of business processes.
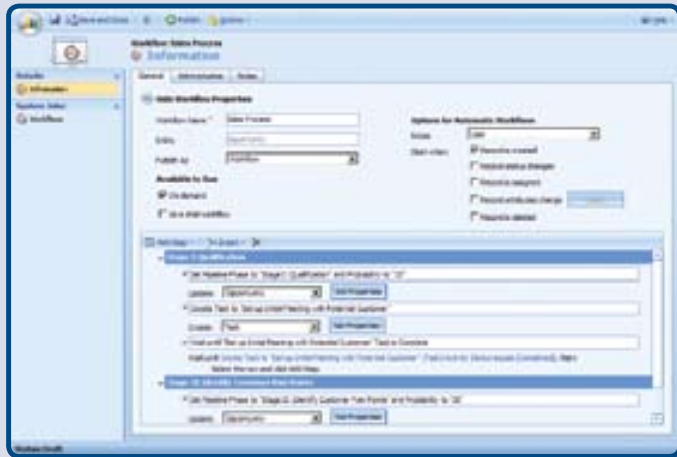
"The time we spend on customer service calls has been reduced by 80 percent per call on average, and with 22,000 complex sales orders per year, we've cut our order entry time from five minutes to 20–30 seconds per order."

ROBERT VLEESCHHOUWER
General Manager
Information Systems Group
Mitsubishi Caterpillar Forklift

Today's companies are awash in data, but turning that data into actionable knowledge can be difficult and time-consuming. With better access to reporting tools and new ways to work with data, Microsoft Dynamics CRM 4.0 helps you get the most out of your CRM data. Wizard-driven tools enable end users to create sophisticated reports without the assistance of the IT department.

21 SCHEDULED REPORTING
Get insight on demand.
Keeping up with changes in the customer repository is an ongoing challenge. Scheduled and recurring reports provide snapshots of the customer information as it evolves. On-demand reporting provides customer data in real time, so that people can stay informed and do their job better.

22 REPORTING WIZARD
Create, share, and use reports easily.
Microsoft Dynamics CRM 4.0 empowers end users to create, share, and use reports without IT assistance. The Web-based Reporting Wizard provides simplified access to information, allowing users to work more independently and freeing IT staff to do other work. Users can also create and share personalized views and filters on reports to help them focus on the information that's most relevant to their work and share insight with others.

23 OFFLINE REPORTING
Take your reporting with you.
Offline users can take advantage of reporting capabilities using synchronized data. Offline users can easily run reports against their locally synchronized data store on their client machine, and reports are republished in offline mode. Users have full access to reporting features, such as filtered views, helping them be effective even without a connection to the CRM system.

24 INTEGRATED REPORTING ACCESS MODEL
Access reports simply and seamlessly.
In Microsoft Dynamics CRM 4.0, a new report security model empowers users to access reporting more easily. Reports are now entities and are managed and administered with the same security roles and rules as other entities in the CRM system. There are no additional authentication mechanisms and no need for any users to subscribe to external security measures to access reports, so they don't have to spend extra time to access data.
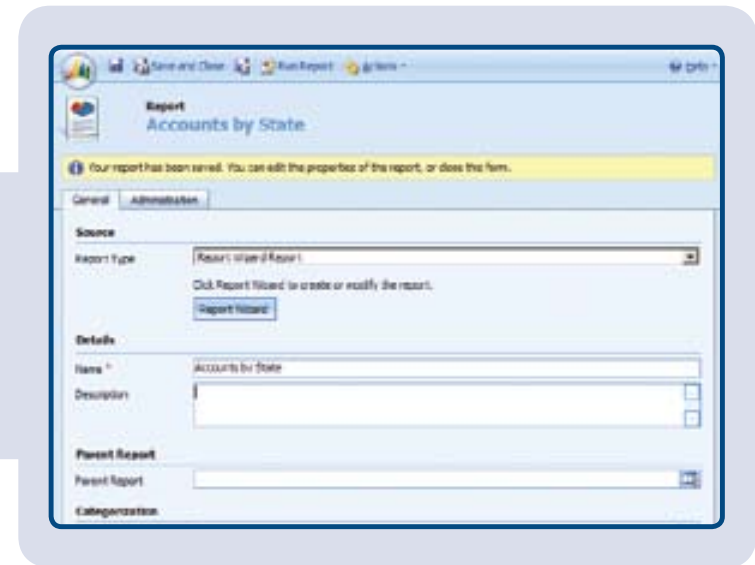
"Microsoft Dynamics CRM gives my sales team a 360-degree view of our customers. Knowing more about our customers means we can offer and sell more relevant products and services to them at the right time."

MARTIN HEGEMAN
Director Sales and Dealer Network
Renault Netherlands

25 ADVANCED FIND
Enhance your view of customer data.
Enhancements to Advanced Find in Microsoft Dynamics CRM 4.0 give a wider view of customer data. By building on data from anywhere in the CRM system, users can quickly create multiple views from information across multiple areas, such as satisfaction, sales data, opportunities, and others.

