

SINGLE VIEW BUILDER for Microsoft Dynamics CRM



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 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.
- Get quick access to all sections of your forms with tabs instead of the scrollbar with the **NAVIGATION PANE**.
- **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 CRM screen with Single View Builder

The screenshot displays a Dynamics CRM dashboard for 'A. Datum Corporation'. Key features include:

- Navigation pane:** Located at the top left, showing 'SUMMARY', 'DETAILS', 'CONNECTIONS', and 'TIMELINE'.
- Tabs:** A row of tabs for 'PORTFOLIO [4]', 'OPPORTUNITY [6]', 'CASE [3]', 'NEW [16]', and 'MAP'.
- Personalized Tiles:** Four product tiles for SKUs AX305, PR214, JJ202, and JJ105, each showing revenue and user counts.
- Process stages:** A 'CASES [3]' section showing workflow stages like 'Identify', 'Research', and 'Resolve' for different case types.
- Tree View:** A 'SUBSIDIARY HEAD QUARTER' section showing a hierarchical list of subsidiaries like 'Contoso Pharmaceuticals'.
- Maps:** A Google Map showing the location of the account.
- Timeline:** A horizontal timeline from 2014 to 2015 with various event markers and notes.

System requirements

Natively built into Microsoft Dynamics CRM.

Supported Versions:

- MS CRM 2013
- MS CRM 2015
- MS CRM 2016

Supported Platforms:

- CRM Online
- CRM on premise
- Partner Hosted
- Offline Outlook client
- Cross-browser

INTERESTED ?

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Ask a free trial:

www.singleviewbuilder.com

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.

| PRICING | Perpetual | Annual Subscription | Monthly Subscription |
|---------------------------|--|---------------------|----------------------|
| Server License | € 2.500,00 | included | included |
| Pack - 5 users | € 585,00 | € 495,00 | € 45,00 |
| Pack - 10 users | € 1.170,00 | € 990,00 | € 90,00 |
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