What's changed in this version?

Just updated?

Find out what's changed in Microsoft Dynamics CRM 2013 & Microsoft Dynamics CRM Online Fall '13

Microsoft Dynamics CRM

Getting Started Series

4

meet Microsoft Dynamics CRM 2013

You probably noticed—

we've made some pretty significant changes to the ways you get your work done in this version of CRM.

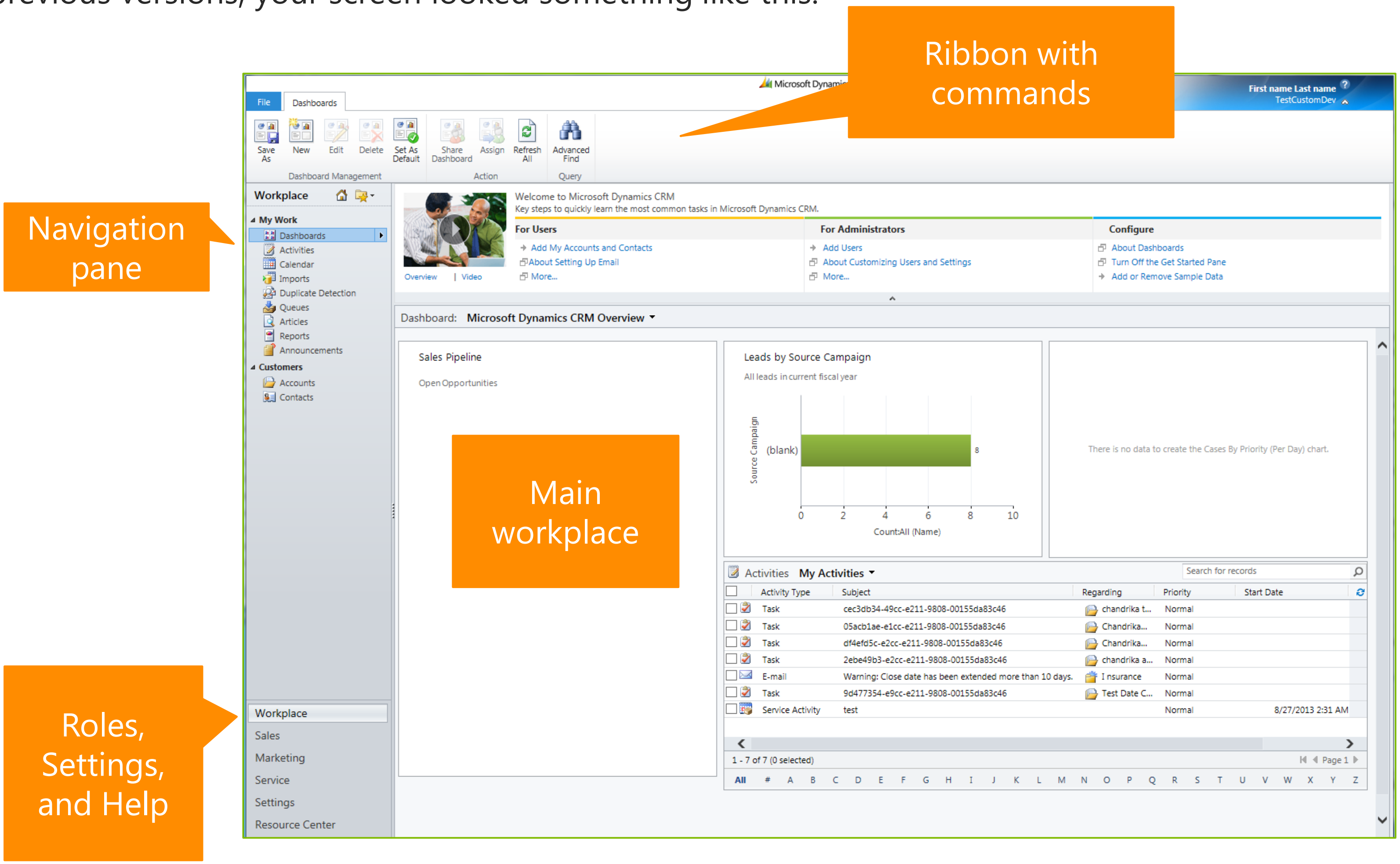
We think you'll like them!

Here are some highlights to help experienced users get started in the new user experience…

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

goodbye, navigation pane...