**26 DYNAMIC DATA CONNECTIONS IN MICROSOFT OFFICE EXCEL**
Work in Office Excel with a dynamic connection to CRM data.
Microsoft Dynamics CRM 4.0 supports dynamic data connections with Office Excel spreadsheet software so users can work with CRM data using familiar productivity tools. Users can import dynamic CRM data into Office Excel from Microsoft Dynamics CRM 4.0 and refresh it from live CRM data while they work using easily accessible controls in the Microsoft Office ribbon. This allows them to take advantage of the data analysis tools of Office Excel for work with their CRM data.

27 ACTIVITY REPORTING
View activities for specific users, cases, and opportunities.
Managing task and activity information is essential in creating happy and profitable customers. Microsoft Dynamics CRM 4.0 now includes pre-built activity reporting that can be filtered for specific cases, opportunities, CRM users, and activity types. Out-of-the-box, this provides an easy way for account, sales, and case managers to organize and prioritize task information. It also serves as a great starting point for creating more detailed, customized activity reports.
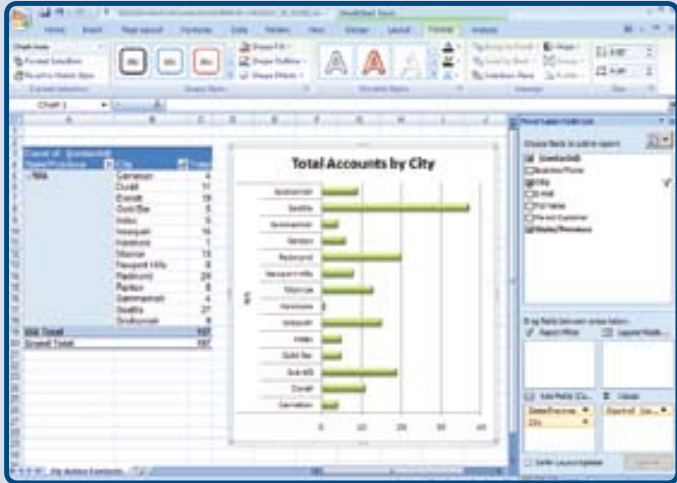
"As the CEO of a global company, Microsoft [Dynamics] CRM allows me to log on to all of our remote sites to get a snapshot of what's going on. I can get a snapshot of what any of my business units are doing, real time, any day of the week."

NATHAN BUZZA
CEO
Commtech Wireless

Data is the lifeblood of a CRM system. When users need to wait for access to data, or when customer data is inaccurate, it can result in missed opportunities and reduced customer satisfaction. Microsoft Dynamics CRM 4.0 provides powerful data management tools that help users import data rapidly and intelligently so they can start working right away.

28 **DATA IMPORT WIZARD**
Import data with ease.
Microsoft Dynamics CRM 4.0 provides robust data-import capabilities, empowering end users to add data to the CRM system quickly and easily. An easy-to-use wizard puts users in control of their own data, and they can get important leads and other data into the system quickly without waiting for IT assistance. Upon completion, users can view and validate their data import before committing it to help ensure the highest data quality.

29 **DUPLICATE DETECTION**
Identify and resolve duplicate data.
Duplicate data can compromise overall data integrity in your CRM system. Now, duplicates can be more easily identified and resolved by end users or administrators so that data integrity can be enforced at all levels of the organization. Automatic duplicate detection alerts users or administrators when data is added to the CRM system, including during manual entry, bulk import, or when promoting a contact from an e-mail message. Duplicates can be handled in multiple ways, including merging or removing duplicate records, depending upon the requirements of your business.

**30** **REUSABLE DATA IMPORT MAPS**
Import data with confidence.
Having accurate, complete customer data can help ensure productive and successful customer interactions. To improve data quality, the new Data Migration Wizard provides built-in data maps for common scenarios, enforces required fields on data imports, and allows you to save data maps for reuse later. This helps end users import data accurately and put it to work right away.

31 **DATA IMPORT VALIDATION**
Import data with control.
In Microsoft Dynamics CRM 4.0, users can test their data imports and validate the results before committing them to the CRM database. Users can back out of an import with a click if the results look incorrect. This helps ensure the integrity of CRM data and eliminate errors.
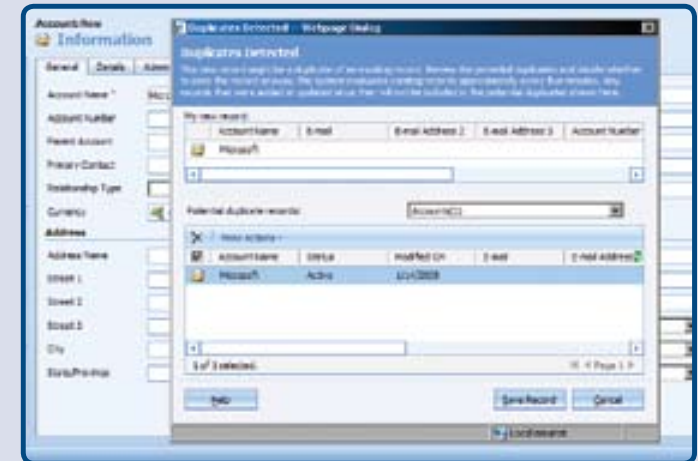
"Microsoft [Dynamics] CRM met the biggest burning desire for our organization. The need to organize, store, and access customer data so that it becomes an institutional asset that we don't lose when someone gets a job elsewhere."

