

# Microsoft Dynamics CRM 2015 Release Preview Guide

## Detailing:

- Microsoft Dynamics CRM 2015
- Microsoft Dynamics CRM Online (2015 Update)
- Microsoft Dynamics Marketing (2015 Update)
- Microsoft Social Listening (2014 R2)

### **NOTE:**

The guidance included in this document reflects current release objectives as of September 2014. 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. Please contact your salesperson for more information on the pricing and licensing of features contained in this release preview guide.



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# Release Preview Guide

September 2014

# Introduction

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At Microsoft Dynamics, our vision is to help our customers deliver the kinds of amazing customer experiences that will help their business thrive. We believe that there has traditionally been a chasm between marketing and sales that needs to be bridged in order to truly deliver personalized, end-to-end experiences that customers will love. In a world where sellers and marketers must work more closely together to seamlessly and successfully engage customers, Microsoft is providing the solutions that can enable them to deliver amazing customer experiences **together**. By aligning your organization around what matters most, companies will be able to drive greater success and engagement with their customers.

This document highlights the capabilities in Microsoft Dynamics CRM 2015, Microsoft Dynamics CRM Online (2015 Update), Microsoft Dynamics Marketing (2015 Update) and Microsoft Social Listening (2014 R2) that will further our customers' abilities to deliver amazing customer experiences. With a commitment to an agile release cycle, there are currently several releases in planning and development. Dynamics CRM 2015 is a major release that will be delivered to our online customers as a customer driven update and to our on-premises customers as version 7.0. Microsoft Dynamics Marketing will be delivered as a manual update.

# Key Investment Overview

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To help our customers market smarter, sell effectively and provide care everywhere, we are investing in the following areas:

## Marketing

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Business Context – The world is changing and it is impacting how companies need to engage with customers. Customers are 57% of the way through the buying cycle before they engage with you. Marketers, more than ever, need to be there every step with the customer, ensuring that when the customer does reach out, sales, marketing and the customer are all on the same page. Marketing owns more of the customer journey than ever before, so they must engage customers in new ways, across new channels in a personalized, relevant way. At the same time, marketers are being held increasingly accountable for the ROI of their marketing investment, yet most lack the ability to track campaigns end-to-end and understand impact in real-time. More than 50% of CMO's feel unprepared for the new marketing landscape.

Microsoft Dynamics Marketing enables your marketing team to seamlessly go from planning, to execution, leveraging the power of Excel and Power BI to measure campaigns across channels from start to finish so you can bring your marketing vision to life. You can **engage customers** one-to-one across channels, **build your sales pipeline** and **demonstrate the impact** of your marketing investments in real-time.

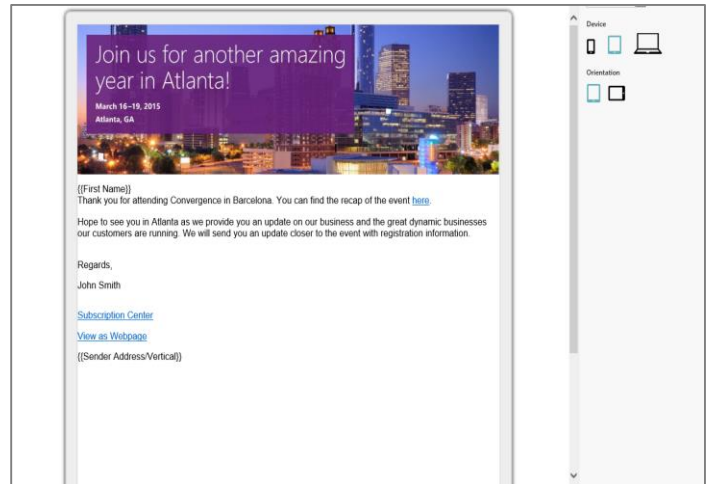
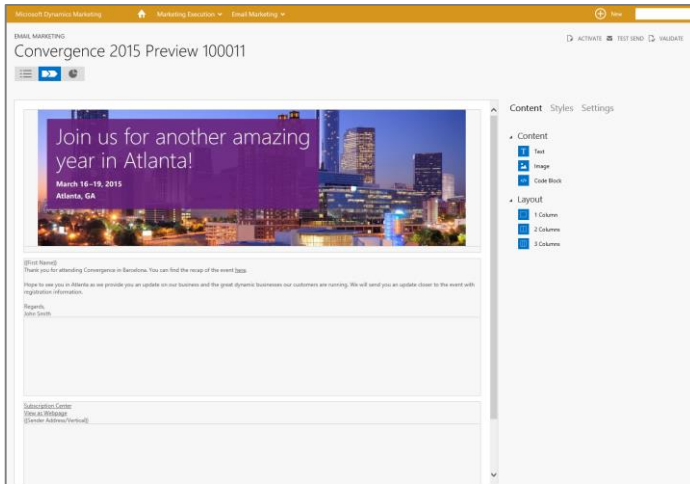
## Multi-channel Marketing

