

# REALDOLMEN CRM SINGLE VIEW BUILDER

**Quick Start Guide** 



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# Preface

Thank you for acquiring Realdolmen CRM Single View Builder, the tool that will improve the user experience on Microsoft Dynamics CRM. The Single View Builder is a suite of visual components that is used to enrich the graphical user interfaces with tree views, timelines, tiles, map and grid views and other.

The solution is an add-on to the latest version of Microsoft Dynamics CRM. Earlier versions are limited supported. Please take a look at our website to check the requirements. (<u>http://www.cemaddons.com/SVB/system-requirements</u>)

Finally Realdolmen CRM Single View Builder can be used in connected environments (online, on premises) as well as in disconnected environments (with the CRM connector for Microsoft Outlook)

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# Chapter 0 Instant access to Single View Builder through AppSource Test Drive



# 1. Requesting your Single View Builder-Test Drive

### 1. Start Test Drive Process

From the AppSource landing page for Single View Builder, click TEST DRIVE.

Microsoft	AppSource Apps	Search Microsoft AppSource	,∕2 More ∽	V <sup>2</sup> © (8)
	Apps > Single View Build	er		
		Single View Builder Saved Realdolmen ***** \$50(0) Premers source Overview Reviews		
	CONTACT ME TEST DRIVE What's Test Drive? Test Drive duration 168 hours	Build personalized graphical Single Views to get an instant 360° view of customers, quotes, cases With single View Builder, you can build personalized and graphical Single Views to get an information about any entity in one single screen using graphs, colors and icons. The solution consists of.	CEMADDONS	
	Products Dynamics 365 Sales Dynamics 365 Field Service Publisher Real/doman	Tile View: visualize your information using personalized (Vindows, Carcusel) tiles: choose your icons, background colors, visual indicators and text placeholders.     The View, get a corso-entity hierarchical view with the dynamic, performance optimized The View care: aboly filter, chance colors, additions	Single Vew Builder	
	Acquire Using Work or school account	<ul> <li>Timeline View: 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.</li> </ul>		
	Version 2.1 RTM	<ul> <li>Grid View: render items in a tabular layout based on view definitions found on the entity to display.</li> </ul>		
	Categories Customer service Productivity Sales	<ul> <li>Map View: bring Google maps into your Single Views to display all leads around a contact to be visited or see the territory of an agent by analyzing its portfolio,</li> </ul>		
	Industries Financial services Professional services	<ul> <li>Display process stages into your Single View.</li> <li>Build Dynamic button pads: to create new related records to get a view on multiple opportunities and quotes with the actual status.</li> </ul>		
	Products supported Dynamics 365 Customer Eng Dynamics 365 CE 9.0 Dynamics CRM 9.0	Group related entity info to roll up data in one screen.     Clone Option to support faster and more efficient Single View Builder project implementations.		
	Support Support Help	<ul> <li>All components are PCF Controls fully leveraging all capabilities of the Microsoft Power Platform.</li> </ul>		
	Legal License Agreement Privacy Policy	Single View Builder provides the CRM user with contextual high-value experiences exposing the value-add of all data readily available, enabling them to acquire better insights and take the appropriate decisions faster, while:		

2. Mark the checkbox to share basic profile information, then click CONTINUE to proceed.





3. This setup process will take a few minutes to complete.



4. Once completed you get 7 days access to evaluate Single View Builder through the AppSource Test Drive setup.

E Microsoft AppSource	8
Search Microsoft AppSource	Q
Apps → Single View Builder → Test Drive	
Test Drive Single View Builder by Realdolmen	
Your Test Drive is ready (6 days 23 hours remaining)         GO TO MY TEST DRIVE	
Test Drive details Test Drive for Single View Builder	
Documentation Test Drive User Manual	

5. You also get notified per email when your Single View Builder test drive is ready.





# 2. Accessing your Single View Builder-Test Drive

- 1. Click the AppSource link provided to access your Single View Builder-test drive
  - (a) Either from the notification e-mail your received, click Test drive now >
  - (b) Either from the result page once the test drive was setup, click GO TO MY TEST DRIVE
- 2. Configuration of your test drive user account (so you can use Single View Builder through your work account)
  - (a) Test Drive enables you customers and partners to try out our Single View Builder solution, without signing up for a Dynamics 365 license plan nor installing any applications. You just sign into AppSource.com using your work-related Azure Active Directory (AAD) account, AppSource maps this to a test user account within the test drive-tenant setup for you to run the app in a web browser. With Test Drive, you get a better idea of what functionality and experience you get using Single View Builder.
  - (b) Click ACCEPT to provide the necessary information and allow the sign-in setup process to continue



3. Your browser will open your Single View Builder-test drive session at https://rdtrialsvb.crm4.dynamics.com/default.aspx





# 3. Showing Single View Builder Components

1. Go to **SALES HUB**, navigate to subarea **ACCOUNTS** and open an account that has cases available. Make sure you select the correct view to visualize the account, select the SVB\_All accounts view.

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s	Sales	$\diamond$	1 - 4 o	of 4 (0 se	lected)																			

- 2. Select and click to open the account CEMADDONS Ltd.
- 3. Make sure you select the correct form from the form selector, which is in our case the form SVB\_Account.

	Dynamics 3	65 🗸	Sales H	Hub Sales > Accounts	> CEMADDONS Ltd	
=			٢	🖧 Open Org Chart	= Add to Marketing List 5 Email a Link 🖒 Refresh 🛛	<b>]</b> 2
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		SVB_A	Account	t_Tree_And_Grid_Com.		K
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	Accounts			Fax		uto ase:
8	Contacts					
				Website		uto



- SANDBOX III Dynamics 365 V Sales Hub Sales > Accounts > CEMADDONS Ltd ۲ 👎 Add to Marketing List 🛛 Email a Link 💍 Refresh 🔛 Process 🗸 🖧 View Hierarchy 🥒 Flow 🗸 🖳 Word Templates 🗸 🖧 Open Org Chart III Run Report A Read-only: You don't have access to edit this record. ⇔ Home B Recent CL CEMADDONS Ltd 🖈 Pinned Single View Builder Information Summary Details Scheduling Files Related My Work 表 Dash Activitie Custor A Contact Sales < 1/6 > 12 Leads 內 Comp Collater 🔁 Quote Orders < 1/6 > B Ir
- 4. From here you can navigate through the different TABs to visualize the power of Single View Builder.

From left to right, on the Form Single View Builder Information for the selected account:

- (a) The TAB CASES BY STATUS REASON shows use of the TILE VIEW, with a tile for all cases in context of a specific selected account, revealing selective and actionable small & long field information in carousel format, dynamically grouped per status.
- (b) TAB NON-DYNAMIC CASE GROUPING shows use of the TILE VIEW, with a tile for all cases in context of a specific selected account revealing selective and actionable small & long field information in carousel format, without dynamic grouping but separate series ordered per specific field.
- (c) TAB **OPPS BY STATUS** shows use of the **TILE VIEW**, using the Process Type visualizing all opportunities of a selected account, dynamically grouped by status.
- (d) TAB **CONNECTED EMPLOYEES** shows use of the **TILE VIEW**, using the Tile Type visualizing all contacts connected to an account with the employee connection role, dynamically group using the Tile Type
- (e) TAB **QUOTES FOR OPPORTUNITY** shows use of the **TILE VIEW**, using the New Tile Type visualizing all quotes of a selected account creating starting from an opportunity of that account.
- (f) TAB ACCOUNTS CONTACT SUBACCOUNTS CONTACT shows use of the TREE VIEW, to visualize both contacts and subaccounts of a selected main accounts, as well as the contacts of the subaccounts using actionable nested tree view nodes.
- (g) TAB **DECISION MAKERS** shows use of the **TREE VIEW** to visualize all contacts that are connected to a specific selected account in a decision maker role.
- (g) TAB CONTACTS WITH ALL PREFERRED CONTACT METHODS shows use of the GRID VIEW visualizing all contacts for a specific account while highlighting per row or specific cells using conditional coloring.
- (h) TAB **TIMELINE** shows the use of the **TIMELINE VIEW** visualizing chronologically events or activities (phone call, meetings, ...) in horizontal swimming lanes, revealing selective and actionable info per shown time item.
- (i) TAB MAP OF ACCOUNTS AND CONTACTS shows the use of the MAP VIEW visualizing all contacts related to a specific account in one single map view, revealing relevant information on the account and contacts in the map details.



5. Switch to another for using the form selector, to go to SVB\_Account\_Tree\_And\_Grid\_Combined.



- 6. Broadcast and subscribe: this Form demonstrates one of the strongest features of the Single View Builder, namely using multiple single views together rom here you can navigate through the different TABs to visualize the power of Single View Builder.
  - (a) The TAB COMBINE SINGLE VIEW shows how you can combine multiple SINGLE VIEWS
  - (b) The TREE VIEW is **broadcasting** to 1 or multiple other views, in other words **subscribed**, in this example a GRID VIEW showing contacts of the selected account in the grid view at the left, while keeping the specific behavior and actionable character of each defined Single View.

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Ì	Activities	2	Search					Full Name	Email	Company Name	Business P	hone	
Cust	omers	-	2020010101 - Contacts of main	CEMADDONS LTD				Nick Clark Patrick Ash	patric.ash@cemaddo	CEMADDONS Ltd	+32280147.	33	
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Sale	s		<b>T</b> 202001010	13 - SVB nv									
ç	Leads		202001010	12 - SJA SA									

7. Switch to another for using the form selector, to go to SVB\_Account\_CustomLayout.

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	Recent	$\sim$	C	IL.	CEM	A	DON	IS I	.td
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		Accou	nt for Ir	nterad	tive exp	peri	ence		1 cim
му	Work	Sales	Insights	6					
쁢	Dashboards	SVB_A	Account	t					
2	Activities	SVB_A	Account	t_We	bResou	irce			CE
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Cus	tomers	SVB_A	Account	t_Cu	stomLay	yout			+3
	Accounts			Fa	x				



- 8. Dynamic custom layouts:
  - (a) In most the view configurations as in the above examples, the colors (fore or font color, back color,...) are defined a static color
  - (b) Referencing a field contain the color code or icon, is particularly convenient when you want to differentiate elements of the same type: cases based on case types, case origins, ... The TAB SINGLE VIEW BUILDER INFORMATION in the SVB\_Account\_CustomLayout is showing the power of using dynamic custom layouts.