FIONA BUCKNER
Manager of E-Business
South Africa Tourism

ALIGN BUSINESS AND TECHNOLOGY

Every business is dynamic and every business has its own unique value proposition. As a result, a CRM solution must have the flexibility required to address ongoing and distinct business requirements. Microsoft Dynamics CRM 4.0 lets you choose how you implement and how you use your CRM system so that you can tailor your implementation to match your business.

"The multi-tenancy feature of the new solution is very attractive to us. We'll be able to personalize the CRM data experience for each of our business units and 138 franchisees with minimal IT resources."

GREG LUSH
CIO
The Linc Group

32 ADVANCED ENTITY RELATIONSHIP MODELING
Model your business relationships.
More flexible entity relationships in Microsoft Dynamics CRM 4.0 enable businesses to more accurately and easily model their business. For example, a healthcare company might run several hospitals while also employing doctors who work at more than one of the hospitals. Microsoft Dynamics CRM 4.0 supports many-to-many relationships like this one out of the box. In addition, the application provides support for self-referential relationship hierarchies, for example, where a case may have sub-cases related to it.

33 SMART NAVIGATION
*Provide smarter navigation to users.*
Each organization has its own way of using CRM. You can now easily define the layout of the left navigation pane in Microsoft Dynamics CRM 4.0 so that it exposes only the functionality that your users need. Access to navigation items is role-based, so that users can focus on items that are relevant to their job.

34 DEVICE CLIENT ACCESS LICENSE
License your devices.
A new licensing option in Microsoft Dynamics CRM 4.0 provides support for organizations where multiple users access their CRM application from the same device. The new device client access license (CAL) enables organizations to license Microsoft Dynamics CRM 4.0 on a per-device basis no matter how many users work with that device, providing you with flexibility in how you license your CRM application. User CALs are also still available, and can be mixed with device CALs so each business can create the licensing model that best suits their needs.

35 READ-ONLY CLIENT ACCESS LICENSE
License your light users.
Read-only licensing in Microsoft Dynamics CRM 4.0 enables organizations to more easily support the needs of users who require only limited access to CRM data. The new read-only CAL supports users, such as analysts or executives, who don't work in Microsoft Dynamics CRM 4.0 every day but still require access to CRM data. Read-only licenses can be mixed with full-use licenses so you can create the licensing model that best suits your needs.
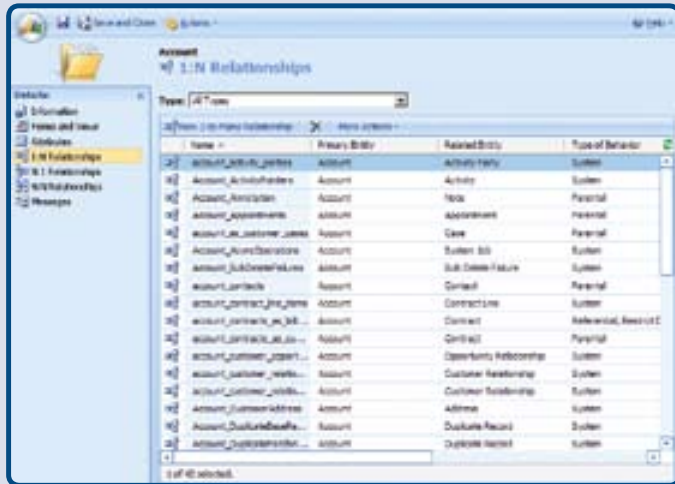
SUPPORT GLOBAL BUSINESS REQUIREMENTS

In today's global marketplace, more and more companies require the ability to deal in multiple languages and currencies whether globally or within their own geographical area. Microsoft Dynamics CRM 4.0 adds enhanced support for multiple languages and currencies within a single instance of the solution, so you can compete on a global basis while keeping costs under control.

36 MULTI-TENANCY
Host multiple groups with multi-tenancy.
A new multi-tenant architecture allows organizations to host multiple distinct instances of Microsoft Dynamics CRM 4.0 on the same server. This not only allows them to make better use of hardware, it reduces management and maintenance costs associated with the CRM application. Multiple organizations may each have their own instance of Microsoft Dynamics CRM 4.0 without requiring additional database servers, making it an excellent solution for companies that host CRM services for multiple customers, or for organizations with distinct business units who each need their own data repository.

37 MULTI-LANGUAGE
Remove language barriers.
By supporting multiple languages at the server, Microsoft Dynamics CRM 4.0 helps you do business locally or around the world. Agents can now work in multiple languages within the same organization and multiple groups can work in their own languages across geographical regions, reducing language barriers to communication. Language packages are a free download and may be installed as add-ons as they are needed.

