

Microsoft Dynamics CRM 2015 Release Preview Guide

Detailing:

- Microsoft Dynamics CRM Online (2015 Update 1)
- Microsoft Dynamics Marketing (2015 Update 1)
- Microsoft Social Engagement (2015 Update 1)
- Parature, from Microsoft 15.2

NOTE:

The guidance included in this document reflects current release objectives as of April 2015. 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

April 2015

Introduction

Customer experience has become increasingly important for brands, yet there is a significant gap between how companies think they're doing on delivering great customer experiences and what customers think. We believe companies must think about their customer journey and engagement models differently in today's world.

Our mission with Customer Engagement solutions from Microsoft Dynamics is to enable companies deliver amazing customer experiences via intelligent customer engagement. We provide end-to-end customer engagement solutions so that companies can deliver customer experiences that are personalized, proactive and predictive. Companies can:

- **Personalize customer experiences** by creating end-to-end, outcome-focused journeys that engage customers at the right time and place with the right message.
- **Create proactive experiences** by determining the next best interaction with your customer based on context.
- **Make customer engagement predictive** by using analytics, internal and external data to identify patterns and predict outcomes.

This document highlights the capabilities of the Spring 2015 release, which includes updates to all online services, including Microsoft Dynamics CRM Online (2015 Update 1), Microsoft Dynamics Marketing (2015 Update 1), Microsoft Social Engagement (2015 Update 1) – *renamed from Microsoft Social Listening*) and Parature, from Microsoft *(2015 Update 1) that will further our customers' abilities to deliver amazing customer experiences. Microsoft Dynamics CRM Online and Microsoft Dynamics Marketing will be delivered to our online customers as a customer driven update.

Key Investment Overview

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

Marketing

Microsoft Dynamics Marketing enables your marketing team to seamlessly go from planning, to execution, leveraging the power of Office 365 and Power BI to measure your marketing performance 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.

As part of our continued investments in making Dynamics Marketing the best integrated marketing management system on the market, we are continuing to invest in advanced capabilities across the board in email marketing, digital asset management, campaign management, lead management, lead nurturing, sales collaboration, and analytics including role-based customizable dashboards based on PowerBI. Additionally we have invested in lowering the total cost of ownership by investing in making the service easier to deploy, administer, and upgrade. Lastly we continue to invest in our backend infrastructure to make the service easier to scale and to integrate.

Enhancements to email marketing, lead management and digital asset management

We heard our customers loud and clear to understand some of the key enhancements they needed in our core integrated marketing management areas.

Email marketing

Our customers would now be able to fully configure and track their contact's email opt-in preference for double opt-in scenarios, which makes an especially important regulatory requirement in many markets and in particular in some European countries. We are also enhancing email deduplication by adding more flexibility to configure deduplication rules at email send time or campaign launch. Marketers would be able to track emails that get blocked due to deduplication.

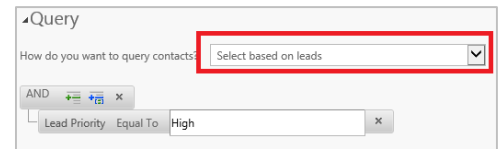
Activity	Type	Timestamp	Changed By
Opt-in	Double opt-in	30/06/2014 23:47:46 EDT	-
Opt-out	Subscription center	27/07/2014 11:45:23 EDT	-
Opt-in	CSV import	23/08/2014 17:30:28 EDT	Julia Reid

Submit Cancel Save

Marketing Automation...
Default Subscription...
Default Sender Address...
Email Strategy: Send one email per contact
Submit Cancel Save

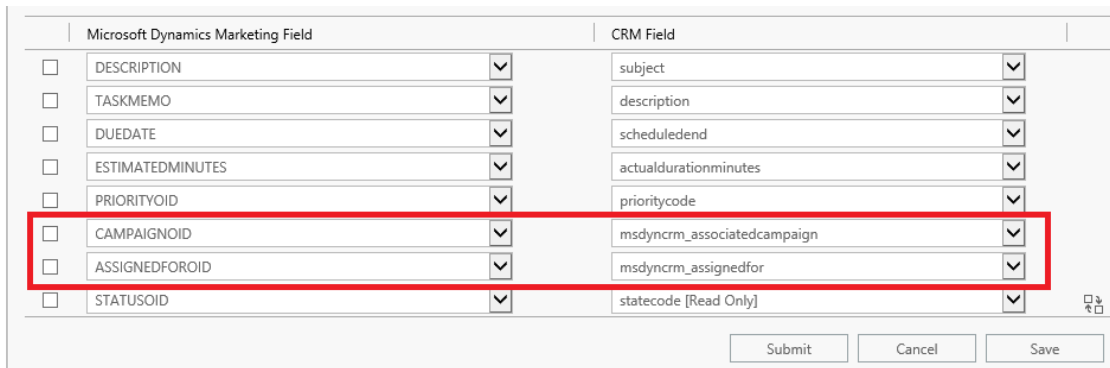
Digital asset management

We are going to support multi-keyword search and multi-asset download. We are also going to support file markup for PSD files.



Campaign and Lead Management

We are making segmentation more powerful by supporting lead based queries for marketing contacts. We are enabling task sync i.e. customizable fields to support tasks in CRM. We are also adding support to configure search of website visits. Users can now search websites (Microsoft Dynamics Marketing Website entity – to configure websites with tracking scripts) by website name or URL.



Microsoft Dynamics Marketing Field	CRM Field
<input type="checkbox"/> DESCRIPTION	subject
<input type="checkbox"/> TASKMEMO	description
<input type="checkbox"/> DUEDATE	scheduledend
<input type="checkbox"/> ESTIMATEDMINUTES	actualdurationminutes
<input type="checkbox"/> PRIORITYOID	prioritycode
<input type="checkbox"/> CAMPAIGNOID	msdyncrm_associatedcampaign
<input type="checkbox"/> ASSIGNEDFOROID	msdyncrm_assignedfor
<input type="checkbox"/> STATUSOID	statecode [Read Only]

Lower cost of implementation

We are continuously driving down the cost of implementing a marketing workload for your organization. With the 2015 Update 1, just like in Dynamics CRM, you would be able to schedule and reschedule upgrades as an administrator. We are also making Connector setup a single click action. From the 2015 Update 1 onwards, Microsoft would manage your Azure queues and you would be able to turn Connector on and off by flipping a switch.

