

10 Tips for Designing a Great User Experience in Dynamics CRM

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What am I going to talk about today?

- How to make your users love CRM even more!
 - ...Or hate it a bit less
- Show some design practices I (try to) follow when building CRM solutions
- Give you practical customization tips for the latest Dynamics CRM version
- Zero lines of code needed for all of these!

Tip 1: Understand what User Experience design means





What is this “UX” thing anyway?





It's not the same as User Interface design





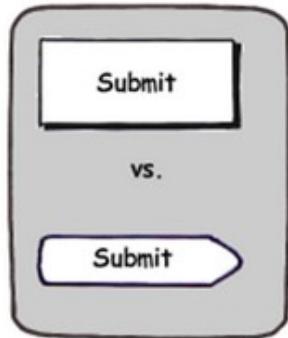
How UX design makes software better

- “*User knowing how to use the system*” vs. “*system knowing what the user wants*”
- The human brain hates uncertainty – UX design can reduce uncertainty via:
 - Choice reduction
 - Visual cues
 - Adapting to user interaction
 - Following the user’s natural process

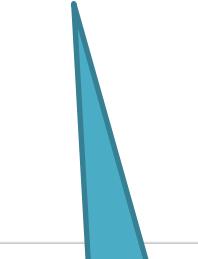


User experience is about the whole process

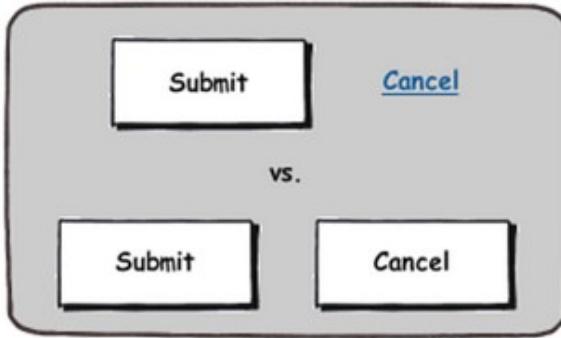
UI Design



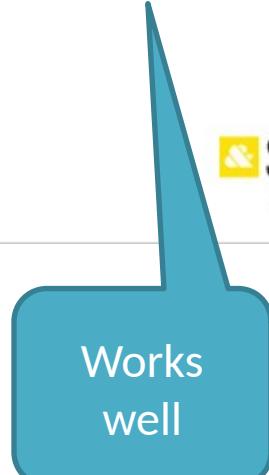
Function: It works.



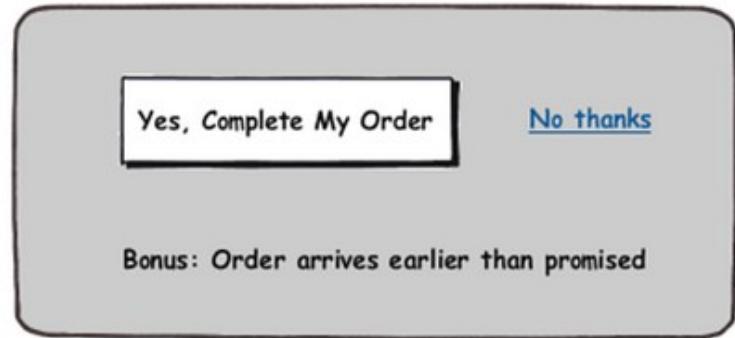
Usability Design



Action: It works well.



User Experience Design



Bonus: Order arrives earlier than promised

Emotion: It works well and makes me say Wow!





Why user experience is important for CRM systems

- The frequency of user pain
 - Online store customer: temporary pain caused during the commercial transaction
 - CRM system user: continuous pain through repeated encounters with the day-to-day tools
- The variety of use cases and user groups
 - People who don't share the same processes trying to use the same customer information system
 - Trying to deliver “something for everybody” will result in monolithic enterprise software



Why it's especially important with CRM 2013+

- Higher user expectations due to relative ease of out-of-the-box functionality
- Simplified UI only delivers benefits when the actions visible are the relevant ones
- Tons of new components to configure = more potential for UX success AND failure

Tip 2: start from the navigation





What changed with CRM 2013?