38 MULTI-CURRENCY
Work with multiple currencies.
Microsoft Dynamics CRM 4.0 provides support for any number of international currencies. Users can record and follow transactions in the local currency, making global deals easier to track. When a deal is closed, the conversion is locked in at the current rate. Exchange rates can be updated manually or automatically.

39 MULTIPLE E-MAIL PLATFORM SUPPORT
Support more e-mail platforms.
Microsoft Dynamics CRM 4.0 offers a broad range of choice for e-mail platforms. Native support for Exchange Server ensures seamless e-mail integration, and extends powerful features of Exchange Server to provide a richer e-mail experience. Support for POP3 and outbound SMTP allow Microsoft Dynamics CRM 4.0 to support diverse business scenarios.
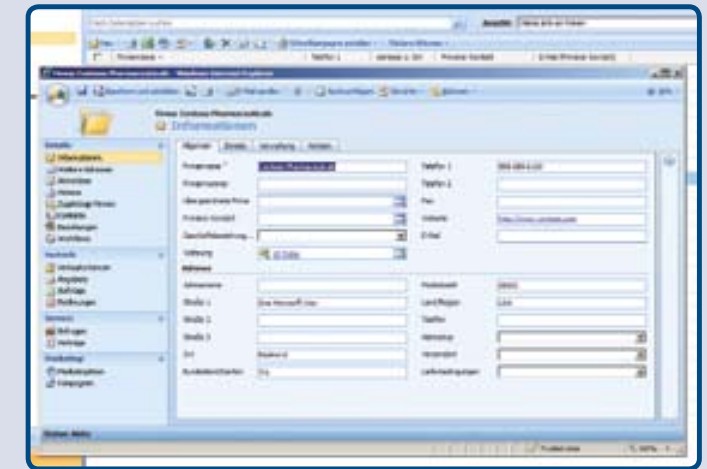
"Microsoft Dynamics CRM 4.0 allows a deep level of collaboration among our employees across multiple languages and currencies to a level we've never experienced before."

STEFAN MAJA
MIS Director
Abacus Group, PLC

MICROSOFT DYNAMICS CRM 4.0 13

EFFECTIVELY MANAGE CRM

When line-of-business applications suffer downtime, the results can include lost productivity, reduced customer satisfaction, and increased costs. Microsoft Dynamics CRM 4.0 includes monitoring tools that give administrators insight into how the CRM system is functioning and diagnostic tools to help identify and resolve issues quickly and efficiently.

40 SYSTEM JOB MONITOR
Track and monitor asynchronous processes.
Microsoft Dynamics CRM 4.0 gives administrators superior visibility into system and data management jobs. Process status viewers enable administrators to efficiently monitor the functioning of asynchronous processes including data imports, workflows, and duplicate checking. This keeps administrators better informed as to the functioning of the CRM system and makes it easier to diagnose issues.

41 MONITORING AND DIAGNOSTICS
Diagnose your environment.
With new diagnostic tools, it is easier than ever to get a clear picture of how well the CRM system is running. Diagnostic tools provide administrators with a broad set of alerts and warnings to help detect and resolve issues with the CRM system, including detection of unsupported configurations, before they result in outages.

**42 OFFICE CLIENT DIAGNOSTIC TOOLS AND REPORTS**
Empower end users to support themselves.
Microsoft Dynamics CRM 4.0 gives end users new tools to diagnose and fix problems when working in Office Outlook. The Office Client Diagnostics Tools and Diagnostic Reports empower users to test for common issues and, if a fix is available, to apply it with the click of a button.

43 CLIENT TRACING AND TROUBLESHOOTING FILE
Streamline client troubleshooting.
With the advanced troubleshooting features of Office Client Diagnostics, IT support professionals are better able to help end users resolve support issues. End users can enable tracing to assist with troubleshooting and can create a troubleshooting file for support staff so they have the right information to help solve problems fast.
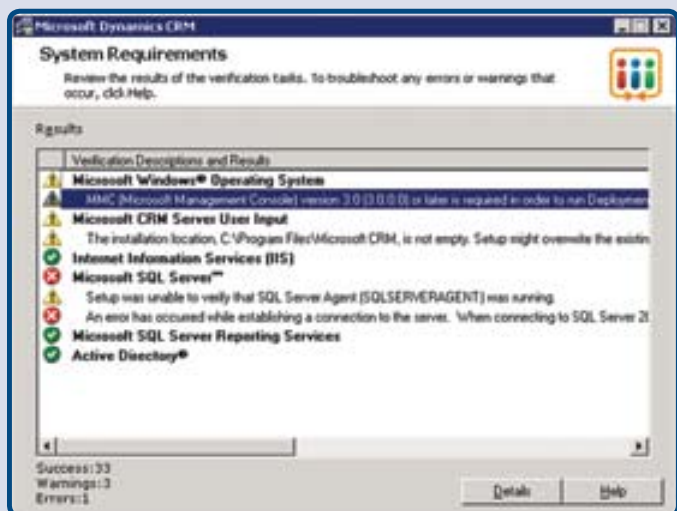
"We liked being able to configure workflows to trigger activities and person-specific tasks. And with a presence in over 50 countries, the multi-tenancy and multi-lingual capabilities foster better collaboration."