This QuickStart guide provides you:

- (a) a description of the different components included in Single View Builder in Chapter 1
- (b) additionally detailing the logical usage flow of the Single View Builder and what is needed to refresh meta data when configuring SVB components, in **Chapter 2 and 3**
- (c) **Chapter 5** focusses on the Tile View component, whereas you can review Online tutorials through **Chapter 4** to show how and what to configure for the Tile View component

There is much more than meets the eye. If the QuickStart documentation isn't sufficient to support your need, if you want to elaborate more on your need our presales team will be happy to work and assist you, we encourage you to connect with us through the **CONTACT ME**-button on the landing page of Single View Builder within AppSource.



Our **Full Product Manual** - *not published through AppSource* - details configuration and usage options for all components (Tile View for all Types [Tile, Carousel, Process], Tree View, Grid View, Timeline View and Map View, installation procedure of the solution, step-by-step migration instructions for SVB installation prior to version 2.1, how components can be integrated in any View or Dashboard, the new Clone-Option for efficient SVB implementation, ...



# Chapter 1 Definition and components of the Single View Builder



## 1. Definition

**Realdolmen CRM Single View Builder** [abbreviated as **SVB**] is an add-on to Microsoft Dynamics CRM that provides tools and features to create 360° views on entity items.



Some examples can be the following:

1. General overview of an account

All opportunities of an account, appointments on a timeline, the hierarchy structure of an account, ... The above screenshot show all opportunities of an account e.g.

#### 2. General overview of a contact

Relationships with other contacts (e.g. wife, children, friends, ...), relevant events (e.g. birthday)



# 2. Components of the Single View Builder

The SVB has several components. We will list them up in this section, but they will be explained in much further detail during the rest of the chapters of this manual.

## 2.1 Single View component

The single view component is the main component of the solution. It acts as a container which is placed on forms in order to display tree views, timelines, tiles, maps, grids, ... in a tabbed view or individually.



## 2.2 Tile View component

The tile component can be used to display information about related items (i.e.: opportunities, cases ...). Tiles are available in three flavors:

#### 1. Tile Type

Information tiles are used to provide an overview of the items with visual elements and small facts.





NON-DYNAMIC CASE GRO V Status Reason [7]	UPING [					
CAS-01005-KEP4M4 In Progress Maintenance	Question Marco Cleandens CAS-01000-N1D8N4 In Progress Query	Problem Marco Cleantiens CAS-01002-88600(7 On Hold Products	Problem Nicolas Clerc CAS-01003-G7H2W9 Researching Delivery	Request Martinus Blacksrr CAS-01215-N0Y1T2 Researching Information	Question Daavid Vermama CAS-01004-H3V5X3 Waiting for Details Information	Request Marco Cleantiens CAS-01250-WRIJF2 Waiting for Details Maintenance
Crigin [7] Cuestion Daavid Vermana CAS-0100L+RVSX3 Bert Schellemans Email	Request Martinus Blacksm CAS-01215-A091172 Eva Etanicova Email	Question Marco Cleantiess CAS-01000-N1108N4 Tom O'Nell Phone	Problem Nicolas Clerc CAS-01003-G71/2W0 Vincent Laurlant Writter	Request Patricio Toash CAS-01005-KERMM4 Vincent Laurlant Web	Problem Marco Cleantiess CAS-01002-866007 Eva Elznicova Web	Narco Cleantiers CAS-01250-WEUF2 Susanne Schuttin Web

#### 2. Process Type

When business process flows are applied on these items, tiles can also give users a visual indication about the current stage in the process:



#### 3. New Type

This is for creating new objects from out a form. In this manual we will use the example that you can create from the contact form a new case and on that case a product will be filled up automatically, based on the product that you have double clicked on the tile view on the contact form.



#### 4. Carousel visualization for Tile view components

With version 2.1 we've added a new 2D-visualization option for the Tile View component, i.e. Carousel.





When using the carousel visualization default it will auto-operate as a circular infinite loop. Additionally, it will behave fully responsive through an auto-scaling layout. In today's version the horizontal Carousel-slider can be steered to navigate through the tiles shown using the left or right buttons underneath the tile view component. The counter in the middle, indicates which item is focused on and shown in the center of the carousel and relatively to the total amount to be shown (e.g. 1 / 7 or first out of a total of seven). This counter and the arrow navigator is positioned underneath the carousel tile view component.

We consider to add future improvements for more configuration flexibility (e.g. vertical next to horizontal carousel, position of the arrow navigator (above/under, left/right) as well as navigation options (e.g. keyboard support using left and right arrows, driving left and right direction using mouse wheel scrolling when hovering over a specific carousel, left/right swiping for touch devices).

## 2.3 Tree view component

The tree view component is used to visualize lists of items that are related to an entity item and that might also be related to each other hierarchically.



A tree view is typically used to display:

- 1. An enumeration of items by category
- 2. A hierarchical structure of items

This component can be used to navigate in the CRM: users can click on items and access their detailed information. The tree view also benefits from common features usually available in regular tree view components: Expand and collapse, multiple selection ...



## 2.4 Grid view component

This component lets you render items in a tabular layout. The definition of the grid relies on view definitions found on the entity to display.

Full Name	Em	nail		Company Name	Bu	usiness Phone	Status
Bert Schellemans	ber	rts@cemaddons.com		CEMADDONS Ltd.	+3	32 2 801 55 55	Active
James Wood				CEMADDONS Ltd.			Active
Vincent Lauriant	vin	ncent@cemaddons.com		CEMADDONS Ltd.	+3	32 2 801 63 00	Active
Eva Elznicova	eva	a@cemaddons.com		CEMADDONS Ltd.	+3	32 2 801 55 55	Active
Tom O'Neill	ton	m@cemaddons.com		CEMADDONS Ltd.	+3	32 2 801 55 55	Active
Susanne Schustin	sus	sanne@cemaddons.com		CEMADDONS Ltd.	+3	32 2 801 55 55	Active
Pre		F	Page	1 of 1	10 rov	ws 🔻	Next

Grid View is very strong in combination with other Single View Builder components, especially when you use the so called **broadcast** functionality, which we will explain further on. In the above example you see a grid combined with a tree view where you can select an office that will display the employees and agreements of that office. You can even work with colors in your grid.

## 2.5 Timeline component

The timeline component is used to chronologically visualize events or activities related to an entity item. For example, a timeline could display all created cases related to a customer or all the made phone calls or appointments.



Types of activities can be mixed in order to show a more elaborated timeline (i.e.: the component dynamically rearranges the elements depending on the number of elements to display).

Users can use the timeline to navigate between elements displayed on the timeline. Furthermore, controls such as zoom in / out facilitate browsing in the timeline.



## 2.6 Map view component

Map view is the component that visualizes your geolocation abled data on a map by using Google maps. While using standard functionality on latitude and longitude you can see where your accounts, leads, contacts are situated.



Map view is not limited to one record (as the standard Bing Map integration) but let you combine multiple information of different entities on one map view. So you can see all of your accounts on one map. In some examples we have set up Map view to display the cases and their occurrence. Map view can be extended with a list to show the record on the map.



The indication of the record allows you to go to street view or go directly to the record by double clicking.



## 2.7 Clone Option

Your SVB Architect together with the business will configure the suite of visual components to enrich the graphical user interfaces. Working with and configuring- tree views, timelines, tiles, map and grid views and other will be part of his core task. To facilitate and support the SVB architect realizing SVB implementations more efficiently and less prone to errors, we have added a **Clone Option**.

This new Clone Option for Single View Builder is available on each component (e.g. Tile View component) as well as on the child level of each component (e.g. Tile Group, Tile Indicator for that Tile View component).

# 3. Logical Data Model

As explained above SVB offers several Single View Components, you can configure and combine.



The logical data model reveals:

- 1. you can combine one or more Single Views
- 2. a Single View can contain multiple View Parts
- 3. a View Part can be a tile, a tree, a grid or a timeline or map view
- 4. each view type has specific configuration settings

All configurations are done through point and click screens, full details of the hierarchical logical data model can be found in Chapter 18.



# 4. Color palettes

## 4.1 RGB and Hex Triple color models

Customizing your Single Views involves choosing colors for background, font, icons,etc. Both the RGB and hex triplet color model – commonly used in HTML, CSS, SVG and other computing applications to represent colors.- are supported to define your preferences.

- (a) the **RGB color model** is an additive color model in which red, green, and blue light are added together in various ways to reproduce a broad array of colors
- (b) Hex Triplet is a six-digit, three-byte hexadecimal number representing the red, green and blue components of the color. One byte represents a number in the range 00 to FF (in hexadecimal notation), or 0 to 255 in decimal notation. This represents the least (0) to the most (255) intensity of each of the color components. Thus web colors specify colors in the 24-bit RGB color scheme. The hex triplet is formed by concatenating three bytes in hexadecimal notation.

## 4.2 Think ahead – define a color palette for consistency

If you plan to align the colors used in your Single View, think ahead and define your preferred color palette beforehand or keep your corporate color palette next to you, thus creating consistency in your SVB experiences. Example of some color palettes (*horizontally*) in Hex Triplet color palette format.