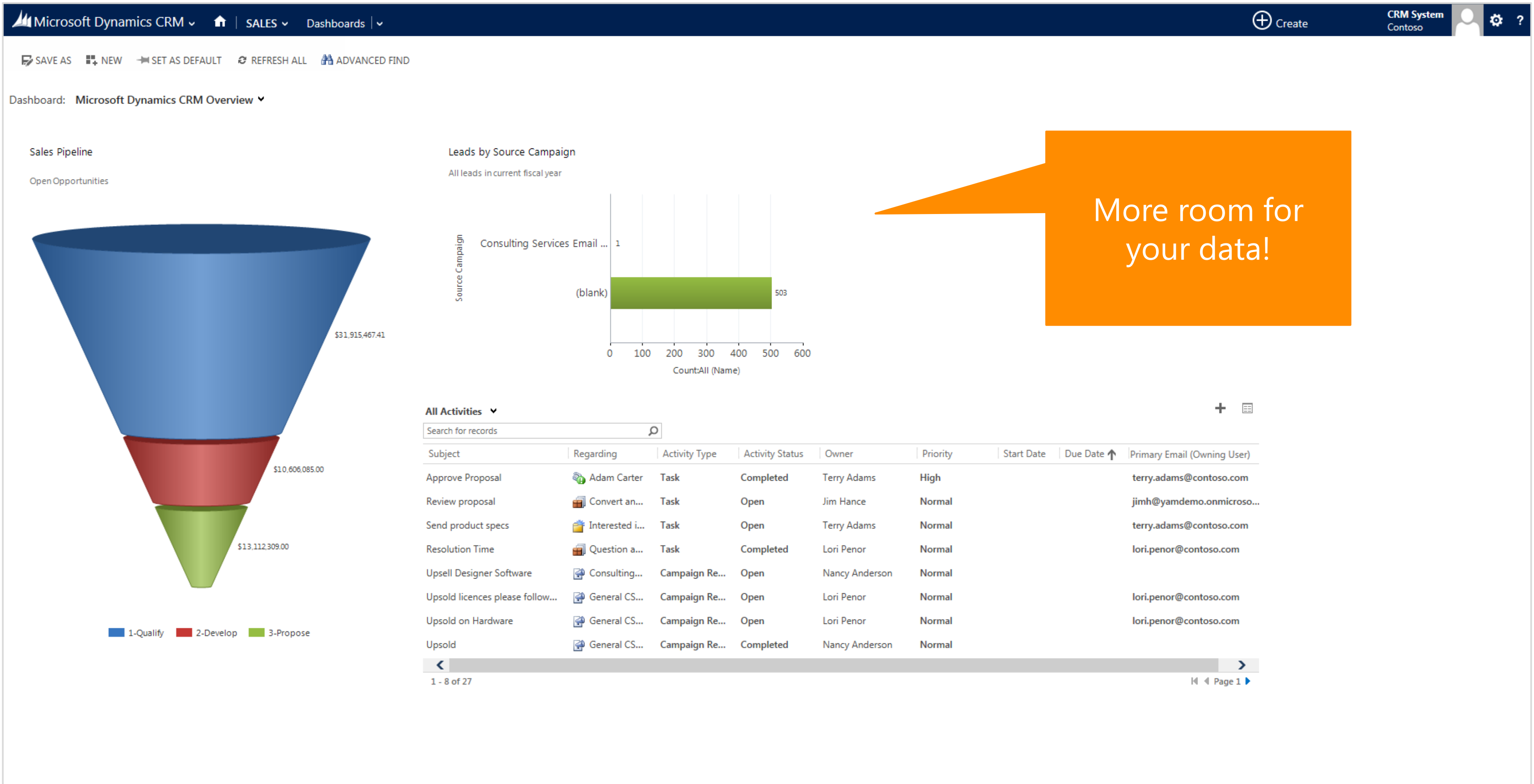
In previous versions, your screen looked something like this:



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

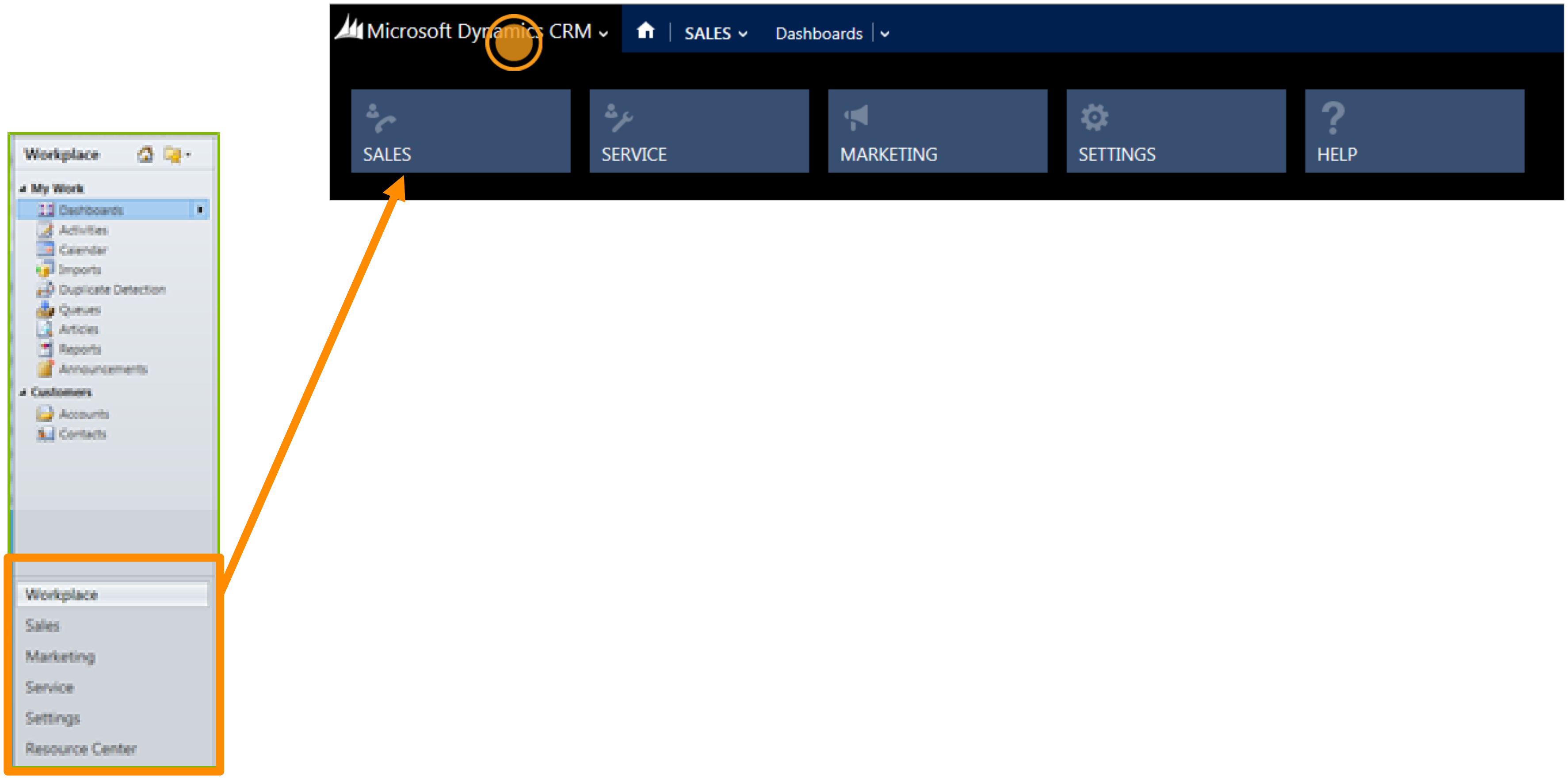
hello, data!