FRED TEEKENS
Senior Procurement Manager
ING Group

Businesses look to their IT departments to deliver fresh and powerful capabilities while keeping costs under control. Centralized management, streamlined tools, and painless upgrades to Microsoft Dynamics CRM 4.0 help improve the efficiency of IT so IT professionals can concentrate on strategic business initiatives.

44 **MIGRATION OF CUSTOMIZATIONS**
Preserve your investment in customizations.
Microsoft Dynamics CRM 4.0 helps preserve your existing investment in CRM technology with forward-compatibility for customizations and configurations. All supported configurations, customizations, workflows, and entities created in Microsoft Dynamics CRM 3.0 will automatically upgrade to version 4.0. This helps you upgrade with confidence and eliminates the time and expense associated with re-creating customizations.

45 **ORGANIZATION IMPORT WIZARD**
Automate user and environment migrations.
Move Microsoft Dynamics CRM 4.0 organizations to other servers with the new Organization Import Wizard. This wizard allows a new organization to be created in your development environment and easily ported to your production environment. When you upgrade server farms, you can quickly import your existing CRM environments to the new farm, as well as import an organization from any domain in the Microsoft Active Directory® forest. The Organization Import Wizard allows you to keep current users, or map users in the new domain to your imported organization, saving you from manually managing user migration.

46 **EXTENDED PORTABLE APPLICATION MODEL**
Manage and export configurations.
Microsoft Dynamics CRM 4.0 extends the portable application model, which supports the export and import of the entire CRM application for seamless migration to another CRM server. Now security roles, workflows, organization settings, multi-language UI settings, and other metadata can all be imported and exported, making it easier for technical teams to move from development to testing to production or move the CRM installation to a new server.

47 **BULK USER ADD**
Multiply your users.
Microsoft Dynamics CRM 4.0 improves administrator productivity by streamlining the process for adding users. New users can now be created in bulk. Tasks such as importing user information from the Microsoft Active Directory directory service, setting user roles, and assigning licenses can all be automated, greatly reducing the time and effort required to create new users and freeing up administrators to do other work.

"It is so much more user-friendly on the technical level that users can create and administer them without the help of programmers. I could tell immediately that it was more robust and functional than the previous version."

SHAWN TABOR
Technology Product Manager
for CRM
Raymond James Financial

DELIVER ON AVAILABILITY, PERFORMANCE, AND SCALABILITY REQUIREMENTS

Businesses expect their CRM data to be available and up-to-date 24 hours a day, 7 days a week. Microsoft Dynamics CRM 4.0 includes significant enhancements to availability, performance, and scalability to ensure that your CRM data is available when it's needed without interruption.

48 ## MICROSOFT SQL SERVER MIRRORING
Enhance availability.
Line-of-business applications must be available to support business requirements without downtime or loss of data. When mission-critical applications go down, the impact can be significant and the result can be missed opportunities, dissatisfied customers, and lost employee productivity. With support for Microsoft SQL Server® mirroring, Microsoft Dynamics CRM 4.0 maintains a copy of its database so that in the event of a database failure it can switch databases automatically with minimal disruption.

49 ## ENHANCED PERFORMANCE
Boost application performance.
Microsoft Dynamics CRM 4.0 delivers several new and improved technologies that boost application performance and help accelerate your business. CRM has been tuned for better performance in wide area network (WAN) environments, transferring only the data that needs to be transferred over slow connections. Microsoft Dynamics CRM 4.0 now uses asynchronous processing for bulk transactions and other long-running tasks, minimizing the impact on other core business applications. The e-mail router also supports parallel processing of inboxes and improves support for enterprise deployment scenarios, providing a more reliable and responsive end-user experience.

50 ## CLUSTERING AND LOAD BALANCING
Cluster for scalability.
Microsoft Dynamics CRM 4.0 supports clustering and load balancing of all solution components, including Exchange Server, SQL Server Reporting Services, and Web services. Clustering allows you to scale your applications effectively so that you can support your user base and expand as your business grows.

51 ## COMPONENT SCALABILITY
Cluster application services for scalability.
Because each business uses the CRM application differently, organizations can elect to cluster CRM application services together to match their usage needs. For example, one organization may make heavy use of workflow, while another may have large data imports. Clustering the components and services your business uses most, to match your business needs, improves scalability and improves the responsiveness of your CRM application.
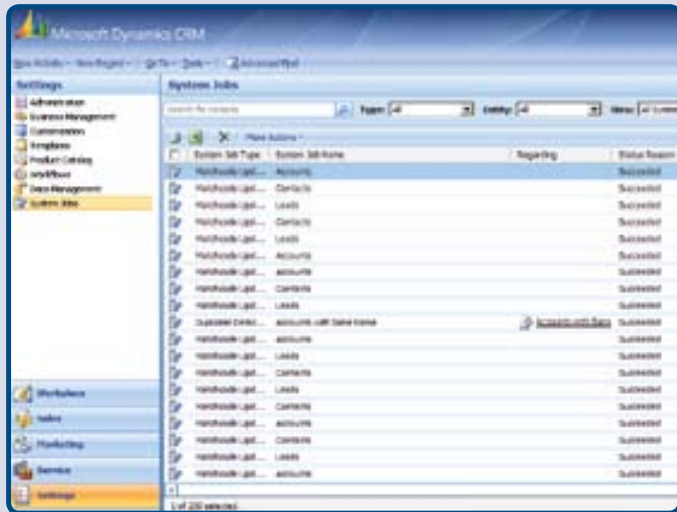
"We've embarked on building a world-class sales organization, and we couldn't have done it without a world-class sales force automation tool. Microsoft Dynamics CRM is playing a central role in achieving this goal."