- Drivers for CRM 2013 UI re-design:
 - Single window = global navigation
 - Touch enabled = bigger icons
 - Content over UI chrome = hidden menus
- Casualties:
 - Much fewer menus immediately visible
 - Nav Bar mouseover effect requires cursor precision
 - “Vanilla CRM 2013 SiteMap” vs. upgrade experience



Optimization in the world of Dynamics CRM

Microsoft Dynamics CRM | SALES | Dashboards | Customers | Sales | Create | Jukka Niiranen | Org1 | ?

- My Work
- DASHBOARDS
- ACTIVITIES
- ACCOUNTS
- CONTACTS
- LEADS
- OPPORTUNITIES

Microsoft Dynamics CRM | SALES | Dashboards | Collateral | Sales | Create | Jukka Niiranen | Org1 | ?

- OPPORTUNITIES
- COMPETITORS
- QUOTES
- ORDERS
- INVOICES
- PRODUCTS

Microsoft Dynamics CRM | SALES | Dashboards | Marketing | Sales | Create | Jukka Niiranen | Org1 | ?

- PRODUCTS
- SALES LITERATURE
- MARKETING LISTS
- QUICK CAMPAIGNS
- GOALS
- GOAL METRICS

Microsoft Dynamics CRM | SALES | Dashboards | Tools | Sales | Create | Jukka Niiranen | Org1 | ?

- GOAL METRICS
- ROLLUP QUERIES
- REPORTS
- ALERTS
- CALENDAR

Scrolling to the 4th page of CRM 2013 Nav Bar is like...

...Getting to the 4th page on Google. Not very likely.

Google | dynamics crm navigation

Verkkohaku Kuvahaku Videot Kartat Lisää+ Hakutulokset

Sivu 4 noin 910 000 tuloksesta (0,45 sekuntia)

CRM 2013: Customize navigation | CRM 2013 Experience
www.crmexperience.wordpress.com/.../crm-2013-custo... | Käännä tämä sivu
27.11.2013 - Recently, I've been asked to change the sequence of some navigation items in MS Dynamics CRM 2013. To be honest, this isn't really a ...

Customer Effective: Microsoft Dynamics CRM | Microsoft ...
www.customereffective.com/.../Käännä tämä sivu

Since the release of Microsoft Dynamics CRM 2013, the platform has been on a very rapid release cycle. As was announced three years ago, the release cycle ...

Microsoft Dynamics CRM 2013 User Interface: Easier ...
www.dynamicscrmpros.com/microsoft-dynamics-crm-... | Käännä tämä sivu
12.8.2013 - Now, when you want to navigate to a new Area, you click "Microsoft Dynamics CRM" in the upper left-hand corner and a new menu slides down ...

MSCRM ADDONS

www.mscrm-addons.com/.../Käännä tämä sivu
mscrm-addons.com Home page Addons for Microsoft Dynamics CRM. ... Simple navigation between related CRM Records. Get the count of the related records ...

MSCRM Hacks - Not just another MS CRM blog!

mscrmhacks.com/.../Käännä tämä sivu
17.8.2014 - Technical blog dedicated to Microsoft Dynamics CRM and tutorials, ... Ribbon Button for a specific link of left navigation pane in CRM 2011 - ...

Keyboard shortcuts in Dynamics CRM 2013 | Microsoft ...
msdynamicscrmblog.wordpress.com/.../keyboard-short... | Käännä tämä sivu
21.2.2014 - The following table provides keyboard shortcuts used in Dynamics ... Navigate to the next item on the list (when forms are in Edit mode), Ctrl+>.

Settings Top Navigation Options - Microsoft Dynamics CRM ...

www.safaribooksonline.com/.../dynamics-crm-.../ch12le... | Käännä tämä sivu
Settings Top Navigation Options Other options available from the Settings top navigation options include the following: Data Management System Jobs ...

Microsoft Dynamics CRM 2013 Navigation Review ...

msdynamicsworld.com/.../microsoft-dynamics-crm-20... | Käännä tämä sivu
30.4.2014 - One of the huge difference between Microsoft Dynamics CRM 2011 and 2013 is page and menu navigation. In CRM 2011, navigation is done ...