Today's buyer is smart and getting smarter each day. You need to understand what matters most to them and help them get to the truth that they seek. Quickly and consistently. The 2015 update of Dynamics Marketing helps organizations streamline campaign creation and improve segmentation with graphical email editing, A/B and split testing, integrated offers and approval workflows.



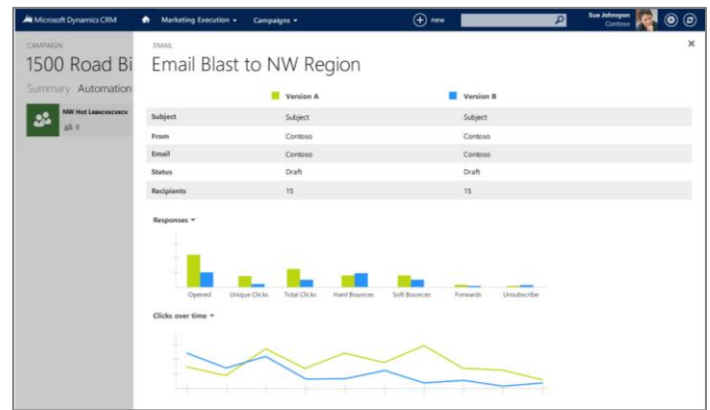
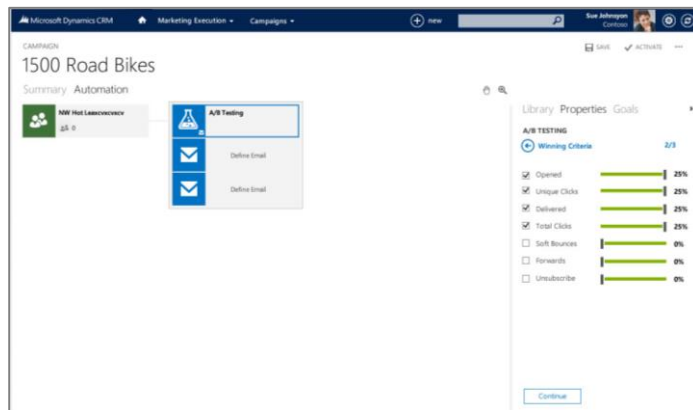
## Email Editor

The new Email editor provides marketers with the ability to select from pre-defined templates or create an Email from scratch using an interactive drag and drop build process or an advanced editor for the CSS & HTML experts.



