

Dynamics CRM 2013 Customization and The Platform Evolution

Jukka Niiranen (@jukkan)





Today's agenda

- History of Microsoft's CRM platform
 - CRM 2013 – the start of the next chapter?
- Effects of mobile computing
 - One app – many, many clients
- Customizing CRM today
 - Design more than just the data model
- Delivering responsive solutions
 - ...with no code!



About me

- Dynamics CRM consultant from Helsinki, Finland
- Worked with the platform since 2005
- Frequent blogger & #MSDYNCRM evangelist on social media
 - Blog: Surviving CRM at niiranen.eu/crm/
 - [@jukkan](https://twitter.com/jukkan) on Twitter (& many other networks...)
- Awarded as Microsoft MVP last year
- Focused on improving CRM solution usability & information work efficiency

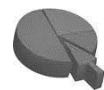
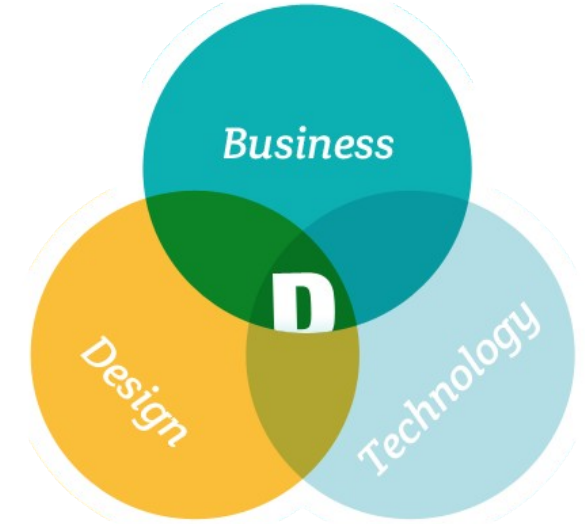




About Digital Illustrated



- Digital Illustrated is an agile technology agency that creates business value with Microsoft technologies.
- We focus on solutions that improve customer experience, social collaboration and business agility.
- Designing and implementing consumer-grade enterprise solutions built on platforms like SharePoint, Dynamics CRM, Yammer, Azure
- Founded in 2011, growing fast, and owned by the employees
- ***THIS JUST IN!*** Download a free CRM Online goal visualization app for your Windows Phone 8 device from crmgoals.com!



ClickDimensions

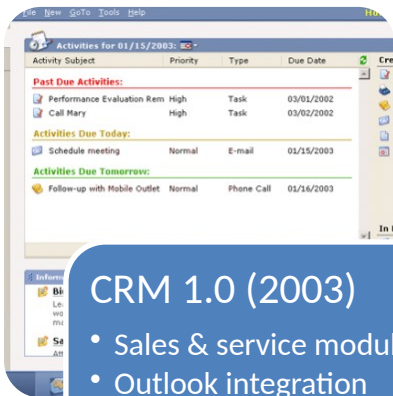


HISTORY OF MICROSOFT'S CRM

CRM 2013 – The start of a new chapter?

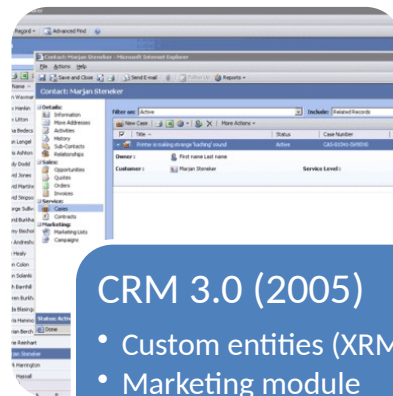


The first chapter of CRM: 2003-2011



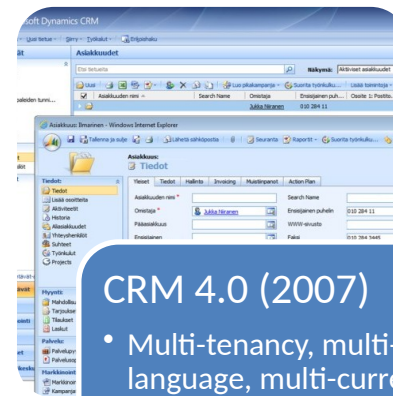
CRM 1.0 (2003)