So we redesigned the system to make more room for what's most important – your customer data. The new, streamlined navigation drops down from the top of the screen. No more navigation pane.



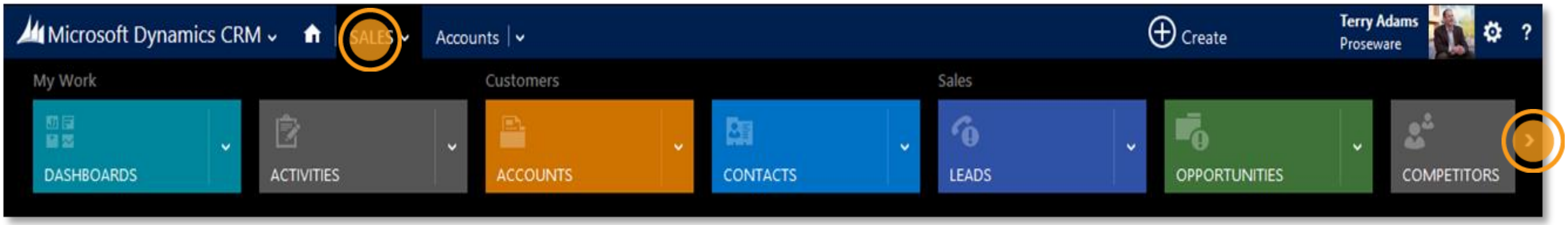
find work areas under the logo

Work area dashboards have moved under the Microsoft Dynamics CRM logo.
Just click or tap the logo any time to switch between work areas.



find the different record types

You can quickly get to different record types with a single touch. On the nav bar, just click or tap a work area to see tiles for the types of records you work with most often.

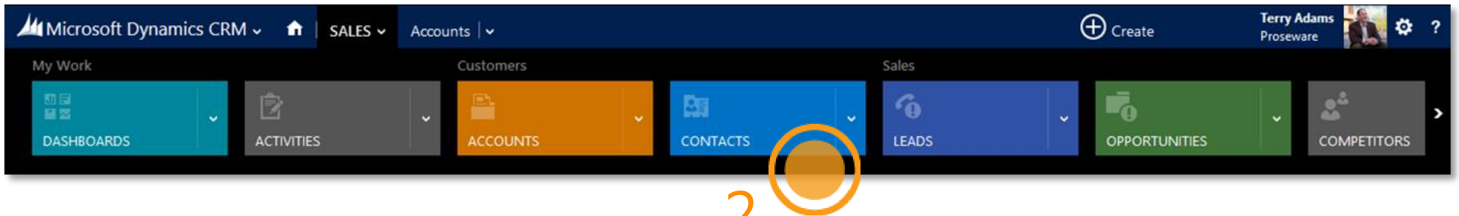


TIP
Click or tap this arrow to scroll right and see more tiles

find your records

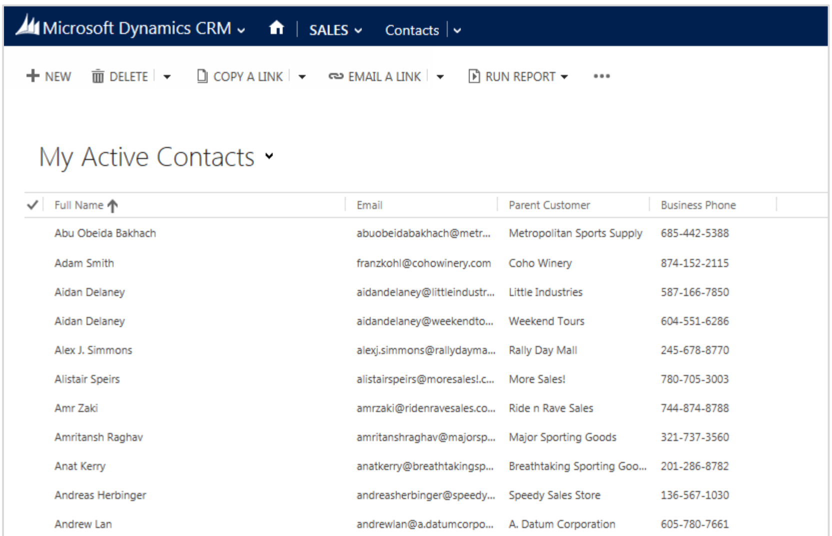
1

On the nav bar, click or tap your work area



2

then click or tap the tile for the record type.

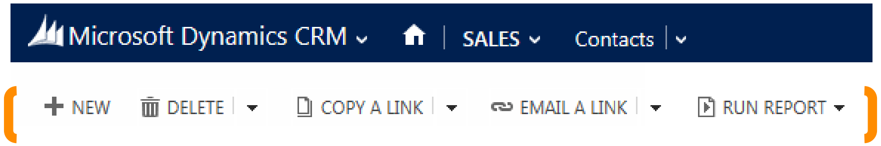


3 You'll see a list of records.

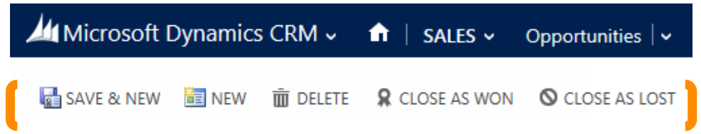
TIP These steps work for any record type.

find commands where you're working

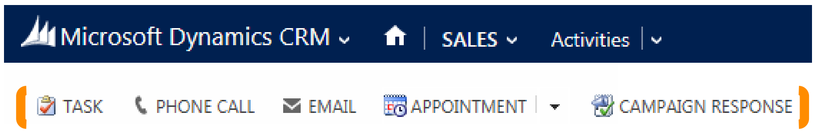
No more ribbon. Instead, you'll see just the commands related to the things you're working on.



