Dynamics CRM 2013 Customization and The Platform Evolution

Jukka Niiranen (@jukkan)

Today's agenda

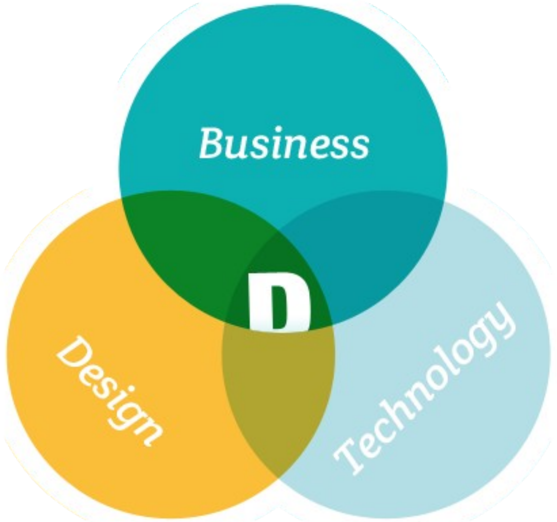
- History of Microsoft's CRM platform
  - CRM 2013 – the start of the next chapter?
- Effects of mobile computing
  - One app – many, many clients
- Customizing CRM today
  - Design more than just the data model
- Delivering responsive solutions
  - ...with no code!

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 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!*



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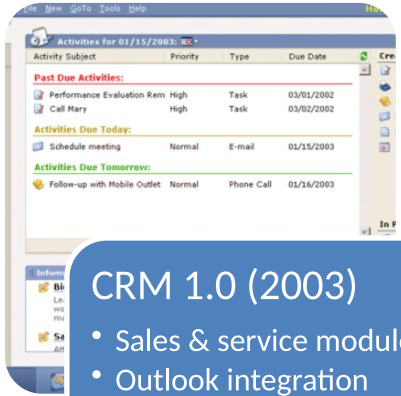
HISTORY OF MICROSOFT'S CRM

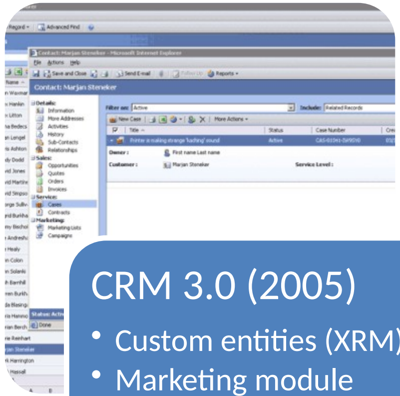
CRM 2013 – The start of a new chapter?

The first chapter of CRM: 2003-2011



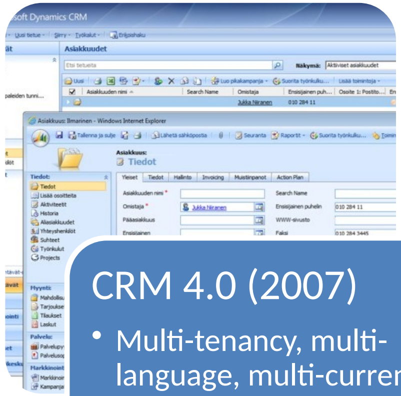
CRM 1.0 (2003)

- Sales & service modules
- Outlook integration



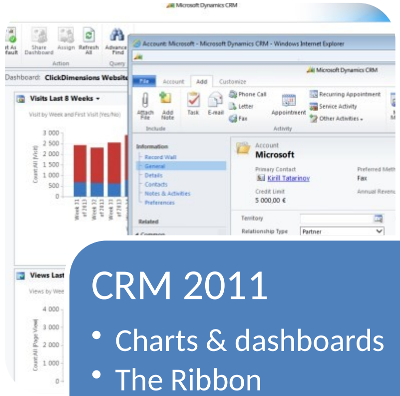
CRM 3.0 (2005)