SAP CRM WEBUI Dynamic Navigation to Activity Create - ...

wiki.sdn.sap.com/.../CRM+SAP+CRM+WEBUI+Dynam... | Käännä tämä sivu
17.7.2012 - SAP CRM WEBUI Dynamic Navigation to Activity Create ... Summary: This paper illustrates how to dynamically navigate to "create activity" of ...

Dynamics CRM 2013 navigation - CRM Software Blog

www.crmsoftwareblog.com/.../dynamics-crm-2013-na... | Käännä tämä sivu
28.5.2014 - There is something to be said about the decision to make Dynamics CRM 2013's top-bar navigation system universal to all screen sizes.



Optimization tips for the new navigation

- SiteMap
 - Make each process specific area self-sustained
 - Kill the Workplace while you're at it
 - Don't be afraid to add more areas
 - Configure a “landing page” dashboard for each area
- Form Related Records (“the 4th level” in Nav Bar)
 - Remove menu items that already have a subgrid on the form
 - Prioritize the order based on presumed access frequency

Tip 3: Save clicks with view design





What's #SavedYouAClick?

Huffington Post @HuffingtonPost · Sep 9

THIS is the best time to book a plane ticket huff.to/1fVN1YE

Reply Retweet Favorite More



Have to click through to a new page to get the information you want



Saved You A Click

@SavedYouAClick



Follow

54 days before takeoff. RT

@HuffingtonPost: THIS is the best time to book a plane ticket

Reply Retweet Favorite More

RETWEETS

152

FAVORITES

313



2:04 PM - 9 Sep 2014

The information you want, right there



CRM views and clicks

- Two reasons for clicking a record in a view
 - You want to access more information from it (minimum 1 click)
 - You need to check if it's the right record in the first place (1...N clicks)
- The best views **don't require a single click**
 - Columns provide the most important info
 - Sorting promotes the most relevant records
 - (Btw: 1 scroll/swipe effort < 1 click effort)



Default views that suck

Marketing list members: which company/address/permission?

MARKETING LIST
Invitation to customer event

Locked	Last Used on (Date)	Owner*
No	--	Jukka Niiranen
Members		
+ 		
Full Name ↑	Business Phone	
Ari Rahkonen	+358 9 525501	
Duke Duplicate		
J. Jones		
Jim Beam		
Jim Glynn (sample)	555-0109	
Jimmy Beamish		
Joe Perry	804-762-9576	
John Jones		
Jukka Niiranen		
Jukka Niiranen		
Kamlesh Gopalakrishnan	(022) 677 6776	
Kim Douglas		
Linda Little	804-762-9576	

Active Cases: who's the customer? Or case owner?

→ Active Cases ▾

Case Title	Case Number	Priority ↑	Created On	Business Unit (...)
Complete overhaul required...	CAS-01001-D7L3JB	High	23.8.2013 10:00	Org1
Item defective on delivery (s...	CAS-01010-W7Q1...	High	23.8.2013 9:00	Org1
Maintenance time informatio...	CAS-01013-Z4H2G9	High	24.8.2013 0:00	Org1
Noise from product (sample)	CAS-01016-L6M2P4	High	24.8.2013 0:00	Org1
Service information required...	CAS-01027-L8G5F1	High	24.8.2013 0:00	Org1
Service required (sample)	CAS-01029-N0L9S9	High	23.8.2013 14:00	Org1
Defective item delivered (sa...	CAS-01005-Q3G1Y3	Low	14.8.2013 10:00	Org1
Information on the product (...)	CAS-01008-J4D2V0	Low	18.8.2013 0:00	Org1
Maintenance information (sa...	CAS-01011-Z2L4L9	Low	19.8.2013 7:00	Org1
Missing parts (sample)	CAS-01014-T8F5Z1	Low	24.8.2013 0:00	Org1
Product feature information...	CAS-01020-F3C2W4	Low	22.8.2013 10:00	Org1
Service requested (sample)	CAS-01028-W2X0...	Low	24.8.2013 0:00	Org1
Average order shipment tim...	CAS-01000-R5W9H1	Normal	23.8.2013 16:00	Org1
Contact information request...	CAS-01002-V8Q8R8	Normal	21.8.2013 9:00	Org1
Contact information require...	CAS-01003-F5H4T8	Normal	24.8.2013 0:00	Org1
Faulty product catalog (sam...	CAS-01007-G2T8W9	Normal	24.8.2013 0:00	Org1
Need help (sample)	CAS-01015-Z0Z2W1	Normal	22.8.2013 12:00	Org1

Price list items: where's the product's price????

