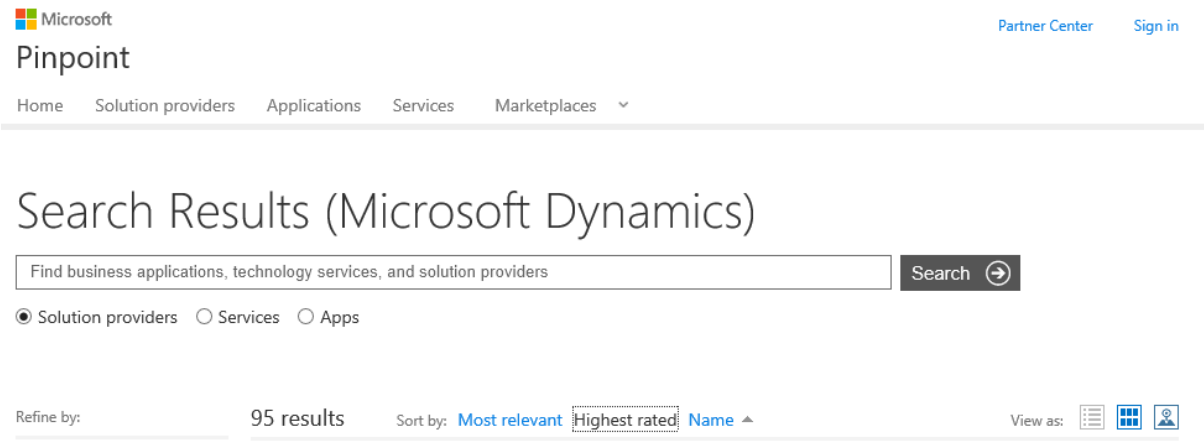
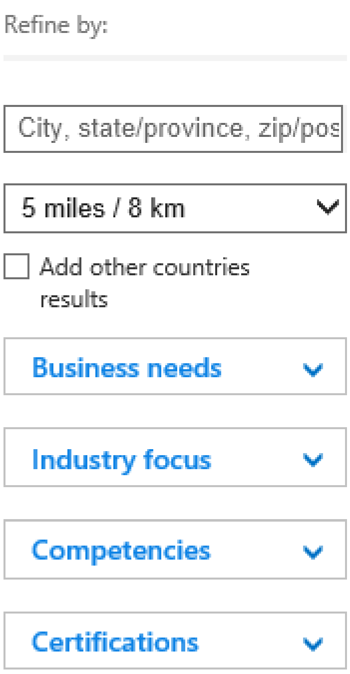
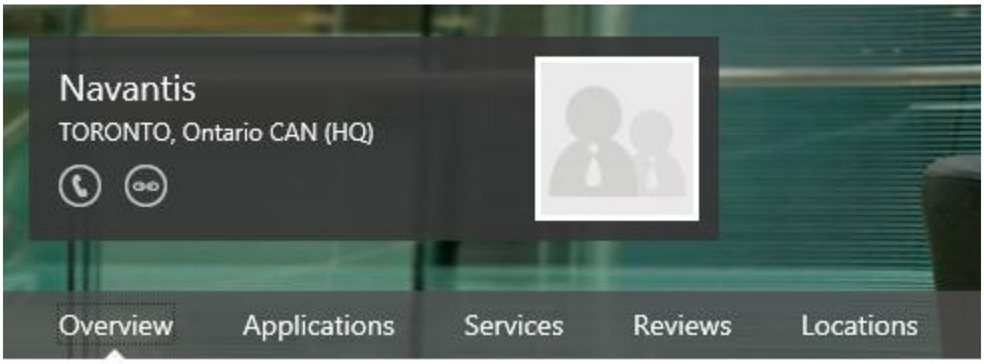
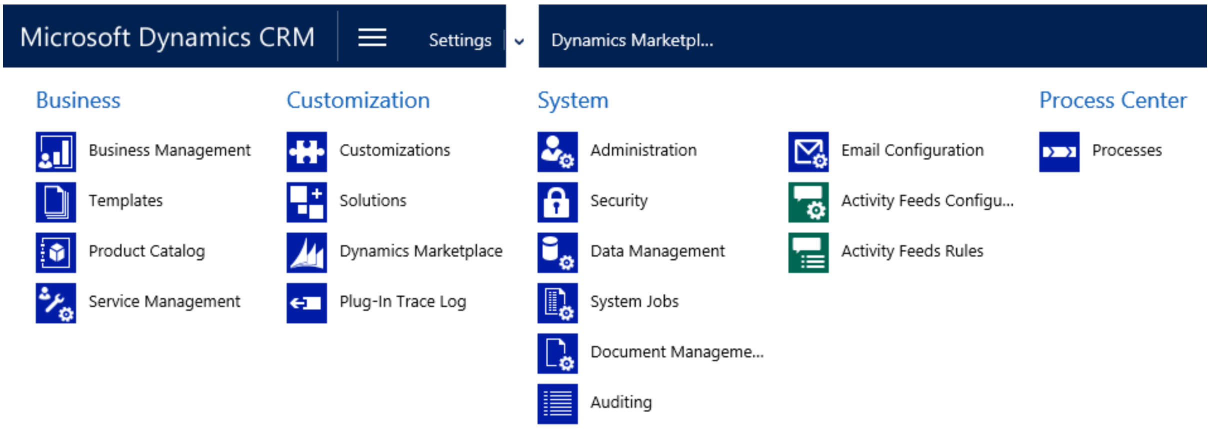
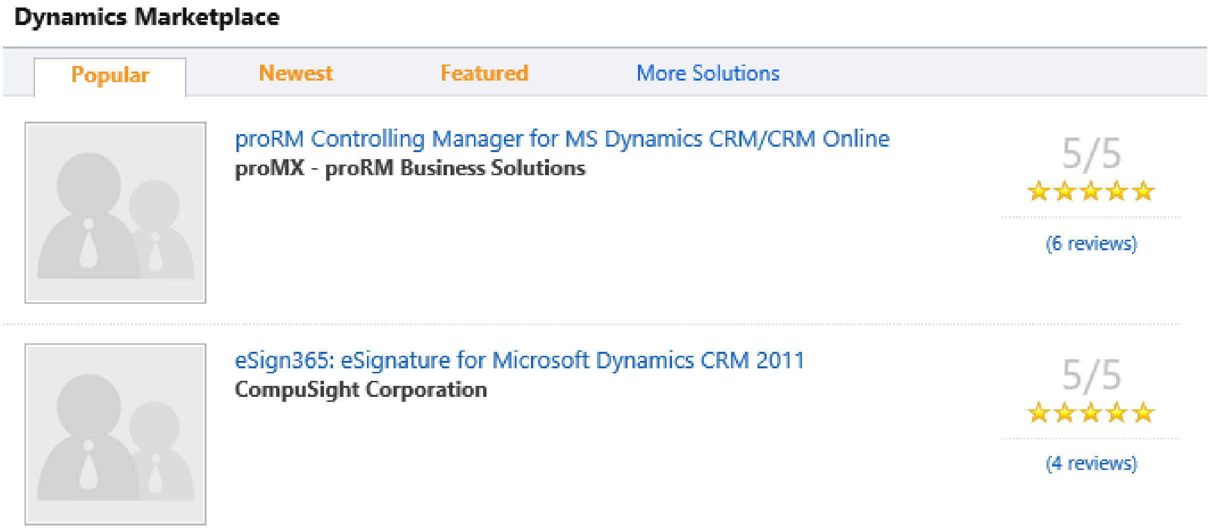
Chapter 1: Getting Started



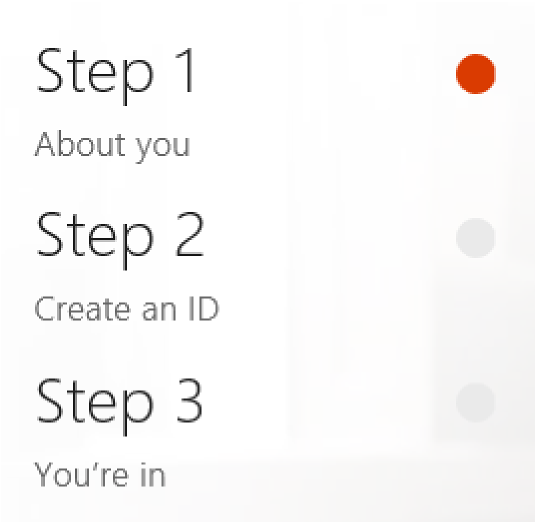


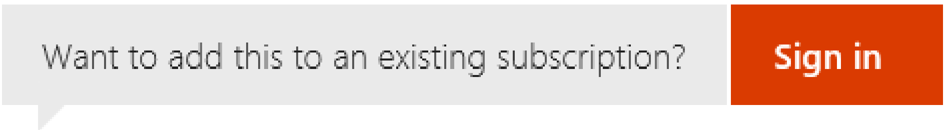

Navantis
TORONTO, Ontario CAN (HQ)
Overview
Applications
Services
Reviews
Locations

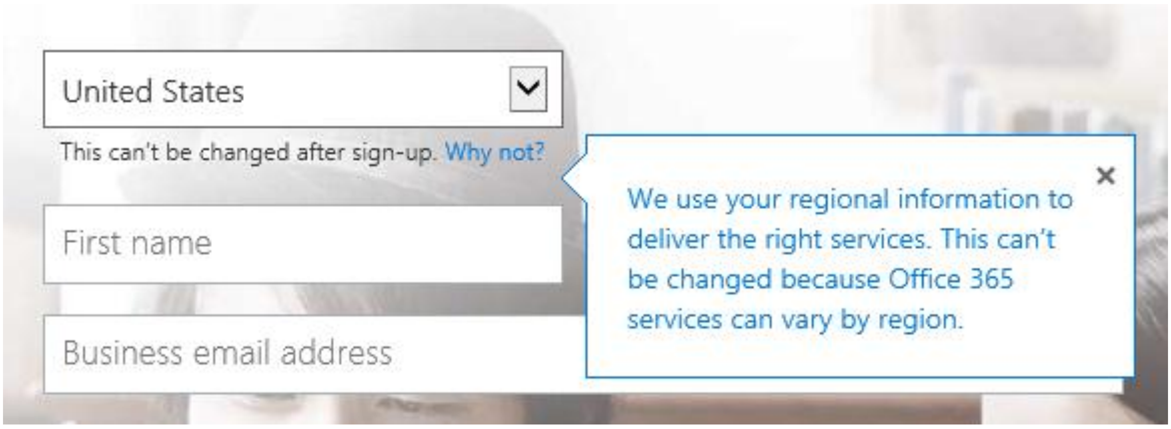

Microsoft Dynamics CRM
Settings
Dynamics Marketpl...
Business
Business Management
Templates
Product Catalog
Service Management
Customization
Customizations
Solutions
Dynamics Marketplace
Plug-In Trace Log
System
Administration
Security
Data Management
System Jobs
Document Manageme...
Auditing
Email Configuration
Activity Feeds Configu...
Activity Feeds Rules
Process Center
Processes