- Sales & service modules
- Outlook integration



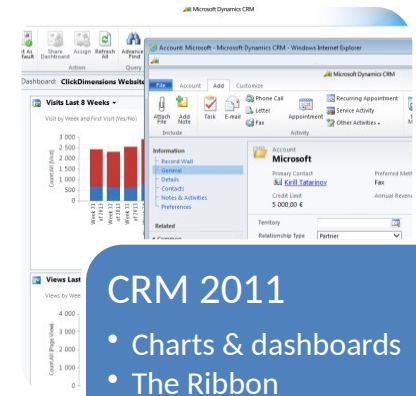
CRM 3.0 (2005)

- Custom entities (XRM)
- Marketing module
- SSRS reporting



CRM 4.0 (2007)

- Multi-tenancy, multi-language, multi-currency
- Windows Workflow Foundation
- From callouts to plugins
- Report Wizard



CRM 2011

- Charts & dashboards
- The Ribbon
- Solution model
- Native Outlook app
- Form subgrids, web resources, goal management, dialogs



From evolution to revolution?

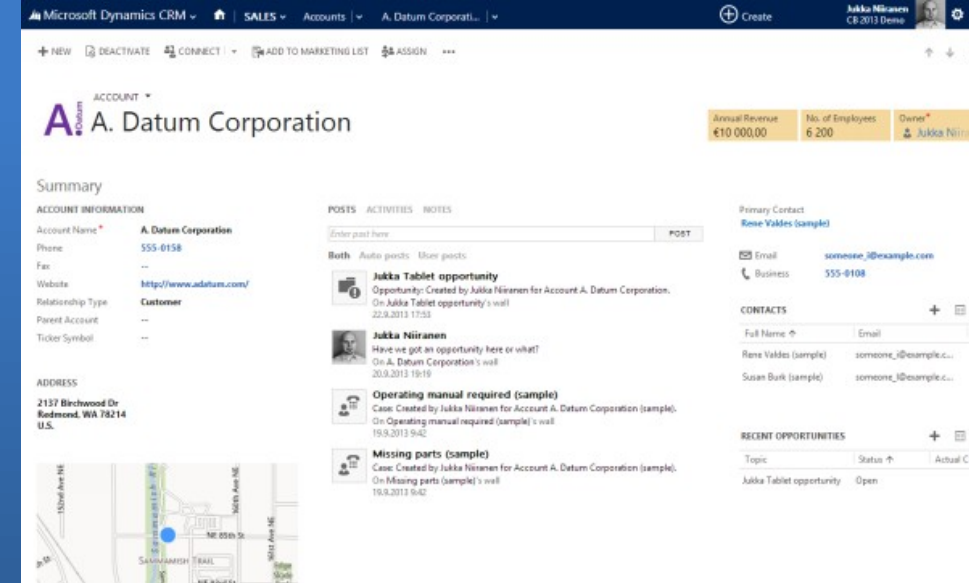
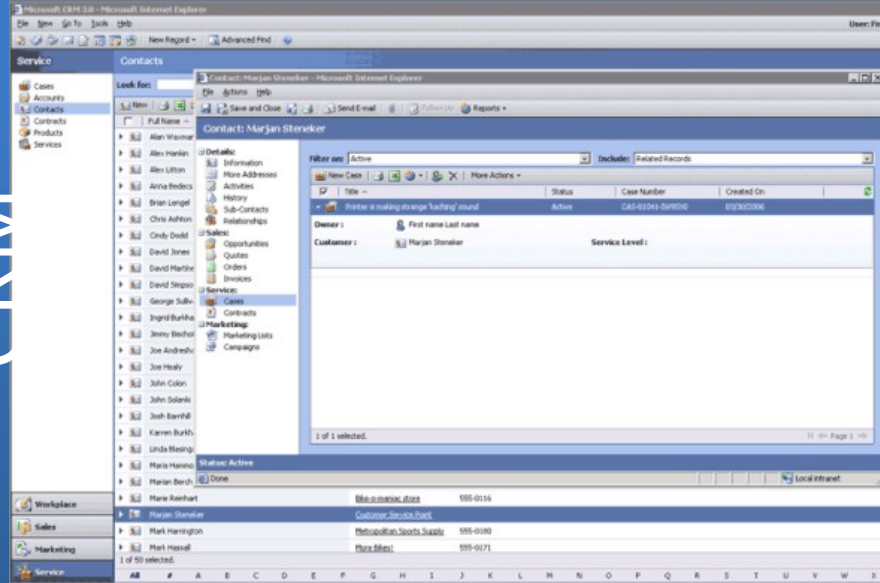
- The first 4 major releases of CRM were a steady evolution:
 - New functionality and options being added alongside existing ones
 - Platform components replaced with more robust technologies
- CRM 2011 was a “*more of everything*” release, a pinnacle of this chapter
- CRM 2013 no longer continued on this familiar path, instead it could be seen as an “*everything’s different*” type of a paradigm shift