#011826	#F2762E	#A65729	#F2B999	#F24405
#3F83BF	#3A7AB7	#3B8DBF	#F2F2F2	#595959
#002050	#DFE2E8	#116087	#B1D6F0	#D24726
#F26D85	#BF214B	#CID0D9	#0E6973	#0E7373
#83A603	#5A7302	#D2D904	#F27507	#D95204
#024959	#027373	#F2B705	#F29F05	#F2B999



# Chapter 2 The logical usage flow of the Single View Builder



## 1. Introduction

If you want to use the Single View builder (SVB), you must follow certain steps to get the job done. If you don't follow these steps, you will have problems in configuring the SVB.

# 2. The flow itself

## 2.1 Refresh metadata

Retrieve info concerning all entities that you plan to manipulate

## 2.2 Create the view components

You can create now different components in a random desired order based on the needs of the customer. The components that can be created during this phase in the process are:

- Tile view
- Tree view
- Timeline
- Map view
- Grid view

## 2.3 Bundle those elements into single view component

Once you have created the components mentioned in the above step, you have to assemble the desired ones within a single view component.

## 2.4 Create single view form

Before you can actually benefit from the SVB, you need to setup a good working form with some adjustments.

## 3. Important remark for the tutorial

This quick start guide will be focusing on one example with the Tile View, a more elaborated tutorial can be found in our full manual for Single View Builder using multiple lifetime examples. Within both tutorials we can't follow 100% the above logic, because you need to see fast some results. In this tutorial we will use the following process:

- 1. Refresh metadata
- 2. Build a component (of type Tile view, Tree view, timeline view, map view, grid view)
- 3. Create a single view component
- 4. Add the created component of step 2 into the single view component of step 3
- 5. Create a form (or modify an existing one) and add the single view component to the form
- 6. Test all modifications
- 7. Build a component (of type Tile view, Tree view, timeline view, map view, grid view)



- 8. Add this to the single view component of step 3
- 9. Test all modifications
- 10. Continue the steps 6-9 If there are too many components on one single view component, we will create a new single view component.
- 11. Test all modifications



# Chapter 3 Refresh metadata



# 1. What?

Retrieve information concerning all entities that you plan to manipulate through one of the components. The configuration of all controls of the Single View Builder rely on entities and their attributes. For technical reasons, that information is stored in a "cache" in order to facilitate the configuration afterwards.

## 2. When?

- 1. Necessary to start working with the single view builder
- 2. When an entity has been modified

### **REMARK:**

Refreshing all the metadata may take some time

## 3. How?

1. Navigate via the App Switcher to the SVB Configuration Hub App.



2. Select "Refresh Metadata" from the sitemap.





- 3. In the upcoming screen, you select the entities that you need and you click afterwards on the button **REFRESH**. For our tutorial, we need the following entities:
  - (a) Account
  - (b) Appointment
  - (c) Case
  - (d) Contact
  - (e) Opportunity
  - (f) Products

ii Dy	namics 365 🗸 SVB Configuration Hub 🦳 Single View Builder 🚿 Refresh Metadat				م	Ø	Q	+	7	۲	?	8
Sele Pleas	cct Entities e select the entities you want to make available into the Single View Builder											
	Display Name	Logical Name	Type Code	Schema Name								
	ACIViewMapper	aciviewmapper	8040	ACIViewMapper								
	AI Configuration	msdyn_aiconfiguration	402	msdyn_AlConfiguratio	n							
	Al Form Processing Document	msdyn_aifptrainingdocument	10006	msdyn_AlFpTrainingDo	ocument							
	Al Model	msdyn_aimodel	401	msdyn_AlModel								
	Al Object Detection Bounding Box	msdyn_aiodtrainingboundingbox	10011	msdyn_AlOdTrainingB	oundingBa	ж						
	Al Object Detection Image	msdyn_aiodimage	10009	msdyn_AlOdimage								
	Al Object Detection Image Mapping	msdyn_aiodtrainingimage	10012	msdyn_AlOdTrainingIn	nage							
	Al Object Detection Label	msdyn_aiodlabel	10010	msdyn_AlOdLabel								
	Al Template	msdyn_aitemplate	400	msdyn_AlTemplate								
	Account	account	1	Account								
	Account Project Price List	msdyn_accountpricelist	10084	msdyn_accountpricelis	t.							
	AccountLeads	accountleads	16	AccountLeads								
	Action Card	actioncard	9962	ActionCard								
	Action Card Role Setting	msdyn_actioncardrolesetting	10033	msdyn_actioncardroles	setting							
	Action Card Type	cardtype	9983	CardType								
	Action Card User Settings	actioncardusersettings	9973	ActionCardUserSetting	js							
	ActionCardUserState	actioncarduserstate	9968	ActionCardUserState								
	Activity	activitypointer	4200	ActivityPointer								
	Activity Party	activityparty	135	ActivityParty								
	Actual	msdyn_actual	10055	msdyn_actual								
	Actual Data Export (Deprecated)	msdyn_dataexport	10093	msdyn_dataexport								
	Address	customeraddress	1071	CustomerAddress								
Not	te: Please note that some system entities are included in this list.											
												-
□ vi	ew Logs			(	Delete	Meta-Data	Clean	Meta-Dat	Re	hesh	Can	xel

4. When finished, you will get the following window, in which you click on the button CLOSE

Logs	×
Complete!	
* Case (1/5) * Intermediary (2/5) * Opportunity (3/5) * Party (4/5) Product (5/5)	4
Auto scroll     Reset     Close	

5. If you want to open this window again, you can use the option VIEW LOGS on the main screen of the REFRESH METADATA



# 4. Clean and delete metadata

It is of course also possible to delete metadata. On the main screen, you will find two options for that. When refreshing metadata; the SVB is actually creating also kinds of relationships between the selected entities. So if you add e.g. Accounts and Case to the refresh metadata, SVB is creating a relation between those entities.

1. If you choose CLEAN METADATA:



- (a) SVB will refresh all related metadata and also verifies whether the relationships linked to the entity that you are cleaning the metadata for are still in use, if they are not they are removed.
- (b) the cleaned metadata then remains available for the SVB configurations.
- 2. If you choose **DELETE METADATA**:

🕑 Delete Meta-Data 🔲 Clean Meta-Data	Refresh	Cancel

- (a) the entities Accounts and Cases will be effectively delete
- (b) and they will not be available anymore for the SVB configuration



# Chapter 4 Online Tutorials



TUTORIAL	How to visualize SVB components on an account form.
	http://ior.ad/6MAI
TUTORIAL	How to visualize SVB components using WebResources
	http://ior.ad/6MAB
TUTORIAL	How to create a Tile Group
	http://ior.ad/6Mw4
TUTORIAL	How to create a Tile Indicator
	http://ior.ad/6Mwy
	How to create extra filters using Fetch XML
	http://ior.ad/6MAK
$\overline{}$	How to create New Single View and View Part (Type = Create New)
	http://ior.ad/6MGN
TUTORIAL	How to create New The Group (full fetch XML)
	http://ior.ad/6MHa
TUTORIAL	How to Create New Tile Group (full fetch XML)
	http://ior.ad/6MHb
TUTORIAL	How to Create New View Part (full fetch XML)
	http://ior.ad/6MHb
	How to create new Tile Group (Process)
	http://ior.ad/6MBu
$\overline{}$	How to create new Tile Group (show connected account contact employees)
	http://ior.ad/6MGd
TUTORIAL	How to create new Tile Group (Type = Create New)
	http://ior.ad/6MGD



TUTORIAL	How to create new tile group NonDynamic 1 (Status Reason)
	http://ior.ad/6MAR
TUTORIAL	How to create new tile group NonDynamic 2 (Origin)
	http://ior.ad/6MAU
TUTORIAL	How to create New Tile View (full fetch XML)
	http://ior.ad/6MH7
TUTORIAL	How to create New Tile View (Process)
	http://ior.ad/6MBf
TUTORIAL	How to create new Tile View (Process)
	http://ior.ad/6MFW
TUTORIAL	How to create new Tile View (Type = Create New)
	http://ior.ad/6MGw
TUTORIAL	How to create new Tree View Node
	http://ior.ad/6MKS
TUTORIAL	Svb Config - How to create New Treeview
	http://ior.ad/6MHI
TUTORIAL	How to create new View Part for Non Dynamic
	http://ior.ad/6MB4
TUTORIAL	How to create Single View and add a View Part
	http://ior.ad/6MwL
TUTORIAL	How to create SVB Form on Contact
	http://ior.ad/6MGS
TUTORIAL	How to create Tile View (show contacts connected to account)
	http://ior.ad/6MG6



http://ior.ad/6MvO         Image: Non-Addition of the second sec
How to create Tile View without dynamics grouping
http://ior.ad/6MAP
How to create View Part (show account contact employee connections)
http://ior.ad/6MGj
How to download FetchXML using Advanced Find in CRM
http://ior.ad/6MAN
How to set Tile Group Display Color & Icon
http://ior.ad/6MwE
How to set Tile Group to Carousel
http://ior.ad/6MAy



# Chapter 5 Tile View component



# 1. Definition

The tile component can be used to display information about related items (i.e.: opportunities, cases ...). At creation, you will need to create a tile view, which consists of one or more different tile groups. Tiles are available in three flavors :

#### 1. Tile Type

Information tiles are used to provide an overview of the items with visual elements and small facts.

#### 2. Process Type

When business process flows are applied on these items, tiles can also give users a visual indication about the current stage in the process:

#### 3. New Type

This is for creating new objects from out a form. In this manual we will use the example that you can create from the contact form a new case and on that case a product will be filled up automatically, based on the product that you have double clicked on the tile view on the contact form

# 2. Practical cases

## 2.1 A tile view of tile type that shows you cases for an account

## 2.1.1 Desired result

We want to create a tile view of the tile type which shows all cases of a selected account, grouped by status reason. Within each group, the tiles must be ordered on the field **Case Title** in ascending order. The tile view must look as follows:



You see that the cases in this tile view are grouped on status reason (*On hold*, *In progress*) and within each group the tiles are ordered ascending on the Case Title (*CRM SVB Problem*, *CRM synch issue*, ...).