JAY DEVERS
Director of Technology Solutions
Best Buy

Keeping pace with a rapidly changing market is a challenge for any company. To meet this challenge, companies need tools that give them the power and flexibility to adjust their business to meet new opportunities. New and enhanced tools for developers in Microsoft Dynamics CRM 4.0 help companies create next-generation CRM solutions quickly to meet the changing needs of business.

52 **METADATA APPLICATION PROGRAMMING INTERFACE**
Take advantage of expanded metadata.
The Microsoft Dynamics CRM 4.0 metadata application programming interface (API) has been expanded to make it easier for developers to create flexible custom solutions and to enhance integration capabilities. Developers can now create, read, update, and delete metadata on the fly and create custom entities, attributes, and relationships programmatically. The Microsoft Dynamics CRM 3.0 Metadata API is still available to support backward compatibility. Now it is easier than ever to have a CRM system that is tailored to meet specific business needs with the flexibility to change and expand as the business does.

53 **OFFLINE CUSTOMIZATIONS**
Take your customizations offline.
Microsoft Dynamics CRM 4.0 offers a consistent user experience whether working online or offline, including the ability to take reports, workflows, and other custom functionality offline. A new offline software development kit (SDK) helps developers create solutions that provide functionality even when a connection to the server is not available.

54 **EVENT FRAMEWORK PLUG-INS**
Extend the capabilities of your CRM solution.
A new event framework in Microsoft Dynamics CRM 4.0 makes it easier to extend the capabilities of Microsoft Dynamics CRM with custom code components, called plug-ins, that are dynamically registered and run inside the CRM application. Close integration between custom code and the CRM application makes it easier for developers to create streamlined solutions quickly. Plug-ins can also be configured to execute while working offline, making it easier to provide customizations that benefit both online and offline users.
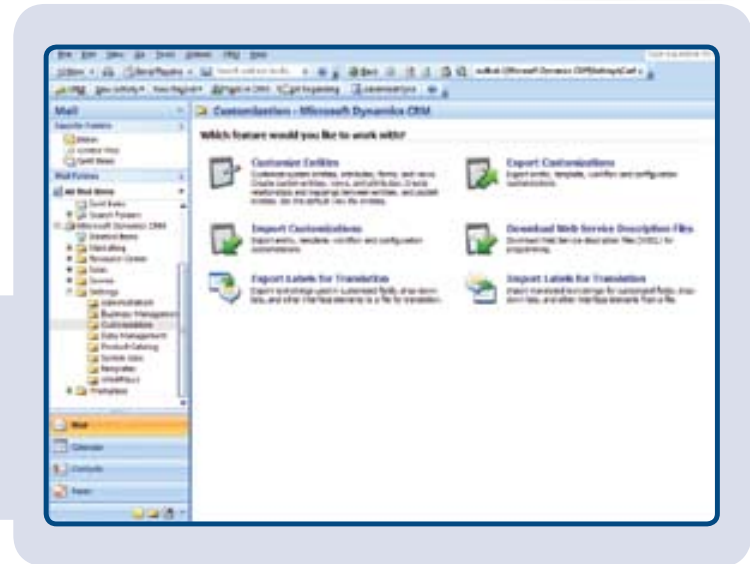
"The solution had to be easy to use, it had to integrate well with Office Outlook, it had to be scalable, and it had to offer a hosted solution because we frankly didn't have the IT resources to implement and support it on our own."

TOM MERCER
VP of Sales & Marketing
High 5 Sportswear, Inc.