Commands for contacts



Commands for opportunities

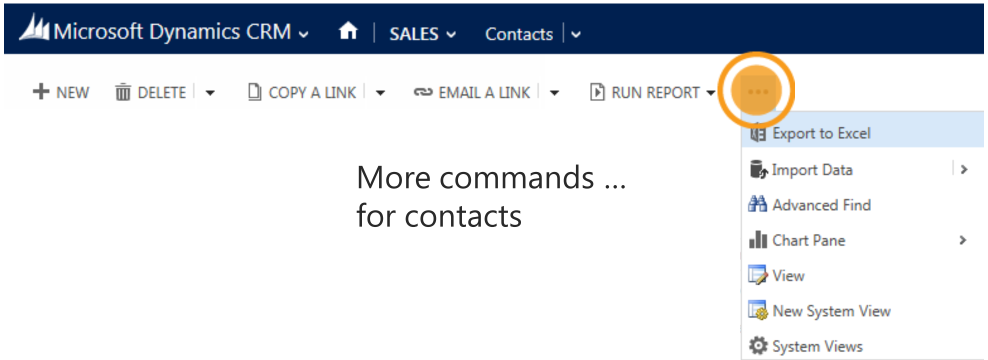


Commands for activities

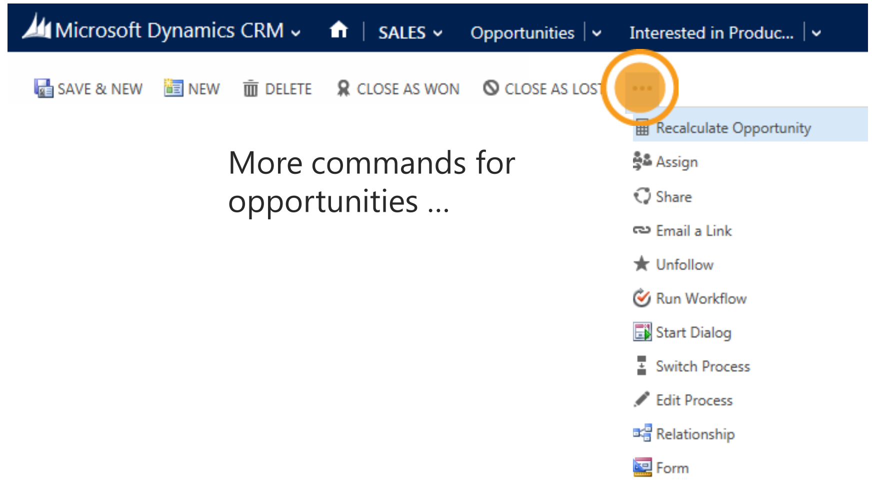
… and so on!

check what's under More commands ...

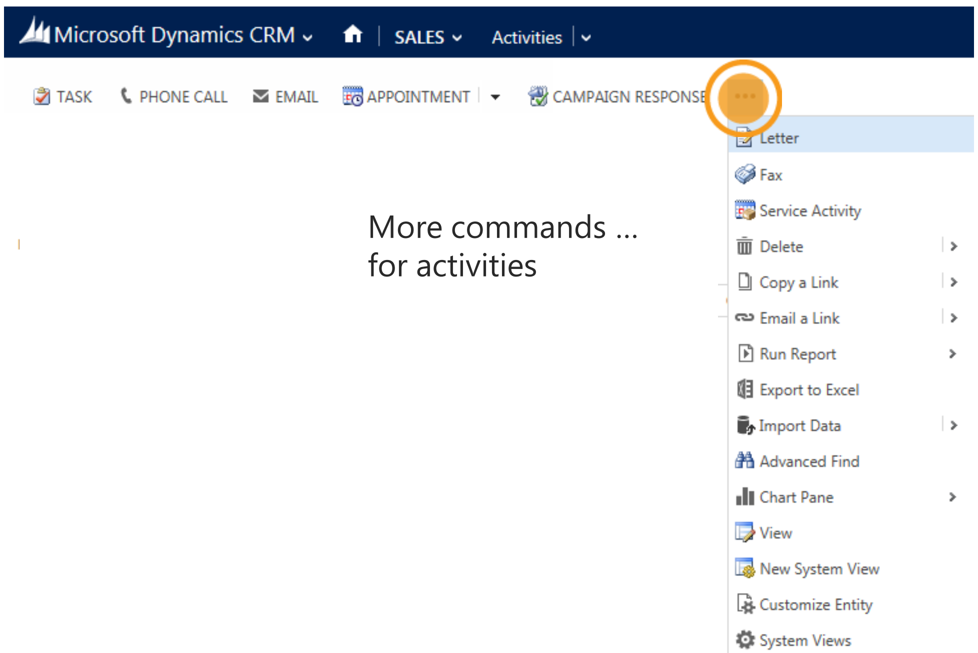
Don't see the command you want? Click or tap the **More commands** dots **...** to see what else is available. You'll find it on most screens where you work on records.



More commands ...
for contacts



More commands for
opportunities ...