Price List
Finland 2014

Product ↑	Unit
Dynamics CRM Online Additi...	Instance/month
Dynamics CRM Online Additi...	Instance/month
Dynamics CRM Online Additi...	GB/month
Dynamics CRM Online Basic	User/month
Dynamics CRM Online Essential	User/month
Dynamics CRM Online Profes...	User/month
Dynamics CRM Online Suppo...	User/month
Office 365 Enterprise E1	User/month
Office 365 Enterprise E2	User/month
Office 365 Enterprise E3	User/month
Office 365 Enterprise E4	User/month

1 - 11 of 11 (0 selected)



Custom views that suck

DIGITAL ILLUSTRATED

DESIGN TECHNOLOGY SUCCESS

Microsoft Dynamics CRM | SALES | My First Entity |

+ NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL

Active My First Entity

Name	Created On	Owner
1	18.9.2014 21:15	Jukka Niiranen
2	18.9.2014 21:15	Jukka Niiranen
3	18.9.2014 21:15	Jukka Niiranen
4	18.9.2014 21:15	Jukka Niiranen
5	18.9.2014 21:15	Jukka Niiranen
6	18.9.2014 21:15	Jukka Niiranen
7	18.9.2014 21:15	Jukka Niiranen
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9	18.9.2014 21:15	Jukka Niiranen
10	18.9.2014 21:15	Jukka Niiranen
11	18.9.2014 21:15	Jukka Niiranen
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14	18.9.2014 21:15	Jukka Niiranen
15	18.9.2014 21:15	Jukka Niiranen
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17	18.9.2014 21:15	Jukka Niiranen
18	18.9.2014 21:15	Jukka Niiranen
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21	18.9.2014 21:15	Jukka Niiranen
22	18.9.2014 21:15	Jukka Niiranen
23	18.9.2014 21:15	Jukka Niiranen
24	18.9.2014 21:15	Jukka Niiranen
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91	18.9.2014 21:15	Jukka Niiranen
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95	18.9.2014 21:15	Jukka Niiranen
96	18.9.2014 21:15	Jukka Niiranen
97	18.9.2014 21:15	Jukka Niiranen
98	18.9.2014 21:15	Jukka Niiranen
99	18.9.2014 21:15	Jukka Niiranen
100	18.9.2014 21:15	Jukka Niiranen



FFFFF
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UUUU
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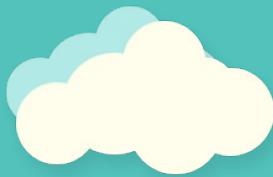


Design views that minimize the clicks

- Sorting
 - Alphabetic sorting almost never makes sense
 - Showing last modified/created records almost always makes sense
- Columns
 - Include relevant fields for visual scanning and manual sorting
 - Synchronize column order (and width!) across your views as much as possible
 - Avoid using lookup fields to other entities as first columns (because the click will not take you to the record you expected)

Tip 4: Make your forms more responsive





Why so many entity forms suck

- The eternal dilemma:
 - Process owners would like to have all the data
 - Process actors would like to enter none of the data
- The varying relevance:
 - Some information will never be known by the user upon record create
 - Some information is only relevant in conjunction with other information
 - Some information becomes irrelevant as the process moves forwards
- Entity attributes (data model) and entity presentation (UI) are two different design areas, because the presentation layer has a **time dimension**



Some things are just better kept hidden

These are all the standard hidden fields for the opportunity entity

Imagine you were being trained to use a new CRM application. Would you want to see a form like this after clicking “add new record”?