These are only a portion of the enhancements and improvements that are part of Microsoft Dynamics CRM 4.0. Additional new features include:
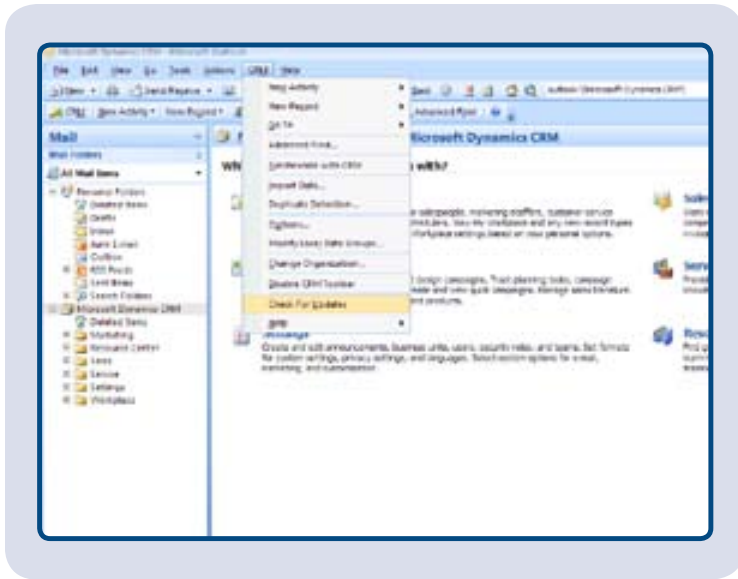
55 CITRIX SUPPORT for integration with third-party applications and platforms.

56 AUTOMATIC CLIENT UPDATES for one-click access to new client software updates.

57 PATH-BASED URLS that make the application easier to navigate.

58 POP-UP BLOCKER DETECTION, providing a better user experience over the Web.

59 NEW ACCESSIBILITY FEATURES for the vision-impaired.

60 ADVANCED QUOTE PRINTING for more effective customer interactions.

"We can be more systematic using Microsoft Dynamics CRM to coordinate a strategic plan to more deeply penetrate accounts."

STEVE ACTERMAN
Director of Corporate IT
Volt Information Sciences

Microsoft Dynamics CRM Value Summary by Role

MANAGER	END USER	IT
Improve employee satisfaction and productivity while reducing training costs.	Reduce repetitive manual processes so you can focus on your work.	Provide powerful tools to end users without increasing your support burden.

Server Editions

All editions of Microsoft Dynamics CRM include marketing, sales, and customer service applications. Server editions are available in the following:

EDITION	LICENSES	DEPLOYMENT
Microsoft Dynamics CRM 4.0 Workgroup	Includes and is limited to five user licenses	Single-tenant only
Microsoft Dynamics CRM 4.0 Professional	No user limit	Single-tenant only
Microsoft Dynamics CRM 4.0 Enterprise	No user limit	Supports single and multi-tenant

"The full marketing, sales, and service functionality in Microsoft [Dynamics] CRM ensures that we cover all the bases with our customers to increase our retention rate."

DEB THORNTON
CRM Implementation Specialist
Noble Trade

Available in more than 20 languages

English, German, French, Spanish, Dutch, Chinese (Simplified, Traditional, Hong Kong), Italian, Danish, Finnish, Japanese, Swedish, Norwegian, Portuguese (Brazil), Portuguese, Turkish, Russian, Czech, Hungarian, Polish, Korean, Greek, Arabic, Hebrew

FEATURES AND BENEFITS SUMMARY

MANAGER	END USER	IT	FEATURES

ENHANCE PRODUCTIVITY

| Improve employee satisfaction and productivity while reducing training costs. | Reduce repetitive manual processes so you can focus on your work. | Provide powerful tools to end users without increasing your support burden. | **Internet-Facing Deployment**—*Access CRM application remotely without a VPN.*
Smart Search—*See search results appear as you type a search term.*
Load Status Bar—*See status or cancel loading of CRM application in Office Outlook.*
Most Recently Used Entities List—*Quickly choose recently used entities when selecting criteria for e-mail tracking.*
Tracking Breadcrumb—*See at a glance why an e-mail message is being tracked.*
Web Mail Merge—*More easily create and manage mail merges and share reusable mail merge templates.*
Activity Synchronization—*Synchronize all CRM activities with Exchange Server.*
E-Mail Smart Matching—*Track CRM e-mail messages without a tracking token.*
E-Mail Promotion to Lead or Case—*Transform an e-mail message into a lead or case with a click.*
Presence Visibility—*See who is online and start instant messaging from within your CRM application.*
Campaign Automation—*Create sales campaigns more quickly and easily.*
Resource Center—*Share information and best practices with your coworkers in a community format.* |

STREAMLINE BUSINESS PROCESSES

| Improve efficiency and consistency of business processes execution. | Gain access to powerful productivity tools without the intervention of IT. | Provide workflow tools to users without increasing the burden on IT. | **Windows Workflow Foundation**—*Extend workflows across line-of-business systems.*
Workflow Wizard—*Create workflows using wizard-based tools.*
Workflow Accessibility—*Access workflows from your CRM application and through the Web.*
Expanded Workflow Actions—*Create workflows using a broad library of actions or create custom actions.*
Dynamic Data Access for Workflow Design—*Access and use dynamic data in the workflow design interface.*
Multi-Stage Workflows—*Model multi-stage business processes more faithfully.*
Choice of Design Environments—*Design workflows using the Workflow Wizard, markup, or code.*
Advanced Workflow Expressions and Triggers—*Apply sophisticated logic and trigger conditions in your workflows.* |