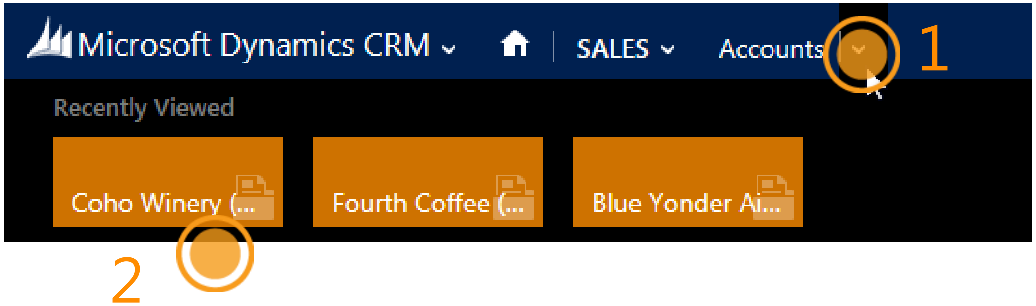


More commands ...
for activities

... and so on!

pick up where you left off

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



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

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

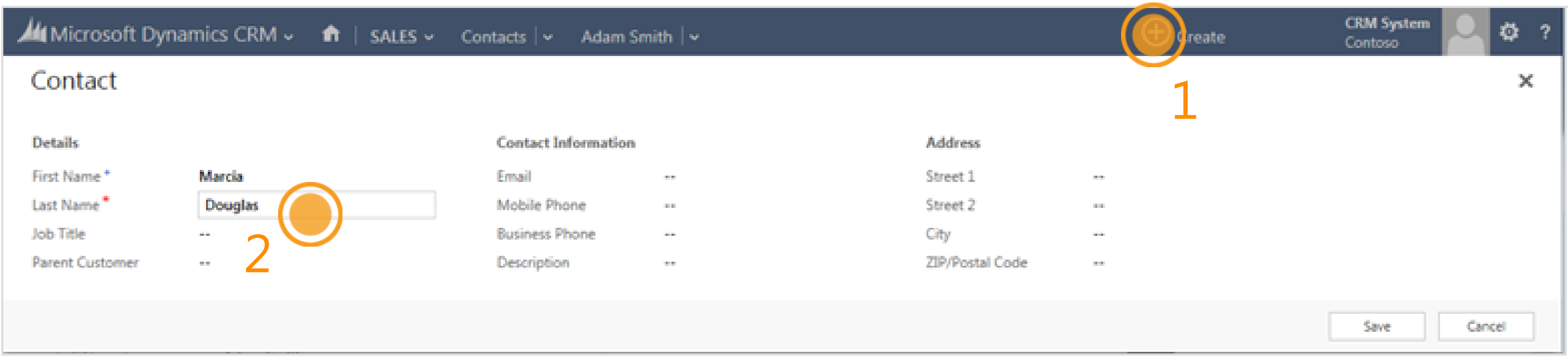
enter data in new ways

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

quickly create new records

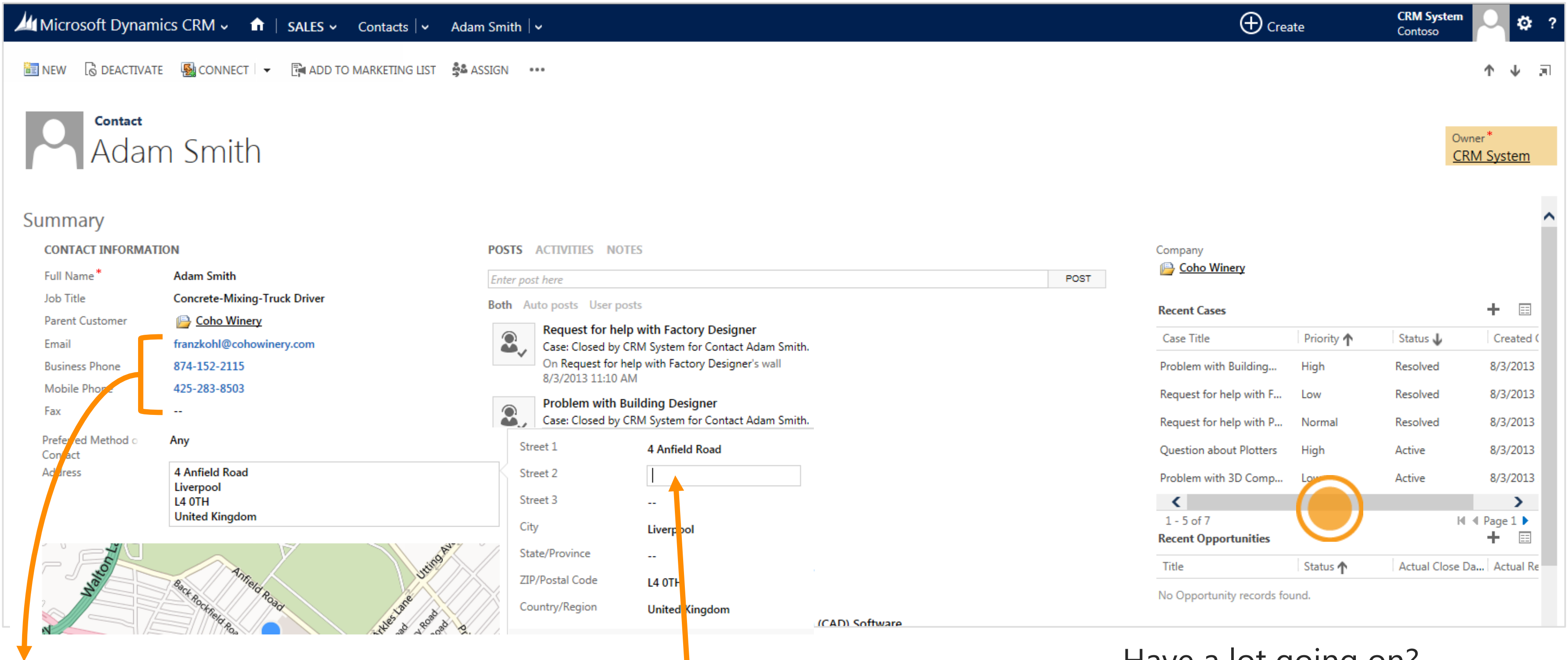
Now, you can quickly capture key data points when you enter new records with **Quick Create**.