Marketing Analytics

We are extending support for native integration with PowerBI.com service. As part of product we are also shipping new role based powerbi.com apps and click through reports. Now as part of the service you'd receive free out of box ready to consume role-based dashboards and reports for key marketing roles. In addition these apps would also support natural language Q&A to derive insights that you need from the data.

The oData feeds available from MDM is being enhanced to include more entities such as Opportunities, UDFs in more entities, Channel, Region, Budget etc. The number of entities available would increase from 42 in the 2014 release to 255 in the 2015 Update 1 release.

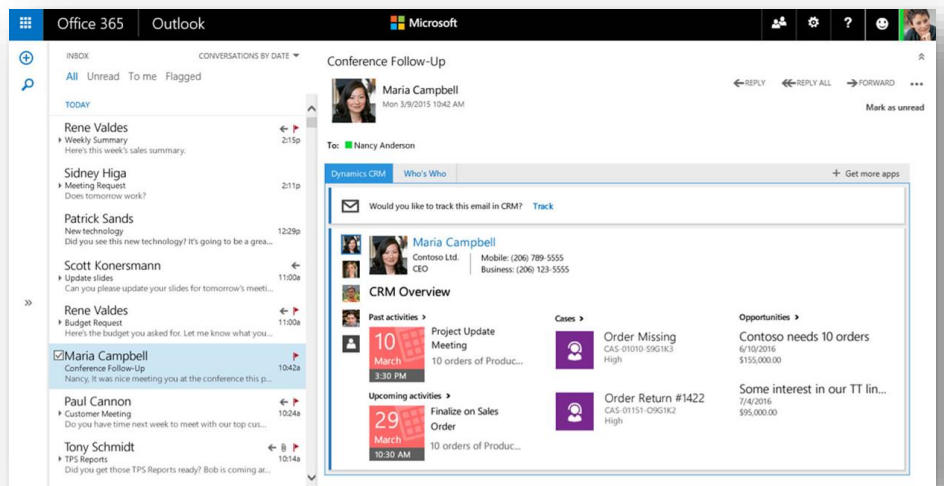
Sales

The way customers interact with businesses has fundamentally changed. Today's customers are ubiquitously connected via mobile devices, plugged into their social network, and doing their own research. This means that the usual methods of doing business are no longer working. The sophisticated and more demanding customers of today expect to be engaged in new ways. To continue to sell effectively, salespeople need to change the way they sell. Because the new ways of selling require deeper commitment and more time, it is even more critical for salespeople to maximize sales productivity and free up time to conduct the highest value activities – delivering amazing customer experiences. Sales by Microsoft Dynamics helps sales professionals transform into top performers in this new era where internal pressures and new buyer behavior and expectations create unprecedented challenges.

In order to help salespeople be more productive and deliver amazing customer experiences, we are pleased to deliver the following features:

Outlook App

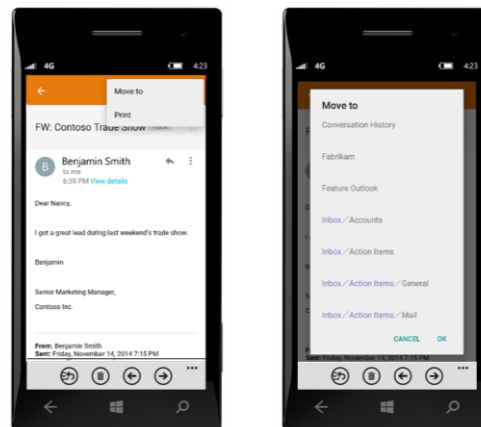
Microsoft's strategy is to align with how and where salespeople want to work. One way Microsoft is doing that is by delivering key sales capabilities within Outlook desktop and browser. For Outlook on the desktop, Microsoft already delivers CRM for Outlook, which provides true offline, rich sales capabilities inside the productivity application that salespeople already use on a daily basis. In this release, Microsoft makes it even easier to stay productive by surfacing contextual information from Dynamics CRM right in your inbox. The Microsoft Dynamics CRM App for Outlook¹ makes it easy to track emails or create contacts in CRM and view contact information and related records (e.g. Activities, Cases, Opportunities, even custom) for email sender and recipients.



¹ Enabled by system administrator and available (without install) for all users in all supported Outlook apps' clients. Not initially available with GA of Microsoft Dynamics CRM but will be made available in the Office Store in the coming months.