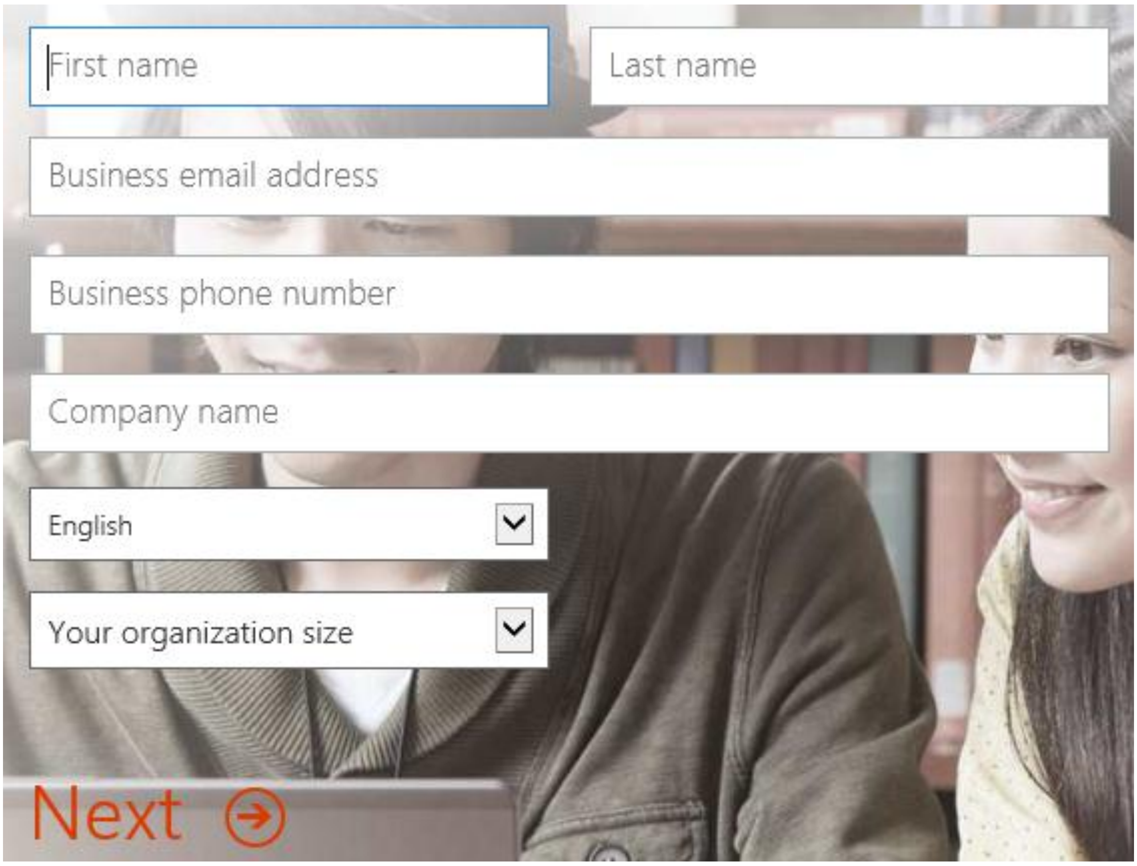

Dynamics Marketplace
Popular
Newest
Featured
More Solutions
proRM Controlling Manager for MS Dynamics CRM/CRM Online
proMX - proRM Business Solutions
5/5
(6 reviews)
eSign365: eSignature for Microsoft Dynamics CRM 2011
CompuSight Corporation
5/5
(4 reviews)

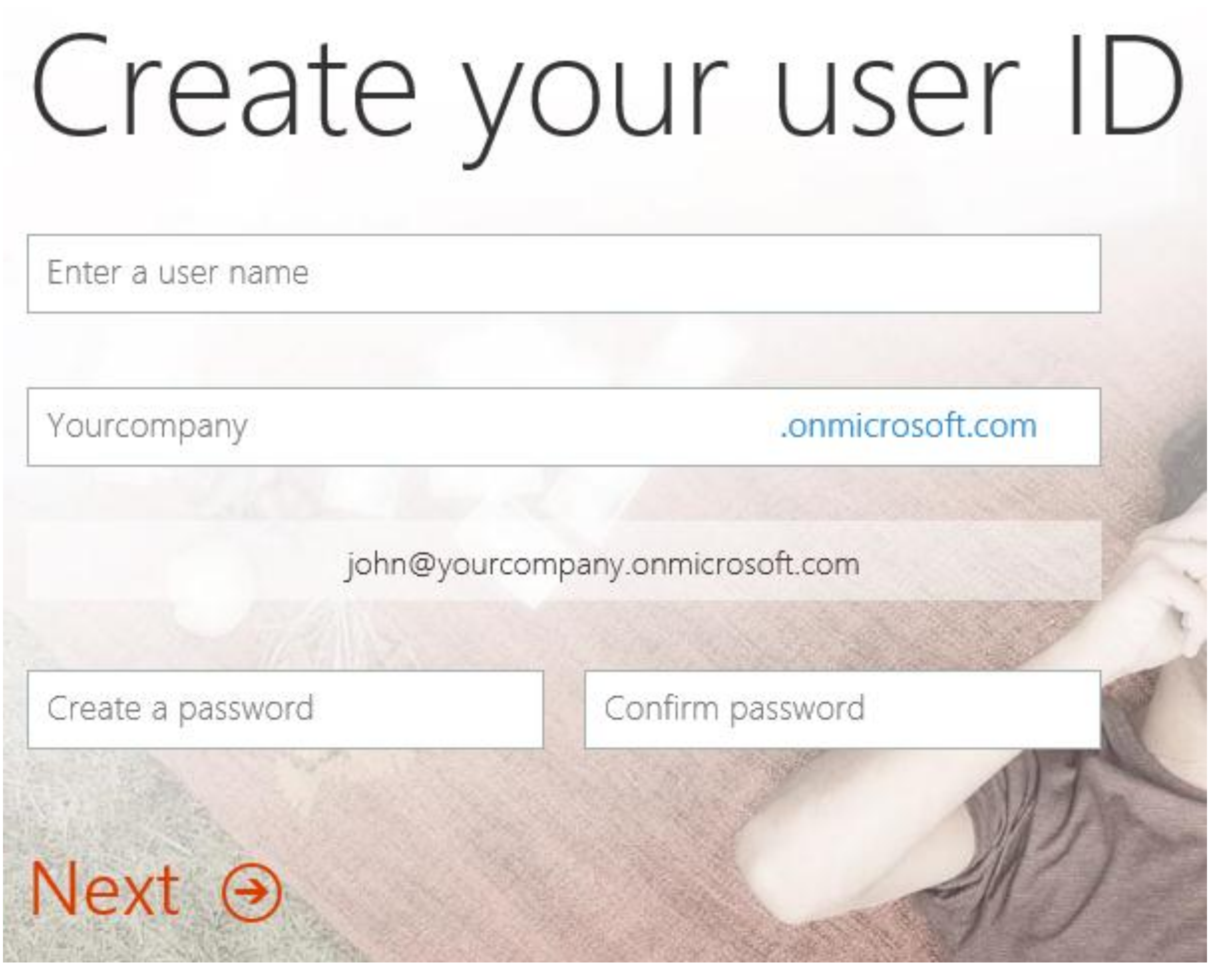

User name
someone@example.com
Get a new email address

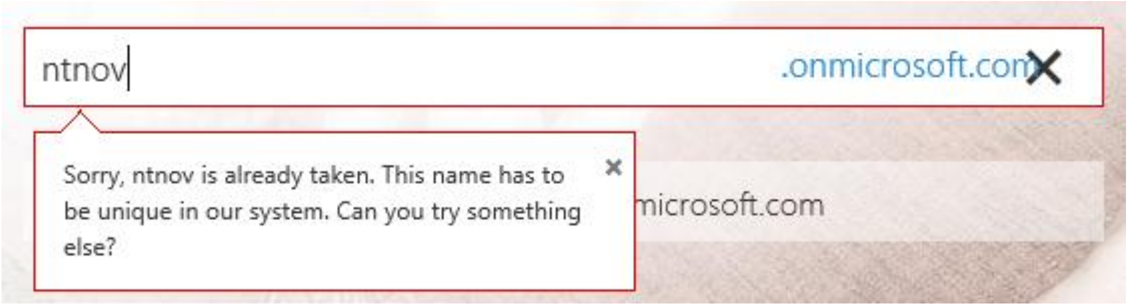

Step 1
About you
Step 2
Create an ID
Step 3
You're in

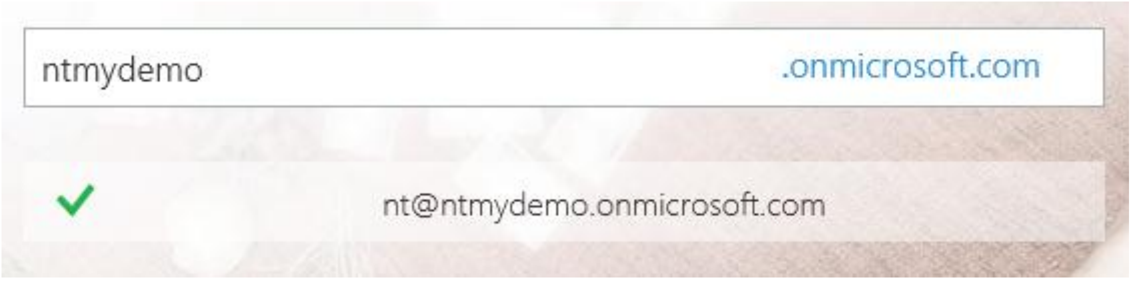

Want to add this to an existing subscription?
Sign in

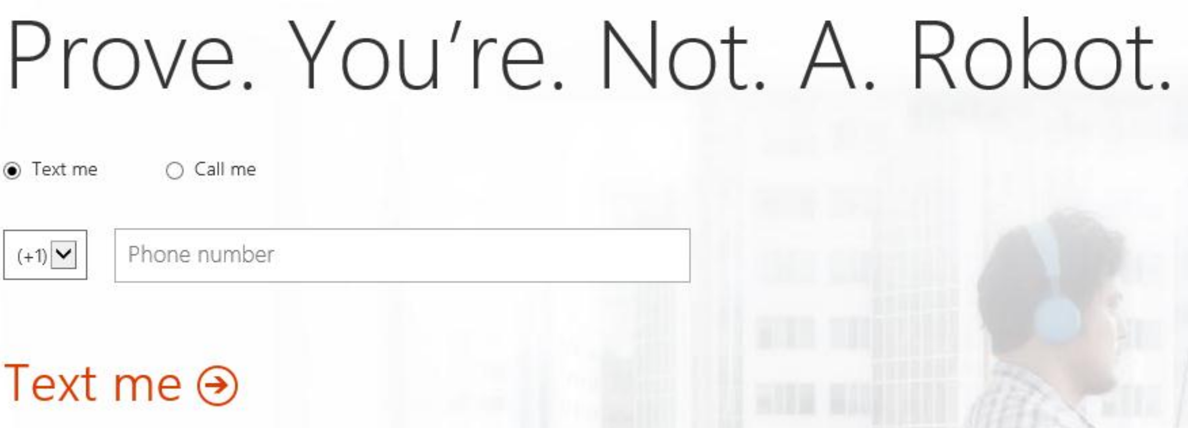

United States
This can't be changed after sign-up. Why not?
First name
Business email address
We use your regional information to deliver the right services. This can't be changed because Office 365 services can vary by region.

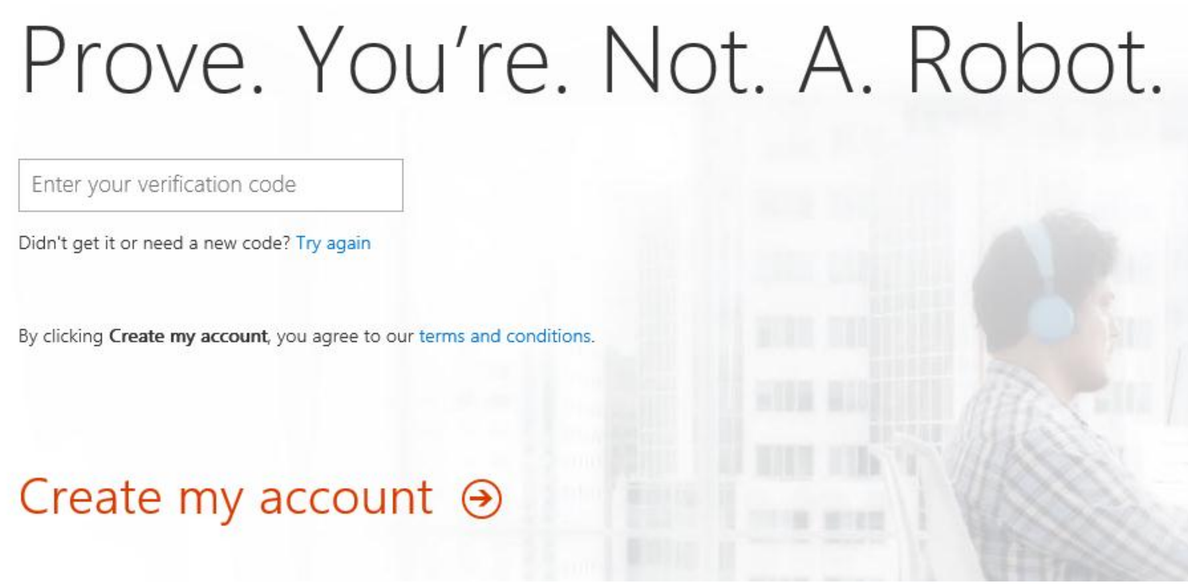

First name
Last name
Business email address
Business phone number
Company name
English
Your organization size
Next