On the nav bar, click or tap **Create**, and then select the type of record you want. Enter data for a few fields, or more if you have it. You can come back and fill in the gaps later when you have more time.



edit contact info inline

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



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

Click or tap an email to send a message

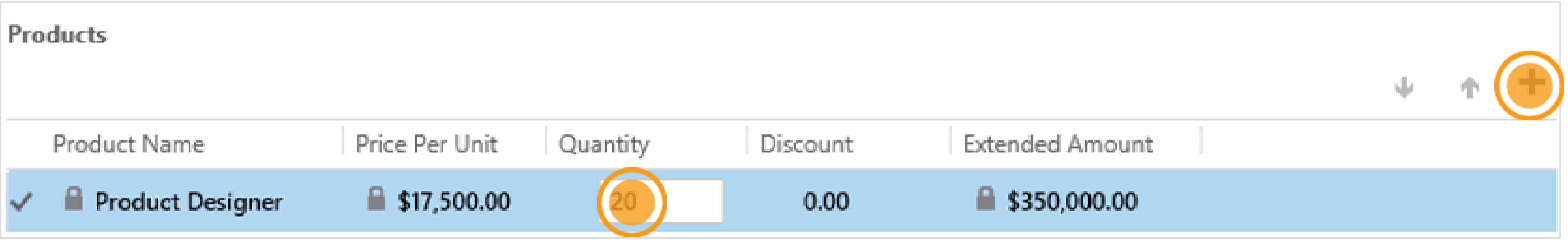
Click or tap the address to see the fields you can edit

Have a lot going on?

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

add or edit product line items inline

Product fields are now editable right on the screen where you’re working.
Enter details like price, quantity, and discount directly in the fields.