## 2.1.2 Solution

### 2.1.2.1 Create the tile view component

1. Navigate via the App Switcher to the **SVB Configuration Hub** App.



2. Select TILE VIEWS from the sitemap



3. Click the **NEW**-button in the command bar



- 4. Fill in the data as explained here beneath and start with the **GENERAL** tab and it's three sections:
  - (a) General information section
  - (b) Relationship section
  - (c) Tile groups section

#### GENERAL TAB - GENERAL INFORMATION SECTION

New Tile View	
GENERAL SETTINGS	
General Information System Reference	*
Contextual Entity	*
Account	

(a) System Reference

This is the name of the tile view configuration. We advise you the following naming convention, which is a bit



similar to the Hungarian naming convention that is often used when working with objects. The name has four parts, which will be separated by an underscore

A three character abbreviation to indicate the object type	As we are creating a tile view, we could use <b>til</b>
The name of the contextual entity. This is the entity on which you will put the tile view	In our example this will be the Account entity
The name of the related entity. This is the entity for which you want to see the tiles	In our example this will be the Case entity
A description of the tile view	In our example we want to the Cases by Status reason

The final result for our example is then til\_Account\_Case\_CasesByStatusReason

#### (b) Contextual entity

Reference to the entity on which the tile view will be placed. In our example we use Account

TILE VIEW - GENERAL TAB - TILE PART TYPE SECTION

til_Account_Case_CasesByStatusReason Tile View		
GENERAL	SETTINGS	Related
Tile Part Tile Typ	Type De	
lile		

#### (a) Tile type

With this field, you can select which type of tile view you would like to create. As mentioned before, three types are available:

- Tile
- Process
- New

We will give an example of each type further on in this manual. In our example we use Tile



#### TILE VIEW - GENERAL TAB - RELATIONSHIP SECTION

til_Account_Case_CasesByStatusReason Tile View		
GENERAL	SETTINGS	Related
Relations	hip	
Relation	nship Type	
Relatio	n	
Related	Entity	
🐼 Case		
Relation	nship	
🐼 incid	lent_custome	r_accounts

#### (a) Relationship type

Type of link between the contextual entity and the related entity. The type can be:

#### (1) Relation

Contextual and related entities are linked together via a [1:N] relationship. In our example this means that we would select all cases that are really related to the accounts.

#### (2) Connection

Contextual and related entities are linked together by using CRM connections. In our example this means that we would select all cases that are connected to the accounts.

#### In our example we use Relation

#### (b) Related entity

Name of the related entity This is the entity for which you want to see the tiles. In our example we use Case

#### (c) Relationship

The relation you want to use. The relations are filtered according to the contextual and the related entities. In our example we use incident\_customer\_accounts

#### Important Remarks on Relationship

- This is one of the fields that you have to select carefully. Very often people take the wrong relationship, which will give you no or very strange results. Keep that in mind!!!
- If you have selected in the field **Relationship type** the option **Connection**, you will have to select a **Connection role to** instead of **Relationship**. We will give an example later in this course (practical case: "A tile view of tile type that shows all contacts connected to an account with the role "employee").



## TIEL VIEW - GENERAL TAB - TILE GROUPS SECTION

til_Account_Case_C	asesByStatusReason
GENERAL SETTINGS	Related
Tile Groups	
	Yes
Group Ву	않 Status Reason

#### (a) **Dynamic grouping**

With this field you can define if groups of tiles should be dynamically created or if each group should be individually defined.

If you put the field on **yes**, this means you are going to use a grouping. By selecting **yes**, you will see an extra field **Group by**, in which you have to indicate on which field you want to group.

Keep in mind that if you select **yes**, you can only add one tile group to the tile group view.

If you put the field to **no**, you don't group the tiles and it will be possible to add more than one tile group. If you do that, the field **order** on the tile group form will determine in which order you see the different tile groups. We will give an example of that later in the course (practical case: "A tile view of tile type that shows you cases for an account without dynamic grouping")

As long as you don't add a tile group, you will see no results. In our example we use Yes

#### (b) Group by

If you have chosen for **yes** in the previous option, you must specify here on which field you want to group. In our example we use Status Reason

- 5. Before you can add a tile group, you must save the tile view by using the **SAVE**-button in the command bar.
- 6. Add a tile group to the tile view by clicking on the +-sign on the right side. With a tile group, you specify in fact which tiles you want to see and how they have to appear on the tile view.

Tile Groups		
Dynamic Grouping	9 * <b>Yes</b>	
Group By	🐼 Status Reason	
		+ New Tile Group …
✓ Order ↑	System Reference	↑ Created On
No data available.		



- 7. Fill in the data as follows, by going through the **GENERAL** tab and it's sections:
  - (a) General information section
  - (b) Others section
  - (c) Indicator section

TILE GROUP - GENERAL TAB - GENERAL INFORMATION SECTION

New Tile Group		
GENERAL SETTINGS DISPLAY : FIELD SETT	INGS DISPLAY : COLOR & ICON	
General Information		
System Reference	*	
TG_til_Account_Case_CasesByStatusReason		
Label Text		
Cases by Status Reason		
Parent Tile View *		
til_Account_Case_CasesByStatusReason		
Contextual Entity	*	
🔯 Case		
Order		

#### (a) System Reference

This is the name of the tile group configuration. We advise you the following naming convention, which is a bit similar to the Hungarian naming convention that is often used when working with objects. The name has different parts, which will be separated by an underscore

An abbreviation to indicate the object type	As we are creating a tile group, we use <b>TG</b>
The name of the tile view on which you put the tile group.	Our tile view was called til_Account_Case_CasesByStatusReason
A short description of the tile group	As we visualize the cases by status reason we could take something as CaseByStatR

The final result for our example is then TG\_til\_Account\_Case\_CasesByStatusReason\_CaseByStatR

#### (b) Label text

This is the label of the tile group. If you have chosen a tile view without dynamic grouping, this label will be used as label for the tile grouping. So it is only of use if you don't use dynamic grouping. In our example we use Cases by Status Reason, and we will see later where that comes up (when we create an example without dynamic grouping.)



(c) Parent tile view

Reference to the parent tile view, which is filled up automatically. In our example it is thus til\_Account\_Case\_CasesByStatusReason

#### (d) Contextual entity

Reference to contextual entity, which is filled up automatically. In our example it is thus Case

(e) Order

If you don't use dynamic grouping, it is for ordering the tile groups. You will do that by filling in a number starting from 1 for the first, 2 for the second, ... In our example we leave it blank

### TILE GROUP - GENERAL TAB - OTHER SECTION

TG_til_Account_Case_CasesByStatusReason_CaseByStatR Tile Group		
GENERAL SETTINGS DISPLAY : FIELD SETTINGS	DISPLAY : COLOR & ICON Related	
General Information	Other	
System Reference *	Style Type	
TG_til_Account_Case_CasesByStatusReason_Ca	Medium	
Label Text	Style Template	
Cases by Status Reason	Normal Tile	
Parent Tile View *	Is Collapsed	
til_Account_Case_CasesByStatusReason	Νο	
Contextual Entity *	Open Connection Records	
🖾 Case	Νο	
Order		

(a) Style type

Size of the tile: small, medium, large (only for "Tile" type) In our example we take Medium

(b) Is collapsed

Define if the tile group should be collapsed or not. In our example we take No

(c) Open connection record If you had selected *Connection* as relationship type, you could ask if the connection record must be opened when you double-click on it In our example we take No



### TILE GROUP - GENERAL TAB - INDICATOR SECTION



You have the possibility to show extra indicators on the right side of a tile view of the tile type as you can see on the following image.



#### (a) Hide indicators

You can ask to hide the created indicators or not In our example we take No

#### (b) Create indicators

Therefore you click on the +-sign on the following part of the screen. Keep in mind that the data of the tile group must be saved before you can do that.

Now you can start filling up the necessary data



### TILE INDICATOR - GENERAL TAB - GENERAL INFORMATION SECTION

New Tile Indicato	r
General DISPLAY : TI	LE INDICATOR
General Information	1
System Reference	* TI_TG_til_Account_Case_CasesByStatusReason_CaseByStatR_CaseOriginW
Parent Tile Group	* E TG_til_Account_Case_CasesByStatusReason_CaseByStatR
Contextual Entity	* 🔂 Case

#### (a) System Reference

This is the name of the tile indicator configuration. We advise you the following naming convention, which is a bit similar to the Hungarian naming convention that is often used when working with objects. The name has different parts, which will be separated by an underscore

An abbreviation to indicate the object type	As we are creating a tile group, we use <b>TI</b>	
The name of the tile group on which you put the tile indicator.	Our         tile         view         was         called           TG_til_Account_Case_CasesByStatusReason_CaseByStatR	
A description of what the indicator shows	In our example we will create an indicator for a case origin coming from the web so we take something as CaseOriginWeb	

The final result for our example is then TI\_TG\_til\_Account\_Case\_CasesByStatusReason\_CaseByStatR\_CaseOriginWeb

#### (b) Parent tile group

This is the tile group on which you create the indicator. It is filled up automatically In our example it is TG\_til\_Account\_Case\_CasesByStatusReason\_CaseByStatR

#### (c) Contextual entity

The entity for which you are creating tiles and tile indicators It is filled up automatically In our example it is Case

### TILE INDICATOR – GENERAL TAB - CONDITION SECTION

New Tile Indica	ator				
General DISPLA	Y : TILE INDICATOR				
Condition					
Field	🐼 Origin	Operator	=	Value	3



 (a) Field The field that you want to add as indicator In our example it is Origin

#### (b) **Operator**

This is a classic operator as we have in e.g. advanced find: =, contains data, ... In our example it is =

(c) Value

What is the filter of the field that you want to use?