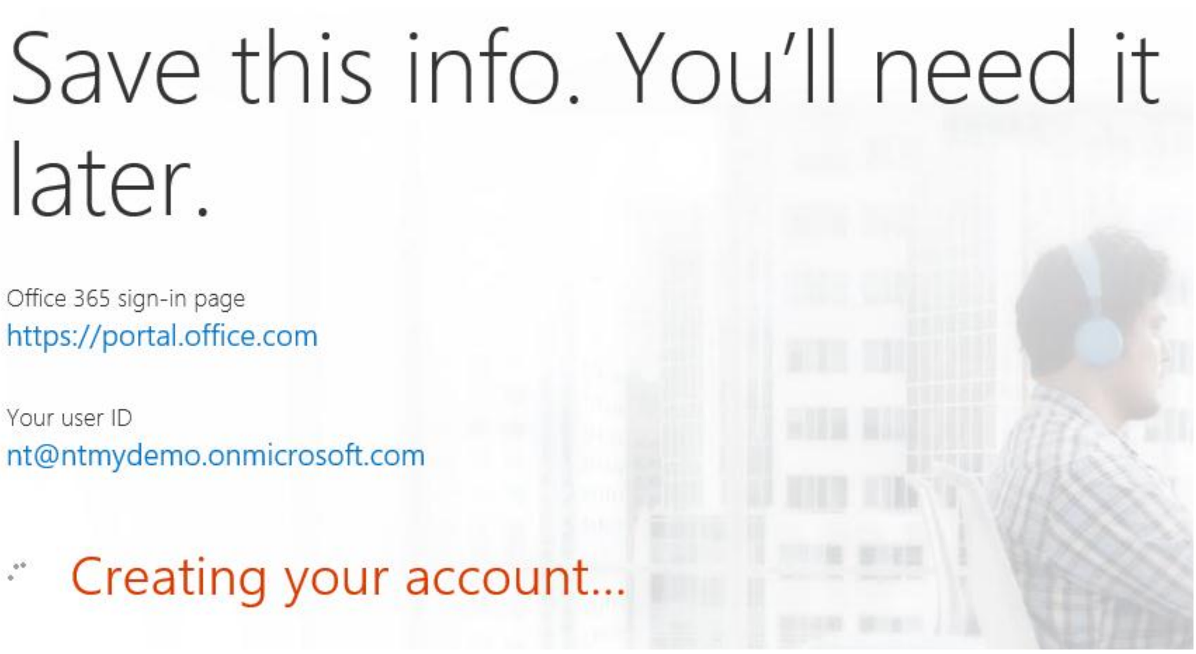

Create your user ID
Enter a user name
Yourcompany
.onmicrosoft.com
john@yourcompany.onmicrosoft.com
Create a password
Confirm password
Next

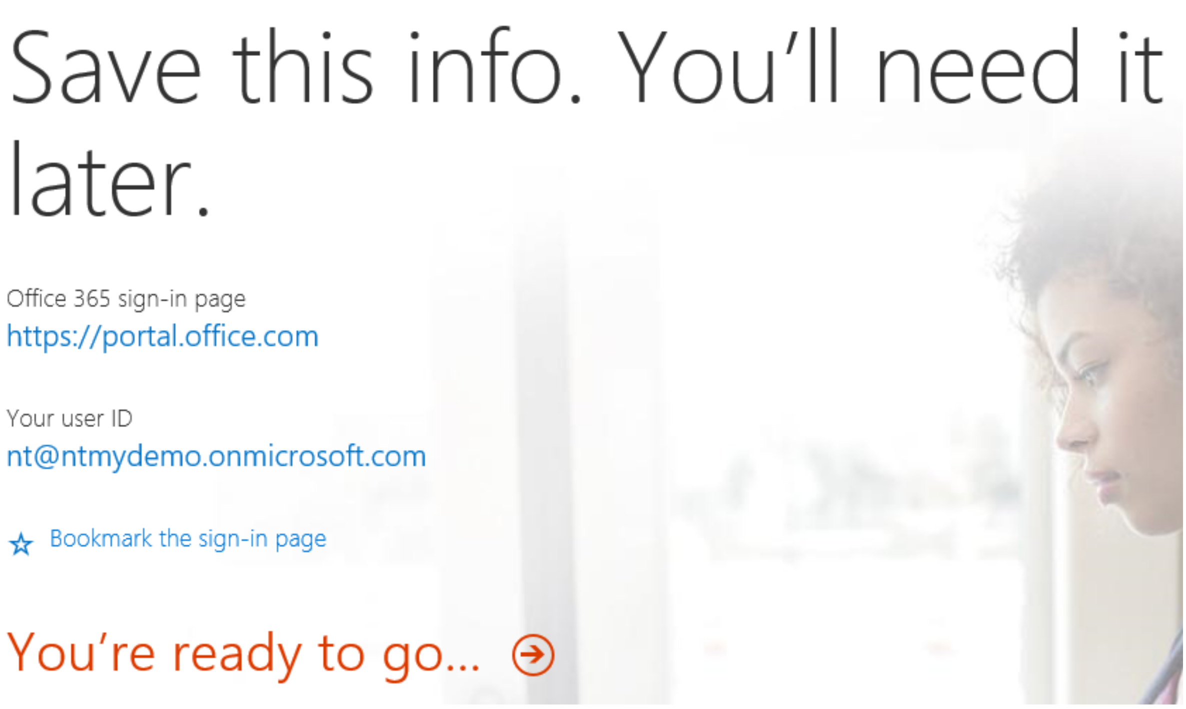

ntnov
.onmicrosoft.com
Sorry, ntnov is already taken. This name has to be unique in our system. Can you try something else?
microsoft.com


ntmydemo
.onmicrosoft.com
nt@ntmydemo.onmicrosoft.com


Prove. You're. Not. A. Robot.
Text me
Call me
(+1)
Phone number
Text me


Prove. You're. Not. A. Robot.
Enter your verification code
Didn't get it or need a new code? Try again
By clicking Create my account, you agree to our terms and conditions.
Create my account


Save this info. You’ll need it later.
Office 365 sign-in page
https://portal.office.com
Your user ID
nt@ntmydemo.onmicrosoft.com
Creating your account...


Save this info. You’ll need it later.
Office 365 sign-in page
https://portal.office.com
Your user ID
nt@ntmydemo.onmicrosoft.com
Bookmark the sign-in page
You’re ready to go...

Confirm some details

Language

English

◉ Select currency by country/region

The currency can't be changed later. All CRM reports will be based on the currency you select now.

Country/Region

United States

Currency

US Dollar (USD,$)

○ Specify Custom Currency

Finish

Getting set up...

View this email in your browser

Microsoft Dynamics CRM

Microsoft

Hello!

Welcome to your Microsoft Dynamics CRM Online Trial.

Sign-in to the Microsoft Online Services Portal and learn about managing users, licenses, subscriptions, and support incidents

Name: Nicolae Tarla
User ID: nt@ntmydemo.onmicrosoft.com
(What is this?)

We'll be in touch with you throughout the trial to make sure you are getting the most out of your experience.

Our Microsoft Dynamics CRM Online partners can also help you find the path to success. Find one now.

Thank you for this opportunity,

The Microsoft Dynamics CRM Online Team

Login

Account Information

Organization:
ntbook

Service:
Microsoft Dynamics CRM Online Trial

Subscription Start Date:
2015-11-24

Subscription End Date:
2015-12-24

Helpful Resources

CRM Help & Training

Find a Partner

Contact Us

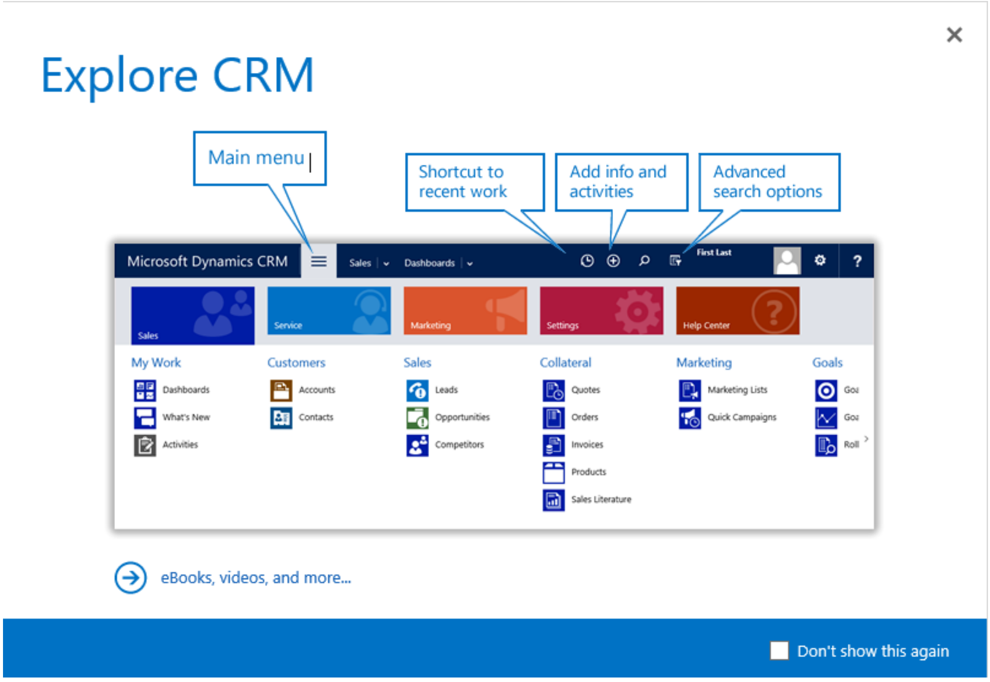
Microsoft Office
One Microsoft Way
Redmond, WA
98052-6399 USA

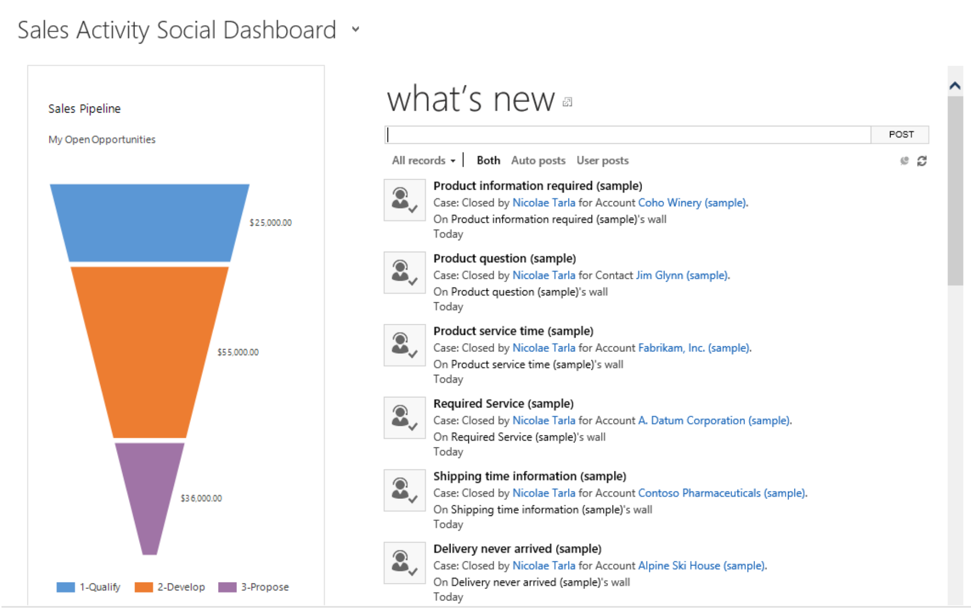
Microsoft

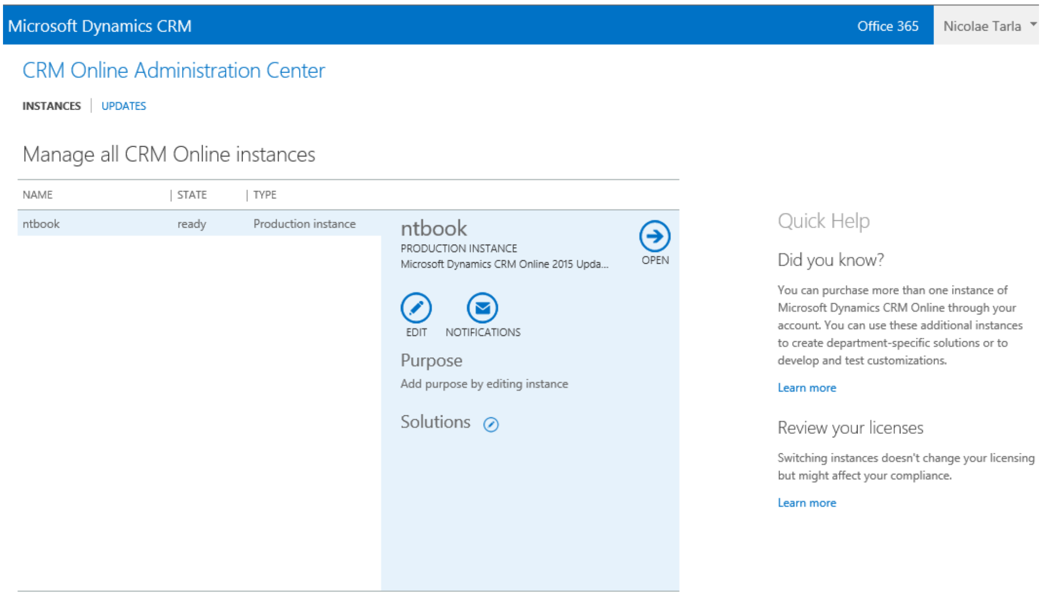
You're in!