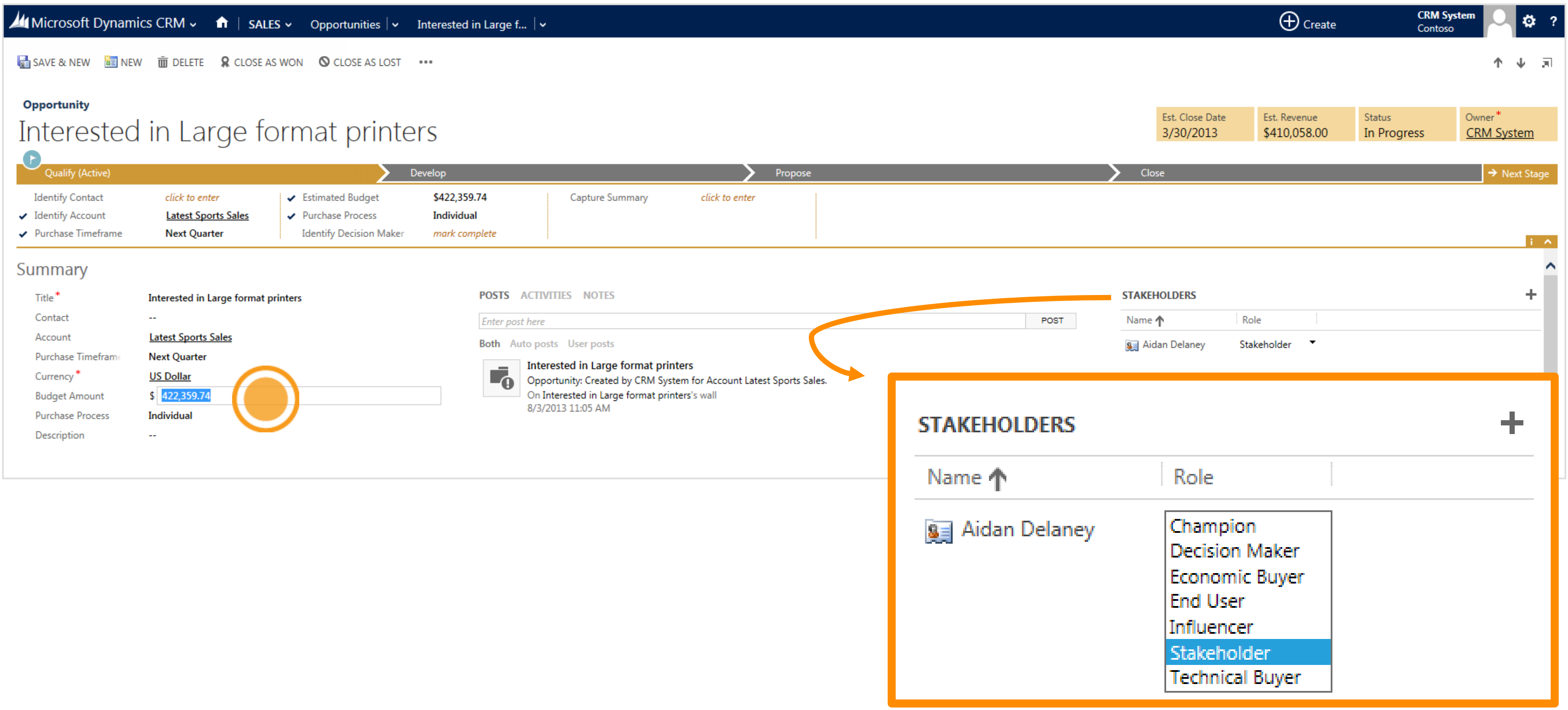
TIP
Click or tap here
to add a product

records are saved automatically

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

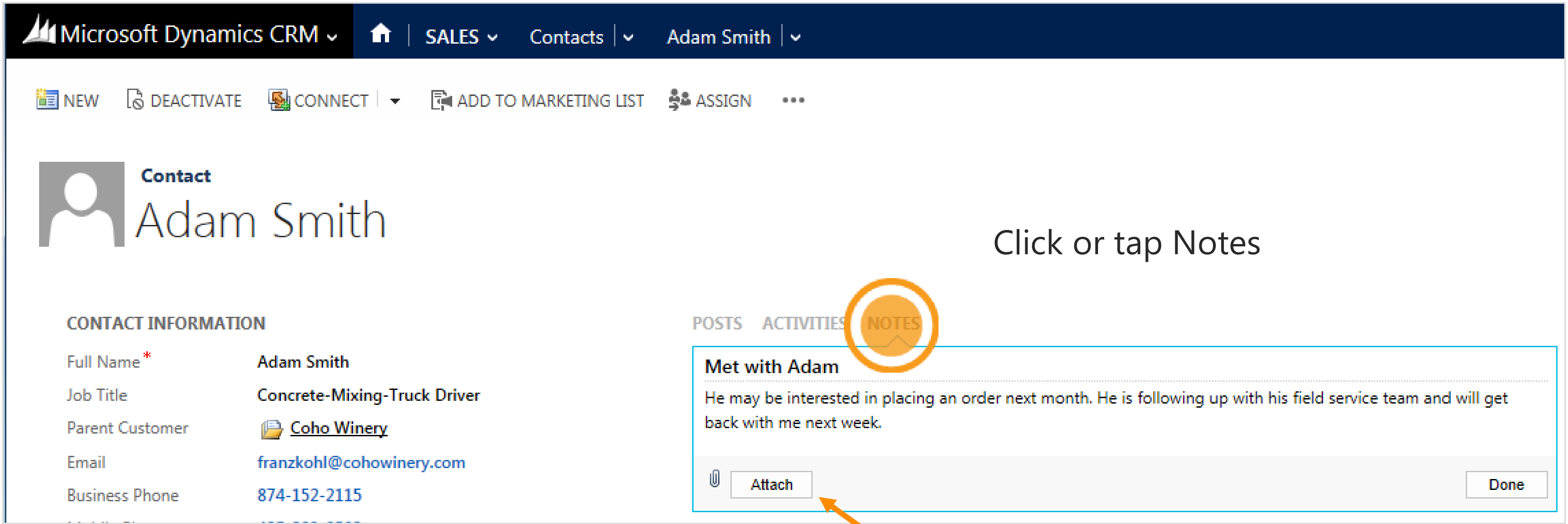
track key decision-makers for your deals

Inline editing and lookup makes it easier to understand at a glance who is connected to an opportunity and their role. You can even create new records inline from within the lookup screen.



add notes

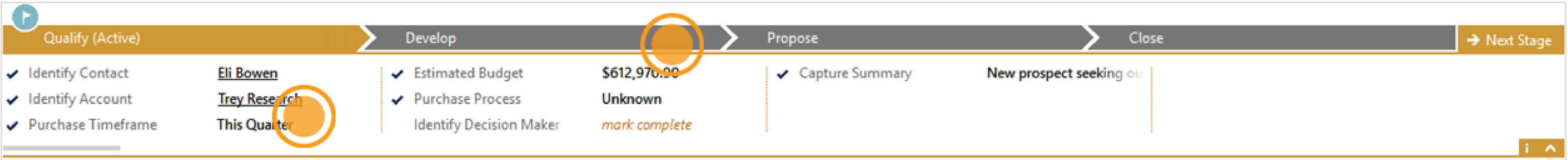
When you're viewing the details for a record, click or tap **Notes**, then type away.