User interface evolution CRM applications: Microsoft vs. Salesforce

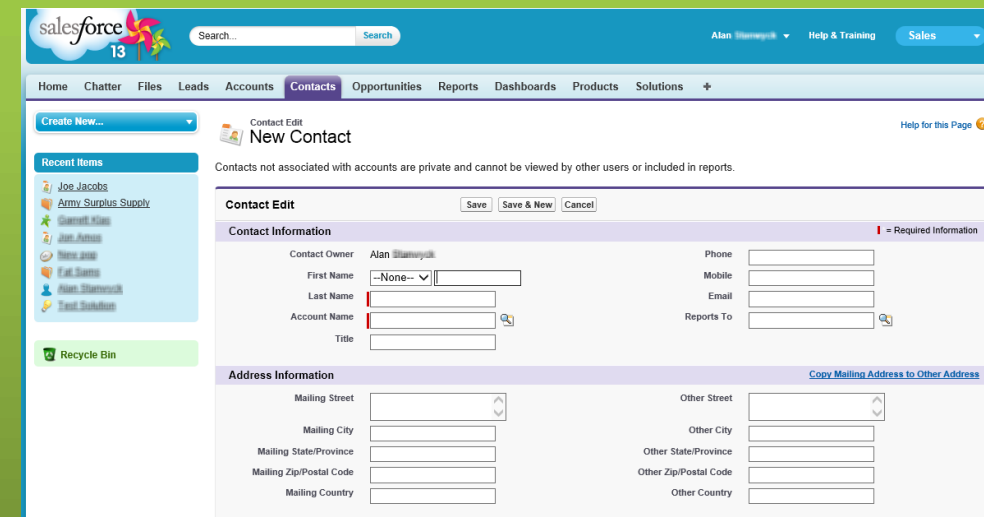
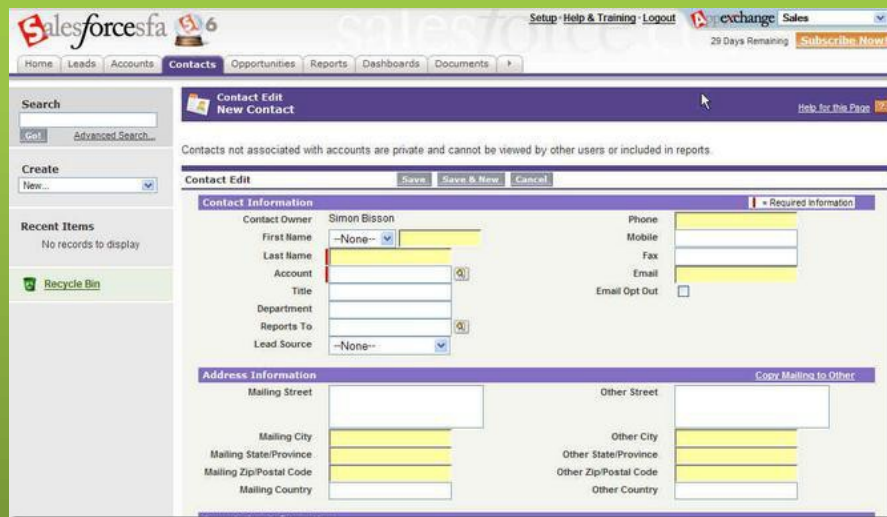
2006



Microsoft Dynamics CRM



Salesforce





CRM design principles: then and now



Aaron Elder's WebLog

Microsoft CRM and the wonderful world of making it work for you...

2004

2013

[MSDN Blogs](#) > [Aaron Elder's WebLog](#) > Microsoft CRM User Interface Part 3 of 4

Microsoft CRM User Interface Part 3 of 4



MSDNArchive 16 Sep 2004 8:37 AM | 4

ISV User Interface Guidelines, Etc.

