

How to increase productivity in Microsoft Dynamics CRM

Ways to Increase Productivity in Dynamics CRM

Make it simple!

- Define processes for you users
 - By designing standard operating procedures for you user they will understand what it takes to complete a task.
 - Using a well defined business process flow can help users complete repeating tasks and up productivity.
- Design your CRM system to be user friendly
 - Don't over complicate your CRM forms.
 - Give the users a design that makes sense and doesn't clutter the form with useless information.
- User training
 - Take the time to implement a solid user training program.
 - Spring update comes with OOB-tutorials in CRM
- Give your users the tools to make tasks as easy as possible!



Time Saving Tools to Increase Productivity

What we offer

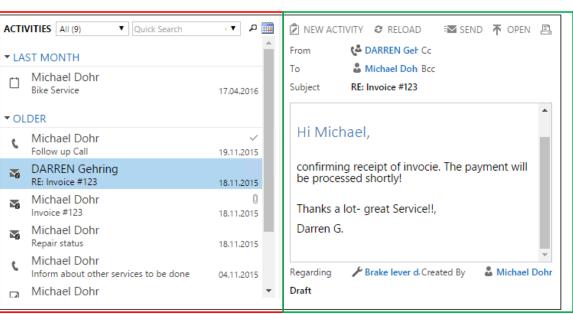
ActivityTools – Outlook like look & feel

- Activity and Email Preview
 - Simply browse through the activity list while getting an instant view on your activity in the preview pane.
 - Search & Filter Options
 - Custom Activities
 - Add it to any CRM Form or Dashboard
- Email Features
 - Define Signatures
 - Default Sender and Default Signatures
 - Full HTML Support



Preview (Right Pane, marked green)

- Direct access to attachments and related records (from,to,cc,bcc...)
- Customizable layout



Overview (Left Pane, marked red)

- List of activities (standard & custom)
- Search capabilities

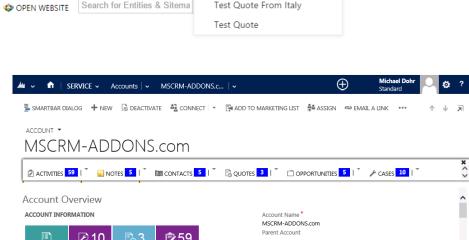
Time Saving Tools to Increase Productivity

Active

What we offer

SmartBar

- Smart and Simple Navigation
 - Simple navigation within CRM Entities
 - Counts and Displays Related Records
 - Buttons show a number count of the related records per entity.
- Customizable
 - Add it to any CRM Form or Dashboard
 - Add Links, Scroll to Section, Entities/Sitemap entries and Java Script Buttons
 - Rearrange button order
 - Choose your own style and color



CAMPAIGNS OPPORTUNITIES 2 | CASES 7 | GODERS INVOICES NOTES 7 |

QUOTES 2 | FIREDOCUMENTGENERATION

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Ticker Symbol
-Primary Contact

Christian Ternek
NOTES



Live Demo

CRM 2016

- <u>Use Case 1:</u>
 - Using the SmartBar to quickly navigate through CRM.
- Use Case 2:
 - Using ActivityTools vs standard CRM when taking over a case from another user.



Thank You

Feel free to join our upcoming Webinars! http://www.mscrm-addons.com/Support/Webinars.aspx

Resources:

- You can find us on the web at http://www.mscrm-addons.com
- Help-Center (Live-Chat, Support): http://www.mscrm-addons.com/Support.aspx
- Don't forget we have an awesome blog at http://blogs.mscrm-addons.com/, you'll find it to be a helpful resource!

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