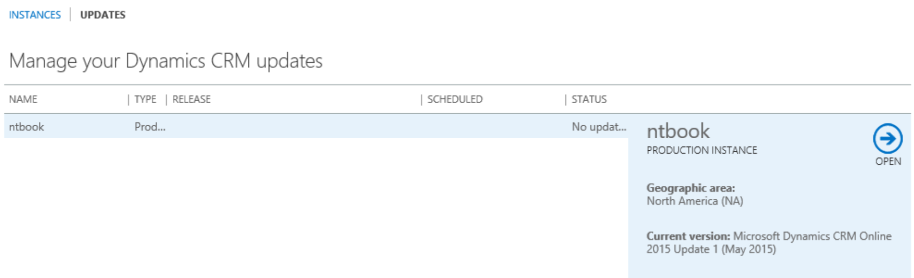
Sign in here: https://ntmydemo.crm.dynamics.com/

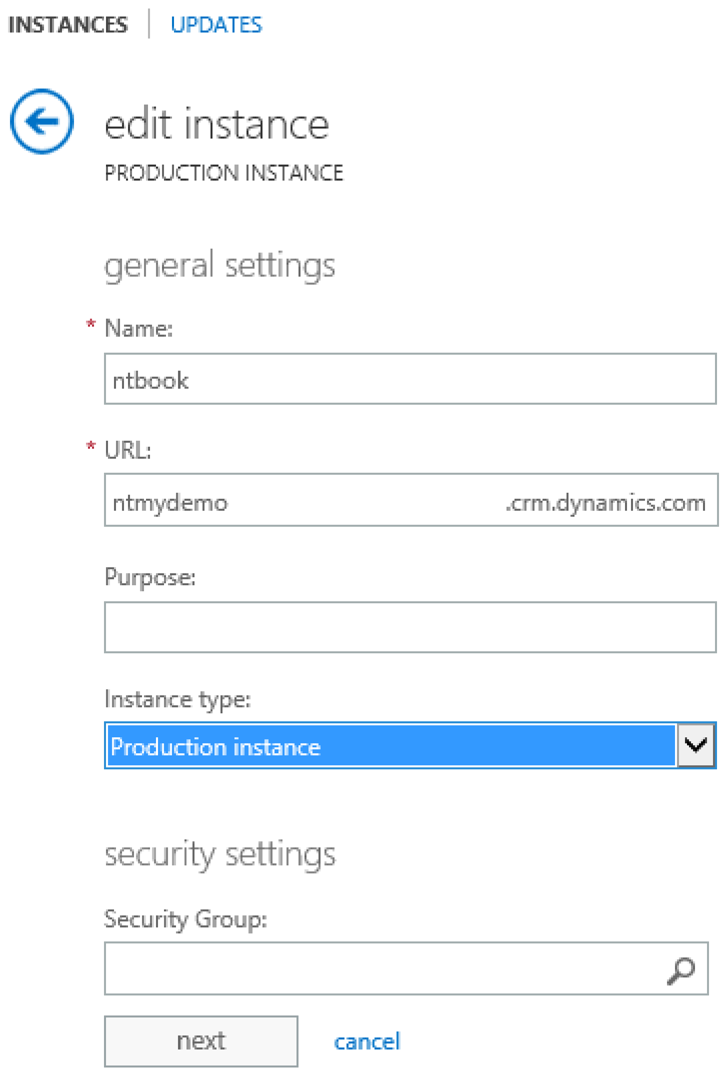
Click here to bookmark sign-in page

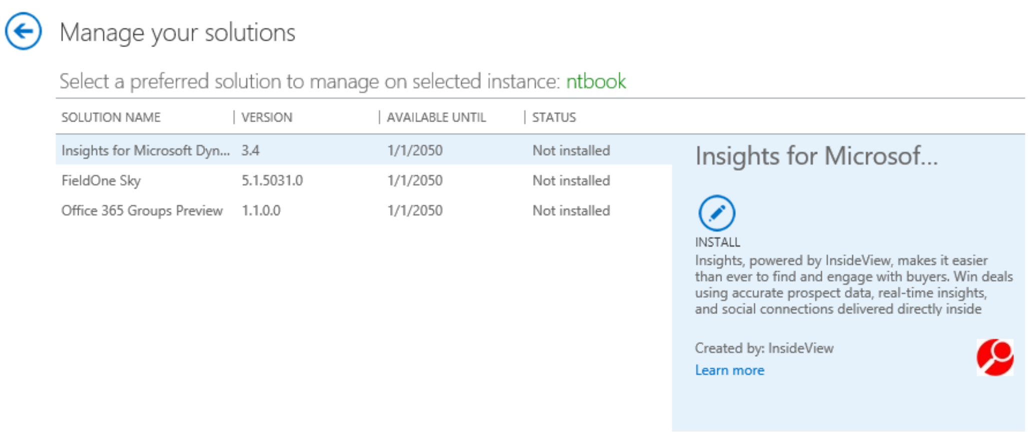

Explore CRM
Main menu
Shortcut to recent work
Add info and activities
Advanced search options
Microsoft Dynamics CRM
Sales
Dashboards
First Last
Sales
Service
Marketing
Settings
Help Center
My Work
Dashboards
What's New
Activities
Customers
Accounts
Contacts
Sales
Leads
Opportunities
Competitors
Collateral
Quotes
Orders
Invoices
Products
Sales Literature
Marketing
Marketing Lists
Quick Campaigns
Goals
eBooks, videos, and more...
Don't show this again

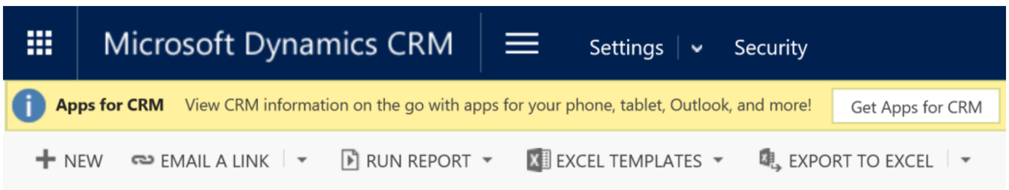

Sales Activity Social Dashboard
Sales Pipeline
My Open Opportunities
$25,000.00
$55,000.00
$36,000.00
1-Qualify
2-Develop
3-Propose
what's new
POST
All records
Both
Auto posts
User posts
Product information required (sample)
Case: Closed by Nicolae Tarla for Account Coho Winery (sample).
On Product information required (sample)'s wall
Today
Product question (sample)
Case: Closed by Nicolae Tarla for Contact Jim Glynn (sample).
On Product question (sample)'s wall
Today
Product service time (sample)
Case: Closed by Nicolae Tarla for Account Fabrikam, Inc. (sample).
On Product service time (sample)'s wall
Today
Required Service (sample)
Case: Closed by Nicolae Tarla for Account A. Datum Corporation (sample).
On Required Service (sample)'s wall
Today
Shipping time information (sample)
Case: Closed by Nicolae Tarla for Account Contoso Pharmaceuticals (sample).
On Shipping time information (sample)'s wall
Today
Delivery never arrived (sample)
Case: Closed by Nicolae Tarla for Account Alpine Ski House (sample).
On Delivery never arrived (sample)'s wall
Today

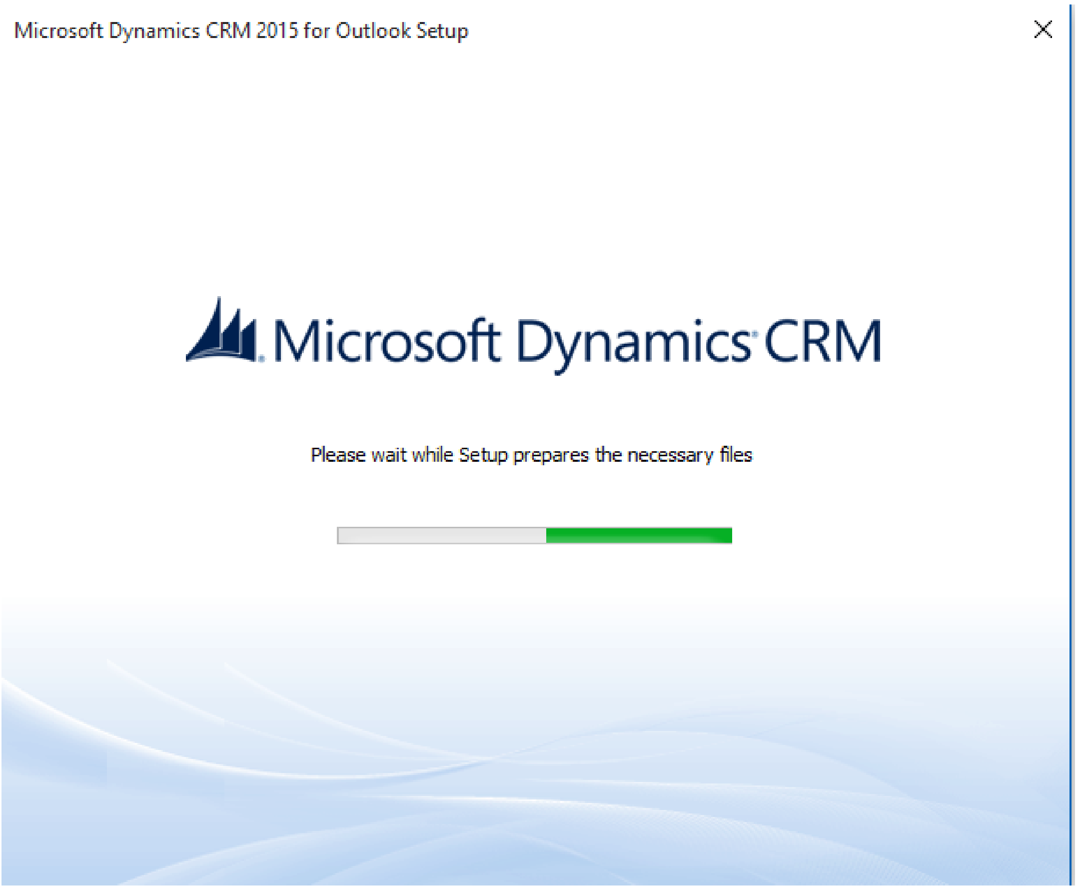

Microsoft Dynamics CRM
Office 365
Nicolae Tarla
CRM Online Administration Center
INSTANCES
UPDATES
Manage all CRM Online instances
NAME
STATE
TYPE
ntbook
ready
Production instance
ntbook
PRODUCTION INSTANCE
Microsoft Dynamics CRM Online 2015 Upda...
OPEN
EDIT
NOTIFICATIONS
Purpose
Add purpose by editing instance
Solutions
Quick Help
Did you know?
You can purchase more than one instance of Microsoft Dynamics CRM Online through your account. You can use these additional instances to create department-specific solutions or to develop and test customizations.
Learn more
Review your licenses
Switching instances doesn't change your licensing but might affect your compliance.
Learn more