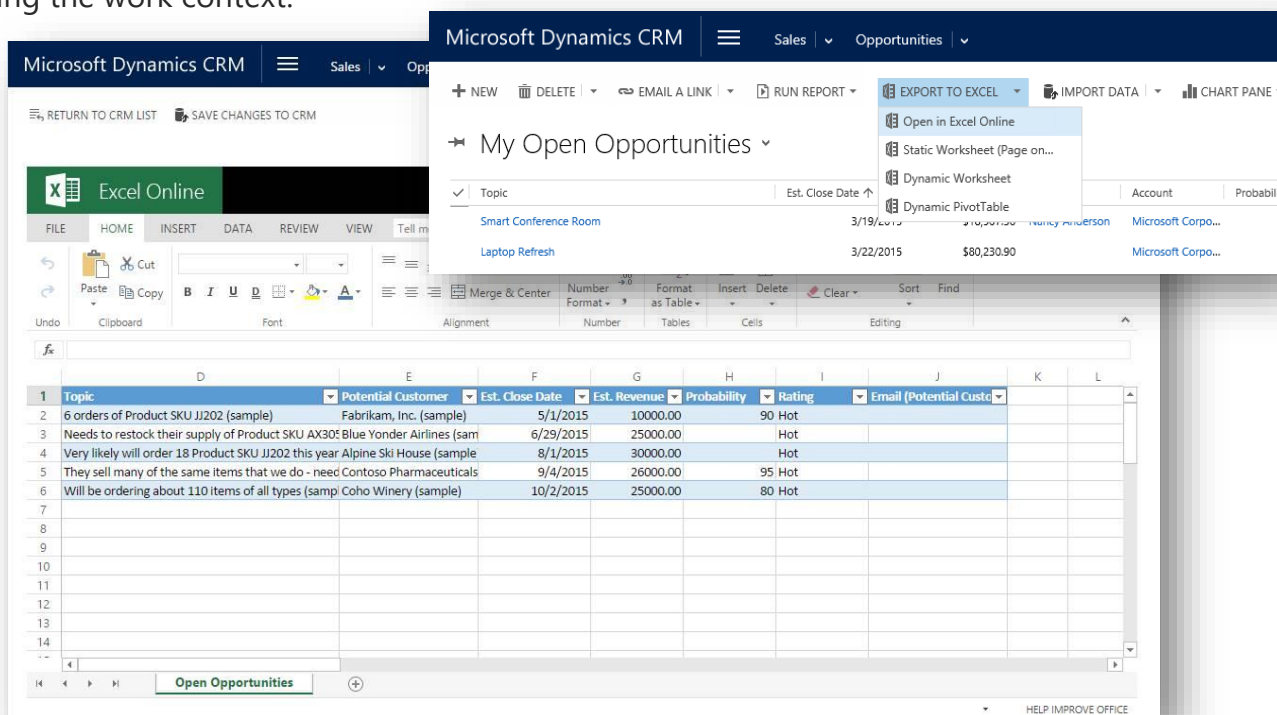
Track Emails

Microsoft is providing a new and intuitive way to track incoming Exchange emails. Salespeople can set up a tracking folder, using any Exchange folder in the Inbox, and then drag an incoming email to that folder to track it in CRM. Salespeople can associate a tracked folder with a specific CRM record, such as an account or opportunity, so whenever a user moves a message to that folder, it's automatically linked to that specific record. Tracked folders work with Exchange Inbox rules, which makes it even easier to automate management and tracking of incoming emails.



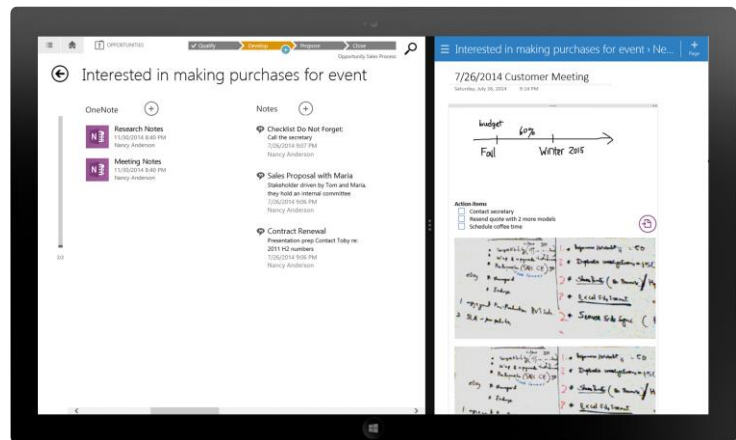
Immersive Excel Experience

To help increase productivity, Microsoft is providing the ability for salespeople to conduct analysis in Excel, directly within Microsoft Dynamics CRM. This eliminates the time and effort required to switch between applications in the middle of completing a business process. Salespeople can now view sales data in familiar Excel spreadsheets, perform what-if analysis, and upload the changes, all while maintaining the work context.



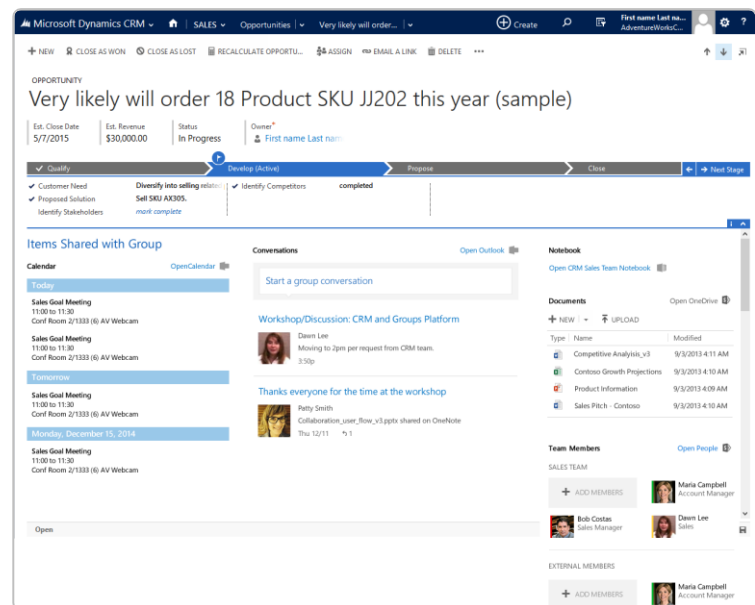
Embedded OneNote

With this release, salespeople can share information more easily with OneNote embedded inside Microsoft Dynamics CRM. They can create and view notes containing text, photos, voice, spreadsheets, and free-form drawings, all within the context of the account, opportunity, or any other CRM record they are working on.



Group Collaboration

Salespeople can collaborate more broadly by using Groups across Office products. A Group is a workspace that team members can use to share files, email messages, conversations, calendars, and Microsoft OneNote notes. Groups are a great way to collaborate with team members, even if they don't have access to CRM Online. For example, create a group for your sales team, invite other Office 365 users to join the group, and then share documents, email, conversations, meeting information, and OneNote notes related to specific accounts or opportunities.