Watch out because you will need the value of the option set as it is determined within the settings of the environment

In our example we want to see an indicator for all cases with an origin of type Web, so we need the value **3** 

### TILE INDICATOR - GENERAL TAB - OTHER SECTION

New Tile Indicator		
General DISPLAY : TILE INDICATOR		
Other		
Tooltip Text	* Case Origin is web	
Position	Placeholder 1	

#### (a) Tooltip text

If you will hover over the indicator on the tile, you can have a tooltip which explains what the indicator is showing In our example we will use Case Origin is web

#### (b) Position

You can add maximum 5 indicators. With this field you specify on which position you want to see the indicator In our example we will use Placeholder 1

#### TILE INDICATOR - DISPLAY: TILE INDICATOR-TAB - ICON SECTION

TI_ TG_1 Tile Indicat	:il_Account_Case_CasesByStatusReason_CaseByStatR _CaseOriginWeb
General	DISPLAY : TILE INDICATOR Related
lcon	
lcon	/WebResources/SVB_/GridView/Images/gridview_16.png
5	3 Ta 🚳 🗏 Ta 🕼 🛤 🗙 🔒 C 🖾 A 🏭 🐭 🗟 🗟 🖼 🏠 🔺

#### (a) Icon

Icon displayed in the indicator. The URL can point to an internal web resource (relative path) or an external image (absolute URL).

When a dynamic icon field is mentioned, the default icon is only displayed when no value has been found in the dynamic field.

You don't need to type the URL : simply click on the desired image in the icon library below the URL. The library is showing all the icons with a 16x16 size, saved as web resources in your CRM. In our example we take whatever icon we like.



8. Save and close the modifications of the tile indicator and the final result of the tile with indicator will be the following



- 9. You are back in the tile group form and can continue with the **SETTINGS** tab, in which there are several sections
  - (a) Sorting section
  - (b) Filter section
  - (c) Technical configuration section

TILE GROUP - SETTINGS TAB - SORTING SECTION

TG_til_Account_Case_CasesByStatusReason_CaseByStatR Tile Group			
GENERAL SETTINGS	DISPLAY : FIELD SETTINGS	DISPLAY : COLOR & ICON	Related
Sorting			
Sort By	🐼 Case Title		
Sort Direction	Ascending		
Filter			
FetchXml			

#### (a) Sort by

How do the tiles within the groups have to be sorted? In our example we use Case Title

(b) Sort direction

Sort order: ascending or descending In our example we use Ascending



### TILE GROUP - SETTINGS TAB - FILTER SECTION OF THE TILE GROUP

TG_til_Account_Cas	TG_til_Account_Case_CasesByStatusReason_CaseByStatR Tile Group			
GENERAL SETTINGS	DISPLAY : FIELD SETTINGS	DISPLAY : COLOR & ICON	Related	
Sorting				
Sort By	🐼 Case Title			
Sort Direction	Ascending			
Filter				
FetchXml				

### (a) FetchXML

Additional filter to apply on the query, written in FetchXML format. If you have chosen a tile view without dynamic grouping, you may use this filter to create some custom groupings (for example, the cases of the last 6 months). We will create an example later in this course. In our example we leave it blank



### TILE GROUP – SETTINGS TAB - **TECHNICAL CONFIGURATION** SECTION

TG_til_Ad Tile Group	count_Cas	e_CasesByStatusReaso	n_CaseByStatR	
GENERAL	SETTINGS	DISPLAY : FIELD SETTINGS	DISPLAY : COLOR & ICON	Related
Technica	l Configurati	ion		
Full Fe	tch Xml			
Techni	cal Layout			

(a) Full Fetch XML

We will explain in a later example what we can do with that.

(b) Technical layout

This is about programming stuff and out of the scope for this course

- 10. Save what you have done in the SETTINGS-tab, and continue with the DISPLAY: FIELDS SETTINGS tab and it' sections:
  - (a) Small fields section
  - (b) Long fields section
  - (c) Settings section

### TILE GROUP - DISPLAY: FIELD SETTINGS-TAB - SMALL & LONG FIELDS SECTION

On a tile, you can add the content of six fields as you see on the following image





The small fields are the ones in the upper right corner; the long fields are the ones on the down left corner. In our example we have specified them as follows

TG_til_Account_Case_CasesByStatusReason_CaseByStatR Tile Group		
GENERAL SETTINGS <b>DISPLAY : FIELD SETTING</b>	S DISPLAY : COLOR & ICON Tile Indicators	
Small Fields Field 1	Long Fields Field 4	
Field 2	Field 5	
Field 3	Field 6	

TILE GROUP - DISPLAY: FIELD SETTINGS-TAB SETTINGS SECTION

Settings		
Title Field	Field 1	$ $ $\vee$

(a) Title field

This is what is considered as the most important field with the small/long fields. The field that you select will be visible in bold in the tile view. In our example we use Case Title

- 11. Save what you have done in the **DISPLAY: FIELDS SETTINGS** -tab, and continue with the **DISPLAY: COLOR AND ICON** tab with sections tab and it' sections:
  - (a) Back color section
  - (b) Icon section

TILE GROUP - DISPLAY:COLOR&ICON-TAB - BACK COLOR SECTION

TG_til_Account_Case_CasesByStatusReason_CaseByStatR Tile Group		
GENERAL SETTINGS	DISPLAY : FIELD SETTINGS	DISPLAY : COLOR & ICON Related
Back Color		
Dynamic Color Field	Look for Dynamic Color Field	٩ م
Default Color	Type to search + New SVB Field	
	R 255 t G 191 t B 0 t W mino	

(a) **Dynamic color field** 

If the fore color has to be dynamically determined, select one field on the contextual entity, containing the value



of the back color. The color format must be either a web color code (i.e.: #FFFFFF) or a color name (i.e.: red). We will deal later on with dynamic coloring In our example we leave it blank.

#### (b) Default color

Background color of the icon.

When a dynamic color field is mentioned, the default back color is only used when no value has been found in the dynamic field.

You don't need to type the color code; simply click on the desired color in the color picker. In our example we take whatever color we like.

#### TILE GROUP - DISPLAY:COLOR&ICON-TAB - ICON SECTION

TG_til_Ac Tile Group	count_Ca	se_Cases	BySta	atusR	easo	n_Ca	seByS	StatR		
GENERAL	SETTINGS	DISPLAY	: COLO	OR & I	CON					
lcon										
Icon Fi	eld									
Default	t Icon	/WebF	Resourc	es/msd	yn_/lco	ns/Site	map/W	orkOrd	er_32.pn	g
32x32										•
17	لچ 🙏	😻 🖹	图						Ŷ	
	<b>i</b> N	<b>—</b>		2	5	5	Ĉ	Þ	Ċ.	
6.		2	0)))		())) !	Û		1	N	

#### (a) Icon field

If the icon has to be dynamically determined, select one field on the contextual entity, containing the value of the icon.

In our example we leave it blank.

#### (b) Default icon

Icon displayed in the tile. The URL can point to an internal web resource (relative path) or an external image (absolute URL).

When a dynamic icon field is mentioned, the default icon is only displayed when no value has been found in the dynamic field.

You don't need to type the URL : simply click on the desired image in the icon library below the URL. The library is showing all the icons with a 48x48 size, saved as web resources in your CRM. In our example we take whatever icon we like.

- 12. Save the data of the tile group and go back to the **TILE VIEW**, where we need to fill data in the **SETTINGS**-tab which consist of two sections
  - (a) Other section
  - (b) Filter section



### TILE VIEW - SETTINGS TAB - OTHER SECTION

Other	
Use Click Animations	No

### (a) Use click animations

If you click on the sides of a tile, youw ill see a small animation in the form of a kind of min popup of the tile. In our example we use Yes

### SETTINGS - TAB - FILTER SECTION

New Tile View			
GENERAL SETTINGS			
Other			
Use Click Animations	No		
Filter			
FetchXml			

#### (a) FetchXML

Additional filter to apply on the query, written in FetchXML format. We will create another case to give you an example of that later in this tutorial (Practical case:" A tile view of tile type that shows you cases with an origin "web" for an account") In our example we don't add anything in here

13. Save the modifications of the tile view



## 2.1.2.2 Create the single view component

If we want to see results of what we have done, we must first create a single view component to which we add later on our tile view component. These are the necessary steps to do that

1. Select **SINGLE VIEWS** from the sitemap.



2. Click the **NEW**-button in the command bar



3. Fill in the data as explained here beneath:

SINGLE VIEW - GENERAL TAB - GENERAL INFORMATION SECTION

New Single View		
GENERAL		
General Informatior	1	
System Reference	*	sin_Accounts
Contextual Entity	*	💮 Account



#### (a) System Reference

This is the name of the single view configuration. We advise you the following naming convention, which is a bit similar to the Hungarian naming convention that is often used when working with objects. The name has several parts, which will be separated by an underscore

A three character abbreviation to indicate the object type This will be placed as reference on the contextual entity form and used by the system to retrieve its configuration.	As we are creating a single view, we could use <b>sin</b>
The name of the contextual entity. This is the entity on which you will put the single view	In our example this will be the Account entity

The final result for our example is then sin\_Accounts

#### (b) Contextual entity

This is the entity on which the single view will be placed. In our example we use Account

#### SINGLE VIEW – GENERAL TAB - MASTER-DETAIL SYNCHRONIZATION SECTION

New Single Viev	v	
GENERAL		
Master-Detail Syr	chronization	
Broadcast	Νο	

These two options are useful if you want to have two linked single views in one form. In such case, if you click on one record of the first single view, the second will refresh and display the information of the record focused on in the first one. We will give an example of that when we are dealing with tree view and grid view components.