This section will give you pointers and guidelines for developing UI's that "play nice" in the Microsoft CRM space. This will help your user's interact with your add-on more efficiently and will help you achieve a "professional lookup".

Note: A lot of what you see below are guidelines and principles. Rules of course are meant to be bent on occasion, and in the interest of time and ship dates we had to bend some. You will have to use your best judgment when it comes to putting these guidelines to work for you.

Note: Some of this stuff is going to change in v2.0...

1.) Interface Principles and Overview

Keywords to describe the MSCRM User Interface:

Clean

Having no imperfections or blemishes; Free from clumsiness; Devoid of restrictions or encumbrances;

Elegant

Characterized by or exhibiting refined, tasteful beauty of manner, form, or style.

Simple

Not involved or complicated; easy; not overly complex;

Clean

Elegant

Simple

Simple
Usable
Modern
Fast

- Focus on the essential functions with a clear, consistent purpose that matches user intention
- Measure usability, incorporate feedback into designs
- Use appropriate web interpretation of Windows® 8 UI to create delightful, engaging people and process centric experiences
- Design and deliver great perceived performance

Loved

- Design for Love. Create software that people not only want to use, but simply can't live without

THE EFFECTS OF MOBILE COMPUTING

One app – many, many clients



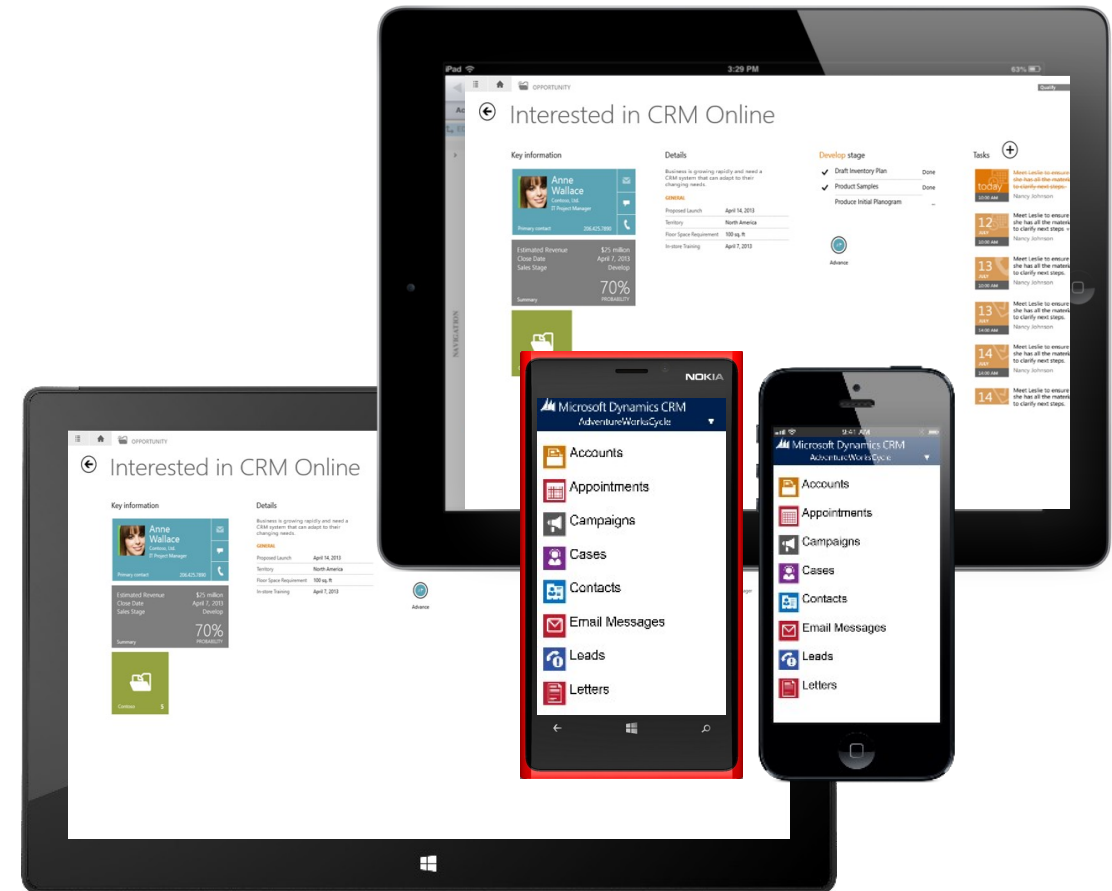


Mobile CRM concept: then and now

What Microsoft originally thought it was



What it actually turned out to be





CRM 2013 Client Types

Web

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

Hämerenkatu 11-13

00180 Helsinki

Finland

Map showing location near Pörkäläntien and Sandgatan.