- 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

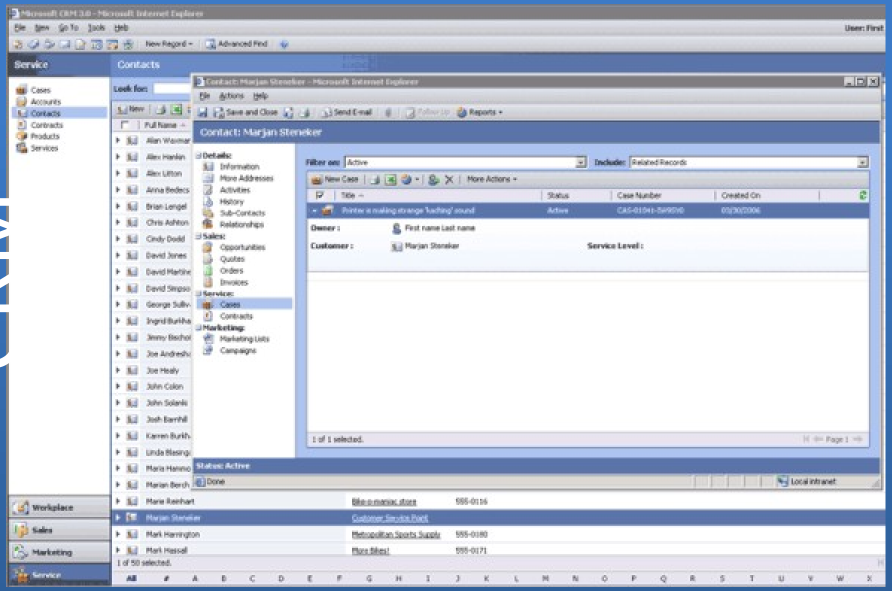
From evolution to revolution?

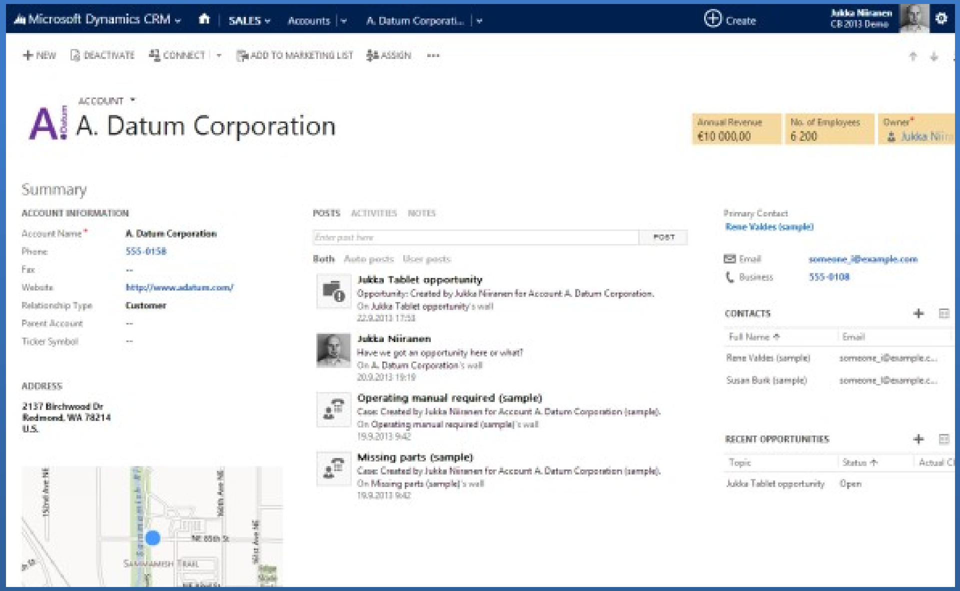
- The first 4 major releases of CRM were a steady evolution:
  - New functionality and options being added alongside existing ones
  - Platform components replaced with more robust technologies
- CRM 2011 was a "*more of everything*" release, a pinnacle of this chapter
- CRM 2013 no longer continued 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

