

## SINGLE VIEW BUILDER for Microsoft Dynamics 365/CRM



# Because a picture is worth a 1000 words. Build your own 360° Single View of your customer.

In the Era of big data, we are surrounded by a lot of information. Standard Microsoft Dynamics CRM/365 screens often contain many empty areas, while important data tend to drown in a flood of less critical information. As a result we are forced to provide tremendous efforts to interpret what our senses could capture immediately.

Visual representation of information reduces the time needed to acquire, interpret and make mental projections based on the information displayed. It's a fact, your users often challenge you when it's time to provide efficient screens that will help making their life easier.

If you're tired of navigating between screens in your CRM to collect the information you need about your customer, Single View Builder is a **MUST HAVE** to save time and improve your user experience.

With Single View Builder, you can build **personalized** and **graphical** Single Views to get an **instant 360° view** of customers, quotes, campaigns, cases, contracts, etc. by **grouping** any kind of information about **any entity** that is important to YOU in one single screen using graphs, colors and icons.

Possibilities are endless.

- **TILE VIEW:** visualize your information using personalized (Windows) tiles: choose your icons, background colours, visual indicators and text placeholders.
- **TREE VIEW:** get a cross-entity hierarchical view with the dynamic, performance optimized Tree View pane: apply filters, configure tooltips, change colors, add icons, ...
- **TIMELINE:** display and zoom in on past, current and due activities and events in the journey of a contact, lifecycle of a contract, case,... for any date or period.

- **GRID VIEW:** render items in a tabular layout based on view definitions found on the entity to display.
- **MAP VIEW:** bring Google maps into your Single Views to display all leads around a contact to be visited, see the territory of an agent by analyzing his portfolio, etc.
- Display **PROCESS STAGES** into your Single View.
- Build **DYNAMIC BUTTON PADS** to create new related records to get a view on multiple opportunities and quotes with the actual status.
- **GROUP RELATED ENTITY INFO** to roll up data in one screen

Single View Builder works with standard and custom entities.

Usage scenarios are unlimited: from a truly customer 360° consolidated view to a full operations cockpit, our visual components can be combined together to result into a new exciting user experience !

*Render key information in a visual way and you will grow system adoption.*

# Dynamics 365 screen with Single View Builder

The screenshot displays a Dynamics 365 account page for 'Clernico Enterprises'. At the top, there are account details: Account: SVB\_Account, Annual Revenue, Number of Employees, and Owner: user 01. The main navigation bar includes 'Summary', 'Accounts', 'Opps', 'Cases Co...', 'Phones and appointments', 'Contacts of an account', 'Details', and 'Related'. The page is divided into several sections:

- ACCOUNT INFORMATION:** Displays account details such as Name, Phone, Website, and Address.
- Case Management:** Shows 'CASES BY STATUS REASON' with filters for 'OPEN CASES [2]' and 'CLOSED CASES [2]'. It features 'Personalized Tiles' for 'new release' and 'Sales Journey'.
- Process Stages:** Displays 'OPPORTUNITIES BY PHASE' and 'OPPORTUNITIES BY STATUS' with progress bars for stages like 'Qualify', 'Develop', and 'Propose'.
- Maps:** A 'MAP VIEW SUBSIDIARIES' showing a map of Belgium with various locations marked.
- Timeline:** A 'PHONE CALLS & APPOINTMENTS' section with a 'Timeline' view showing events like 'Price change' and 'Appointment'.
- Tree View:** A 'Tree View' showing a hierarchical structure of 'OPPS-CASES (SUB)ACCOUNTS'.

## System requirements

Built as an add-on on top of the Microsoft Dynamics 365 Customer Engagement platform. Works on ALL apps of that platform, including your own customizations.

### SUPPORTED PLATFORMS:

- Dynamics 365 Online
- Dynamics 365 on premise
- Partner Hosted
- Cross-browser

### SUPPORTED VERSIONS:

- Online: 8.2 and 9.0.2
- On premise: 8.2

## TOP 6 TIME-SAVING FEATURES:

- Higher user adoption
- Improved user experience
- All info (including related data) on 1 screen
- Easy navigation between entities
- Quick access to all data without leaving your screen
- Available in your language

## EASY TO USE:

**No coding required!** Single View Builder has been designed to be used:

- by Power Users
- without any help from developers.

## INTERESTED ? FREE TRIAL?

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