Enter post here

Both Auto posts User posts

Jukka Niiranen
These guys just sold 51% for a whopping \$1.53 billion! On Supercell's wall 28.10.2013 22:21

Supercell
Account: Created By Jukka Niiranen On Supercell's wall 28.10.2013 22:04

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 Deactivate Merge Send Direct Email Add to Marketing List Assign

Records Collateral

Sales

Collateral

Customers

Accounts

Contacts

Goals

Marketing

My Work

Activities

Dashboards

What's New

Tools

Service

Collateral

Articles

Contracts

Products

Services

Customers

Extensions

Goals

My Work

Service

Cases

Queues

My Active Accounts

ACCOUNT NAME	MAIN PHONE	ADDRESS
C W D C Metal Fabrica...	914-861-9748	Kat...
Calaveras Prospect	732-628-9909	Tom...
Call Sportswear Cuttin...	973-936-5095	Littl...
Cambridge Inn	908-409-2890	Pitts...
Campbell, Jan Esq	215-964-3284	Phil...
Campbell, Robert A	201-920-9002	Kea...
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, Jeffery L Esq	415-306-7897	San...
Carol, Drake Sparks Esq	650-933-5072	San...
Carriage House Cllsn ...	847-519-5906	Elk...
Carroccio, A Thomas Esq	931-273-8709	Tull...
Cascade Realty 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 Mf...	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...

1 - 100 of 512

Tablet

Sales Dashboard

Pinned Tiles

The Cracker Box
Mason, Ohio
Gabriele Cannata
1-555-555-0146
Account

Matthew Miller
Senior Web Administrator
The Cracker Box
1-555-555-0194
Contact

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

My Activities

Date	Time	Activity
12 July	12:29 PM	Review the RFP Library Interested in Pr
13 July	11:37 PM	Identify Decisio Maker from RFP Rave Sales for C Interested in Fa
15 July	12:29 PM	Prepare sales presentation fo opportunity: Interested in Pr
19 July	3:16 PM	Review the RFP Library Interested in Fa
22 July	3:16 PM	Prepare sales presentation fo opportunity: Interested in Fa
25 July	5:06 PM	Review the RFP Library Interested in La
28 July	5:06 PM	Prepare sales presentation fo opportunity: Interested in La

Phone

Microsoft Dynamics CRM
AdventureWorksCycle

- Accounts
- Appointments
- Campaigns
- Cases
- Contacts
- Email Messages
- Leads
- Letters



Key Differences Between Clients

Web

- Mostly single window
- Sitemap as global Nav Bar
- 3 column form layout by default
- No more Ribbon

Outlook

- Sitemap shown as folders
- Ribbon in main window
- Popups for record details
- Preview form as single column
- No Global Quick Create

Tablet

- Standard forms rendered for touch
- One dashboard
- Business Rules supported
- Scripts supported
- No HTML or iFrames support

Phone

- Separate Mobile forms
- Business Rules not supported



Client Support Considerations



- Every supported client option will require testing – and support
- Outlook client is still frequently needed for tracking individual emails and other activities, regardless of the CRM 2013 Server-side Sync support
- Not all of your entity form functionality may work when accessing the record via the CRM for Tablets app
- The Web UI can be accessed with many non-PC devices

CUSTOMIZING CRM TODAY

Design more than just the data model



Traditional CRM system

Tietueiden valinta
Kirjoita haettavat tiedot Etsi-ruutuun ja valitse Etsi. Valitse sitten haluamasi tietue ja valitse OK.

Etsi: Etsi

Hanketyyppi	Hankeryhmä	Näytön järjestys
Tutkimus	Rahoitus	1
Koulutus	Rah...	
Kokeilu ja kehittäminen	Rah...	
Hallinnon hankkeet	Rah...	
Esiselvitys	Rah...	
Sijoitus	Sijoi...	
Kotimainen rahastosijoitus	Rah...	
Kansainvälinen rahastosijoitus	Rah...	
Peruspääoman rahastosijoitus	Rah...	

1/9 valittu.