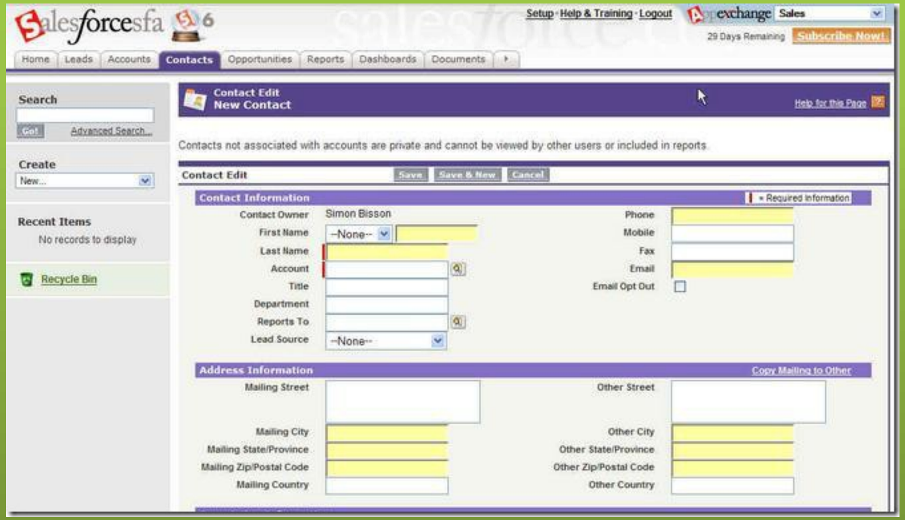
2006 | 2013

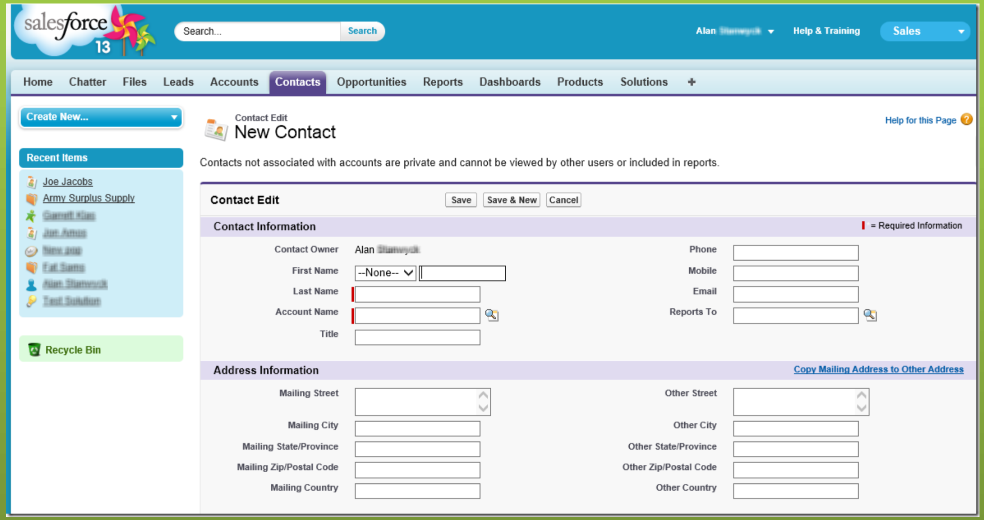
Microsoft Dynamics CRM





Salesforce





CRM design principles: then and now

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2004

Aaron Elder's WebLog

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

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 yo "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

2013

Simple
- Focus on the essential functions with a clear, consistent purpose that matches user intention

Usable
- Measure usability, incorporate feedback into designs

Modern
- Use appropriate web interpretation of Windows® 8 UI to create delightful, engaging people and process centric experiences