REPORT WITH EASE

| Turn your valuable CRM data into actionable insight. | Gain rapid access to data without the intervention of IT. | Provide fast data access to users without increasing the burden on IT. | **Scheduled Reporting**—*Schedule reports or run them when you need them.*
Reporting Wizard—*Create reports using wizard-based tools.*
Offline Reporting—*View reports offline based on synchronized data.*
Integrated Reporting Access Model—*Secure reports using the same role-based access model as your CRM application.*
Advanced Find—*Create sophisticated views of customer data.*
Dynamic Data Connections in Office Excel—*Work with CRM data in Office Excel and refresh from the CRM database.*
Activity Reporting—*View activities for specific users, cases, and opportunities.* |

MANAGE DATA INTELLIGENTLY

| Protect the value and integrity of your CRM data. | Import data quickly, easily, and accurately. | Protect the integrity of data and ease data management tasks. | **Data Import Wizard**—*Import data more easily with wizard-based tools.*
Duplicate Detection—*Detect duplicates and merge or delete redundant records.*
Reusable Data Import Maps—*Create and reuse data-import maps for common data migration activities.*
Data Import Validation—*Test your data import before you commit your data.* |

MANAGER	END USER	IT	FEATURES

ALIGN BUSINESS AND TECHNOLOGY

MANAGER	END USER	IT	FEATURES
Change your implementation of CRM as your business grows and changes.	Work in a CRM environment that matches how you do business.	Implement CRM in a way that matches business requirements.	**Advanced Entity Relationship Modeling**—*Model many-to-many business relationships out of the box.* **Smart Navigation**—*Provide a customized navigation to users in your organization.* **Device Client Access License**—*License Microsoft Dynamics CRM 4.0 on a per-device basis.* **Read-Only Client Access License**—*License those users who require only limited access to Microsoft Dynamics CRM 4.0.*

SUPPORT GLOBAL BUSINESS REQUIREMENTS

MANAGER	END USER	IT	FEATURES
Compete on a global basis.	Work with your CRM application in the language of your choice.	Reduce costs associated with supporting a global application.	**Multi-Tenancy**—*Host multiple instances of Microsoft Dynamics CRM 4.0 on the same physical hardware.* **Multi-Language**—*Support multiple languages in one location or across geographical boundaries.* **Multi-Currency**—*Support any number of currencies.* **Multiple E-Mail Platform Support**—*Support your e-mail platform of choice, including POP3 and Exchange Server.*

EFFECTIVELY MANAGE CRM

MANAGER	END USER	IT	FEATURES
Reduce costs associated with downtime.	Troubleshoot client issues quickly with or without the help of IT.	Identify and resolve end-user and IT issues quickly.	**System Job Monitor**—*Monitor the processing of asynchronous system jobs.* **Monitoring and Diagnostics**—*Better monitor the health of your Microsoft Dynamics CRM 4.0 environment.* **Microsoft Office Client Diagnostic Tools and Reports**—*Help end users troubleshoot their own issues.* **Client Tracing and Troubleshooting File**—*Create a troubleshooting file and trace client problems for quick resolution.*

IMPROVE MANAGEMENT EFFICIENCY

MANAGER	END USER	IT	FEATURES
Improve IT productivity and reduce costs with efficient management tools.	Reduce lost productivity caused by application downtime.	Streamline management so you can reduce manual tasks and focus on strategic initiatives.	**Migration of Customizations**—*Preserve your customizations when you migrate from Microsoft Dynamics CRM 3.0.* **Organization Import Wizard**—*Automate user and environment migrations.* **Extended Portable Application Model**—*Export your customizations and apply them accurately to servers.* **Bulk User Add**—*Add users in bulk, including Active Directory lookup and application of roles.*

DELIVER ON AVAILABILITY, PERFORMANCE, AND SCALABILITY REQUIREMENTS

MANAGER	END USER	IT	FEATURES
Support business needs while reducing costs and losses due to downtime with a highly reliable, available platform.	Work in a CRM application that is available and responsive so you can be more productive.	Support multiple instances of Microsoft Dynamics CRM 4.0 on the same hardware.	**Microsoft SQL Server Mirroring**—*Employ SQL Server mirroring to enhance the availability of your CRM data.* **Enhanced Performance**—*Improve performance with parallel inbox processing and other enhancements.* **Clustering and Load Balancing**—*Cluster application components for scalability.* **Component Scalability**—*Cluster the components you use most.*

QUICKLY DEVELOP, INNOVATE, AND DEPLOY

MANAGER	END USER	IT	FEATURES
Create new solutions to help you maintain and gain market advantage.	Customize and extend your CRM solution quickly.	Quickly create new solutions and workflows while keeping costs under control.	**Metadata Application Programming Interface**—*Take advantage of the power of metadata with the metadata API.* **Offline Customizations**—*Take your customizations with you when you work offline.* **Event Framework Plug-ins**—*Integrate your applications with the Microsoft Dynamics CRM 4.0 event pipeline.*

MORE INFORMATION

To find out more about these or other features of Microsoft Dynamics CRM 4.0, contact your Microsoft sales representative, Microsoft partner, or visit **www.microsoft.com/dynamics/crm**.

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