



**mscrm-addons.com**

Your company for MS-CRM ADD-ONS!

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

The screenshot displays the ActivityTools interface. The left pane, outlined in red, shows a list of activities under the heading 'ACTIVITIES'. The list includes entries for Michael Dohr (Bike Service, 17.04.2016), Michael Dohr (Follow up Call, 19.11.2015), and DARREN Gehring (RE: Invoice #123, 18.11.2015). The right pane, outlined in green, shows an email preview for the selected activity. The email header includes 'From: DARREN Gehring', 'To: Michael Dohr', and 'Subject: RE: Invoice #123'. The body of the email reads: 'Hi Michael, confirming receipt of invoice. The payment will be processed shortly! Thanks a lot- great Service!!, Darren G.' The bottom of the preview pane shows 'Regarding Brake lever d. Created By Michael Dohr' and 'Draft'.

#### Overview (Left Pane, marked red)

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

# Time Saving Tools to Increase Productivity

## 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

The screenshot illustrates the SmartBar navigation tool in a CRM environment. At the top, a navigation bar displays various CRM entities with their respective record counts: Campaigns, Opportunities (2), Cases (7), Orders, Invoices, and Notes (7). A dropdown menu is open under 'Cases', showing options like 'Test Quote From Italy' and 'Test Quote'. Below this, the account overview for 'MSCRM-ADDONS.com' is shown. The SmartBar at the top of the account page includes buttons for Activities (59), Notes (5), Contacts (5), Quotes (3), Opportunities (5), and Cases (10). A dashboard grid below the SmartBar shows counts for Orders, Cases (10), Quotes (3), Activities (59), Notes (5), Invoices (6), and Contacts (5). The right sidebar displays account information such as name, website, phone, and primary contact.

# Live Demo

## CRM 2016

- Use Case 1:
  - 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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