Attach documents or photos, if you like

follow guided business processes

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

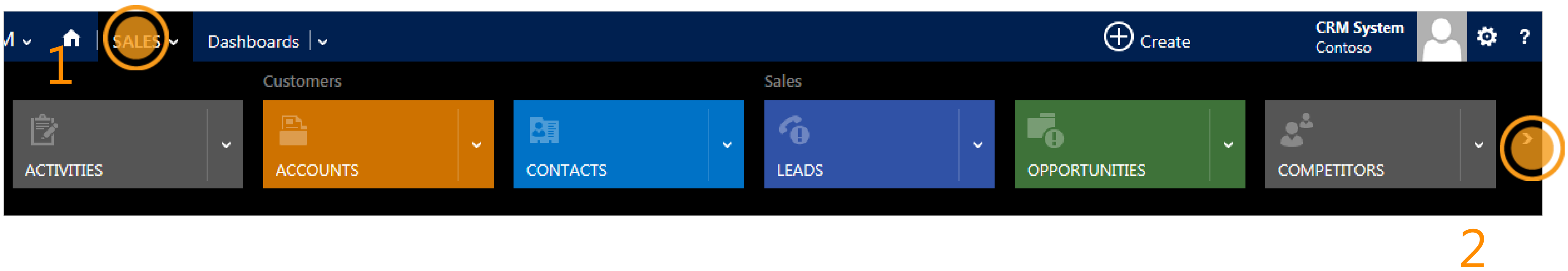


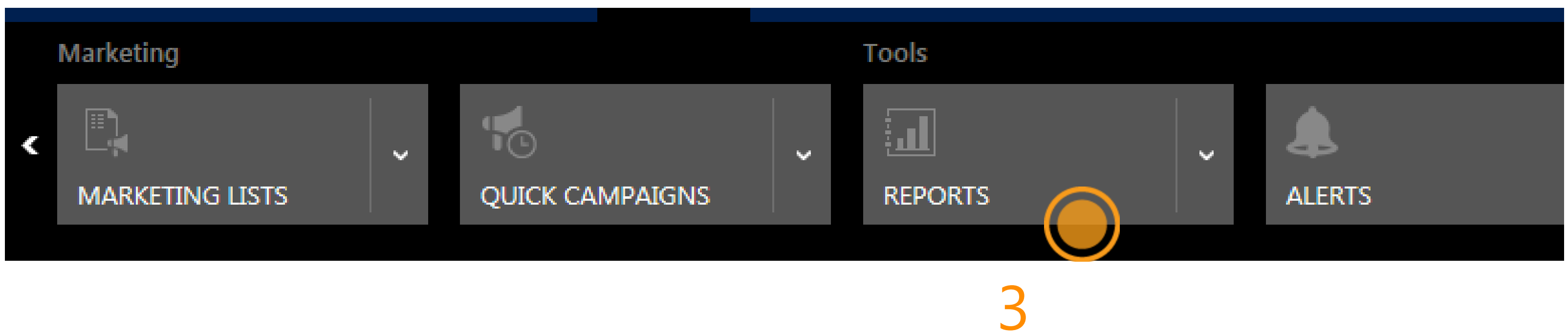
1 Click or tap to enter data

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

looking for your reports?

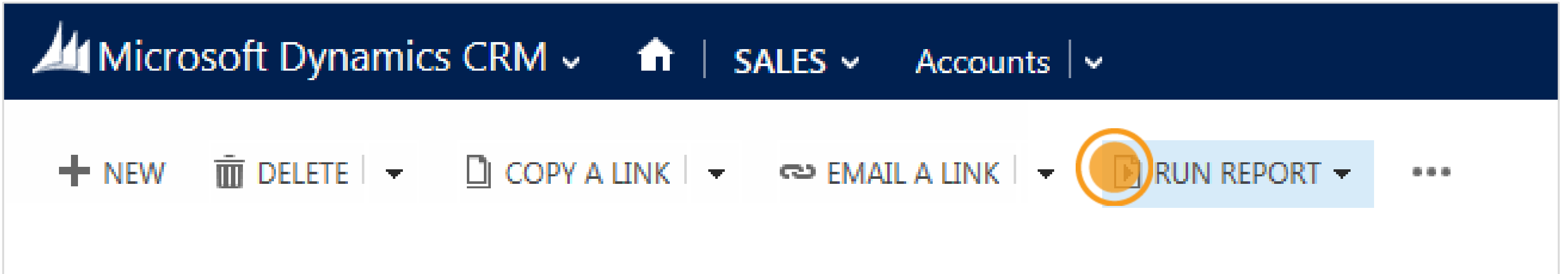
Now, you'll find a tile for reports in your work area, instead of in the Workplace. On the nav bar, cllick or tap the work area, then click or tap the right arrow to scroll and find **Reports**.





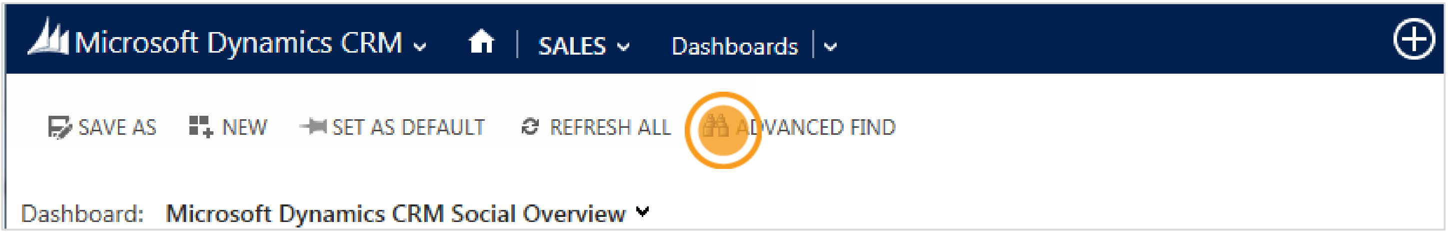
find the Run Reports command

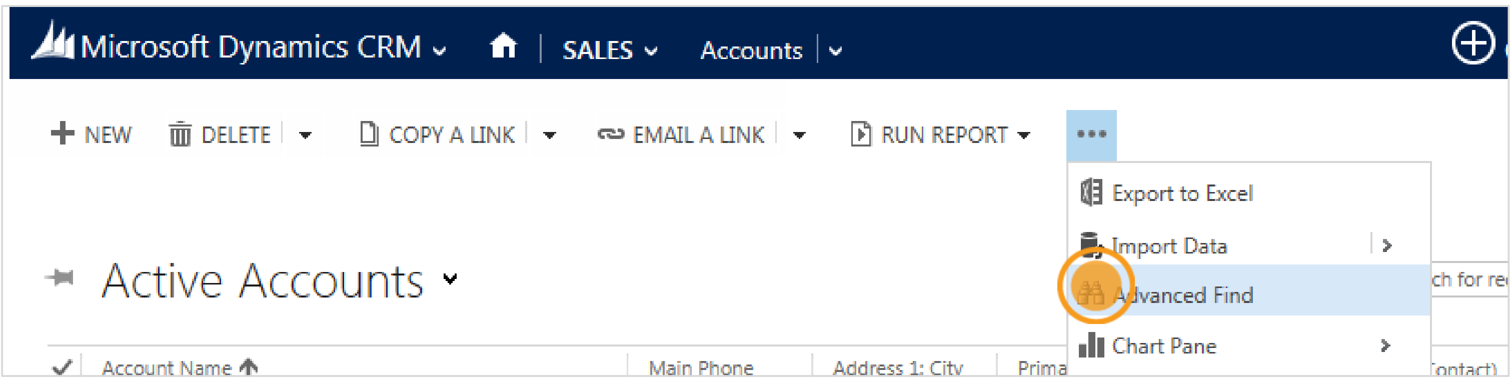
Or, you can run reports from the command bar when you're working on records.



locate the Advanced Find command

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





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

Thanks for reading!

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