Process: Update Opportunity Manually
Update Opportunity

Additional Fields

Actual Close Date

Actual Revenue

Budget

Source Campaign

Proposal Feedback Captured

Yes No

Probability

Final Proposal Ready

mark complete completed

Complete Internal Review

mark complete completed

Confirm Interest

Yes No

Potential Customer

Customer Pain Points

Decision Maker?

mark complete completed

Develop Proposal

mark complete completed

Integration Key

Est. Close Date

Est. Revenue

Evaluate Fit

File Debrief

mark complete completed

Final Decision Date

mark complete completed

Identify Competitors

mark complete completed

Identify Customer Contacts

mark complete completed

Identify Sales Team

mark complete completed

Initial Communication

mark complete completed

Weighted Revenue

Need

Rating

Originating Lead

Present Final Proposal

mark complete completed

Presented Proposal

mark complete completed

Priority

Decide Go/No-Go

Yes No

Qualification Comments

Quote Comments



Use Business Rules to trim down the forms

- Show/hide fields for new/existing record forms
 - Conditions for Created On/By field
- Hide entire sections by setting all fields as hidden
- Target Business Rules to specific forms via hidden fields
 - The rule will only run when all fields are present

Tip 5: Automate the business process (flow)





The truth about Business Process Flows

- Business Process Flows (BPF) are the opposite of workflows:
 - Front & center in the UI vs. behind the scenes
 - All manual actions vs. fully automated process
- Business Process Flows alone are just a process map
 - They show you what should be done next
 - They don't know when it's time to move on



The manual steps

PROJECT CRM 2013 Upgrade

Analysis Design

Core Team Training click to enter

Standard Solution Con click to enter

General

Name * CRM 2013 Upgrade

Project Manager * Jukka Niiranen

Select Business Process Flow

This is a list of business process flows that are available for your security role.

Sure Step CRM implementation

Default process for all Dynamics CRM projects

General IT Project

Use for non-Dynamics software projects.

Switch Process:
needs to be performed by the user from the Command Bar

PROJECT CRM 2013 Upgrade

Analysis (Active) Design Development Deployment Operation Next Stage

✓ Solution Overview	Completed	✓ Fit Gap Analysis	Completed
✓ User Training Requirements	Completed	✓ Development Environment	Completed
✓ Business Requirements	Completed	✓ Data Migration Requirements	Completed

Project Manager *
Jukka Niiranen

Change Stage: needs to be done by the user from the BPF



Tips for smarter processes

- Automate the process selection via workflows
 - Requires a custom workflow activity, Google for “[dynamics crm workflow essentials](#)”
- Control process stage changes
 - Run a workflow from *stageid* & *stepid* field changes to trigger further actions
- Use process & stage specific Business Rules to trim the forms
 - Copy the stage value onto a custom field, so you can reference it via Business Rule conditions

Tip 6: Show the user what's going on





CRM: is it just for storing records?

- CRM solution design is often focused on planning what information needs to be *captured* for records (i.e. data entry) and how it is to be *queried* (views, charts, reports)
- This record centric approach is not very good at surfacing the *actions* performed by CRM users
- Yet these actions are a key component when users evaluate the validity and relevance of the data
 - Account created today vs. last updated three years ago: which data would you trust more?
 - Primary contact for customer account changes: will the account team discover this information on their own?



Static vs. dynamic information system

Sales | Accounts | Jukka Niiranen Org1

NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | ...

My Active Accounts

Search for records

Account Name ↑	Main Phone	Address 1: City	Address 1
Bradley Nameplate Corp	701-898-2154	Fargo	ND
Branford Wire & Mfg Co	215-934-8655	Jenkintown	PA
Bresler Eitel Framg Gilry Ltd	201-672-1553	Hackensack	NJ
Brooks, Morris J Jr	919-623-2524	Raleigh	NC
Buckley Miller & Wright	440-780-8425	Chagrin Falls	OH
Buerghi & Madden Scale	415-423-3294	Novato	CA
Burrows, Jon H Esq	337-566-6001	Lafayette	LA
Burton & Davis	818-864-4875	Northridge	CA
Business Systems Of Wis Inc	806-703-1435	Amarillo	TX
C 4 Network Inc	408-540-1785	San Jose	CA
C W D C Metal Fabricators	914-861-9748	Katonah	NY
Calaveras Prospect	732-628-9909	Toms River	NJ
Cali Sportswear Cutting Dept	973-936-5095	Little Falls	NJ
Cambridge Inn	908-409-2890	Pittstown	NJ
Campbell, Jan Esq	215-961-3284	Philadelphia	PA