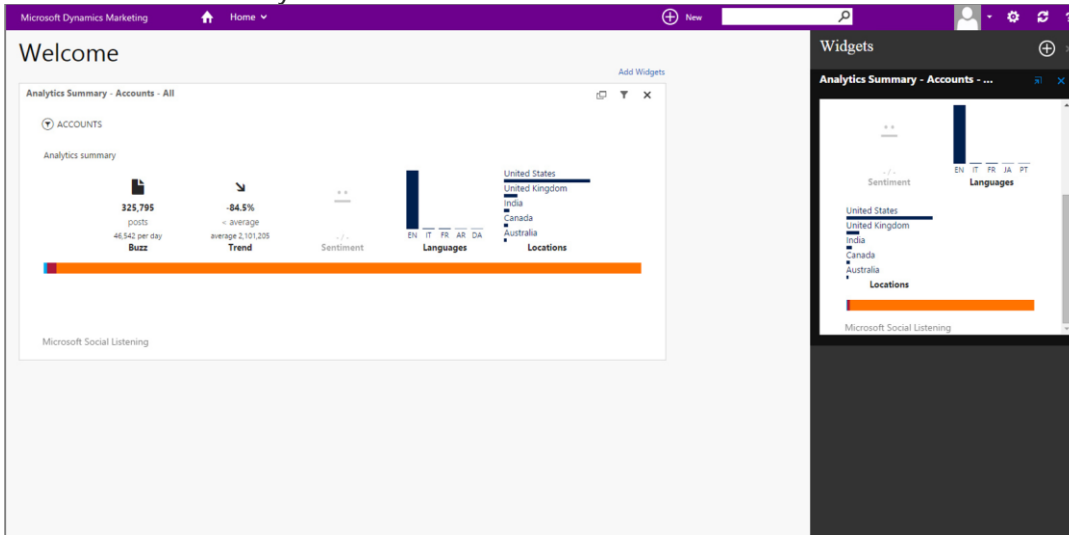
## Campaign Management Console

The Campaign Management Console has been enhanced to include complex multi-condition triggers to fine tune responses, embedded cross campaign offers and A/B testing. A/B testing provides marketers the confidence that their efforts will deliver the desired impact by easily setting up and running A/B tests that are multi-objective with results displayed via in place real-time analytics.



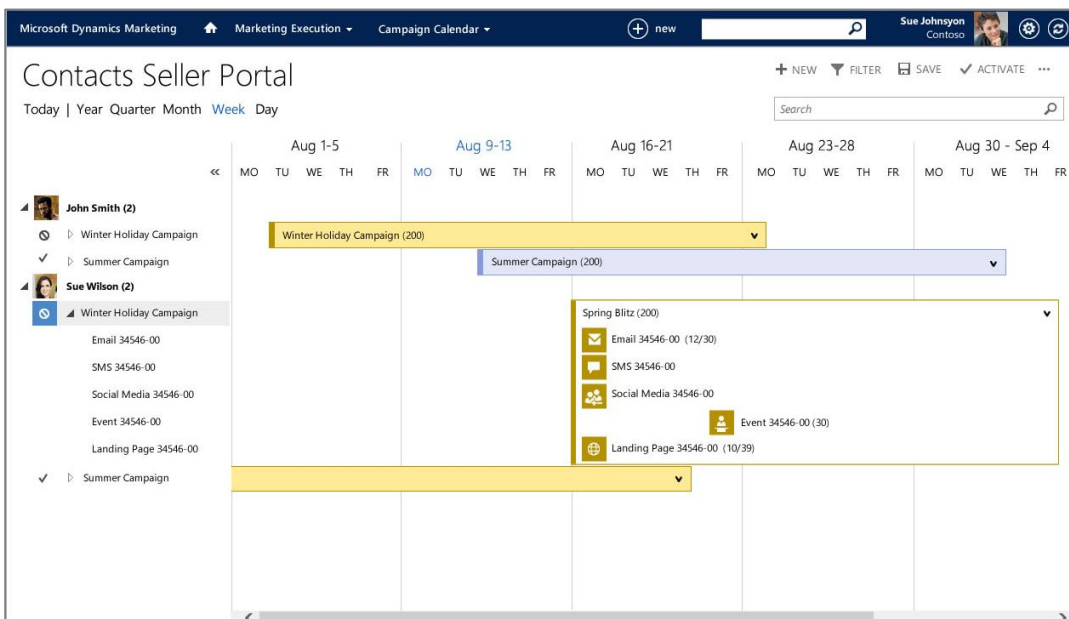
## Integrated Social Listening

Ensure success with integrated transactional and social insights and positively impact on your brand with sentiment analysis.



## Sales Collaboration

Strengthen your marketing and sales synergies with the new Sales Collaboration Panel which allows sellers to provide input into campaigns and targeting. Sellers can gain visibility into the campaign activities and can control communications targeting their customers as well as setup and receive alerts based on their interactions.



## B2B Marketing

Deepen your lead management capabilities with webinar integration and improved lead scoring, including the ability to introduce multiple lead scoring models.

**New Rule**

**Condition**

Field \* Campaign (Interaction) Is In Set ▼

Values \* Campaign (Lead)  
Description  
Due Date (Interaction)  
Due Date (Lead)  
Email  
Email Message  
Landing Page  
Name (Interaction)  
Name (Lead)  
Phone  
Priority (Interaction)  
Priority (Lead)  
Program (Interaction)  
Program (Lead)  
Source Code  
Status  
Type  
Web Site  
LandingPage (Submission)  
List (Subscription)  
Event (Registration)  
Event (Attendance)  
Event (Participation)

**Action**

Update score with: \*

**New Rule**

**Condition**

Field \* Event (Participation) Is In Set ▼

Values \* Webinar ✕

Start to type or press the down arrow...