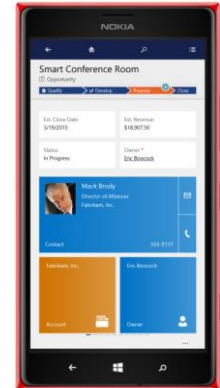


Social Sales

Microsoft continues to help salespeople transform into social sellers. With the latest release of Microsoft Social Engagement, salespeople can create leads and opportunities directly from social posts. **So now salespeople have a new source for high-quality and timely leads and opportunities that are based specifically on buying signals found in social conversations.**

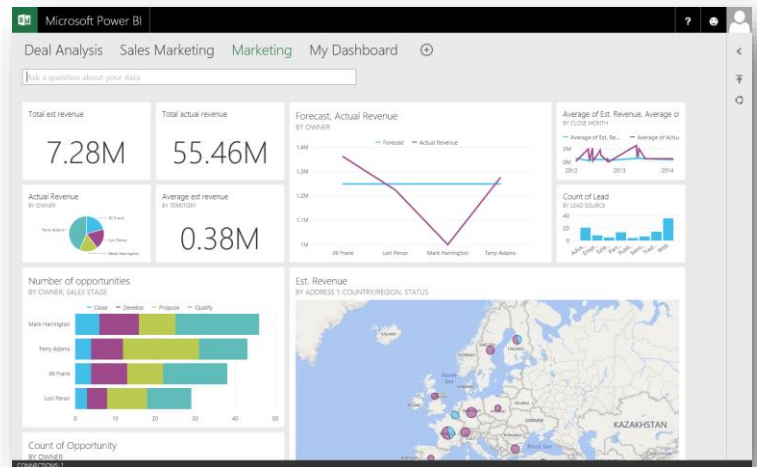
Mobile Sales

Microsoft is delivering a seamless sales experience across web, tablet, and now phone. Microsoft Dynamics CRM for phones is a re-imagined phone app, with support for iPhone, Android, and Windows Phone, allows salespeople to manage their sales data, guided by contextual business process, while on the go. Even when there is no connectivity, salespeople can continue to work with offline drafts that get synchronized once reconnected. With an app optimized for the phone, salespeople experience greater adoption and productivity. Deploying mobile apps is easy for the organization since they don't have to configure for every device. The settings cascade across all devices and form factors.



Analytics

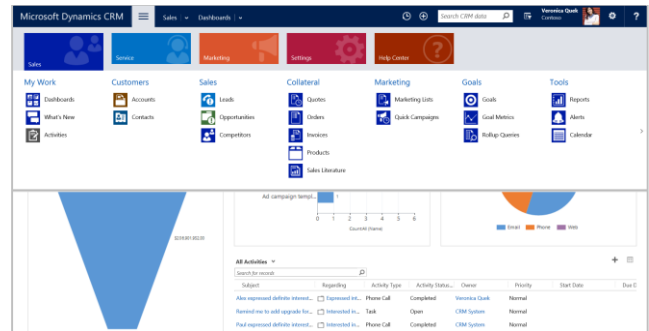
Microsoft is empowering sales professionals with insights for better decision-making. Sales professionals can use Microsoft Power BI's live dashboards and reports with drill-through, interactive, and visual capabilities to better track sales performance. In addition, with Power BI, sales managers can get answers fast with natural language Q&A. And sales managers can conduct all the analysis on their own, without having to rely on any technical resources. To help sales organization get up and running quickly on Power BI, Microsoft provides out-of-the-box connectivity to Microsoft Dynamics CRM and pre-built Power BI Sales Templates.



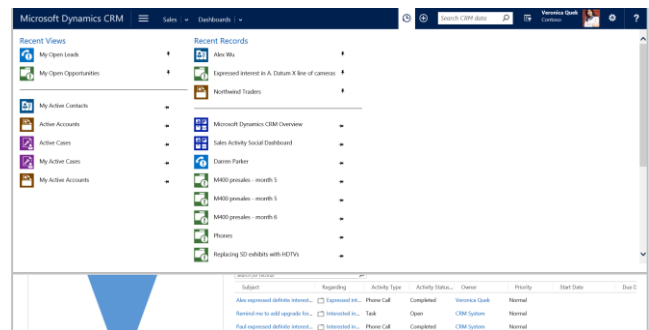
User Experience

To boost adoption and sales productivity, Microsoft is providing the following enhancements:

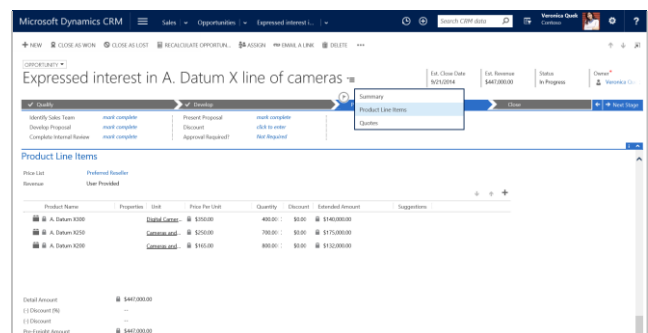
Streamlined Navigation: An updated Navigation Bar UI increases usability for large number of tiles, making it easier and quicker to find entities with less scrolling and clicking



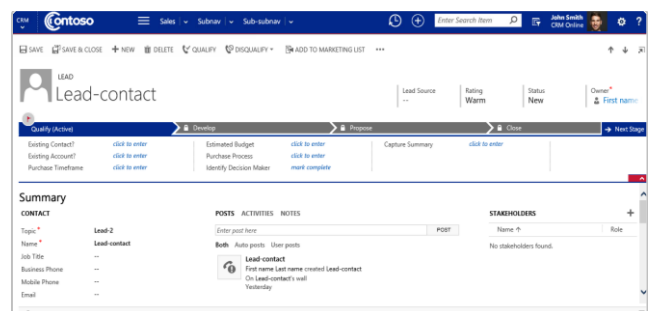
Global Most Recently Used: A central list of all recently viewed and pinned items providing easy access to most recent records and views



Form Navigation: Quickly skip to sections in a large form



UI themes: Create a uniform look and feel across all your applications with themes. For example, add a company logo or change default colors for entities or links.