Fast
- 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

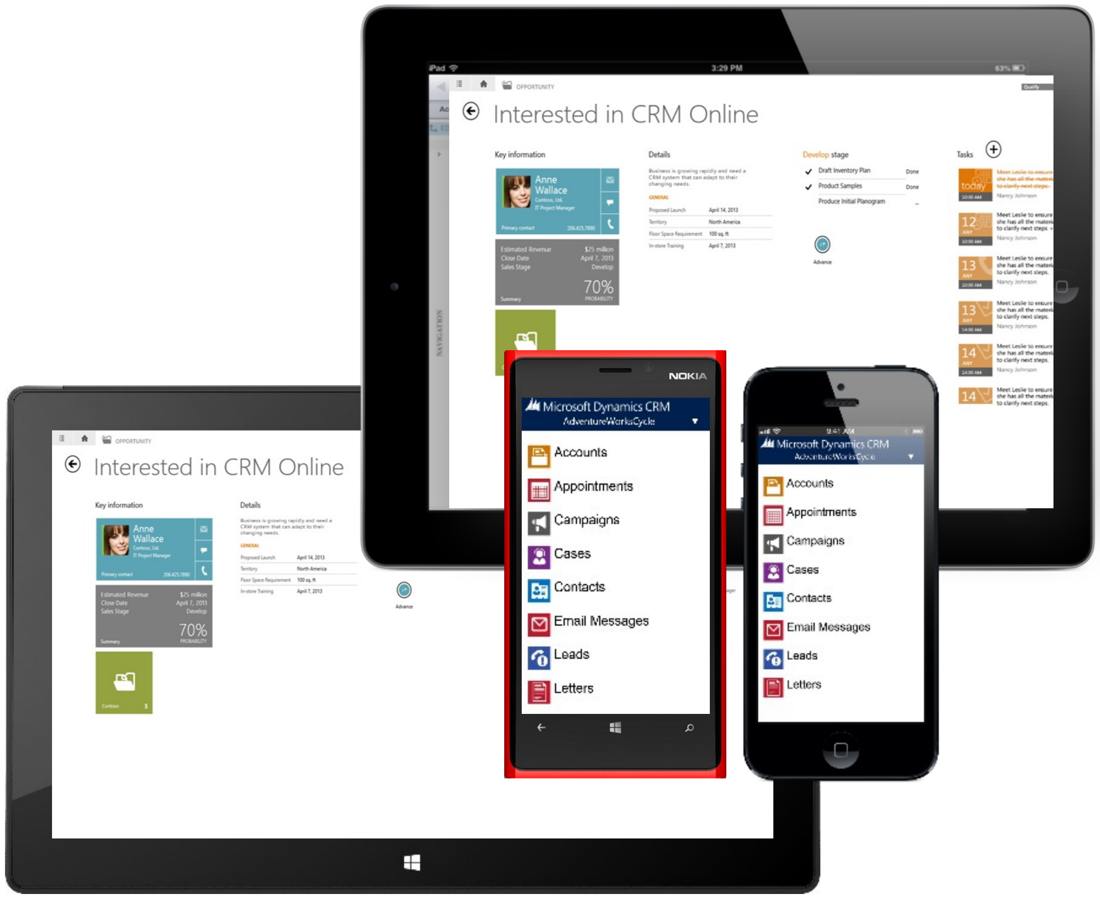
THE EFFECTS OF MOBILE COMPUTING

One app – many, many clients

Mobile CRM concept: then and now

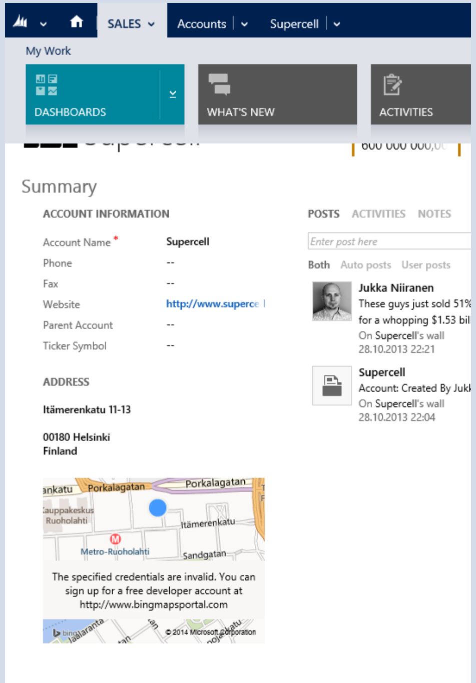
What Microsoft originally thought it was