Where \* For each Participation ▼

**Action**

Update score with: \* 0

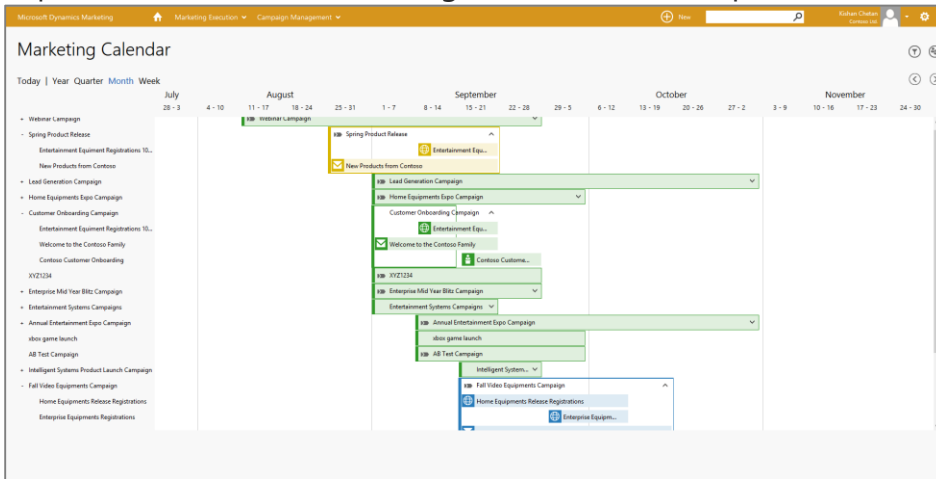
Devalue By Points ▼

Score Range Min Max

Submit Cancel

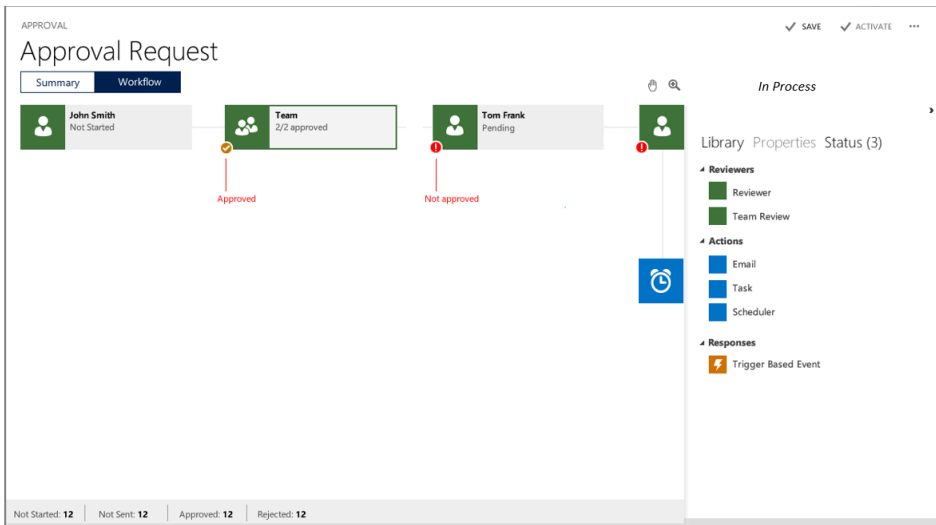
## Marketing Resource Management

Gain unprecedented visibility into your marketing plan with the new Marketing Calendar and improve collaborative marketing with click to call capabilities from Lync.



## Internal Process Automation

Easily design approval processes and track their status to ensure your team is aligned and on target to meet deadlines.



## Geographical Expansion

Geographical availability of Dynamics Marketing will be expanded to include Japan and Russia.



# Sales

In order to help sellers sell more effectively by selling more, winning faster and driving results, we are pleased to deliver the following features:

## Guided Sales Processes

Guide sellers toward desired outcomes with enhanced branching logic and increase impact via automation of business processes and enforcement of business rules across all devices.

This release further improves the business process flows introduced in Microsoft Dynamics CRM 2013 by introducing the branching capability to allow organizations to implement complex business processes. The branch selection is done automatically, in real-time based upon rules defined during the process definition. For example, in selling products or services, you can configure a single business process flow, which after a common qualification stage splits into two branches – one specific to products and the other for services.

