



**User Adoption Monitor**

**Track User Actions &  
Improve Adoption of  
Dynamics 365 CRM**



**User Adoption Monitor**

[crm@inogic.com](mailto:crm@inogic.com)



Available on  
Microsoft AppSource



# Key Features

## Track Actions

Most common actions including Create, Delete, Update, Set State, Form Opens and CRM access is available for tracking.

## Configurable

Monitoring can be configured for the choice of entities and actions.

## Consolidation

Ability to choose the period by which the tracking should be consolidated. It can be summarized by Daily/ Weekly/ or Monthly basis. This helps with reviewing against goals if any set for the users.

## Reporting

Activity stats stored within Dynamics 365/CRM in a format that is easy to report on using either the OOB Charts or SSRS/ Power BI Reports.

## Leaderboards

Easily view the activity breakup and individual user performance across the CRM application through Dashboard visualizations to list out key metrics.

## Performance

Statistics collected in the background without impacting performance or user experience.

## Log-in/Log-out & Check-in/Check-out

Track daily Log-in & Log-out details of each user in Dynamics 365 CRM. Also, keep track of time spent by each user on particular Entity records with Check-in & Check-out feature.



# Available For

## SUPPORTED VERSIONS

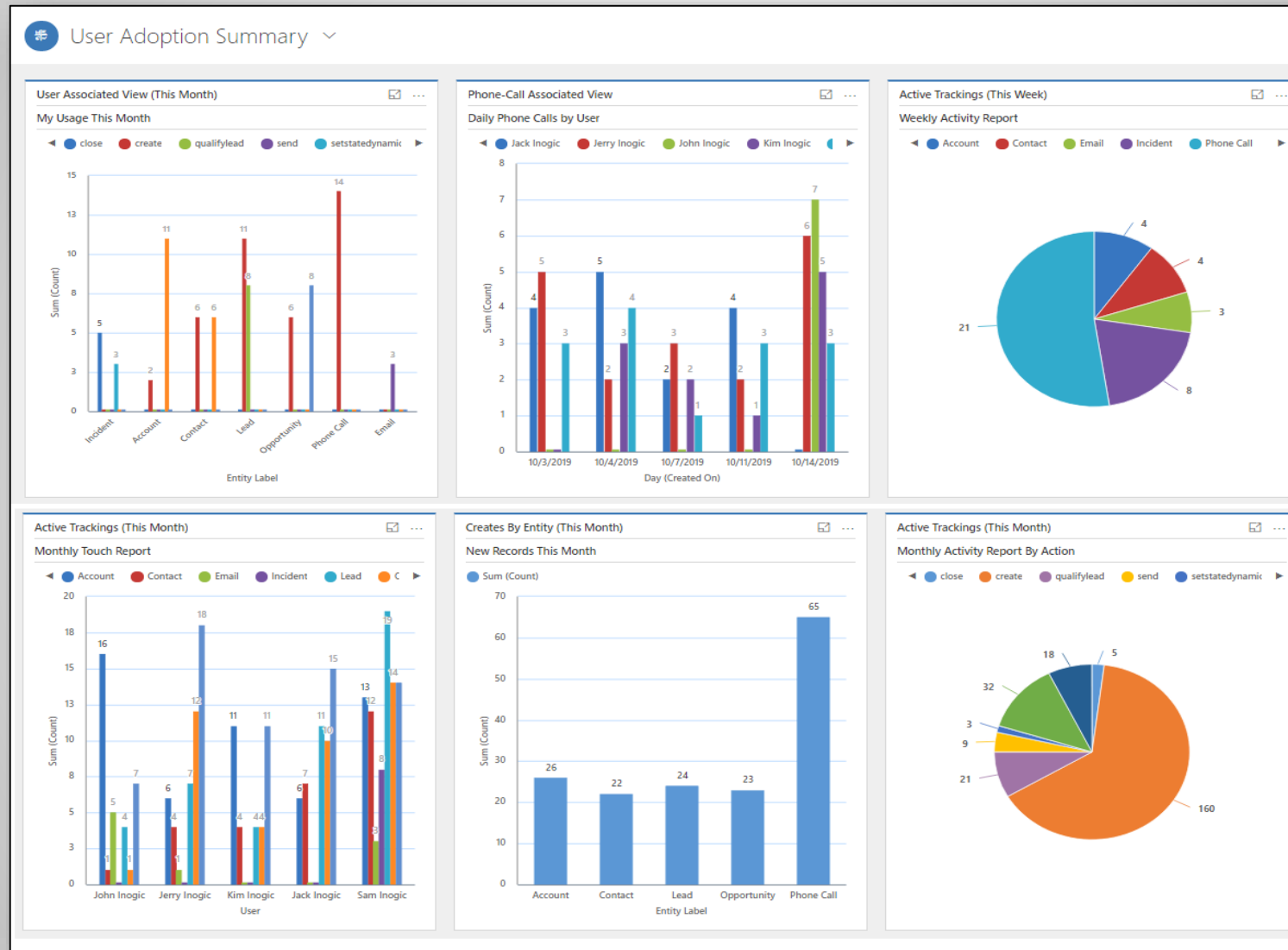
- MICROSOFT DYNAMICS CRM 2016 AND ABOVE

## DEPLOYMENTS

- ON-PREMISES
- ONLINE



# Dashboards for Performance Insights





# Configure Tracking for Entities & Actions

Save Close


## User Adoption Tracking

Entity Name	Create	Update	Delete	Set State	Assign
Account					
Appointment					
Case					
Click2Clone Template					
Click2Export Configuration					
Contact					
CRM Report Parameter					
CRM Report Template					
Email					
Fax					
Invoice					
Lead					
Opportunity					
Order					
Phone Call					
Quote					
Task					

Keys

- None    - Daily    - Weekly    - Monthly

# Monitor Activity Counts

 USER ADOPTION TRACKING  
Jack Inogic - Lead - create

**General** Related

Tracking Summary

Name	Jack Inogic - Lead - create	Owner	Sam Inogic
Entity Label	Lead	Message	create
Entity Configuration Id	Lead-create	Count	5
Start Date	9/1/2019	User	Jack Inogic
End Date	9/30/2019		

Tracking Details

Refresh Run Report Excel Templates

Name	Record URL	Access Date Time (for Login only)	Status Reason	Created On