What it actually turned out to be

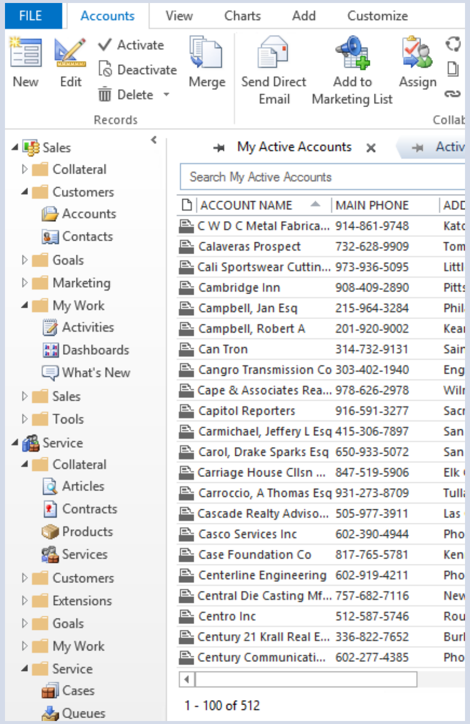


CRM 2013 Client Types

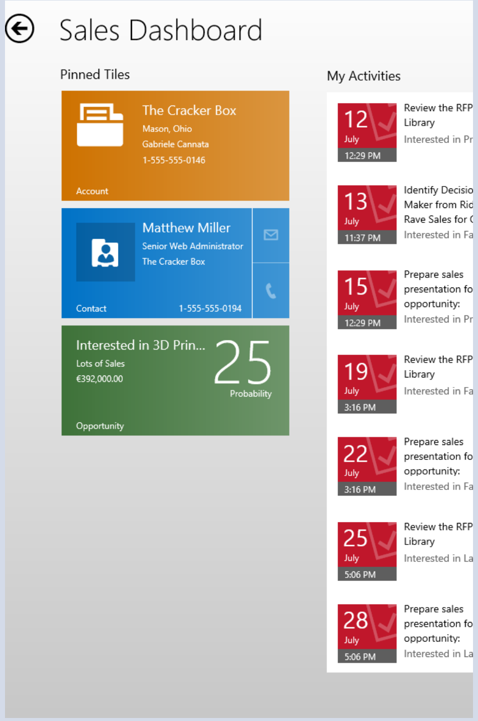
Web



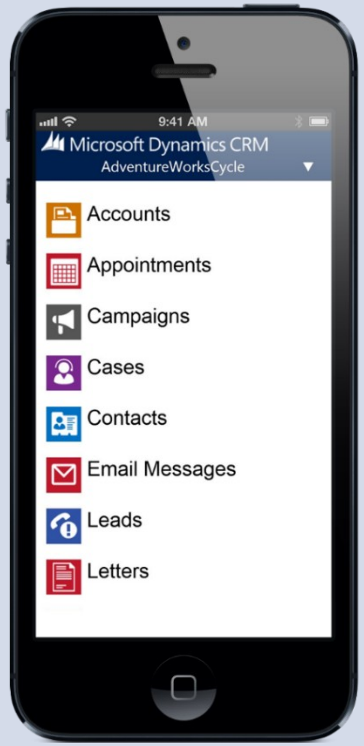
Outlook



Tablet



Phone



Key Differences Between Clients

Web	Outlook	Tablet	Phone
• Mostly single window • Sitemap as global Nav Bar • 3 column form layout by default • No more Ribbon	• Sitemap shown as folders • Ribbon in main window • Popups for record details • Preview form as single column • No Global Quick Create	• Standard forms rendered for touch • One dashboard • Business Rules supported • Scripts supported • No HTML or iFrames support	• 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