BUSINESS PROCESS FLOW  
Sales Process Details ▾

Stage Name*	Step Name	Value	Required
<b>Qualification</b>			
Entity*	<b>Confirm Interest</b>	<b>Confirm Interest</b>	<input type="checkbox"/>
<b>Opportunity</b>	<b>Budget</b>	<b>Budget</b>	<input type="checkbox"/>
Stage Category	<b>Customer Need</b>	<b>Customer Need</b>	<input type="checkbox"/>
<b>Qualify</b>	<b>Timeline</b>	<b>Timeline</b>	<input type="checkbox"/>
	<b>+</b>		

+ Insert stage after branch    ↻ Add branch

If **Timeline** equals **"Immediate"**

**+**

+ Insert stage

Stage Name*	Step Name	Value	Required
<b>Propose</b>			
Entity*	<b>Est. Close Date</b>	<b>Est. Close Date</b>	<input type="checkbox"/>
<b>Opportunity</b>	<b>Develop Proposal</b>	<b>Develop Proposal</b>	<input type="checkbox"/>
Relationship	<b>Present Final Proposal</b>	<b>Present Final Proposal</b>	<input type="checkbox"/>
<b>Select relationships</b>	<b>+</b>		
Stage Category			
<b>Propose</b>			

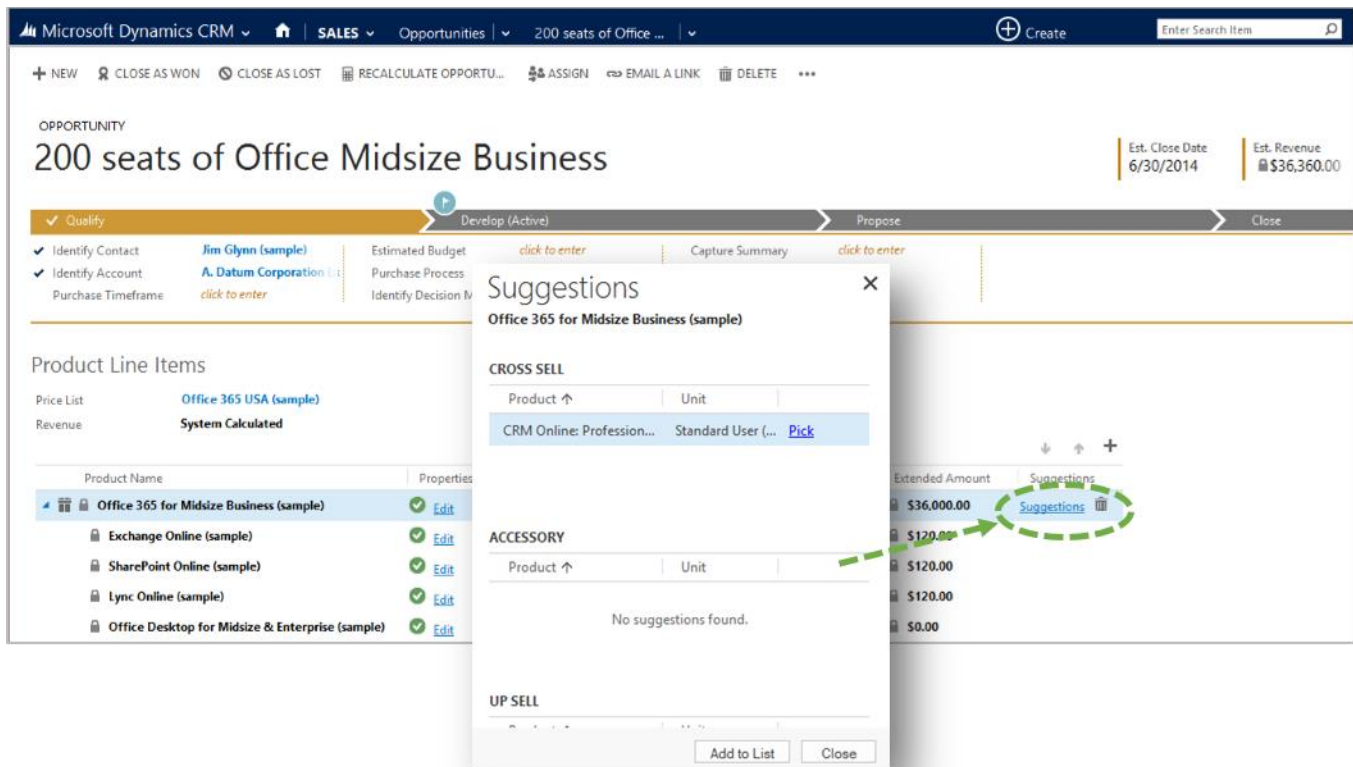
↑ ↓ MOVE

Status: **Inactive**

## Product Families

Boost selling effectiveness with the ability to bundle products and recommend related products for cross-sell/up-sell and simplify and minimize product management with product attributes.

