

Dashboards in MS CRM



Introduction

Dashboards are a convenient way to provide you with quick access to information, as well as to allow you to perform common tasks easily and intuitively. In a glance, you can monitor company performance and take any actions needed to improve operating conditions. Using dashboard puts you in the driver's seat, quickly enabling you to see where your company has been and where it's going using graphs, charts and maps. This is an effort to bring the best practices for creating dashboards and integrate the customized dashboards into MS CRM.

The Business Need

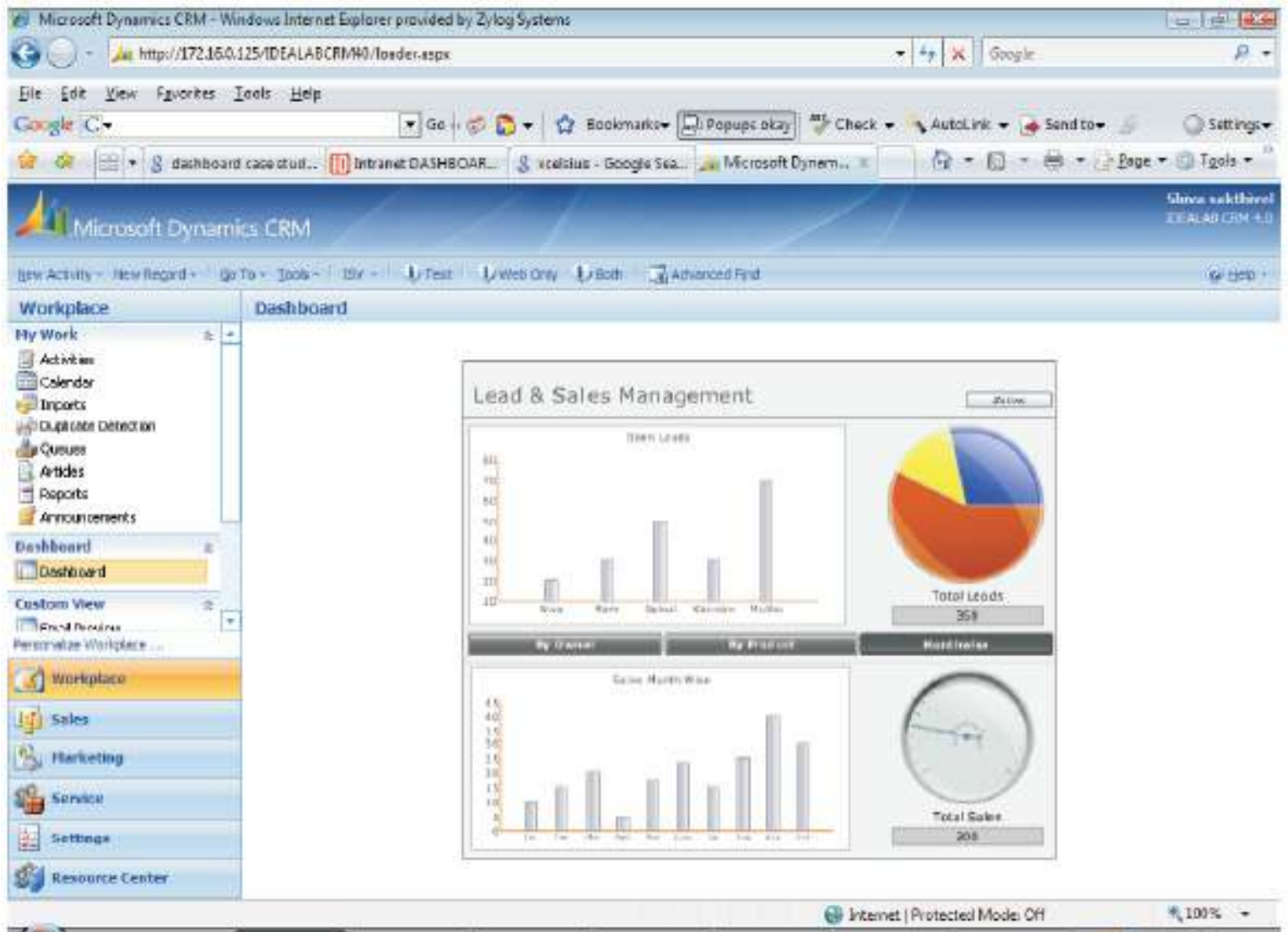
For managers and executives in dynamic business environments, real-time decision-making is critical to maintain efficient operations. To achieve this, they need visibility to up-to-the-minute data about lead status, order status, sales volumes, and employee productivity and so on. Our client was looking for a cost effective, user friendly and extremely versatile package that allows them for great flexibility in analysis and dashboard presentation of real time CRM Data. The dashboards need to be developed with good look and feel having effective delineation to differentiate modules in CRM, providing quick access to information as well enabling to easily and intuitively.

Benefits

- Monitor vital performance metrics in real-time
- Customizable to all CRM modules
- As the dashboards are incorporated into CRM, the dashboards are highly secured access
- Provides greater and clearer appearance of the dashboards
- Draw attention to important information
- More filtering options to get the info the management/organization is looking for
- Dynamic alerts that instantly notify management/organization when exceptions occur, or when critical events take place.
- Develop better, more informed strategies and plans

The Solution

Business Objects Xcelsius tool is used to build dashboards. Dashboard is designed and developed in such a way that it organizes and displays real-time information in clear, intuitive graphical formats. Data from dashboard is exported to an Xml template. A Dot net application is written to retrieve the real time data from CRM and this retrieve operation is done by using the CRM Web services. At frequent intervals the live data is inserted into the xml template and according to the xml data the statistics in the dashboard would vary. CRM dashboard application is integrated with CRM by using sitemap. Secure access rights are provided to the dashboard. The CRM application development framework enables rapid development and deployment on any industry standard CRM Server.



CRM Dashboard application speeds, improves and extends managerial vision and decision-making capabilities—turning the challenge of a fast-paced environment into an opportunity for market leadership.

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