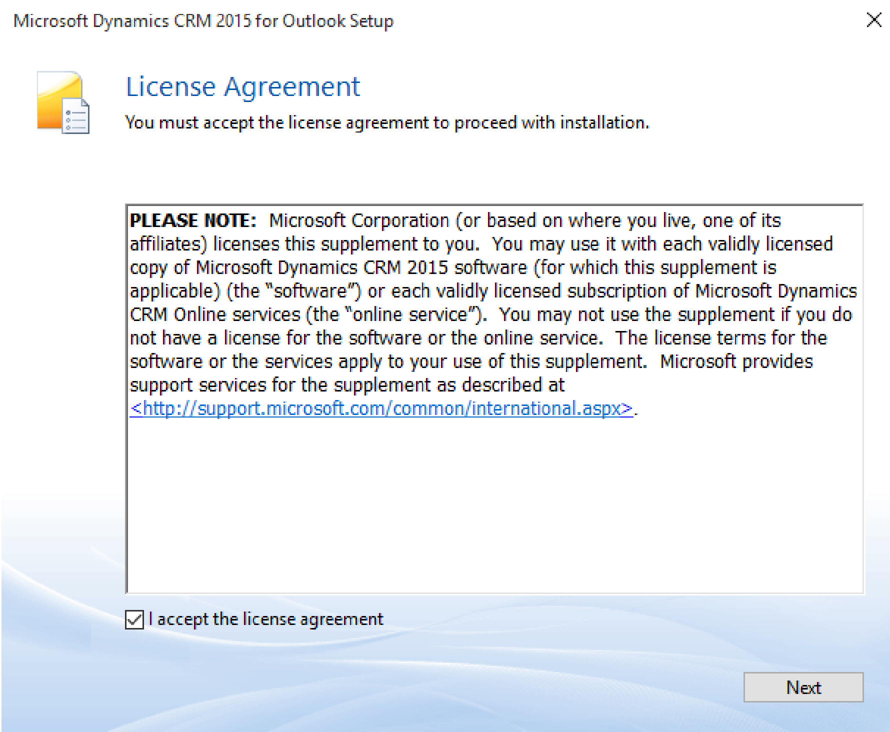

INSTANCES
UPDATES
Manage your Dynamics CRM updates
NAME
TYPE
RELEASE
SCHEDULED
STATUS
ntbook
Prod...
No updat...
ntbook
PRODUCTION INSTANCE
OPEN
Geographic area:
North America (NA)
Current version: Microsoft Dynamics CRM Online 2015 Update 1 (May 2015)

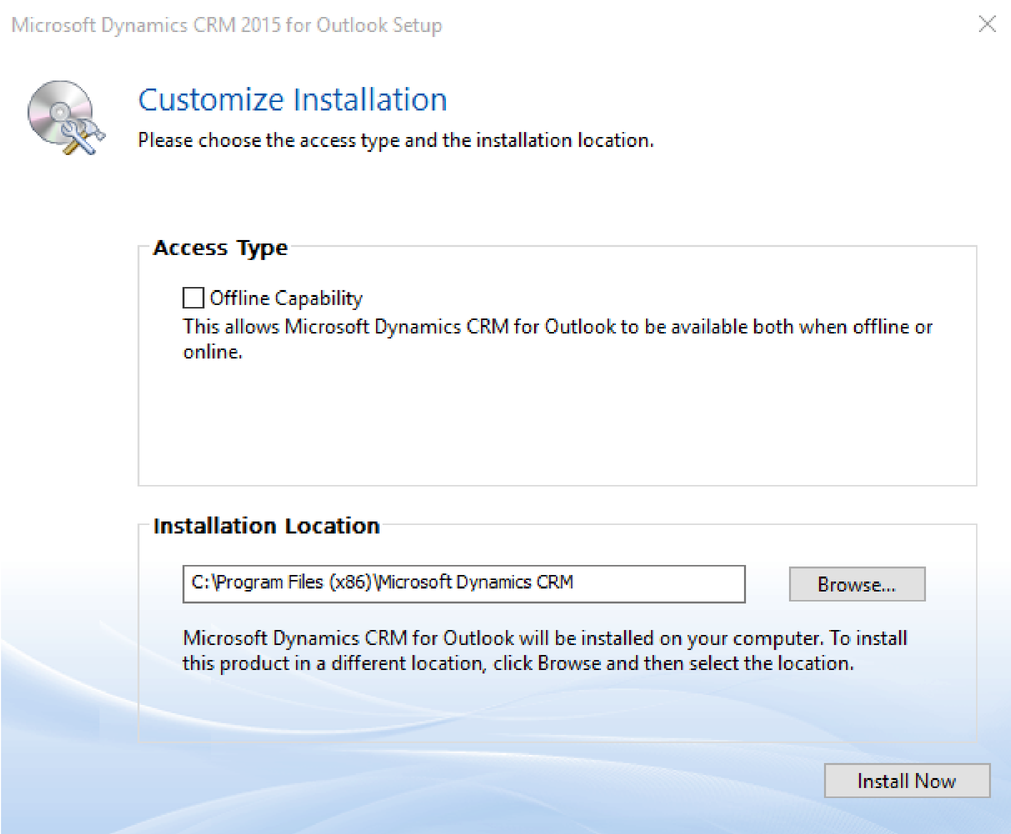

INSTANCES
UPDATES
edit instance
PRODUCTION INSTANCE
general settings
* Name:
ntbook
* URL:
ntmydemo
.crm.dynamics.com
Purpose:
Instance type:
Production instance
security settings
Security Group:
next
cancel

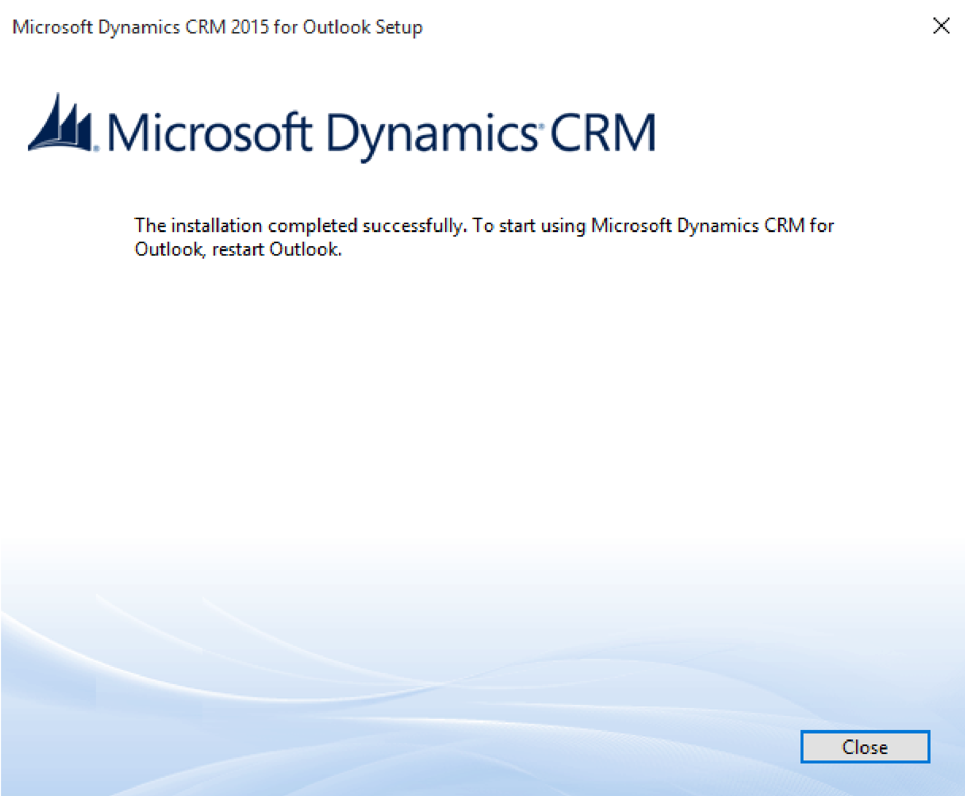

Manage your solutions
Select a preferred solution to manage on selected instance: ntbook
SOLUTION NAME
VERSION
AVAILABLE UNTIL
STATUS
Insights for Microsoft Dyn... 3.4 1/1/2050 Not installed
FieldOne Sky 5.1.5031.0 1/1/2050 Not installed
Office 365 Groups Preview 1.1.0.0 1/1/2050 Not installed
Insights for Microsof...
INSTALL
Insights, powered by InsideView, makes it easier than ever to find and engage with buyers. Win deals using accurate prospect data, real-time insights, and social connections delivered directly inside
Created by: InsideView
Learn more

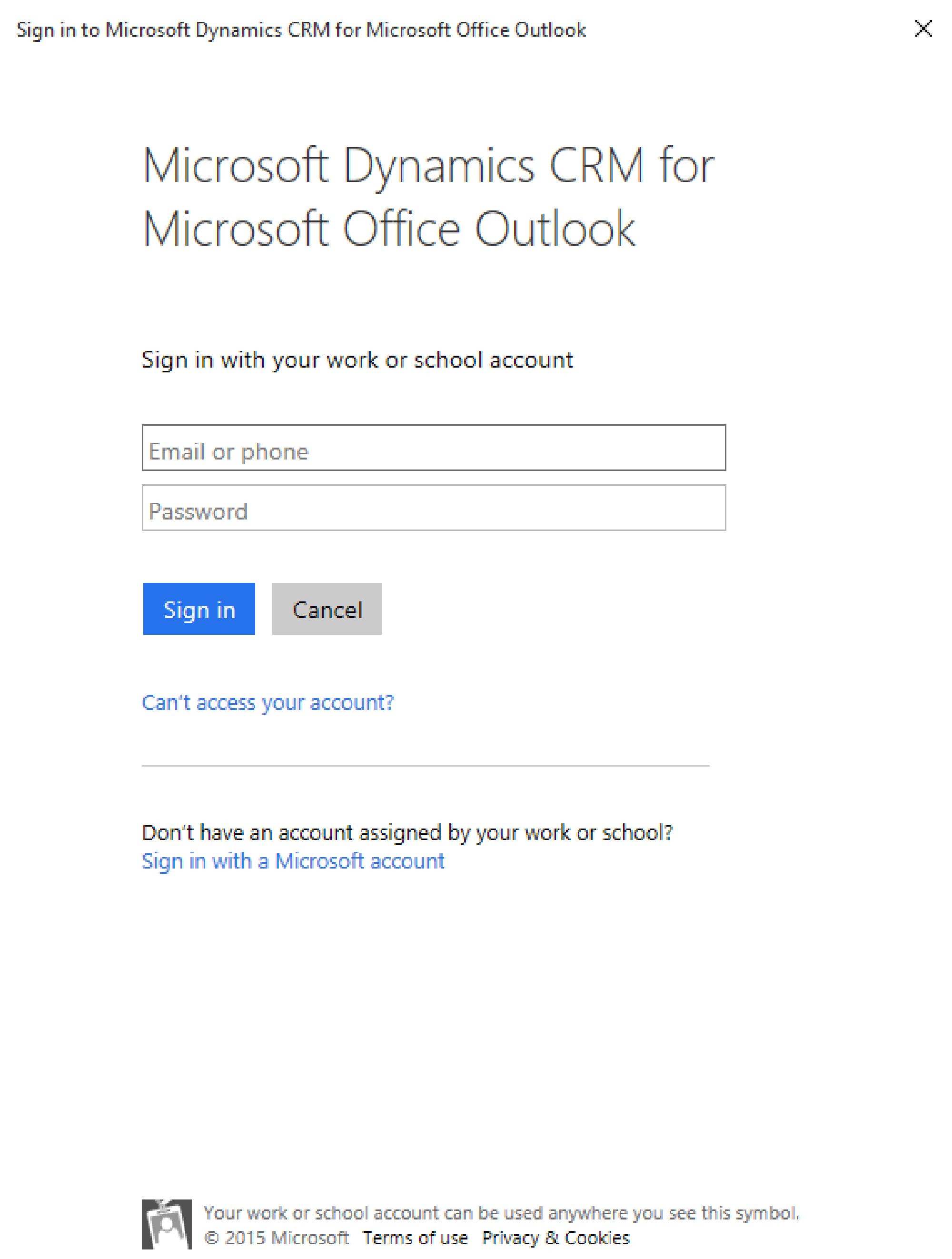

Microsoft Dynamics CRM
Settings
Security
Apps for CRM
View CRM information on the go with apps for your phone, tablet, Outlook, and more!
Get Apps for CRM
NEW
EMAIL A LINK
RUN REPORT
EXCEL TEMPLATES
EXPORT TO EXCEL