Customer Service

Dynamics CRM enables companies to earn customers loyalty and advocacy for life by providing personalized, proactive and predictive service. Companies can connect their customers via self and assisted service with the right answers to their service inquiries at the right time, via their channel of choice across web, social (sentiment analysis, Yammer/Lync FB Portals), chat, email, mobile (customer access and agent/supervisor/SME) and phone. Agents are empowered with a single, unified experience to deliver amazing customer experience with cross-channel context. And, business have the tools to stay agile with solutions designed to easily adapt to changing demands, use service intelligence to deliver intent driven outcomes and ensure security, flexibility and reliability.

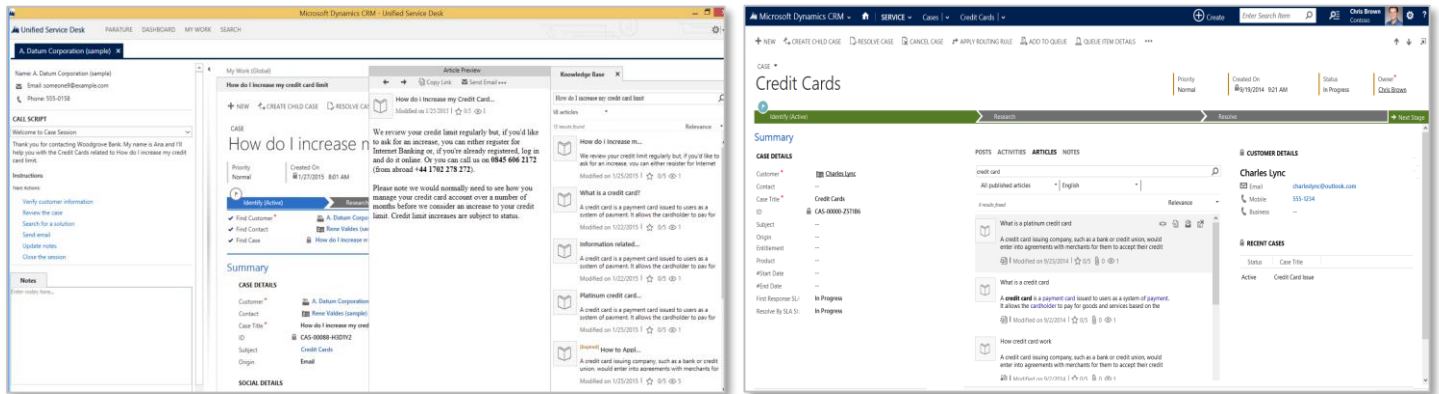
The challenge for customer service organizations is to support every customer with a personalized, contextual interaction from self to assisted service on any device, while achieving their business goals. Customer Service organizations are now at the epicenter of their company's ability to differentiate their brand and drive customer loyalty and advocacy. This means having an agile service environment designed to adjust and anticipate the needs of customers and your brand at the pace of innovation.

Delivering exceptional customer experiences means every interaction matters. Over half of today's customers use web service to find answers to their questions. But if they want to chat or speak to someone they expect a seamless transition to live agent who understands what they've already done and their history with the company if they're an existing customer. Agents who are empowered with the context of the interaction, have access to resources necessary to answer questions and can get everything they need from a single screen are going to be more effective and happier. In fact, happier agents are 2x more likely to impact critical customer satisfaction metrics. While ninety percent of organizations say customer service matters, only thirty percent of customers feel that they truly receive a great customer experience from companies. In fact, 86% of customers are willing to pay more for a better customer experience.

Service by Microsoft Dynamics CRM can help you earn customers for life through cross-channel service, increase agent productivity, channel guidance and adaptive service models.

Integrated Knowledge

Delivering a personalized Agent experience through enhanced Knowledge Management capabilities within Microsoft Dynamics CRM powered by Parature. Empower agents with knowledge integrated into their daily customer service interactions, including the ability to both search and receive automated suggestions.

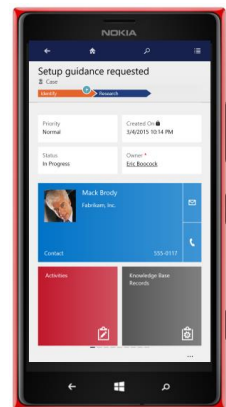


Authoring Parature Knowledge Base articles requires Parature licensing to manage knowledgebase. Searching KB, Parature Knowledge permission will be required (minimum KB read only).

Ability to place KB search control on any entity form (including custom) and in any section of an entity form including Social pane. Enabled by default for Case entity.
Auto KB suggestions based on Entity attributes.
Support for Web and USD clients.

Mobile Case Management

The freedom of mobility for agents and supervisors with the full scope of case management on tablets and phones. The Dynamics CRM application for tablets and phone will now support the CRM Case functionality enabling agents to manage their cases on the go.



The following summary highlights the rich functionality delivered by Parature, from Microsoft.

Parature, from Microsoft's Spring '15 Release delivers more than 30 new features and capabilities that will further enhance productivity and allow employees to consistently deliver amazing customer experiences. These include the ability to now fully provision and configure a complete Parature environment using the Microsoft Online Commerce platform; notable social, mobile and chat customer engagement enhancements; Parature's highly-anticipated unified portal capabilities, and new across-the-board service desk innovations to increase Parature user productivity, service personalization, multichannel and multilingual engagement, and ultimately, each customer's satisfaction. Highlights of the Spring '15 Release include:

Online Commerce Integration

Fully provision, configure and manage a Parature environment using the Microsoft Online Commerce platform. This will make integrated purchasing and billing capabilities with Microsoft Dynamics CRM and other Office 365 applications even easier. Enjoy licensing upgrades such as live chat, social customer service, additional multichannel features and extended support hours for international markets.

Social Customer Service on More Channels

Deliver more productive and personalized social customer care as part of Parature's multichannel service desk, with the ability to read, manage, filter and respond to posts on branded or associated Facebook, Twitter, LinkedIn, YouTube and Instagram properties.