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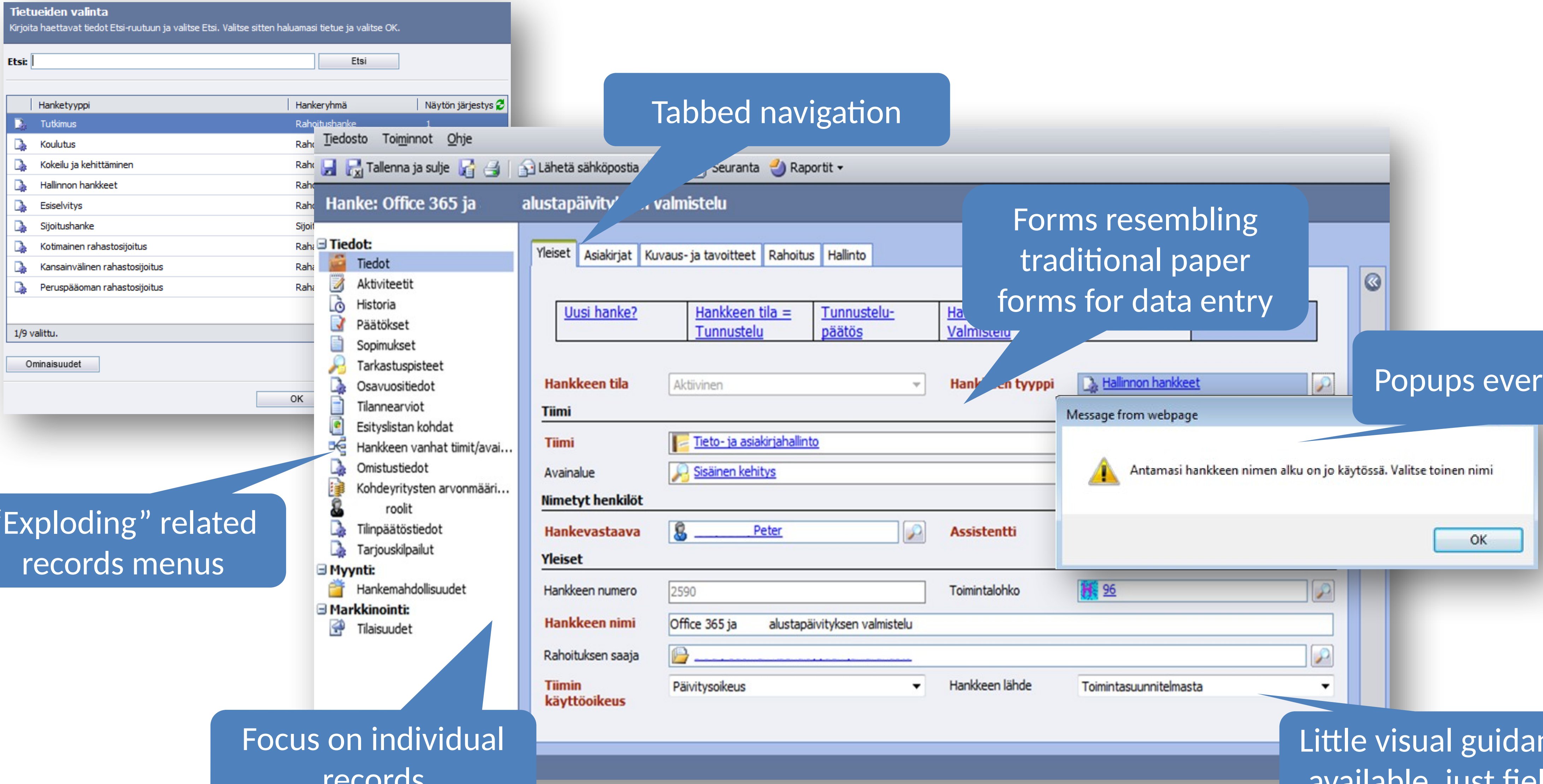


Tabbed navigation

Forms resembling traditional paper forms for data entry

Popups everywhere!