Ominaisuudet

OK

Tabbed navigation

Forms resembling traditional paper forms for data entry

Popups everywhere!

“Exploding” related records menus

Focus on individual records

Little visual guidance available, just fields

Message from webpage

⚠ Antamasi hankkeen nimen alku on jo käytössä. Valitse toinen nimi

OK

Modern CRM system

Every window is a
“main window”

All the latest
related events

Data from parent
& child records

Consistent grouping
of information

Microsoft Dynamics CRM | HANKKEET | Hankkeet | Asiakkuudenhallinn... | Luo | Jukka Niiranen

HANKE : TIEDOT
Asiakkuudenhallinnan kehityshanke

Numero 9021 | Hankevastaava Petri | Tilan syy Aktiivinen | Aloituspäivä 20.11.2013

Uusi Hanke | Tunnustelu | Tunnustelu | Rahoituspäätös | Sopimus | Seuraava...

Aloituspäivä 20.11.2013
Päättymispäivä 20.5.2014

Yleiset

Perustiedot

Nimi Asiakkuudenhallinnan kehityshanke
Hankevastaava Petri
Assistentti Testikäyttäjä
Rahoituksen saaja A. Datum Corporation (sample)
Lyhyt kuvaus testataan hanketta

Aikataulu

Aloituspäivä 20.11.2013
Voimassa oleva pö --
Alkuperäinen aloitus 20.11.2013
Alkuperäinen päätös 20.5.2014

Lisätiedot

Hankkeen lähde Toimintasuunnitelmasta
Nimi englanniksi CRM development project
Nimi ruotsiksi CRM projekten

Luotu 14.11.2013 13:25 | Luonut Petri | Muokattu 26.11.2013 12:16 | Muokkaaja Jukka Niiranen

Aktiivinen

VIESTIT

Kirjoita viesti tähän | Viesti

Molemmat | Automaattiset viestit | Käyttäjien viestit

Testiraportti
Hankkeelle Asiakkuudenhallinnan kehityshanke on lisätty uusi tuotos Testiraportti.
Kohteen Testiraportti seinälle 26.11.2013 16:50

2003
Hankkeelle Petrin testihanke 1 on lisätty uusi sopimus nr. 2003, nimi (puuttuu).
Kohteen 2003 seinälle 25.11.2013 22:04

Päätöksen asiakirjat
Hankkeelle Petrin testihanke 1 on lisätty dokumentti Päätöksen asiakirjat, jonka omistaa Petri
Kohteen Päätöksen asiakirjat seinälle 25.11.2013 21:53

4001
Hankkeelle Petrin testihanke 1 on lisätty uusi sopimus nr. 4001, nimi (puuttuu).
Kohteen 4001 seinälle 25.11.2013 21:41

Rahoituksen saajan tiedot

ASIAKASTIEDOT

A. Datum Corporation (sample)

Suhteen tyyppi --
Puhelin 555-0158
Ensisijainen yll Rene Valdes (sample)

Hankkeet

Aloituspäivä	Nimi	Numero	
1.4.2014	Toinen hanke	1002	1
2.1.2014	Testihanke 1	1001	1