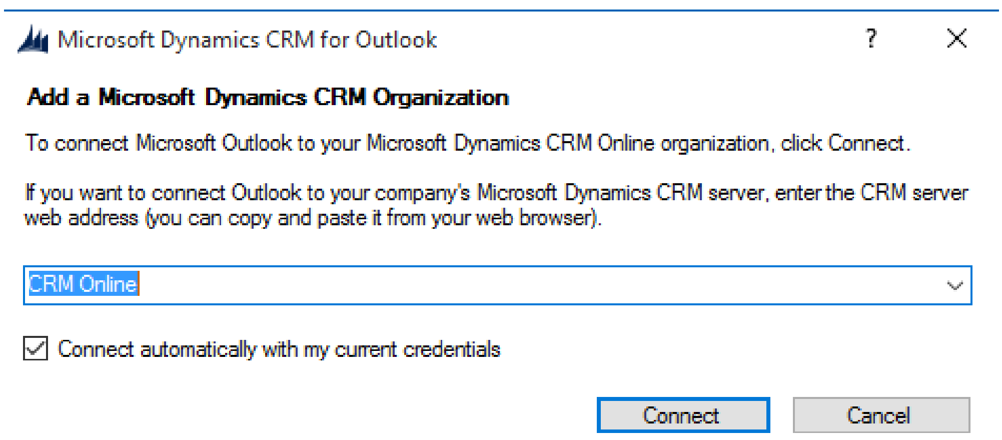

Microsoft Dynamics CRM 2015 for Outlook Setup
Microsoft Dynamics CRM
Please wait while Setup prepares the necessary files

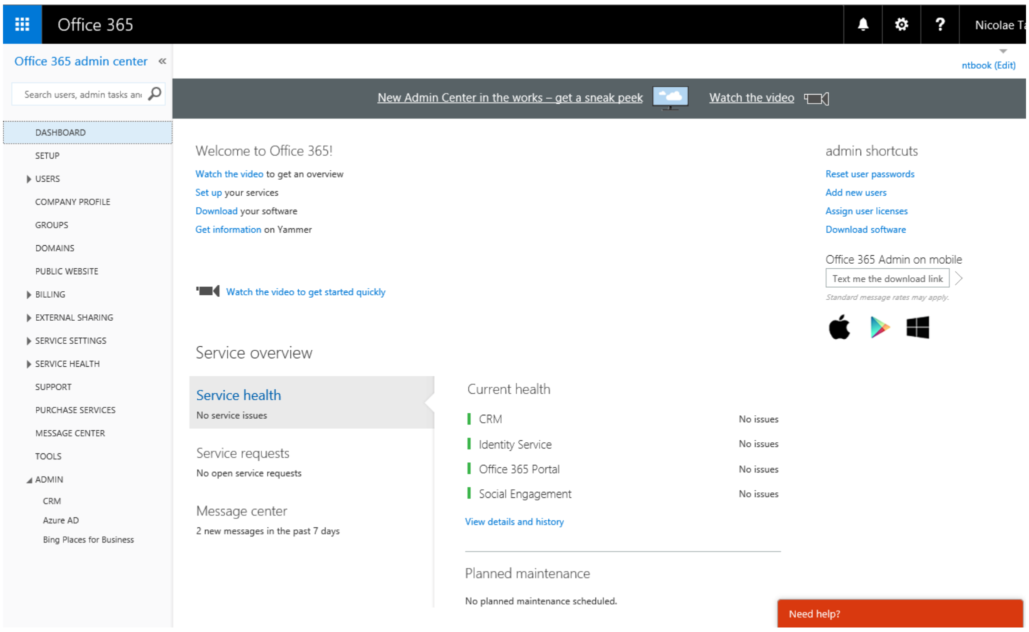

Microsoft Dynamics CRM 2015 for Outlook Setup
License Agreement
You must accept the license agreement to proceed with installation.
PLEASE NOTE: Microsoft Corporation (or based on where you live, one of its affiliates) licenses this supplement to you. You may use it with each validly licensed copy of Microsoft Dynamics CRM 2015 software (for which this supplement is applicable) (the "software") or each validly licensed subscription of Microsoft Dynamics CRM Online services (the "online service"). You may not use the supplement if you do not have a license for the software or the online service. The license terms for the software or the services apply to your use of this supplement. Microsoft provides support services for the supplement as described at <http://support.microsoft.com/common/international.aspx>.
I accept the license agreement
Next

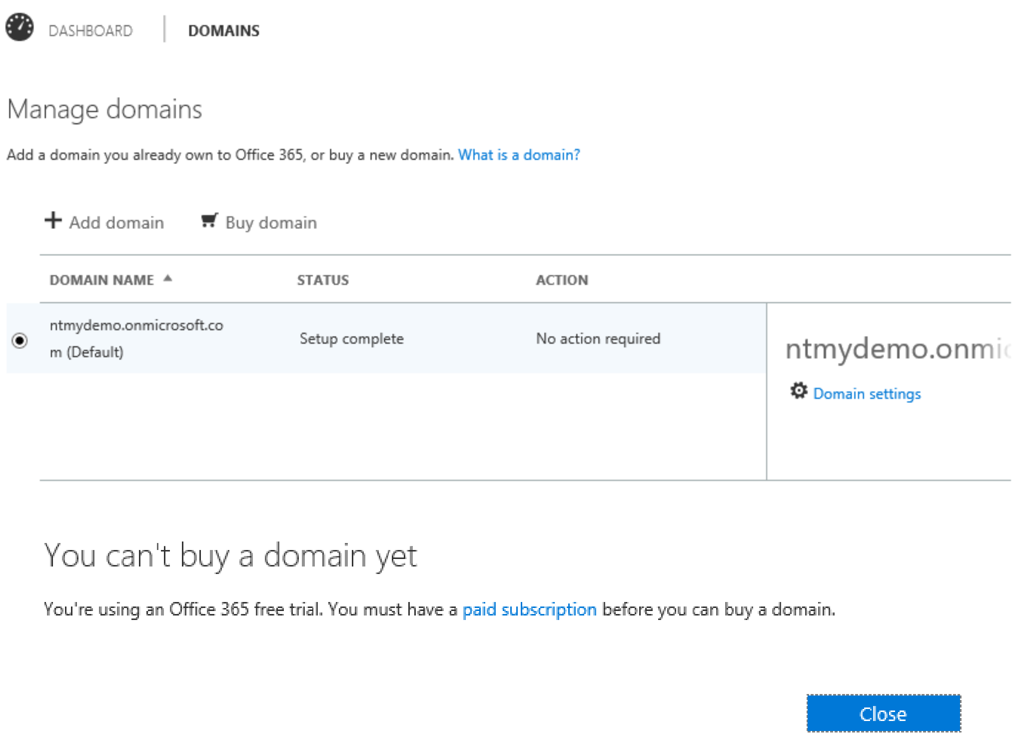

Microsoft Dynamics CRM 2015 for Outlook Setup
Customize Installation
Please choose the access type and the installation location.
Access Type
Offline Capability
This allows Microsoft Dynamics CRM for Outlook to be available both when offline or online.
Installation Location
C:\Program Files (x86)\Microsoft Dynamics CRM
Browse...
Microsoft Dynamics CRM for Outlook will be installed on your computer. To install this product in a different location, click Browse and then select the location.
Install Now

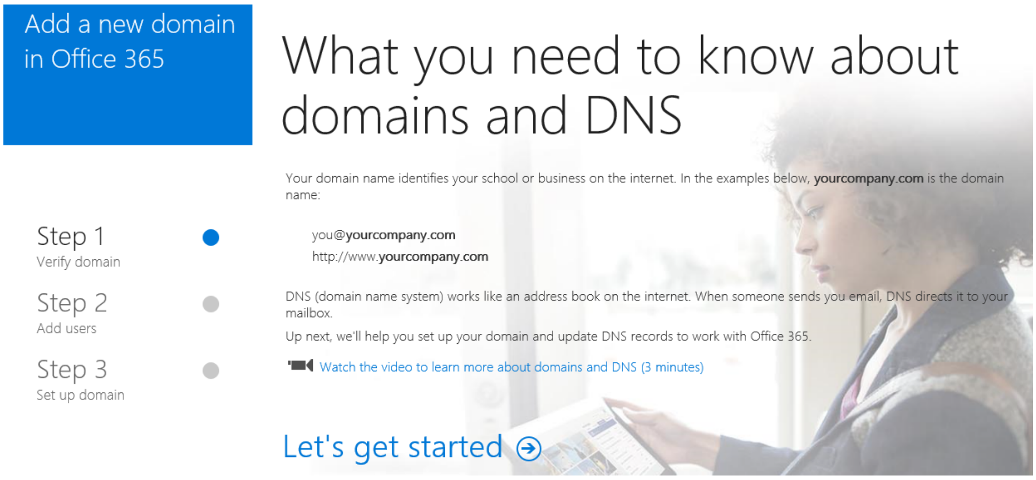

Microsoft Dynamics CRM 2015 for Outlook Setup
Microsoft Dynamics CRM
The installation completed successfully. To start using Microsoft Dynamics CRM for Outlook, restart Outlook.
Close

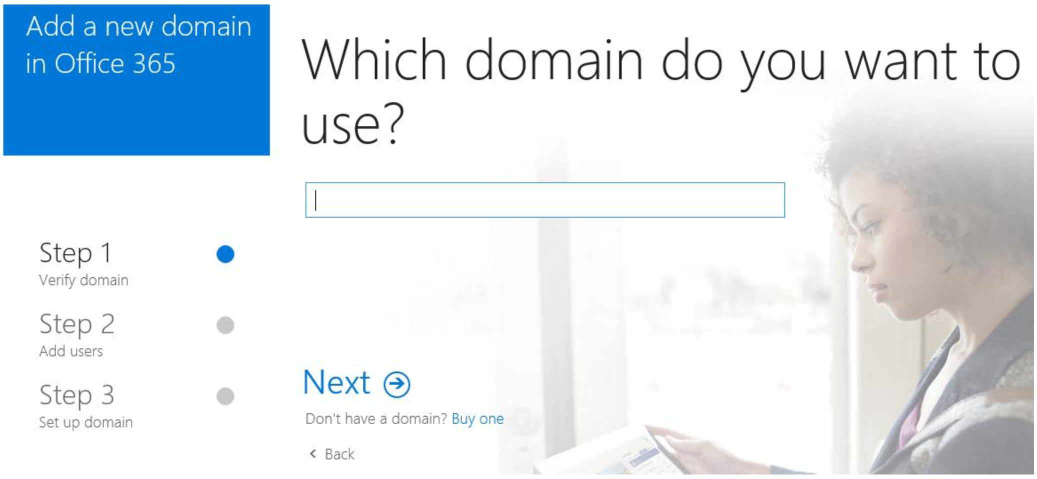

Sign in to Microsoft Dynamics CRM for Microsoft Office Outlook
Microsoft Dynamics CRM for Microsoft Office Outlook
Sign in with your work or school account
Email or phone
Password
Sign in
Cancel
Can't access your account?
Don't have an account assigned by your work or school?
Sign in with a Microsoft account
Your work or school account can be used anywhere you see this symbol.
© 2015 Microsoft Terms of use Privacy & Cookies

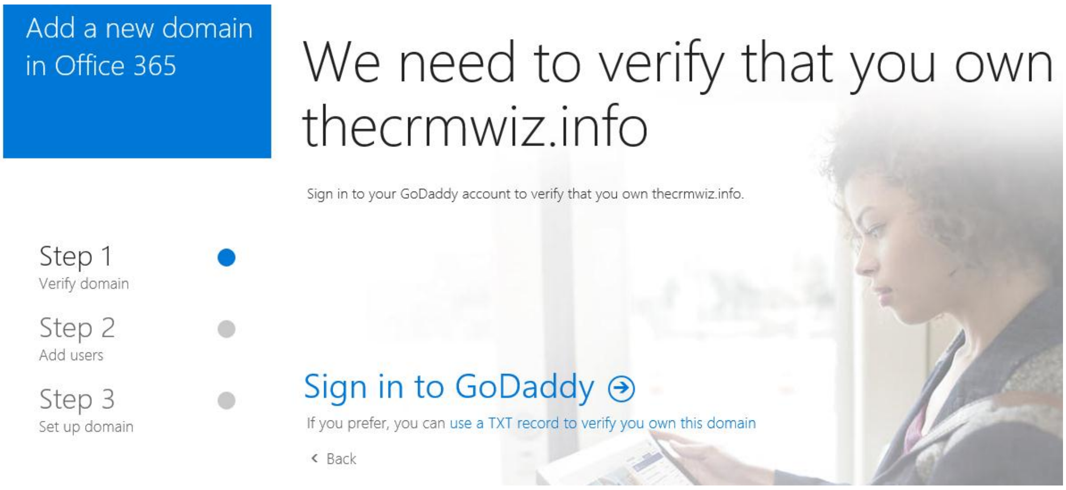

Microsoft Dynamics CRM for Outlook
Add a Microsoft Dynamics CRM Organization
To connect Microsoft Outlook to your Microsoft Dynamics CRM Online organization, click Connect.
If you want to connect Outlook to your company's Microsoft Dynamics CRM server, enter the CRM server web address (you can copy and paste it from your web browser).
CRM Online
Connect automatically with my current credentials
Connect
Cancel