Improvements to the product selling experience help sales operations managers and salespeople manage and sell their company's products more effectively. Sales operations managers can easily configure product offerings that bundle related products together and provide tailored pricelists giving sellers the ability to position the best products at the best price. Salespeople can see suggestions for cross-selling and up-selling, and get recommendations for accessories or substitutes right on the opportunity form while they are working their deal.



Product properties (attributes) such as *updatable*, *read-only*, *required* and *hidden* allow sales operations managers to determine how they can be used by the sales agent at run time, that is, while adding an associated product to an opportunity, quote, order, or invoice.

## Sales Hierarchies

Manage and report on your sales data in a way that maps to your business. New hierarchical visualizations and roll-ups bring real-time territory and forecasting data to your fingertips. Visually explore and traverse hierarchies with key information displayed on tiles, launch actions or communications from any node, and query filter records using the under operator.

With this release, users can see how info is related or grouped by viewing accounts, products, or users in hierarchical charts. You can click a block of info to get more details and navigate to the info you're interested in.

For example, from the hierarchical view for accounts, you can:

- See how an account is doing in overall revenue
- Drill into tiles for sub-accounts to see where the deals are coming from
- Find out who is working an account and enlist help from others by sending email or sharing the account with other salespeople
- View important details about each account, such as credit limit and latest activity posts for the account

Hierarchical views are also available on mobile.

The screenshot shows the Microsoft Dynamics CRM 2015 interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and a 'Create' button. The user profile 'Contoso' is visible. Below the navigation bar, there are options for 'NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', and 'RUN REPORT'. The main content area is titled 'Contoso 3.1.2 Hierarchy' and shows a tree view on the left and a main area with tiles for each account level. The tiles display key metrics for each account, such as Revenue, Avg. opp. size, Activities, and Primary Contact.

Account	Revenue	Avg. opp. size	Activities	Primary Contact
Contoso 3.1	\$340,000	\$30,000	20	John
Contoso 3.1.1	\$200,000	\$20,000	20	Mary
Contoso 3.1.2	\$340,000	\$30,000	20	John
Contoso 3.1.3	\$340,000	\$30,000	20	John
Contoso 3.1.4	\$340,000	\$30,000	20	John
Contoso 3.1.2.1	\$340,000	\$30,000	20	John
Contoso 3.1.2.2	\$340,000	\$30,000	20	John

## CRM for tablets enhancements

Microsoft Dynamics CRM for tablets helps you stay connected and productive wherever you are. Use your Windows 8, iPad or Android tablets to stay up to date with your customer info—even when you're on the go. CRM for tablets has been enhanced to increase sales productivity with flexible, role tailored dashboards and analytics, personalized home pages and the ability to navigate by hierarchy, as well as improved support for disconnected scenarios. A new personalized home experience allows mobile employees to pin key records and surface analytics from any tablet enabled dashboard in CRM and to easily access and analyze their key data on the go.

Connectivity is not always available while traveling. With offline drafts new records can be created and changes can be synchronized once reconnected.



## Customer Service

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Social and mobile have forever changed customer expectations of how they interact with companies for service. 86% of customers are willing to pay more for a better customer experience. They expect high quality, consistent service on the channel of their choice, whether it is over the web, social networks, or on the phone. Today, 67% of consumers use web self-service to find answers to their questions.

The challenge for customer service organizations is to balance delivering amazing customer experiences against their cost to service for an optimal mix over time. Cost of service varies significantly across channels, so companies are investigating how to provide differentiated levels of customer support, while looking at how to empower their agents and make them more efficient and effective.

Microsoft Dynamics CRM enables companies to **build customer loyalty, empower agents and drive resolution** by providing **relevant, proactive** and **personalized service** across all channels. Companies can connect their customers with the right answers to their service inquiries at the right time, via their channel of choice across web, social, chat, mobile and phone.

### Case Management

Enable agents to provide differentiated levels of support with flexible Service Level Agreements "SLA's". Gain insight into service effectiveness with the ability to track and analyze key metrics like First Response and Case Resolution.

In the previous release we enhanced the case management capabilities with Microsoft Dynamics CRM to include:

- updated case form to manage related cases, review entitlements , and a Timer to ensure you do not exceed/breach your SLA's
- defining and managing service entitlements and SLA's
- creating dynamic routing and queuing rules to ensure you hit your service targets
- merging duplicate or creating parent / child relationships between cases to eliminate redundancies

This release further improves the case management capabilities to allow agents to pause and resume SLA's and track the time for which a case was on-hold or waiting on customer to ensure SLA's are met.