#### (a) Broadcast

The single view will be used as master single view on a form and when one element will be focused, trigger the refreshing of other single views (with subscribe option)

#### (b) Subscribe

The single view will listen to the others (with broadcast option) and refresh when needed.

#### In our example we put them both on No



### SINGLE VIEW - GENERAL TAB - OTHER SECTION

New Single View		
GENERAL		
Other		
Display Mode	MGAL T-L-	

#### (a) **Display mode**

Defines how the single view components should be accessed:

With tabs: tabs are displayed on top of the view area.

Without tabs: there are no tabs displayed and only the first view part is displayed.

#### In our example we use With Tabs

- 4. Save the modifications of the single view component
- 5. A single view can contain several other components such as tile views, tree views,...If you want to see those on the single view, you must add them as view parts on the single view. You can do this by clicking on the +-sign on the right side. If this is not available, then you have to save the single view first.

### SINGLE VIEW - GENERAL TAB - VIEW PARTS SECTION

/iew Parts							
				+	<ul> <li>New View Pa</li> </ul>	art 🖒 Refresh	
✓ System Reference	↑	View Part	Display <b>1</b>	Desktop	Tablet En	Mobile E	
VP_sin_accounts_til_Accou	nts_Cases_CasesByStat	Tile View		1 Yes	No	No	

6. Clicking on the +-sign brings you in the screen of view parts, where you can define the following information:



### VIEW PART – GENERAL TAB - **GENERAL INFORMATION** SECTION

New	/ View Part			
GENE	ERAL DISPLAY			
Ge	neral Information			
	System Reference	*	VP_sin_Accounts_til_Accounts_Cases_CasesByStatusReason	
	Part Label	•	Cases By Status Reason	
	Parent Single View	•	🛱 sin_Accounts	
	Contextual Entity	*	C Account	
	View Part Type		Tile View	
	Tile View	*	til_Account_Case_CasesByStatusReason	
	Display Order		1	

#### (a) System Reference

This is the name of the view part configuration. We advise you the following naming convention, which is a bit similar to the Hungarian naming convention that is often used when working with objects. The name has several parts, which will be separated by an underscore

An abbreviation to indicate the object type	As we are creating a view part, we could use <b>VP</b>
The name of the single view on which the view part is placed.	In our example this will be <b>sin_Accounts</b>
The name of the tile view you want to add as view part to the single view	In our example this will be til_Accounts_Cases_CasesByStatusReason

The final result for our example is then VP\_sin\_Accounts\_til\_Accounts\_Cases\_CasesByStatusReason

#### (b) Part Label

This is the label of the view part. If you have chosen to display the title (by asking "with tabs" in the **display mode** option of the single view), this will be used as label for the single view tab. In our example we use Cases By Status Reason

#### (c) Parent Single View

Reference to the parent single view (= the single view on which you are adding the view part) In our example it is sin\_Accounts

#### (d) Contextual entity

This is the entity on which view part of the single view will be placed In our example it is Account

#### (e) View part type

Type of the view part : timeline, tile view, tree view, grid view, map view In our example it is Tile View



#### (f) Tile view

Reference to the tile view that you want to use as view part In our example it is til\_Account\_Case\_CasesByStatusReason

#### (g) Display order

If you are creating a single view with different tabs that represent the different view parts, this field will allow you to order them. In our example this is 1

### VIEW PART - GENERAL TAB - IS ENABLED FOR SECTION

Is Enabled For		
Desktop	Yes	
Tablet	No	
Mobile	No	

You can uses these options to specify on which device you want the view part enabled. You have the coice between **desktop**, **tablet** and **mobile**. The **Desktop** option is by default enabled.

### VIEW PART - DISPLAY TAB - ICON SECTION

New View Part	
GENERAL DISPLAY	
lcon	
Display Only Icon	No
lcon	/WebResources/msdyn_/lcons/CommandBar/CreditToCustome

#### (a) **Display only icon**

If you use tabs (by asking "with tabs" in **the display mode** option of the single view) and an icon, you can ask to show only the icon or the icon and label. In our example we put this on **No** 

- (b) Icon
   Icon displayed in the tabs of your single view.
   The URL can point to an internal web resource (relative path) or an external image (absolute URL).
   You don't need to type the URL : simply click on the desired image in the icon library below the URL. The library is showing all icons with a 16x16 size, saved as web resources in your CRM.
   In our example we use whatever icon we wish
- 5. Save the modifications of the view part and go back to the single view component
- 6. Save the modifications of the single view component



# 2.1.2.3 Create or modify the form to visualise the Single View Component (using PCF Controls)

We have now created a tile view component and added that one to a single view component. This last one must be visualised now on a form of accounts. We will create therefore a new form for accounts. We will not spend too much time explaining how to create the form, because this is general CRM-knowledge, but we have to explain you the steps for adding the single view component to the form

#### 1. Go to the **SETTINGS** module:



#### 2. Open CUSTOMIZATIONS





#### 3. Select CUSTOMIZE THE SYSTEM

🗰 Dynami	ics 365 v Settings v Customizations		$\mathcal{S} \otimes \nabla + \mathcal{C} \otimes \mathcal{S}$
Customizatio	on		
Which feature we	rould you like to work with?		
Custo Create, r	omize the System modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.	8.	Publishers Create, modify or delete a solution publisher.
Soluti Create, r	tions modify, opiort, or import a managed or unmanaged solution.	<b>P</b>	Developer Resources Vew information or download files that help you develop applications and oxtensions for Microsoft Dynamics 365.
Adjust y	nes your organization's colors. Create, change, or delete themes that are used in your organization.		

4. and you should have a similar screen like this one

ence There's a	better way	to customize the system Try New Experi	nence.					×
nd Close	8 4	Show Dependencies 🛛 🛛 🖏 Export Soluti	ion   😤 Translations =   🔯 I	Fublish All Customizations 🛛 🔌	≜ctions +			© Bey -
ult Solutio	¢.							
mation						101		
	P) New	- X Delete A Publish 1995 S	how Dependencies	on Lavers Managed Pro	perfies	151		
		Display Name 🛧	Name	Туре	State	Customizable.	Description	0
			subscriptionstatisticso	Option Set	Managed	False	Full sync required or not	^
		3	organization_featuree	Option Set	Managed	False	Information that specifies whether a feature is e	
584		3	flipswitch_options	Option Set	Managed	False		
		3	sdkmessage_autotran	Option Set	Managed	False	Information about whether the SDK message is	
	1	IDeprecated] Dialog for Sendi		Dialog Box	Managed	True	[Deprecated] Shows the sending command dial	
		A Yes or No boolean	field_security_permiss	Option Set	Managed	False	A Ves or No boolean.	
		Account	account	Entity	Managed	True	Business that represents a customer or potential	
		Account Customer Type	Account Customer Type	Process	Managed	True	Click to add description	
det		Account Distribution	Account Distribution	Report (Reporting Ser	Managed	True	Identify patterns in top revenue-generating acc	
		Account Distribution Detail	Account Distribution	Report (Reporting Ser	Managed	True	Sub-report required by the Account Distributio	
viders		Account Level	rdvs_accountlevel	Option Set	Managed	True		
265	-	Account Manager	Account Manager	Connection Role	Managed	True		
Con.		S Account Manager	Account Manager	Security Role	Managed	True		
		Account Overview	Account Overview	Report (Reporting Ser	Managed	True	View a one-page overview of an account.	
								*

5. Go on the left side of the screen to expand the little arrow-icon preceding **ENTITIES** and open in the same way the structure of the **ACCOUNT** entity and the screen will change as follows:

PowerApps	ncies 🔰 Solution Layers	👌 Publish 🛛 💣 Managed Properties			
Account					
Solution Default Solution	General Primary Field	Controls			
Components	Entity Definition				
A B Account		A			
Forms	Deplay Name	Account	Virtual Entity		
Views	Plural Name *	Accounts	Data Source [N	ione)	
Charts	Name *	account	Ownership* Us	er or Team	~
Eields	Primary Image	Default image	Define as an activity entity.		
要 Keys	Color	#794300	Display in Activity M	17143	
1/N Relationships	Description	Projects that represents a conformer or notential conformer. The company that is hilled in how	iners bransactions		
Sta N1 Relationships		sources our represents a contorner or potential contorner. The company that is used in our			
NEN Kelationships					
Messages					
g business Rules	Areas that display this en	ntity			
Fill Duckbounds			Charles and the second s	<b>—</b> ———	
La Deshectoria	Sales	Service	Marketing	Training	
> Artise Card Action Card	Settings				
Action Card Role Set	Process				
artinorarkanarting	2	F 11 - 71			
P Activity	uusines proces no	the fire of the second s			
> Actual	Communication & Collab	boration			
Actual Data Export 6	<b>D</b> • • • •				
Address	Peedback +				
> admin_settings_entity	reotes (includes atta	coments) *			
> Agreement	Activities *				
> ReAgreement Booking	Connections*				
> Agreement Booking	Sending email (If an	email field does not exist, one will be created) *			
> R Agreement Booking	Mail merge				
> Reareement Booking	Document manager	ment			
b Re Agreement Booking.	C OneNote Integration	n			
> R Agreement Booking	Access Teams				
> T Agreement Business.	L Queues +				
> R Agreement Invoice	Auto	ematically move records to the owner's default queue when a record is created or assigned.			
Petersonal Inspire	Knowledge Manage	ment			