"Exploding" related records menus

Focus on individual records

Little visual guidance available, just fields

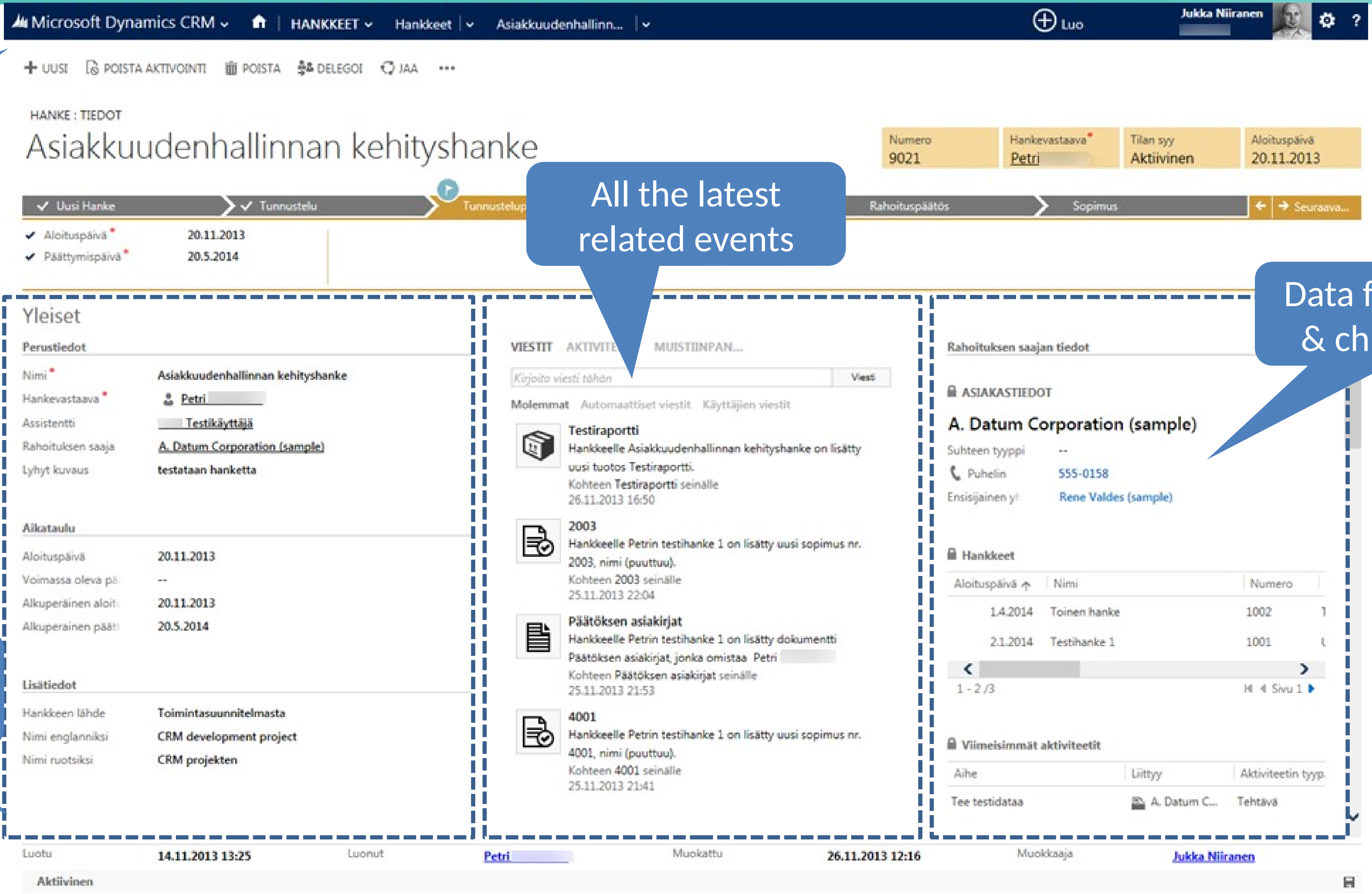
Modern CRM system

Every window is a "main window"