Microsoft Dynamics CRM | SERVICE | Cases | Average order ship... | Create | Enter Search Item | Chris Brown EnglishOrg

NEW | CREATE CHILD CASE | RESOLVE CASE | CANCEL CASE | APPLY ROUTING RULE | ADD TO QUEUE | QUEUE ITEM DETAILS

CASE | Average order shipment time (sample)

Priority: Normal | Created On: 7/1/2014 10:55 AM | Status: On Hold | Owner: Chris Brown

Identify (Active) | Research | Resolve | Next Stage

- Find Customer: Litware, Inc. (sample)
- Find Contact: Susanna Stubberod (sample)
- Find Case: Average order shipment time (sample)

Case Relationships

Enhanced SLA Details

First response in: **Succeeded**

Resolve in: **Paused**

Name	Status	Failure Time	Warning Time	Succeeded On
First Response By KPI	Succeeded	7/2/2014 10:55 AM	7/1/2014 6:55 PM	7/1/2014 11:00 AM
Resolve By KPI	Paused	7/3/2014 10:55 AM	7/2/2014 10:55 PM	

View SLA KPI details on the case form

SLA time calculation pauses when the case is on-hold

Support for Success Actions with Enhanced SLAs

# Social

Social has changed the way people engage and communicate. Today's customers are more informed and getting their information in new ways and from new sources. Decisions are influenced by discussions online and user reviews. In fact, 75% of B2B customers are likely to use social media to influence their purchase decisions, and customers are over 70%<sup>1</sup> of the way through the sales cycle before they contact you. Most of today's social listening tools, however, are so complex and expensive that they're only available to an elite few – which means relevant information rarely gets to the front lines who need it. At Microsoft, we believe this valuable information should be available to everyone.

## Microsoft Social Listening

Microsoft Social Listening is a powerful new service that your organization can use to monitor social media channels like Twitter and Facebook. Use Microsoft Social Listening to track products, brands, competitors, and campaigns globally and in real time to gain a true understanding of your customers and your business across the social web.

**Analyze what people are saying:** In addition to the existing sources (Twitter, Facebook, blogs and videos), you can now add news to your search topics and analyze sentiment in Italian.

**Gain social insights:** Use location filters to narrow your data set and to see posts from specific countries or regions. Create and manage location groups that allow users to filter the data efficiently.

**Geographic availability:** Listen to social conversations in 19 languages: Arabic, Chinese, Danish, Dutch, English, Finnish, French, German, Greek, Hebrew, Italian, Japanese, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish and Thai and analyze sentiment in six languages: English, French, German, Portuguese (Portugal), Spanish and Italian. The Microsoft Social Listening user interface is localized in the same six sentiment analysis languages.



<sup>1</sup> <http://partnersinexcellenceblog.com/70-of-buying-process-completed-without-sales-involvement/>

# Platform

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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. The following investments in our platform capabilities further our commitment to an open, customizable and extensible product and online service.

## Search

Improvements to quick search make it faster and easier to find customer records. Improved search capabilities provide a quick way to find and navigate to records by letting users enter keywords in the search box on the nav bar. The search box supports using an asterisk (\*) as a wildcard character, and allows the user to search across record types and get a full list of matching search results.

To do more sophisticated searches, click the new Advanced Find icon, which is now on the nav bar. To only see matches for a certain type of record, on the search results page, you can select a filter from the drop-down list. Click a search result to open it.

## Synchronize more types of information between CRM and Outlook or Exchange

Teams that use Outlook/Exchange as their centralized information hub can synchronize more types of information now, including:

- Additional contact and task fields
- Assigned tasks
- Appointment attachments

Users can easily view the fields that are synchronized, which provides confidence about where the data comes from and how it's shared. Additionally administrators can enable, disable and configure the direction of synchronization for these fields.

## New Configuration Wizard makes it easy to configure CRM for Outlook for your organization

The CRM for Outlook Configuration Wizard has been redesigned making it easier to configure CRM for Outlook. The new Configuration Wizard also makes it easy to add and manage additional CRM organizations.