Above the Queue Insights

Get more insights into customers and their interactions before they even connect for assisted support. A new portal activity widget gives agents visibility into what a customer has searched for, viewed, and interacted with on your organization's support portal. Agents can now be more productive and proactive in delivering assisted support, and reducing the need for the customer to recount the actions they took prior to requesting assisted service.

Unified Portal for Enterprise Customer Service

Deliver more relevant self-service content and allow customers to submit support requests to the product or department that's most relevant to them through an enhanced enterprise support portal experience. Empower customers with the ability to select what products or services they want to see content for, optionally, even those they haven't purchased yet. Provide multilingual support for more than 40 languages, including right to left.

Global Customer Engagement

Deliver customer service and support in more than 40+ languages including right to left with Parature's new unified portal capabilities. The language packs will be manageable from within the Service Desk or exportable for third party translation. Create linked translations of existing articles and files in both the knowledgebase and downloads. Parature's multilingual search will also make content discoverable in more than 40 languages. Leverage real-time machine translation in live chat. Route and respond to tickets based on the customer's preferred language.

Enhanced Search

Empower both agents and customers with enhanced search capabilities that deliver more relevant knowledge base results and multilingual functionality. Benefit from a combined knowledgebase and download search. Search within files, as well as with Match Any Words. Use advanced filtering and faceting including search by article rating, date added or updated, document type, etc.

Advanced Reporting

Report on customer interactions during a visit to your brand's support portal. The following portal metrics will be captured for each portal alias in both standard and premium reporting when Poly-Portal is enabled on a Parature department: Page Views, Article Views by Day, Searches, Portal Activity, Service Requests, Tickets Submitted, Emails Submitted, Chat Requests, Ticket Deflections through Articles per Day, Total Portal Deflections. Utilize the customer portal activity widget for a quick view of customer support portal activity including articles viewed and files downloaded for each customer which can be added to tickets.

More detail is available in the dedicated [Parature, from Microsoft Spring '15 Release Preview Guide](#).

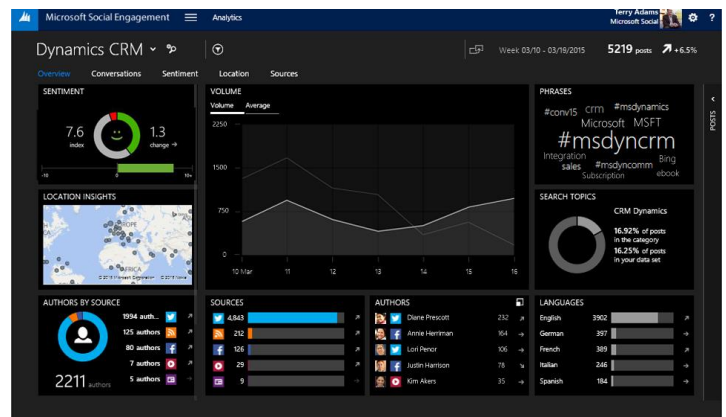
Social

In a socially connected world, engagement with your customers can happen anywhere or anytime. Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams — helping them connect on social media with your customers, prospects, and partners right within Microsoft Dynamics CRM or with a stand-alone app. Find social insights about your brand, products, and services to gain a true understanding of sentiment about your business.

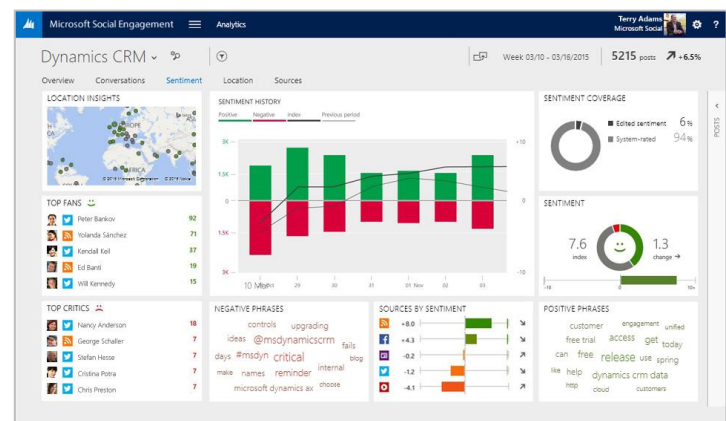
Microsoft Social Engagement

Microsoft Social Engagement helps you harness the power of the social web by analyzing what people are saying on social media and in the news. We support 19 languages and cover a broad range of sources—Twitter, Facebook, videos, blogs, and news syndication. Spot trends and receive alerts about how people are feeling about your products or brand so that you can shape your messaging and sales conversations more effectively. You can even identify your key influencers.

User Interface: Completely redesigned UI throughout the application for a simplified user experience. The dashboards are intuitive with visual filtering capabilities. We also introduce new filters: author, post type, assignee, and labels. Lastly, there is a light theme and a dark theme to suit visual preference.

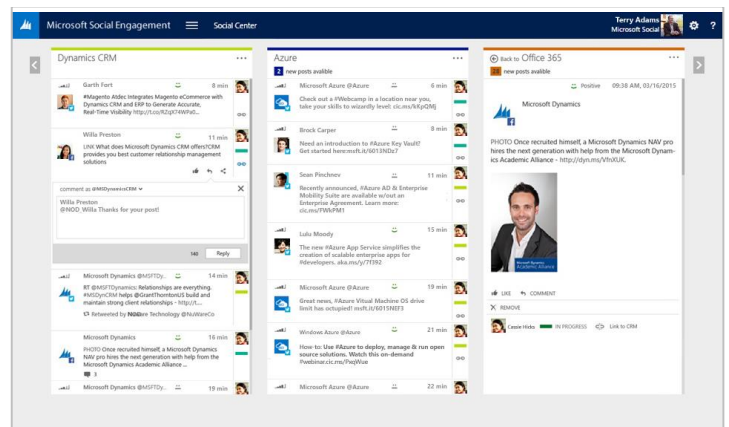


Social analytics: Richer data with new visualizations, such as phrase clouds, top fans, top critics, and top hashtags for greater insights.