All the latest related events

Data from parent & child records

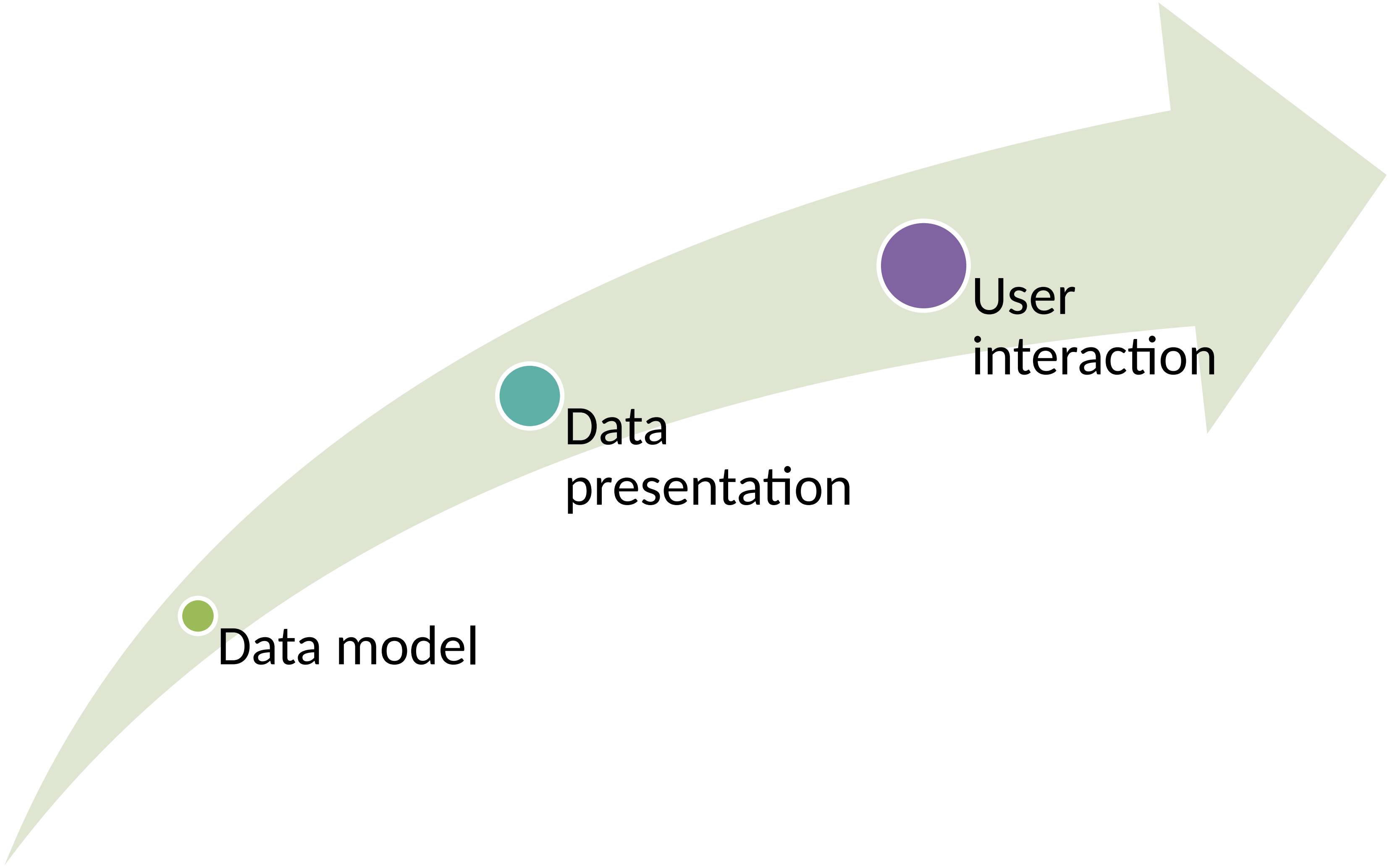
Consistent grouping of information



CRM is <u>not</u> a graphical UI for designing database tables

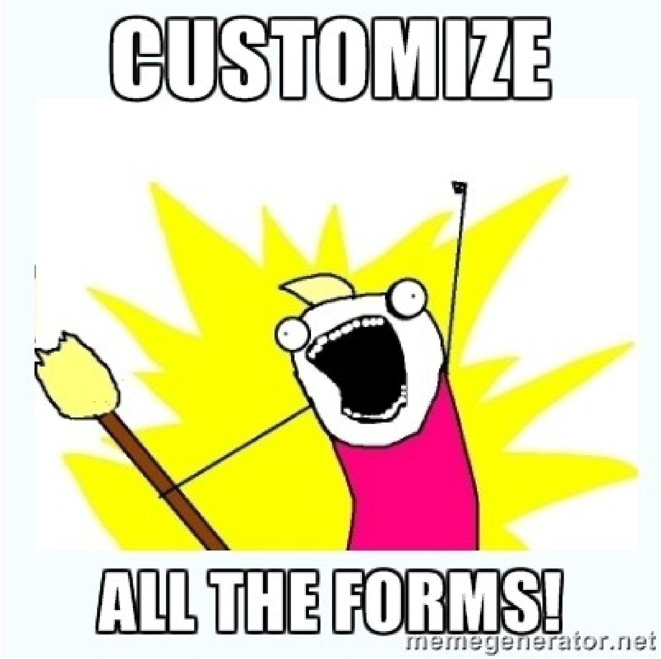
- CRM customization has traditionally been too much focused on just the data model
- End user experience cannot be the direct result of the data model – it requires proper design work in its own right
- How to store the data and how to present it to the user are becoming more and more independent design 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



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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

Read more details from my blog at **http://bit.ly/crm2013process**

Advanced UI customization: then and now

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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 toke 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**

Set visibility

Field: Account Name

- Originating Lead
- Other Phone
- Owner
- Ownership
- Parent Account
- Payment Terms

Status: Hide field

DE

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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!