1 - 2 / 3 | Sivut 1

Viimeisimmät aktiviteetit

Aihe	Liittyy	Aktiviteetin tyyppi
Tee testidataa	A. Datum C...	Tehtävä

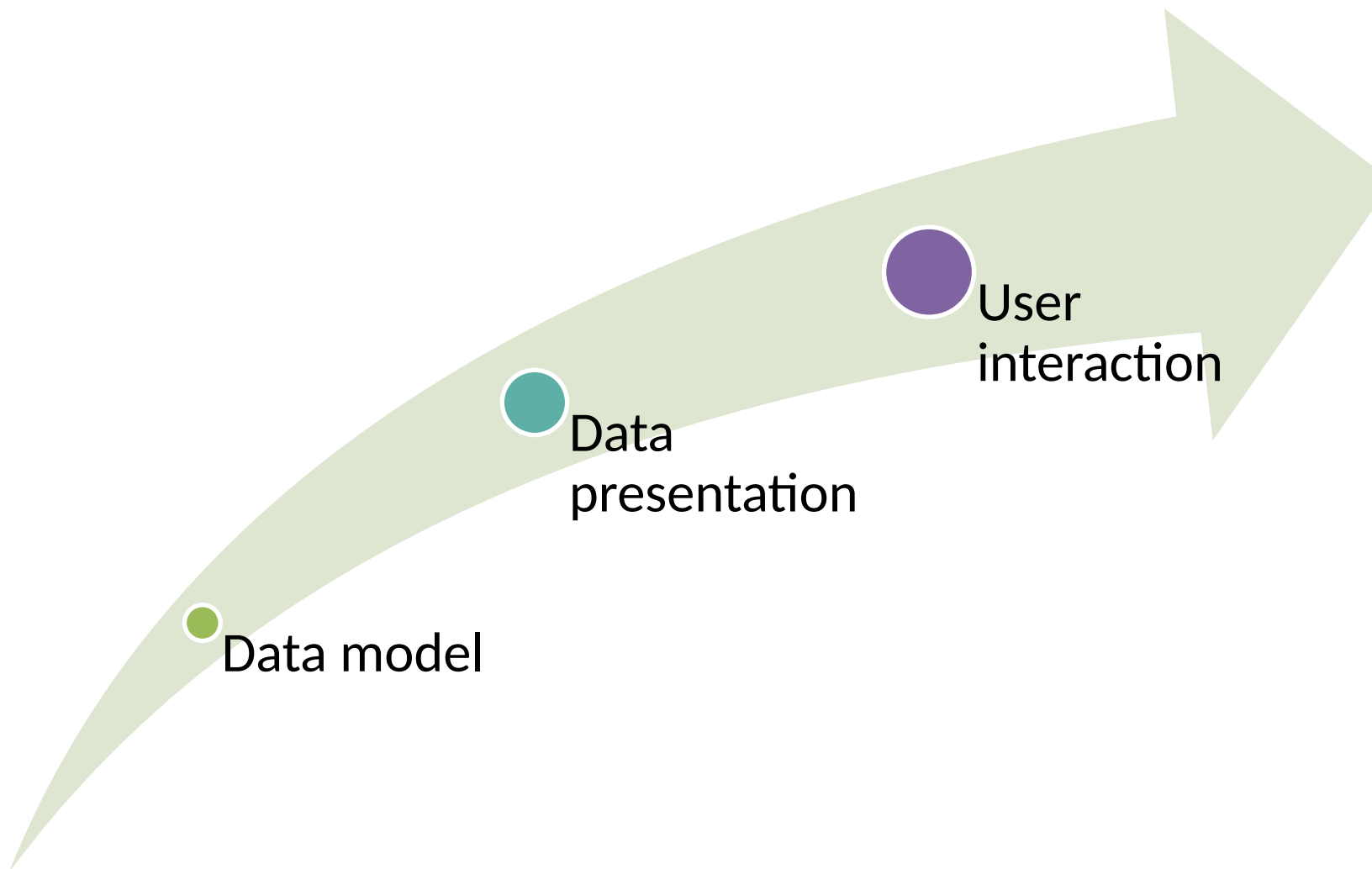


CRM is not a graphical UI for designing database tables

- CRM customization has traditionally been too much focused on just the data model
- End user experience cannot be the direct result of the data model – it requires proper design work in its own right
- How to store the data and how to present it to the user are becoming more and more independent design tasks in CRM
- However, data model cannot be defined without considering its impact to end user experience



Levels of CRM solution design





CRM 2013 considerations for user interaction design

- Design the Sitemap
- Promote child records on parent forms
- Be creative with Quick View Forms
- Test and customize Quick Create
- Optimize the Command Bar
- Simulate your process before implementing Business Process Flows



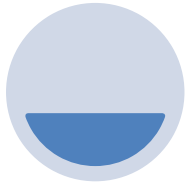
Delivering responsive solutions

...with no code!



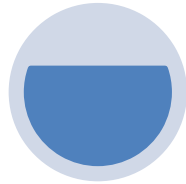


No-code process automation tools in CRM



CRM 4.0

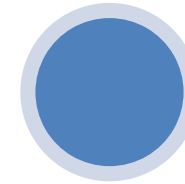
Workflows



CRM 2011

Workflows

Dialogs



CRM 2013

Workflows

- Asynchronous
- Real-time

Dialogs

Business Process
Flows

Business Rules

Actions

Microsoft Dynamics CRM 2013 Process Automation Functionality

Business Rule

- Executes before save event (form onLoad and field onChange)
- Applied to data updates through UI only
- For working with a single record
- Cannot access data from related records
- Can manipulate data and UI