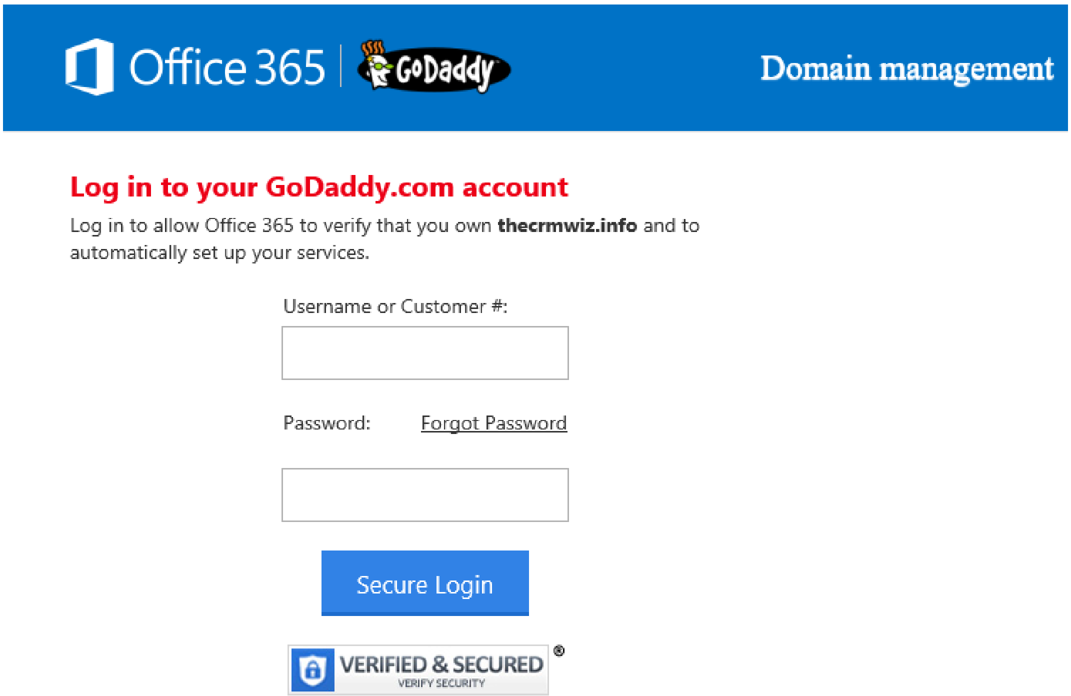

Office 365
Nicolae T
Office 365 admin center
ntbook (Edit)
New Admin Center in the works – get a sneak peek
Watch the video
DASHBOARD
SETUP
USERS
COMPANY PROFILE
GROUPS
DOMAINS
PUBLIC WEBSITE
BILLING
EXTERNAL SHARING
SERVICE SETTINGS
SERVICE HEALTH
SUPPORT
PURCHASE SERVICES
MESSAGE CENTER
TOOLS
ADMIN
CRM
Azure AD
Bing Places for Business
Welcome to Office 365!
Watch the video to get an overview
Set up your services
Download your software
Get information on Yammer
Watch the video to get started quickly
admin shortcuts
Reset user passwords
Add new users
Assign user licenses
Download software
Office 365 Admin on mobile
Text me the download link
Standard message rates may apply.
Service overview
Service health
No service issues
Service requests
No open service requests
Message center
2 new messages in the past 7 days
Current health
CRM No issues
Identity Service No issues
Office 365 Portal No issues
Social Engagement No issues
View details and history
Planned maintenance
No planned maintenance scheduled.
Need help?

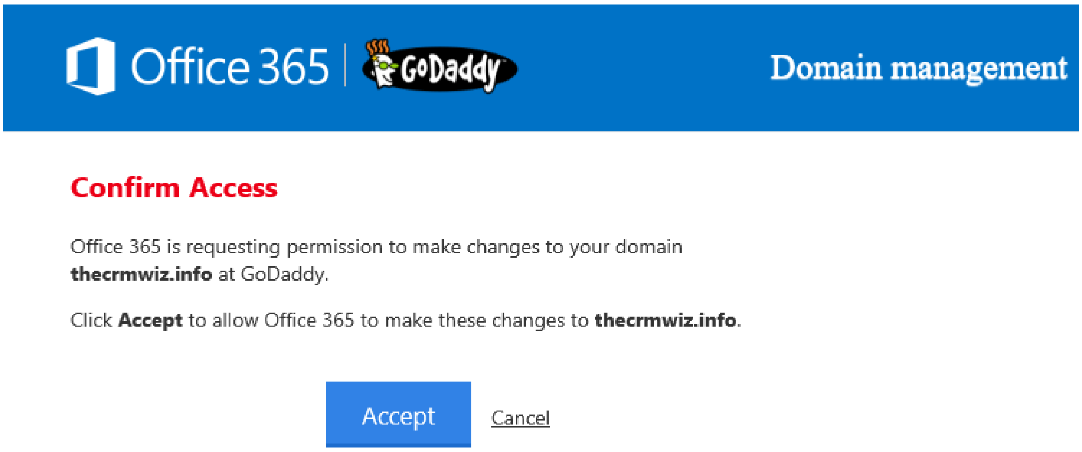

DASHBOARD
DOMAINS
Manage domains
Add a domain you already own to Office 365, or buy a new domain. What is a domain?
Add domain
Buy domain
DOMAIN NAME
STATUS
ACTION
ntmydemo.onmicrosoft.com (Default)
Setup complete
No action required
ntmydemo.onmi
Domain settings
You can't buy a domain yet
You're using an Office 365 free trial. You must have a paid subscription before you can buy a domain.
Close

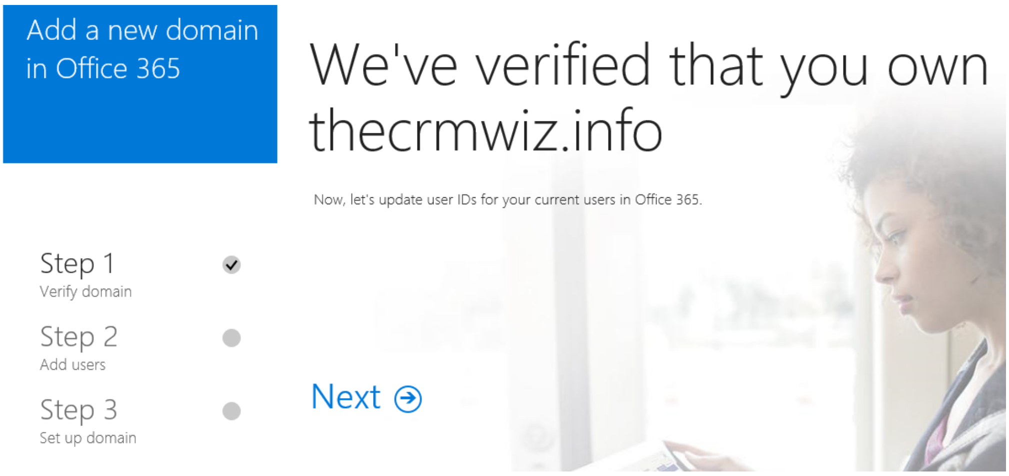

Add a new domain in Office 365
What you need to know about domains and DNS
Your domain name identifies your school or business on the internet. In the examples below, yourcompany.com is the domain name:
you@yourcompany.com
http://www.yourcompany.com
DNS (domain name system) works like an address book on the internet. When someone sends you email, DNS directs it to your mailbox.
Up next, we'll help you set up your domain and update DNS records to work with Office 365.
Watch the video to learn more about domains and DNS (3 minutes)
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Let's get started

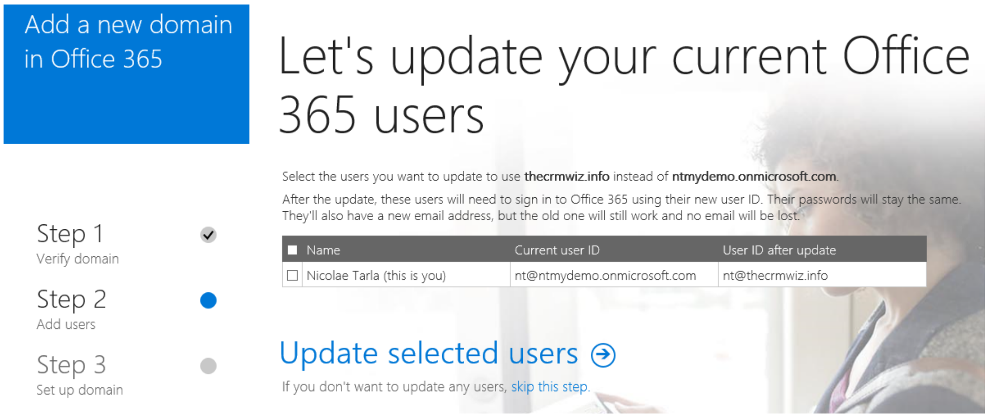

Add a new domain in Office 365
Which domain do you want to use?
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Next
Don't have a domain? Buy one
Back

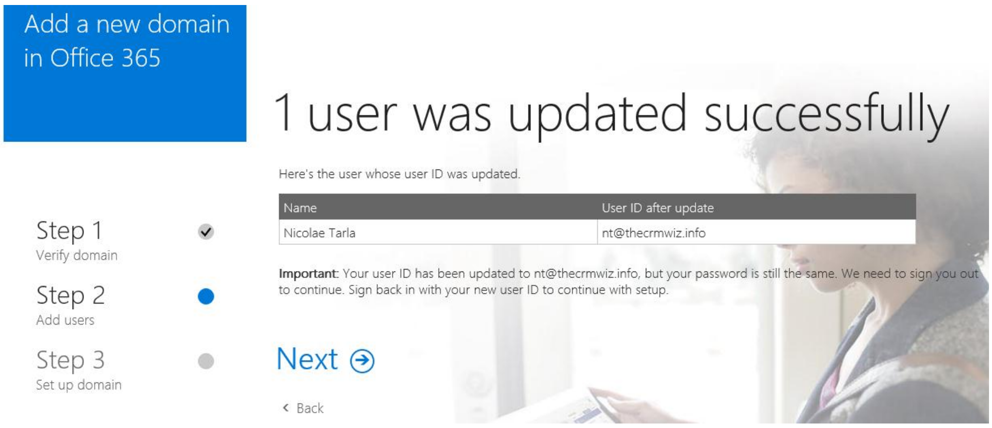

Add a new domain in Office 365
We need to verify that you own thecrmwiz.info
Sign in to your GoDaddy account to verify that you own thecrmwiz.info.
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Sign in to GoDaddy
If you prefer, you can use a TXT record to verify you own this domain
Back

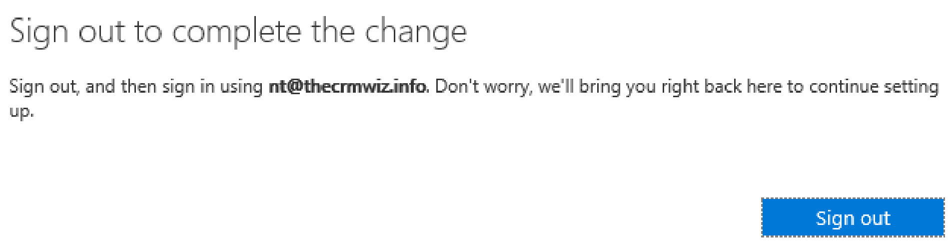

Office 365
GoDaddy
Domain management
Log in to your GoDaddy.com account
Log in to allow Office 365 to verify that you own thecrmwiz.info and to automatically set up your services.
Username or Customer #:
Password:
Forgot Password
Secure Login
VERIFIED & SECURED
VERIFY SECURITY