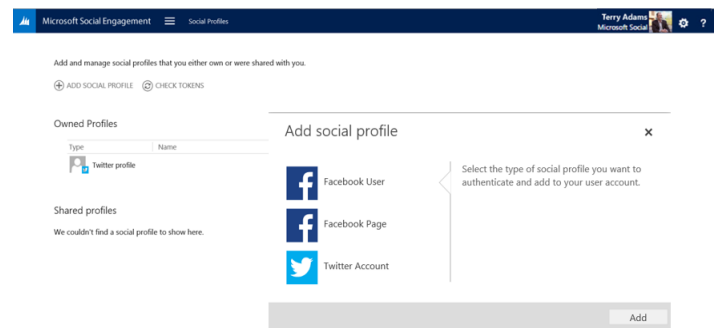


Social center: This is where you might see a social media manager or community manager spend their day interacting with customers, fans, and critics. But, you could also see a customer service manager monitoring posts and proactively engaging. These user-specific configurable and shareable streams are vertical columns displaying social posts as they come in. In this release, we support:

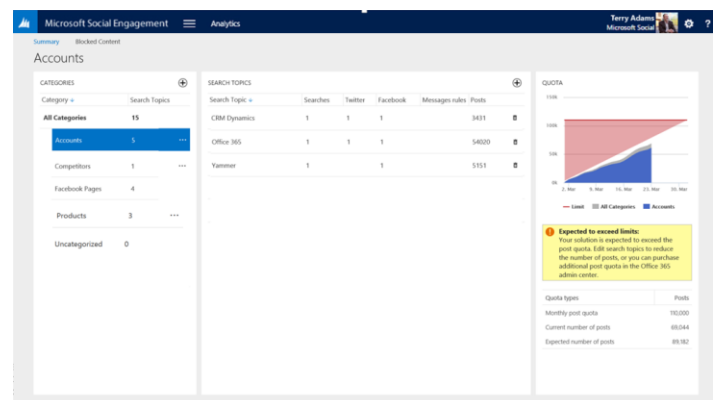
- Internal actions: assigning a post to a user and also applying a status label, which you can define in the settings area.
- External actions: Responding natively from within each stream with the following actions: Reply, retweet, favorite, and direct message on Twitter. Like, comment, share, and private message on Facebook.



Social profiles: You can now add authenticated Twitter and Facebook accounts, which allow users to interact with their audience on social posts coming from Twitter or Facebook.



Search topic set-up: Setting up search topics is easier and more flexible. You can define rules by the following criteria: keyword, Facebook page, and Twitter handle. Projected quota usage is displayed, as well as a preview of Twitter posts, to give you an idea of the type of results you can expect.

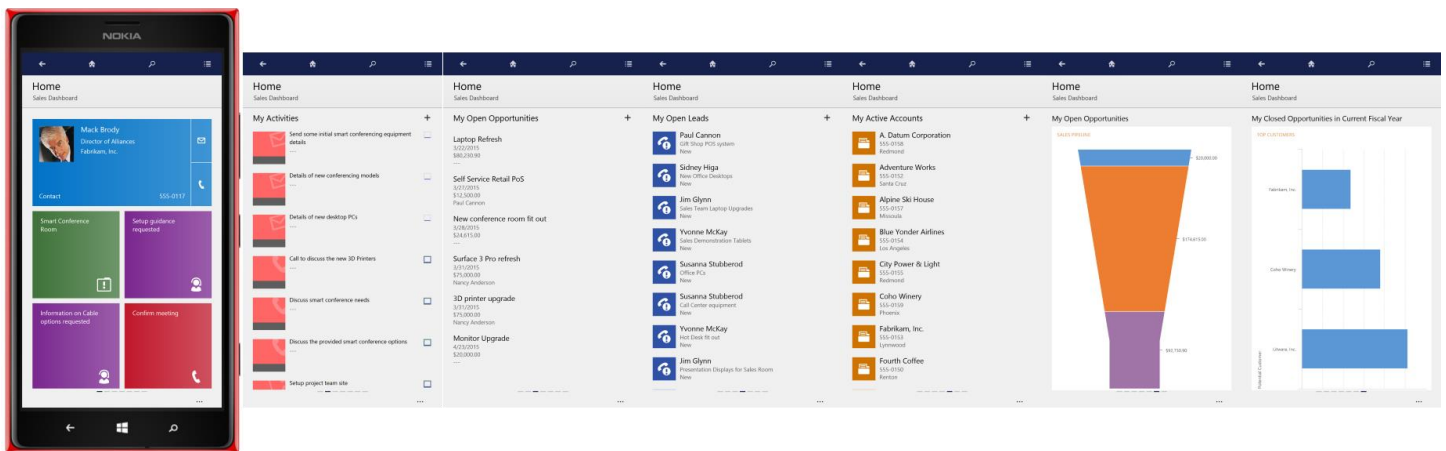


Mobile

In a mobile-first world, Microsoft Dynamics CRM helps you stay connected and productive, while on the go. Microsoft is delivering a seamless user experience across mobile devices, including tablets and phones, in a 'configure once, deploy everywhere' model.

Mobile Phone App

Microsoft Dynamics CRM for phones is a re-imagined phone app, with support for iPhone, Android, and Windows Phone. Designed and optimized for phones, the app provides quick access to relevant information with just a few taps. Mobile users are guided by same contextual business process providing a consistent experience across devices. It provides a simplified navigation tailored for phone form factor. Even when there is no connectivity, users can continue to work with offline drafts that get synchronized once reconnected. Organizations deploying mobility with Dynamics CRM, get the 'configure once, deploy everywhere' model, now extended to the phone experience. With phone specific optimizations, administrators have the ability to fine tune information that gets shown on the phone.