Track Details: Jack Inogic - Lead - create - 9/30	https://ipcrmug.crm.dynamics.com/main.aspx?etn=lead&pag		Active	9/30/2019 3:41 AM
Track Details: Jack Inogic - Lead - create - 9/30	https://ipcrmug.crm.dynamics.com/main.aspx?etn=lead&pag		Active	9/30/2019 3:41 AM
Track Details: Jack Inogic - Lead - create - 9/30	https://ipcrmug.crm.dynamics.com/main.aspx?etn=lead&pag		Active	9/30/2019 3:41 AM
Track Details: Jack Inogic - Lead - create - 9/30	https://ipcrmug.crm.dynamics.com/main.aspx?etn=lead&pag		Active	9/30/2019 3:41 AM

1 - 4 of 5 (0 selected)

Track the Counts and also  
check the Audit Trail

# Track User Log-in/Log-out Counts

Show Chart + New Delete Refresh Log In Detail Map Heat Map Email a Link Flow Run Report

My Active Contacts

Log In Search for records

Full Name	Email	Company Name	Business Phone
A. HENLIA CHEN	mark1850@inogic.com	HC Co	6106357345
A. HENLIA CHEN -Copy	mark1850@inogic.com	HC Co	6106357345

USER ADOPTION ENTITY CONFIGURATION

Application-loginlogout

General Related

Name	Application-loginlogout	Owner	Sam Inogic
Entity Label	Application	Message	loginlogout
Entity Schema	application	Period	Daily

Trackings Refresh Run Report

Name	Count	User	Entity ...	Message	Start D...	End Da...	Created On
Sam Inogic - Application - loginlogout	3	Sam Inogic	Application	loginlogout	10/22/2019	10/22/2019	10/22/2019 8:...

# Track User Check-in/Check-out Counts

CRM interface showing user check-in/check-out counts.

**User Profile: A. ROBERTA LEVINE**  
Contact - Contact

Summary | Accounting Details | Map | Details | Pestanya de conflictes | Related

**CONTACT INFORMATION**

First Name: A. ROBERTA  
Last Name: LEVINE

**USER ADOPTION ENTITY CONFIGURATION**  
Case-checkincheckout

General | Related

**Configuration Details:**

Name	Case-checkincheckout	Owner	Sam Inogic
Entity Label	Case	Message	checkincheckout
Entity Schema	incident	Period	Daily
		Action Name	UAM-Case-CheckinCheckOut

**Trackings**

✓	Name	Count	User	Entity ...	Message	Start D...	End Da...	Created On
	Sam Inogic - Case - checkincheckout	4	Sam Inogic	Case	checkinch...	10/22/2019	10/22/2019	10/22/2019 9:...



# Next Steps

Learn more about [User Adoption Monitor](#) today.

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Email: [crm@inogic.com](mailto:crm@inogic.com)



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