1 - 100 of 514 (0 selected)

Page 1

Click on the chart to perform Drill Down

Accounts by Industry

Industry	CountAll (Account Name)
Transportation	161
Outbound Consu...	31
Insurance	37
Inbound Repair...	33
Consumer Servi...	1
Business Servi...	201
Agriculture an...	12
Accounting	1
(blank)	37

Are we building just a static, glorified address book?

what's new

All records | Both Auto posts User posts

CRM 2013 Upgrade

Project for customer [A. Datum Corporation](#) has moved to stage "Design".
On CRM 2013 Upgrade's wall
Today

Ultimate Engineering

Account name changed from "Topline Engineering" to "Ultimate Engineering".
On Ultimate Engineering's wall
14.9.2014 21:06

Simple Electronics

Account: Created By [Jukka Niiranen](#).
On Simple Electronics's wall
14.9.2014 20:47

Or can CRM tell the users what is going on RIGHT NOW?



Surfacing actions performed on CRM data

- Show the timestamps on who created and modified the record, and when
- Identify events that are important enough to raise a special flag, then use a workflow to write the data (activity feed post, note, custom field)
- Always provide at least one view per entity that shows the latest created/modified records at the top

Tip 7: Don't forget your clients





Our twisted reality

- System customizers live inside the web client, because opening CRM organizations with other clients requires jumping through hoops
- For the past ~10 years CRM Outlook client was the main selling point, today it's the mobile apps
- CRM 2013 web client looks nice & fresh, works great for demos and is the only practical tool for customization work
- So, what's the problem?



CRM is not just a browser application

Web

SALES | Accounts | Supercell |

My Work DASHBOARDS WHAT'S NEW ACTIVITIES

Summary

ACCOUNT INFORMATION

Account Name: Supercell

Phone: --

Fax: --

Website: <http://www.supercell.com>

Parent Account: --

Ticker Symbol: --

ADDRESS

Itämerenkatu 11-13
00180 Helsinki
Finland

porkkula Porkkalagatan
supapekkala Suppoholmen
Itämerenkatu Sandgatan

The specified credentials are invalid. You can sign up for a free developer account at <http://www.bingmapsportal.com>

Outlook

FILE | Accounts | View | Charts | Add | Customize

New Edit Activate Deactivate Merge Send Direct Email Add to Marketing List Assign

Records

My Active Accounts

Search My Active Accounts

ACCOUNT NAME	MAIN PHONE	ADC
C W D C Metal Fabrica...	914-861-9748	Katc
Calaveras Prospect	732-628-9909	Tom
Cali Sportswear Cuttin...	973-936-5095	Littl
Cambridge Inn	908-409-2890	Pitt
Campbell, Jan Esq	215-964-3284	Phil
Campbell, Robert A	201-920-9002	Keai
Can Tron	314-732-9131	Sair
Cangro Transmission Co	303-402-1940	Eng
Cape & Associates Rea...	978-626-2978	Wilt
Capitol Reporters	916-591-3277	Sac
Carmichael, Jeffrey L Esq	415-306-7897	San
Carol, Drake Sparks Esq	650-933-5072	San
Carriage House Clean ...	847-519-5900	Elk
Carroccio, Thomas Esq	931-273-8700	Tull
Cascade Reality Adviso...	505-977-3911	Las
Casco Services Inc	602-390-4944	Pho
Case Foundation Co	817-765-5781	Ken
Centerline Engineering	602-919-4211	Pho
Central Die Casting M...	757-682-7116	New
Centro Inc	512-587-5746	Rou
Century 21 Krall Real E...	336-822-7652	Burl
Century Communicati...	602-277-4385	Pho