Mobile SDK

With mobility going beyond the new normal, organizations often need a unique vertical and role tailored experience for certain personas. Microsoft Dynamics CRM addresses this need by enabling organizations to build custom mobile apps through the platform. Microsoft provides developers with a variety of sample app templates including native iOS, Android and Windows Universal App templates. The samples have pre-configured connectivity to Dynamics CRM with authentication and data access helper libraries. This enables developers to write minimal code to connect to REST/SOAP endpoints.

Azure App Services for Mobile Apps

Azure App Services provides a cloud backend to mobile apps in just a few minutes. Microsoft is providing a Dynamics CRM connector facilitating custom mobile CRM apps to leverage Azure services. Targeted at professional developers, this 'NuGet' package allows developers to use various features of Azure mobile services with Dynamics CRM within custom mobile apps. We'll also be releasing a sample custom mobile app for a Sales/Service professional with full offline capability powered by Azure. Developers can now get the scalability of Azure along with a host of functionality such as offline without expensive development costs. Apps can also leverage other Azure services such as push notifications and events hub. This integration will also pave the way for developers to build with other Azure-supported platforms such as Xamarin, Cordova, Sencha and appcelerator.

Mobile Security with MAM

In a mobile-first world, enhancing mobile productivity in a secure way is paramount to customer success. As a first step in this journey, we will be releasing a secure version of Dynamics CRM iPad app in partnership with Good Technology. This solution provides a secure container for local data, secure data tunnel, and also manages secure email and web links from the Dynamics CRM tablet app. Organizations will be able to enforce central policy management such as device wipe and password management as well as enable employees to access the rich capabilities of the Dynamics CRM tablet app while enforcing corporate policies for customer data.

Platform

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.

API Enhancements

Performance and Scalability Improvements using roundtrip optimization in order to make data integration easier and more efficient.

Inbound Integration

Upsert (Update/Insert) Creates new records and updates existing records using one API method call; this reduces unwanted duplicate records and extra validation effort improving efficiency.

Transaction Batching capabilities allows a single unit of work to be executed and if successful, all of the data modifications made during the transaction are committed.

Alternate Keys allow simplified integration to CRM from external systems that do not have knowledge of CRM record IDs reducing round trips to lookup record IDs from other unique columns increasing overall throughput of bulk data load processes, especially with CRM Online.

Optimistic Concurrency Many application scenarios require that updates to data be coordinated so that conflicting concurrent updates to data do not cause data loss. Optimistic Concurrency is a model whereby a record "version" is provided to a client with some snapshot of the data, and then any changes to that data are presented with that version. The system can then determine that no changes have been made to the record in the interim and allow the changes to be applied, or it can discover that the record has been changed between the time the record was retrieved and when the update was requests, and it can return an error to the caller.

Update Request enhancements streamline API requests simplifying need for specialized messages such as SetState and SetParent maintaining backward compatibility.

Outbound Integration

Change tracking capabilities enable applications to obtain only the changes that have been made to CRM data using enhanced API capabilities. Creating change tracking mechanisms usually involves a lot of work using a combination of triggers, timestamp columns, and tables to store tracking information. With CRM change tracking APIs we provide server to server one-way data synchronization as well as external data store refresh capabilities without having system integrators develop custom change tracking solutions.

Standards

OData V4

For spring we are enabling system integrators to use OData V4 endpoints. OData V4 is shipped as *Preview Only*. Administrators need to explicitly turn on feature under System Settings. For more information regarding OData v4.0 visit <http://www.odata.org/documentation/odata-version-4-0>.

Enhancements for Dev & Test

Preview Instances now have sandbox support (reset and copy instance), don't consume any paid storage and support ondemand update to the beta. Customers can take one on-demand backup per instance (production or sandbox) and download to Azure storage subscription, delete sandbox instances, restore instances from system or on-demand backups. CRM Administrators can manage storage limits across instances and switch instance type between production and sandbox.

The image displays two overlapping screenshots of the Microsoft Dynamics CRM Online Administration Center. The background screenshot shows the 'reset instance' page with fields for 'Target version' (set to 'Dynamics CRM 2013 "Leo"'), 'Name' (set to 'Contoso 47 Corporation of North America'), 'URL' (set to 'Contoso47.crm.dynamics.com'), 'Purpose' (set to 'Purpose Contoso47'), and 'Instance type'. The foreground screenshot shows the 'reset instance' page with 'Language' set to 'English' and 'Please select your base currency'. It includes a note about default currency based on country/region and offers two options: 'Select currency by country/region' (selected) and 'Specify Custom Currency'. The 'Select currency by country/region' option shows 'Country/Region' set to 'United Kingdom' and 'Currency' set to 'US Dollar (USD,\$)'. Both screenshots have 'reset' and 'cancel' buttons at the bottom.

Multi-geo instance support

We will be introducing the ability to provision CRM instances in multiple regions within a single CRM Online tenant. For instance, a company creates a tenant in North America with a single instance to serve NA users but they have a business unit based in the France, with multi geo instance support they will be able to provision a second CRM Online instance hosted in a EMEA datacenter to better serve their users in France. This will make it easy for organizations to administer users and CRM Instances via a single tenant.

Customer Driven Update

Managed through the CRM Online Administration Center, CRM Administrator's are in control with the ability to approve and schedule service updates. Updates to the Customer Driven Update "CDU" process include:

- Notification in the CRM Online UI informing administrators that a Upgrade is scheduled (like the yellow Sharepoint notification)

- Ability to Reschedule Update

- Select Preferred Date/Time and Alternate Date/Time

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

Microsoft is committed to our vision of delivering Intelligent Customer Engagement and helping our customers deliver amazing customer experiences. We will continue to help companies build long-term relationships with their customers that are personalized, proactive and predictive.

With these releases, we've made great enhancements across sales, service, marketing, and social. We are redefining the way companies think about business productivity, and building our CRM capabilities so that they are seamlessly embedded to our productivity tools – including Office 365. We are introducing a completely reimagined approach to social – expanding beyond social listening and sentiment to social engagement. We are extending our Mobile CRM for tablet apps to phones. We are seamlessly integrating knowledge into customer service interactions for agents. And we are providing better insights and decision making with enhanced out of the box integration with PowerBI.

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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