6. Select **FORMS** and the screen changes as follows

PowerApps									
Publish All Customicat	ians.								
Account									
Forms									
on Default Solution	System	n Forms Active Forms v							
amponents	New	• 🗙 Delete 🛛 🕵 Enable Security R	oles   Tarre (	Order + 🗿 Activate	A Descrivete	Manufactions +			
· Do Account		Name	Form State	Form Type 🛧	State	Customizable	Version	Description	1
Charts		Account Card form	Active	Card	Managed	True	8000	Default Account card form.	
Falds		SVB_ACCOUNT	Active	Main	Unmanaged	True	1.0	Updated default Account form.	
1 N Relationships		Account for Interactive experi-	Active	Main	Managed	True	8.000	Default Interactive experience Account form.	
NeN Ralationships		Account - Mobile	Active	Main	Managed	True	6.1.0.0	This form is used for mobile technicians, with appropri-	ate field L.
Business Rules		Sales Insights	Active	Main	Managed	True	1.0	Updated default Account form.	
Deshboards	2	Account	Active	Main	Managed	True	5.0.0.0	Updated default Account form.	
Action Card Action Card     Action Card		Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Default quick create form for Account	

7. Open the **main account form** (the one on the blue line in previous screen), which shows you a similar screen like this one:

PowerApps     PowerApps	nge Remove the Body and Sales	Header Foces Narigation Balas Properties to eno form designar to edit header dansity	So faste Secury faste Security States Security States Form Form Form Upgrade Upgrade			
Account Summary Project Price Lists Details	Solution: Default So Form: Account	lution				Field Explorer Filter All Fields
Field Service	A Header					Convy show unused heras
L Scheduling	Annual Revenue		Number of Employees	Gover*		Account Number
Common ^						Account Fating
Playbooks						Accountievel
Activities	4 Summary					Address 1: Address Type
Social Profiles	ACCOUNT INFORMATION		SOCIAL PANE			Address 1: City
Contacts	Account Name*					Address 1: Country/Region
Sections Connections						Address 1: County
Documents	Phone					Address 1: Fax
Audit History	Fax					Address 1: Name
Actuals	Website					Address 1: Post Office Box
Entitlement Applica						Address 1: Primary Contact Name
Resource Preferenc	Parent Account					Address 1: State/Province
Copportunity Lines	Ticker Symbol					Address 1: Street 1
Quotes	A defined in Rese					Address 1: Street 2
Quote Unes	Reationump type					2 1994 Con - 2 1996 C
Urders	Product Price List				coo	Address 1: street 3
Conferences					Primary Contact	Address 1: Telephone 2
Georgenees						Address 1: Telephone 3
Chiscussion Points	ADDRESS					Address 1: UPS Zone
Entitlements					ONTACTS	V New Field

8. Click on SAVE AS in the ribbon and give a name to the form. In our example we use SVB\_Account here

Save As Enter a name and	d description for the new form.	×
Name * Description	SVB_Account Updated default Account form.	
	OK Cancel	

9. In the "INSERT"-Tab of the ribbon bar, select the "One Column" button

	PowerApps										
FILE				e we	Resource	-	··· Ö	<b>1</b>	⊙ <b>-</b>		
Section *	Three Three Two Columns Columns 3 Tabs	Two Two One Columns Columns Column 2 Tabs 1 Tab	Sub-Grid Space	r Quick View Form	Bing Maps	Navigation Link I	Social Timer nsights	Knowledge Base Search	ACI Control	Relationship Assistant	Predictive Opportunity Scoring



10. DoubleClick on the "One Column" Tab you inserted to change the properties:

PowerApps		
REF HONE HEAT		0
and on the second secon		
3 Tabs 2 Tabs 1 Tab Control		
Form heades now default to high density to display more data. Use the new form designer to edit header density, Loan more		
A SVB Account A Solution: Default Solution		Field Explorer
- Summary Form: Account		Filter Al Fields
	^	Only show unused fields
L beats and L beats A Tab	,	Account Number
L Tak Common A		Account Rating
A Playbooks		Address 1: Address Type
Activities		Address 1: City
Social Profiles		Address 1: Country/Region

11. Name it tab\_ForSingleViews and set Single View Builder Information as Label:

Tab Prope	Tab Properties					
Modify this tab's	properties.					
Display Format	ing Events					
Name						
Specify a un	ique name.					
*Name	tab_ForSingleViews					
*Label	Single View Builder Information					
Show t	he label of this tab on the Form					
Expand	this tab by default					
Visibility Specify the defa Visible by o	ult visibility of this tab. efault					
-Availability -						
Specify the defa	ult availability of this tab on phone.					
Available o	n phone					
L						
	ОК	Cancel				

12. Click on the Section of that "One Column" and insert a Sub-Grid by going to the "INSERT"-TAB of the ribbon bar:

PowerApps		
RE HOME INCERT		ବ
Lettion       Three       Character       Control		
3 Tabs 2 Tabs 1 Tab Control     Form headers now default to high density to display more data. Use the new form designer to edit header density. <u>Learn more</u>		
A SVB Account A Solution: Default Solution		Field Explorer
L summary Single View Builder Info Color Picker	- L	Filter All Fields
- Details		Account Number
L liseth Sales Researce V 4 Common A Section	1	Account Rating
Playbooks		Address 1: Address Type
	1	Address 1: City
Social Profiles	-	Address 1: Country/Region

13. Modify the values as follows. We only describe those that are relevant for our example



### **DISPLAY-TAB**

Set Properti Set the List or Chart	<b>es</b> properties.	? X
Display Formatting Name Specify a uniqu Name *	Controls te name. PCFControl_sin_Accounts	
Name	sin_Accounts the Form #F3F3F3	-
Data Source — Specify the prin Records Entity	nary data source for this list or cha Only Related Records Accounts (Parent Account)	ert.
Default View	My Active Accounts Edit New	-
Display Inde View Selector	tch Box tx O Off	•
	ОК	Cancel

#### (a) Name

ID of the visual element. We always use the following structure: PCFControl\_name of single view component. In our example this is PCFControl\_sin\_Accounts

- (b) Label Name of the single view component In our example this is sin\_Accounts
- (C) Entity Specify the primary data source In our example this is Accounts (Parent Account)

### CONTROLS-TAB:

14. Click the Add Control...option from the Controls-Tab, select Single View Builder from the custom fields listed, and click Add

Set Properties Set the List or Chart proper	? ×	
Display Formatting Cont	rols	
Control	Web Phone Tablet	
Read-only Grid (default) Add Control		
	Add Control Select a custom control from the field.	×
	Editable Grid	^
	Read Only Grid	
	Single View Builder Control	
Select or add a cust	Timeline control	~
	Single View Builder Control	
	Modes: Types: Grid	
	Single View Builder Custom Control based on PowerApps Component Framework	Single View Builder
		Add



15. Set the Single View Builder Control for **Web**, **Phone and Tablet**, and select the pen-icon to configure the properties of the "Single View"

Control	Web	Dhone	Tablet	
Read-only Grid (default)	0	0		
Single View Builder Control	۲	۲	۲	×
Property	Value			
This the alternate grid tha	My Active Acc	ounts		
Single View *	Faabla (Faaa			0
Use grid as contextual	Disable (Enum	) 1)		0
Single View (required) Compatible types: SingleLine This is the property that has t identifier of the Single View t	Text o be setup and hat has to be	l point to t	the actual	

16. Select Bind to a static value and set to sin\_Accounts

$\sim$
Jal

(a) Bind to a static value

This is the System Reference of your single view component that must be given to the Single View Builder custom control

In our example this is sin\_Accounts

(b) Bind to a value on a field One could also reuse the value of a field to make the setting the Single View Builder custom control dynamically configured Not for our example here



#### 17. Save the form and publish it

FILE HOME INSERT				
Save As Save and Close	Change Properties	Body Header Body Header	Business Rules Properties Preview Managed Properties	Merge Forms
Save	Edit	Select	Form	Upgrade

18. Go via the sitemap to **SALES** app, go to subarea **ACCOUNTS** and open an account that has cases available. We take for our example the account **CEMADDONS** Ltd.

$\therefore$ Dynamics 365 $\vee$	Sales Hub Sales > Accounts		ନ ଓ ତ +	₽₽?	R
=	🛱 Show Chart + New 🗎 Delete   🗸 🖒 Refresh 🛛	🕼 Email a Link \mid 🗸 🖉 Flow 🗸 🗐 Run Report 🗡 🖷 Excel Templates	× ✓ III Export to Excel	~ …	
	Accounts I Follow 🖂			Search for records	Q
S Pinned ∨	✓ Account Name	$\uparrow \  \                                $	(Primary Contact)	Status 🖓	
·	දී CEMADDONS Ltd.	+32 2 801 55 55 Vincent Lauriant vince	nt@cemaddons.com	Active	
My Work					
해주 Dashboards					
Activities					
Customers					
Accounts					

19. Make sure you select the correct form, which is in our case the form **SVB\_Account**. You can do this by going to the left side of the forms, just above the account name



20. The single view component with the tile view on it should now be available. As the system needs to load it, you have to wait a few seconds before you see it. It should look like this:



CEMADDONS Ltd. Account · SVB_Account ~		<b>\$1,000,000,000.00</b> Annual Revenue	12,000 Number of Employees	Marco Cleantiens Owner	$\sim$
Summary Single View Builder In	formation Project Price Lists	Details Field Se	rvice Scheduling		
CASES BY STATUS REASON [4]				2	Ö
Contact details re Request Email	Required Service Service Request Web	e Interrupti Phone			
12/5/2019 9:54 PM 11/27/20 Patrick Van Asch Patrick V Marco Cleantiens Marco Cl	19 3:06 PM 11/27/2019 3:05 F an Asch Patrick Van Asch eantiens Marco Cleantiens	PM			
✓ On Hold [1]					
Missing Parts Problem Web					
11/20/2019 11:13 AM Patrick Van Asch Marco Cleantiens					

## 2.1.2.4 Modify the tile view style template to behave as carousel

Till now we have indicated the style template of the tile view in our above exercises. By defining the **Style Template** - either **Normal Tile** or **Carousel** - one can indicate the behaviour of the tile view. You can set this behaviour from the OTHER-Section of the GENERAL-TAB of your Tile Group configuration. If you do not specify explicitly the Style Template, it will default to Normal Tile Style. Next we will show how to configure the tile view style template to get the following desired result. Create some extra cases with different stages to show later on.