## Business Rules

Business Analysts can easily create advanced business logic through a declarative “point-and-click” interface to perform actions within CRM. Business Rules, introduced in Dynamics CRM 2013, have been enhanced to include the following:

- Write once, execute everywhere - Business logic is now even easier to implement and enforce
  - Server side execution allows business rules to be executed irrespective of whether changes are made through the client or on the server through the SDK. Rules can be executed on create or update of the record and form specific actions (field visibility, lock/unlock and field requirement) are ignored.
- Express richer business logic
  - If.. Else if.. Else support enables more complex structures to be easily defined
  - Combine multiple expressions using simple and/or grouping to enable the definition of richer conditions. For instance, if the lead rating is hot or if the lead is from an existing account, mark this lead as ‘ok to pursue’.
- Support for default values and behaviors
  - Set up each record just right for your sales reps by pre-filling information when a record is created. Express condition-less business logic for rules formed of Set Default, Show/Hide, Lock/Unlock, Set Required.

## Business Process Flows

The introduction of the Client API for business process flows, provides complete programmatic access to active and enabled processes. With JavaScript code, implemented by one of your developers, it is now possible to ensure that the user is always working on the right stage of the right process in any given situation. The events such as moving and selecting stages have been exposed to permit for an action to be taken not just in the context of the process, but in the context of the stage that the user is working on and currently viewing.

## Calculated Fields

Often, the users are looking for data that is a result of some calculation. For example, a salesperson wants to know the weighted revenue for an opportunity which is based on the estimated revenue from an opportunity multiplied by the probability. Or, they want to automatically apply a discount, if an order is greater than a certain amount. To provide this data, you can define the calculated fields in the CRM User Interface without needing to write code. The calculated fields contain a value calculated based on conditions and a formula defined within this field. The conditions and formulas can refer to the values of the other fields in the same entity or values of the fields in the related entities. You can define a calculated field to contain values resulting from many common calculations, such as simple math operators, and conditional operations, such as greater than or if-else and many others.

## Business Rules Editor Improvements

The initial release of business rules could only evaluate whether all the conditions in a rule were true. In this release, in addition to the AND operator, you can use OR and If-Else to build more complex and rich business rule logic with less effort. Creating a commonly used branching logic, becomes a simpler task. The business process flow branching capability is built on the new If-Else logic.

Also new, an ability to evaluate the business rules on the server. When you set the scope of the business rule at an entity level, the rule is evaluated on the server. In the previous release, we provided a simple declarative interface for you to apply form logic without writing JavaScript code. But, the rule logic was only evaluated in the clients that supported business rules, such as the CRM Web application or CRM for tablets. For the business rule logic that had to be evaluated on the server and applied to all clients you still needed to write and run the plug-ins on the server. With this release, you can evaluate the business rules on the server and apply them to all clients without writing code. For example, you can move the logic for commonly used scenarios out of plug-ins into the entity-level business rules that you define in the CRM user interface. In addition, the support for setting default values has been added to business rules. For instance, if Contoso only does business in the United States, a simple business rule can be created such that on the creation of an incoming lead, the country is automatically set to U.S.A.

## Capture key business metrics with Rollup fields

The rollup fields are used to capture key business metrics at a record level from related entities with One-to-Many (1:N) relationships. The rollup fields also provide the ability to aggregate over hierarchies for more complex scenarios. You can define the entity rollup fields as a decimal or whole numbers, currency, and date/time. For example, users may want to know:

- How many open opportunities they are working on
- A total revenue for the open opportunities related to the account
- A total number of high priority active cases related to the account

The aggregates are rolled up from the child records to the parent record. A maximum of 100 rollup fields can be defined within an organization and each entity can have no more than 10 rollup fields. The rollup fields are calculated by asynchronous system jobs. The Calculate Rollup Fields is a recurring job that runs according to the recurrence pattern. The Mass Calculate Rollup Fields job runs once, when a Rollup field is added or updated. Because the rollup fields are solution components, they can be easily transported between organizations and distributed in solutions.



## Field Level Security for Out Of the Box fields

Many businesses have sensitive data that should only be viewable or editable by certain users. With field-level security, you can restrict access to custom fields and now other fields. For example, admins can enable the account number field to be viewed but not changeable for members of the sales team.

## Compatibility

Continuing our commitment to deliver CRM functionality on the latest technologies we have updated the [Microsoft Dynamics CRM Compatibility List](#) providing an up to date view of recent and upcoming compatibility testing results.

# Conclusion

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Microsoft has a powerful vision to create a family of devices and services for individuals and businesses that unites and empowers people at home, at work and on the go, for the activities they value most. Microsoft Dynamics CRM solutions play an important and unique role in this strategy. As the world grows smaller and more complicated, technology plays an important role enabling a business to understand and effectively engage their customers. Microsoft Dynamics CRM products help companies unite their marketing, sales and service teams with the insights they need to deliver amazing customer experiences every time.

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 to help your business thrive!

*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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