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Tablet

Sales Dashboard

Pinned Tiles

The Cracker Box
Marion, Ohio
Gabrielle Carnata
1-555-555-0146

Matthew Miller
Senior Web Administrator
The Cracker Box

Contact 1-555-555-0194

Interested in 3D Print...
Lots of Sales
€392,000.00 25 Probability

My Activities

DATE	ACTIVITY	NOTES
12 July	Review the RFP Library	Interested in Pr
13 July	Identify Decisio	Maker from Ric
15 July	Prepare sales presentation fo	Opportunity: Interested in Pr
19 July	Review the RFP Library	Interested in Fa
22 July	Prepare sales presentation fo	Opportunity: Interested in Fa
25 July	Review the RFP Library	Interested in La
28 July	Prepare sales presentation fo	Opportunity: Interested in La

Phone

Microsoft Dynamics CRM
AdventureWorksCycle

Accounts Appointments Campaigns Cases Contacts Email Messages Leads Letters



Know the limitations of each client

- Outlook
 - Folder based navigation & popup windows
 - Reading Pane: single column form with multi-column subgrids
- Tablet
 - Uses same form definition as web client, single form, “single row” rendering, first 75 fields or 5 tabs
- Phone
 - Separate Mobile form, single column, no scripts or Business Rules
 - No process specific actions available, just “CRUD”

Tip 8: Sweat the little things





What really matters

- The longer you work with CRM, the easier it is to become blind to the small glitches
- The efforts of the customizer are not necessarily in any proportion to the significance of a design detail
 - An expensive custom plugin may perform an action that the users will never actually notice
 - A single choice of wording may frustrate and confuse the users every time they use the system
- “People use what works – well” ([will.i.crm](#))



Do you even notice these details anymore?

Do all of your updated CRM forms or custom entity forms say “information” in the header?

The screenshot shows a CRM record for a travel event. The title bar says "TRAVEL INFORMATION : INFORMATION". The main title of the record is "Test trip to Berlin". Below the title, there are three orange-colored status boxes: "Event*" with the value "Germany Summer Co.", "User" with the value "Jukka Niiranen", and "Owner*" with the value "Jukka".

Do you have useless tab labels at the start of your form, stealing screen estate?

The screenshot shows a CRM form with a single tab labeled "Information". Under the "General" section, there are four data rows:

Travel Reason	Test trip to Berlin	Event*	Germany Summer Co
Start Time	2/24/2014 9:00 AM	NIB User	Jukka Niiranen
End Time	2/28/2014 4:00 PM	Type	Flight



Details that are A) important and B) cheap to fix

- Field names:
 - Avoid redundancy: “Case Title” vs. “Title”
 - Group fields with (short) prefixes to help usage in Advanced Find
- View names: think about the sorting
- Field descriptions: provide a tooltip for users
- Custom entities: icons are not optional

Tip 9: Clean up after you're done





The messy construction site of CRM

- Rome wasn't built in a day, neither was your CRM
- Rome had a sanitation system, but does your CRM system have one?
- The system customization process usually starts with the “*add more stuff*” stage
- You should always include a “*take stuff away*” stage into that process, too



CRM comes with clutter right out of the box

→ Accounts Being Followed ▾

- System Views**
- Accounts Being Followed
- Accounts I Follow
- Accounts: Influenced Deals That We Won
- Accounts: No Campaign Activities in Last 3 Months
- Accounts: No Orders in Last 6 Months
- Accounts: Responded to Campaigns in Last 6 Mon.
- Active Accounts
- Inactive Accounts
- My Active Accounts
- My Connections
- Create Personal View
- Save Filters as New View
- Save Filters to Current View

Do all these account views make sense for your business?

Are you really using that many address fields?

Look for: Account

Fields
Account
Account Name
Account Number
Address 1
Address 1: Address Type
Address 1: City
Address 1: Country/Region
Address 1: County
Address 1: Fax
Address 1: Freight Terms
Address 1: Latitude
Address 1: Longitude
Address 1: Name
Address 1: Post Office Box
Address 1: Primary Contact Name
Address 1: Shipping Method
Address 1: State/Province
Address 1: Street 1
Address 1: Street 2
Address 1: Street 3
Address 1: Telephone 2
Address 1: Telephone 3
Address 1: UPS Zone
Address 1: ZIP/Postal Code
Address 2
Address 2: City
Address 2: Country/Region
Address 2: County
Address 2: Fax

Sales Activity Social Dashboard ▾

- System Dashboards**
- Customer Service Manager Dashboard
- Customer Service Operations Dashboard
- Customer Service Performance Dashboard
- Customer Service Representative Dashboard
- Customer Service Representative Social Dashboard
- Marketing Dashboard
- Marketing Social Dashboard
- Microsoft Dynamics CRM Overview
- Microsoft Dynamics CRM Social Overview
- Sales Activity Dashboard
- Sales Activity Social Dashboard**
- Sales Dashboard
- Sales Performance Dashboard

Why do you need “social” vs. “non-social” dashboards?