Real-Time Workflow

- Executes on save event
- Applied to data updates through UI and API
- For working with single or multiple records
- Can access data from parental records
- Can manipulate data only

Asynchronous Workflow

- Executes after save event
- Applied to data updates through UI and API
- For working with single or multiple records
- Can access data from parental records
- Can manipulate data only

Dialog

- Executes on user demand
- Not applied on any data updates
- For working with a single record
- Can access data from parental records and query data
- Can manipulate data only



Advanced UI customization: then and now

[MSDN Blogs](#) > [Joris Kalz's WebLog on MSDN](#) > Part II of Advanced UI Customization

Part II of Advanced UI Customization



Joris Kalz 27 Jul 2005 9:40 PM | 5

RATE THIS
★★★★★

Friends of Microsoft CRM! I got a lot of feedback regarding my first example. Thank you very much! And some of you sent me great suggestions how to make it better. A really smart one came from Anton Dorrestijn. He took the basics of my example and reinvented it with much more mojo. The result is much more flexibility and it will avoid some serious issues.

Basically it works like the following:

- Create HttpModule and tap into the OnBeginRequest event.
- In the event handler use Response.Filter to filter the stream that is send to a client.
- In the filter use some code to insert a link to a stylesheet
- In the stylesheet create a 'behavior' (link to htc file) for the body element
- In the htc file, route the ondocumentready event to an Init() function.
- Do anything you want in the Init() function.

Sounds pretty good! Look at the picture what you can do with it:



E.g. hide the *Details* tabs depending on the value of the field *Relationship Type*

BUSINESS RULE: Account

If Supplier, hide customer related fields

CONDITION

If **Relationship Type** equals "Supplier"



ACTION

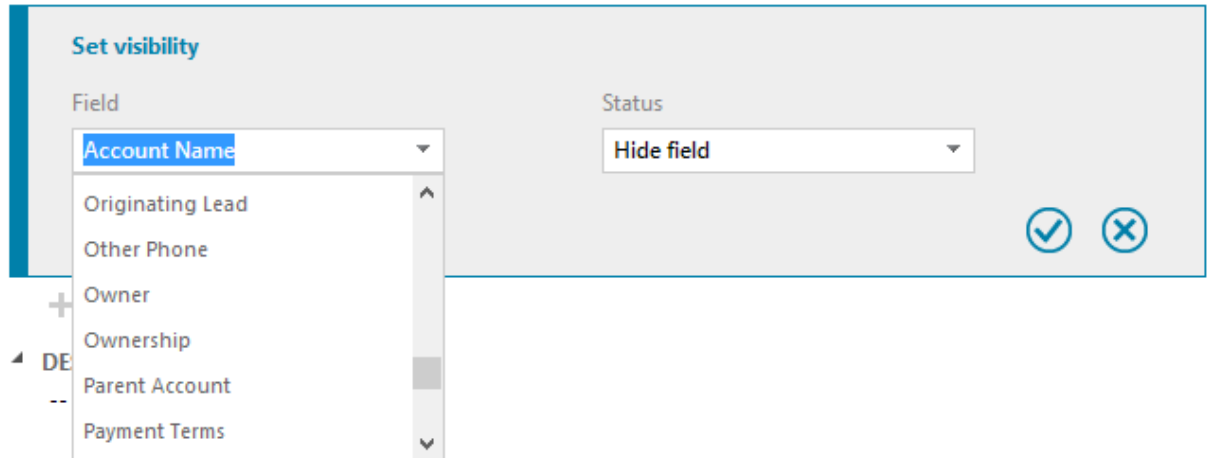
Hide field **Account Rating**

Hide field **Category**

Hide field **Credit Hold**

Hide field **Credit Limit**

Hide field **Customer Size**



TAKEAWAYS





“Everything is different in CRM 2013 because...”



- It's consumed via a client applications of different shapes & sizes
- It accepts your old customizations but it presents them in completely new surroundings
- It opens the doors for non-developers to build a truly intelligent, responsive business application



Want to learn more about CRM 2013?



- Watch out for an updated CRM 2013 edition of the **CRM Field Guide** – a book written by Dynamics CRM MVPs: <http://www.crmfieldguide.com/>
- Go and read more about the latest Dynamics CRM news and tips on my **Surviving CRM** blog: <http://niiranen.eu/crm/>

Thanks for your time!