- 1. Navigate via the App Switcher to the **SVB Configuration Hub** App.
- 2. Select **TILE VIEWS** from the sitemap and open the tile view **til\_Account\_Case\_CasesByStatusReason** you created earlier, and open

::: Dynamics 365 🗸	SVB Configuration Hub Single View Builder > Tile Views			ଦ ଓ ଦ	+ 7 🕲	? ጸ
=	I Show Chart + New Î Delete │ ∨ ◯ F	Refresh 🛛 Email a Link 🛛 🗸 👦 🕫 Flow 🗡 🗐 Run Repo	rt \vee 🖷 Excel Templates \vee 🖪 Export to Excel	I 🛛 🗸 🖪 Import from Excel 🗠 🕞 Create view		
G Home I Recent ✓	Active Tile Views $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$				Search for records	s ,p
x <sup>2</sup> Pinned ∨	✓ System Reference	1 🖓 Contextual Entity	∑ Tile Type	♡ Created On		V
	til_Account_Case	Account	Tile	11/4/2019 10:38 PM		
Main	til_Account_Case_CasesByStatusReason	Account	Tile	10/21/2019 10:11 PM		
Single Views						
Refresh Metadata						
Components						
Treeviews						
🕮 Timeline						
Tile Views						

3. Open the Tile Group TG\_til\_Account\_Case\_CasesByStatusReason\_CaseByStatR

til_Account_Case_CasesByStatusReason Tile View							
GENERAL SETTINGS Related							
General Information	Relationship		Tile Groups				
System Reference * til_Account_Case_CasesBySt	Relationship Type Rela	lation	Dynamic Grouping	* Yes			
Contextual Entity * 🔯 Account	Related Entity	Case	Group By	🔯 Status Reason			
	Relationship	incident_customer_acc				+ New Tile Grou	p
Tile Part Type			✓ Order ↑	System Reference	1 Crea	eated On	
Tile Type Tile				TG_til_Account_Case_CasesB	iyStatusReason_CaseByStatR 10/	/23/2019 9:59 PM	

4. Navigate to the **OTHER**-section of the **GENERAL**-TAB to configure the **Style Template**:

TG_til_Account_Case_CasesByStatusReason_CaseByStatR Tile Group							
GENERAL SETTINGS DISPLAY : FIELD SETTINGS DISP	LAY : COLOR & ICON Related						
General Information	Other	Indicators					
System Reference TG_til_Account_Case_Cases	Style Type Medium	Hide Indicators No					
Label Text Cases by Status Reason	Style Template	+ New Tile Indicator ···					
Parent Tile View III til_Account_Case_Cases	Is Collapsed No	✔         Position         Î         System Reference         Field         0					
Contextual Entity * 🔀 Case	Open Connection Records <b>No</b>	Placeholder 1 TL_TG_til_Account_Case_CasesByStatusReason_CaseByStatR_CaseOriginWeb Origin =					
Order							
		۲					



5. Choose **Carousel** from the drop list to configure the tile view to behave as Carousel representation::

Other	
Style Type	Medium
Style Template	Select
ls Collapsed	Select Normal Tile Carousel
Open Connection Records	No

6. Save and verify the result: go to an account, select the right form SVB\_Account. The cases shown dynamically grouped per status are now visualized in carousel style and should look like this:



- 7. Check also the behavior we have built-in the carousel style template for the tile component:
  - (a) By design using the carousel visualization will auto-operate as a circular infinite loop
  - (b) use left/right arrow buttons of the horizontal Carousel-slider to navigate through the tiles shown underneath the tile groups, the counter in the middle, will indicate which item you are focusing on in the center of the carousel and relatively to the total amount per tile group
  - (c) The carousel style template will behave fully responsive through an auto-scaling layout





## 2.1.2.5 Highlight one of the Fields with larger font and displayed in bold

One of the six field you can show per tile can be highlighted slightly different from the others. By default all fields are shown with font Segoe UI Regular 10px. The field you choose to stand out from the other 5 -also referred to as *Title Field* – will be shown in a slightly larger and bold font Segoe UI Regular 12px.

- 1. Navigate via the App Switcher to the **SVB Configuration Hub** App.
- 2. Select TILE VIEWS from the sitemap
- 3. Open the active Tile View til\_Account\_Case\_CasesByStatusReason you created earlier
- 4. Open the Tile Group TG\_til\_Account\_Case\_CasesByStatusReason\_CaseByStatR and navigate to the DISPLAY:FIELD SETTINGS-TAB
- 5. In our example we want to highlight the Owner, thus choose Field 6 in the SETTINGS-SECTION as Title Field:

TG_til_Account_Case_CasesB Tile Group	yStatusReason_CaseByStatR		
GENERAL SETTINGS DISPLAY :	FIELD SETTINGS DISPLAY : COLOR & ICON RE	lated	
Small Fields	Long Fields	Settings	
Field 1	Field 4	Title Field Field 6	1
🐼 Case Title	🐼 Modified On		1
Field 2	Field 5		
🐼 Case Type	C Modified By		
Field 3	Field 6		
🔀 Origin	C Owner		

- 6. Navigate to the OTHER-section in the GENERAL-tab and revert back the Style Template to Normal Tile
- 7. Verify the Title Field defined standing out





## 2.1.3 Web Browser and Mobile Device Support

## 2.1.3.1 Supported web browsers and mobile devices

Users can access the Dynamics 365 Customer Engagement Web application with the most recent versions of these popular browsers:

- (a) Chrome
- (b) Edge
- (c) Internet Explorer
- (d) Firefox
- (e) Safari

Supported Devices for Mobile App

- (a) iOS 11.4.1 or later (RAM: min 1Gb, recommended 2Gb)
- (b) Android 6.0.1 or later (RAM: min 2Gb, recommended 3Gb)
- (c) Windows 10 (RAM: min 2Gb, recommended 4Gb)

For more detailed information about supported browsers and supported phones or tablets, see <u>https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/supported-web-browsers-and-mobile-devices</u>.

## 2.1.3.2 Smartphone experience with Dynamics 365 for Phones

The **PowerApps component framework** is the foundation for the new Unified Interface released with Dynamics 365 for Customer Engagement apps version 9.0 which uses responsive web design principles to provide an optimal viewing and interaction experience for any screen size, device, or orientation. **Single View Builder V2.1** fully leverages the capabilities of the Microsoft Power Platform and offers all its custom components as PCF controls next to its Web Resource variants, and with support for mobile devices. Example given using a **Microsoft Dynamics 365 for Phones** with **Android 8.0.0** 





2.1.3.3 Tablet Experience with Dynamics 365 for Tablet Example given using a Microsoft Dynamics 365 13.19112.7es with iOS 12.4.3





**Microsoft Dynamics 365** 



Chapter 6 Assistance



# 1. Getting assistance

If you need assistance in deploying Single View Builder or encounter any issues you cannot solve yourself, we recommend you to:

- (1) contact the support department of your implementing SVB Partner or SVB Reseller in 1<sup>st</sup> Line Support
- (2) contact our Realdolmen Service Desk for implementations by Gfi or Realdolmen or 2<sup>nd</sup> Line Support

## 1.1 Realdolmen Service Desk

To streamline all customer and partner support requests and give you a better support experience, we centralize all requests to be handled by our Realdolmen Service Desk. We have foreseen different channels to communicate with the Realdolmen Service Desk.

When asking for assistance and throughout the support process or when providing feedback, you will provide us with contact and identifiable information about yourself and your company. Please read the **Privacy Notice and Policy** (<u>https://www.realdolmen.com/en/privacy-policy-statement</u>) explaining how Realdolmen processes the personal data you submit through this website.

## 1.1.1 Mail

When using electronic mail **send us an email directly** at <u>info.D365products@realdolmen.com</u>. Please note the Realdolmen Service Desk will be available for you from Monday until Friday between 8.30 AM and 5 PM (Time zone UTC +1 i.e. Central European Time (CET)). In order to speed up the support process, please include the following information in your communication:

- (1) Your partner name
- (2) Contact details (company, name, email address, phone number)
- (3) Product name: Single View Builder
- (4) Product version
- (5) Detailed description of the issue you're experiencing and how to reproduce the issue
- (6) Any support logs

## 1.1.2 Phone

Please call the following phone number: +32 2 78 150 140 and provide the following information:

- (1) Your partner name
- (2) Contact details (company, name, email address, phone number)
- (3) Product Name: Single View Builder
- (4) Product version
- (5) Describe the issue you're experiencing and how to reproduce the issue

The operator will log your inquiry in the system of the Realdolmen Service Desk. The "Microsoft Dynamcis365 CRM" team will contact you as soon as possible.



## 1.1.3 Website

We can provide you access to our online system, where you can create your own ticket. The advantage of this system is that you have an overview and can follow-up your tickets. If you want to have access, please ask for your credentials by sending an email to at <u>info.D365products@realdolmen.com</u>. The Realdolmen Service Desk will be available for you from Monday until Friday between 8.30 AM and 5 PM (Time zone UTC +1 i.e. Central European Time (CET)).

## 1.2 Feedback

We are also listening closely to feedback from our customers and partners and we'd like to know how our product and this documentation met your needs, as well as any ways that you would like to improve them.

You can quickly and easily provide your feedback per mail at infoCRM@realdolmen.com.

## 1.3 Contact us

For any other requests please contact us using the online form at https://www.cemaddons.com/contact.