Clean up that clutter

- Hide unused fields from Advanced Find
 - Use [XrmToolBox](#) to find fields not on forms
- Remove unused fields from forms
 - Use [CRM Data Detective](#) for quick statistics
- Deactivate unnecessary default components
 - Views that don't make sense to you
 - Charts using fields that you are not using
 - Dashboards without an audience

Tip 10: Get even more tips!

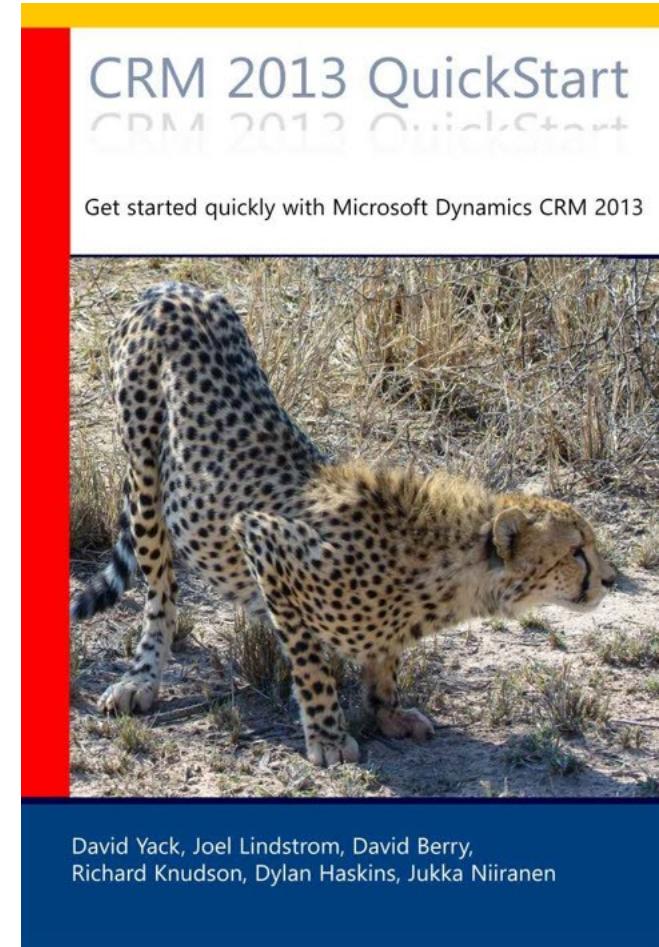




CRM 2013 QuickStart Book

**DIGITAL
ILLUSTRATED**
DESIGN TECHNOLOGY SUCCESS

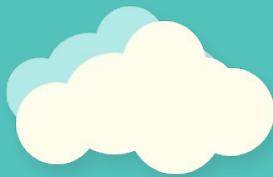
- What's new/different in the CRM 2013 version
- For people who already know something about a previous Dynamics CRM version
- 11 chapters of content from 6 CRM MVPs
- **Special 20% discount code!**
 - [JukkaNiiranenCRMQuickStartEBook](#)
 - <http://www.crm2013quickstart.com/>





Recap





My 10 tips for better CRM user experience

1. Understand #UX
2. Start from the navigation
3. Save clicks with view design
4. Make your forms more responsive
5. Automate the business process (flow)
6. Show the user what's going on
7. Don't forget your clients
8. Sweat the little things
9. Clean up after you're done
10. Know where to go for more tips!

Thank you for listening!

You can follow me at: [https://
twitter.com/jukkan](https://twitter.com/jukkan)

...or read my Surviving CRM blog: [http://
niiranen.eu/crm/](http://niiranen.eu/crm/)