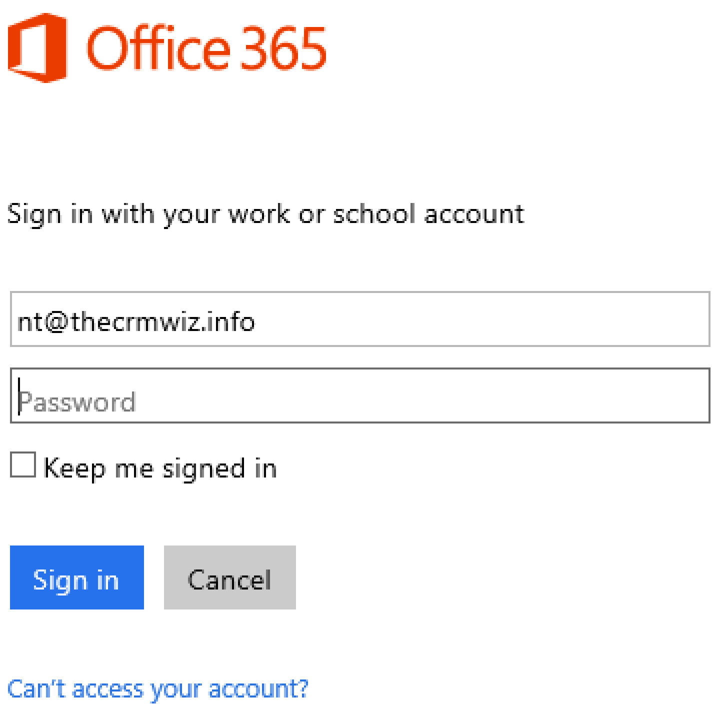

Office 365
GoDaddy
Domain management
Confirm Access
Office 365 is requesting permission to make changes to your domain thecrmwiz.info at GoDaddy.
Click Accept to allow Office 365 to make these changes to thecrmwiz.info.
Accept
Cancel


Add a new domain in Office 365
We've verified that you own thecrmwiz.info
Now, let's update user IDs for your current users in Office 365.
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Next

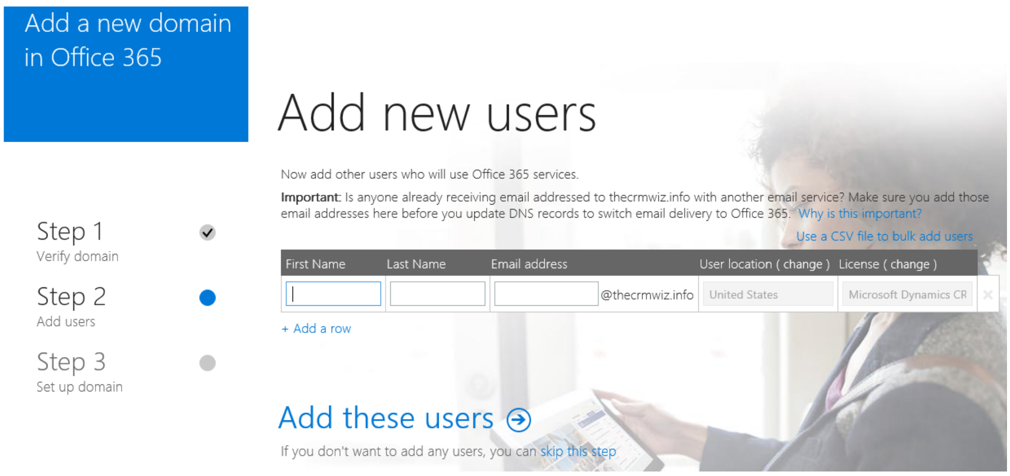

Add a new domain in Office 365
Let's update your current Office 365 users
Select the users you want to update to use thecrmwiz.info instead of ntmydemo.onmicrosoft.com.
After the update, these users will need to sign in to Office 365 using their new user ID. Their passwords will stay the same. They'll also have a new email address, but the old one will still work and no email will be lost.
Name
Current user ID
User ID after update
Nicolae Tarla (this is you)
nt@ntmydemo.onmicrosoft.com
nt@thecrmwiz.info
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Update selected users
If you don't want to update any users, skip this step.


Add a new domain in Office 365
1 user was updated successfully
Here's the user whose user ID was updated.
Name
User ID after update
Nicolae Tarla
nt@thecrmwiz.info
Important: Your user ID has been updated to nt@thecrmwiz.info, but your password is still the same. We need to sign you out to continue. Sign back in with your new user ID to continue with setup.
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Next
Back

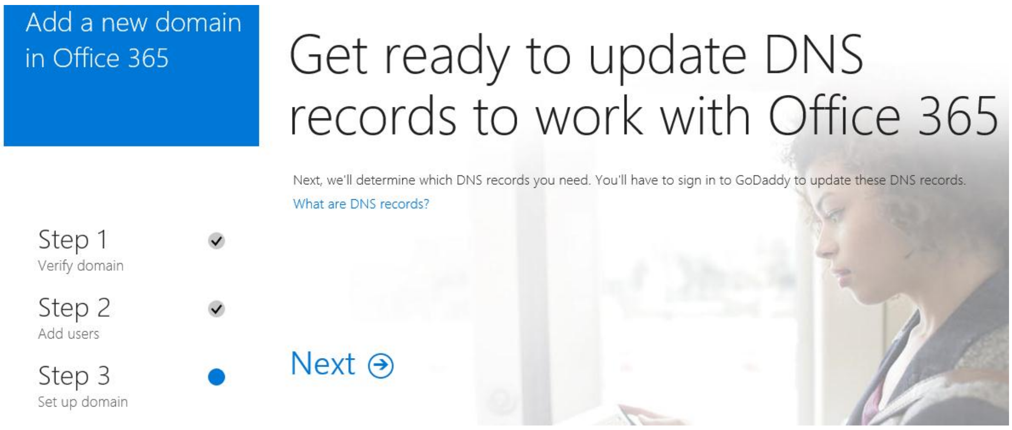

Sign out to complete the change
Sign out, and then sign in using nt@thecrmwiz.info. Don't worry, we'll bring you right back here to continue setting up.
Sign out



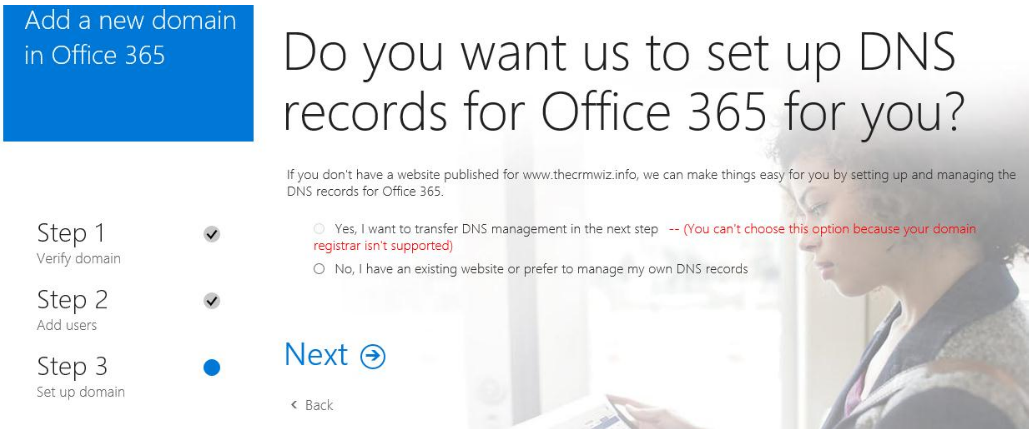
Office 365
Sign in with your work or school account
nt@thecrmwiz.info
Password
Keep me signed in
Sign in
Cancel
Can't access your account?

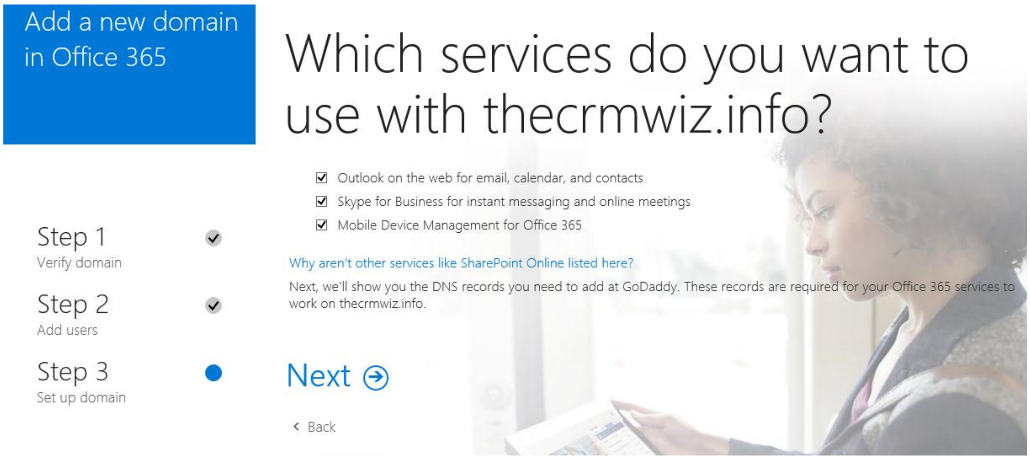


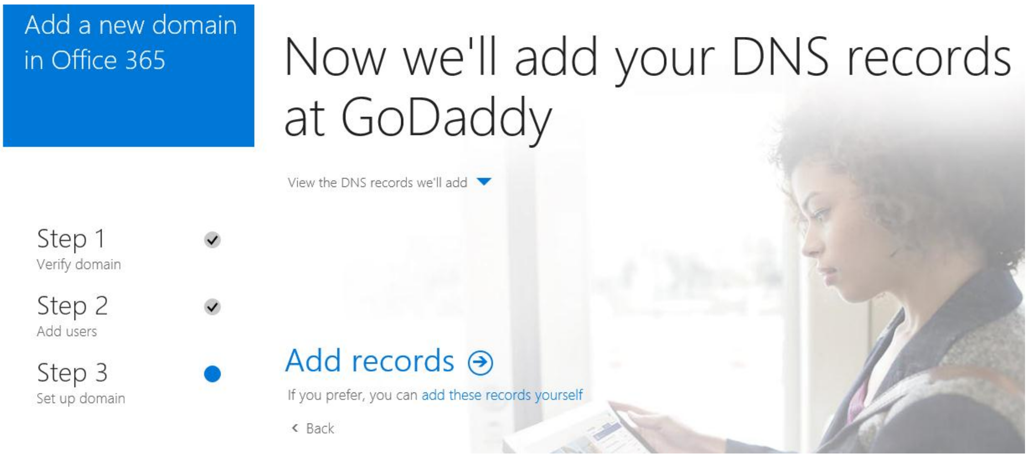
Add a new domain in Office 365
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Add new users
Now add other users who will use Office 365 services.
Important: Is anyone already receiving email addressed to thecrmwiz.info with another email service? Make sure you add those email addresses here before you update DNS records to switch email delivery to Office 365. Why is this important?
Use a CSV file to bulk add users
First Name
Last Name
Email address
User location (change)
License (change)
@thecrmwiz.info
United States
Microsoft Dynamics CR
+ Add a row
Add these users
If you don't want to add any users, you can skip this step

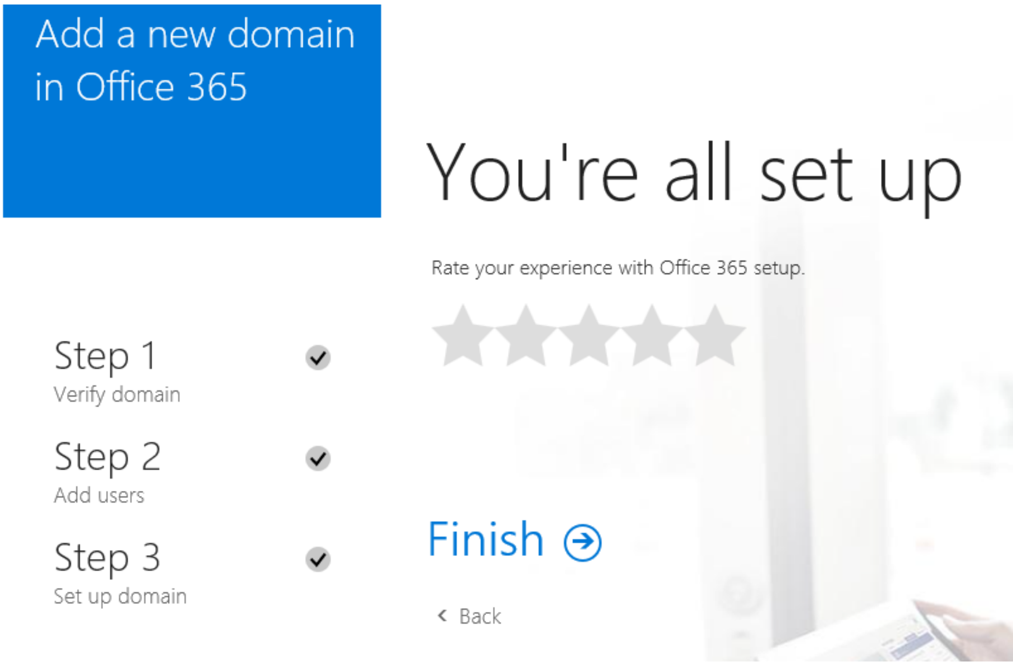


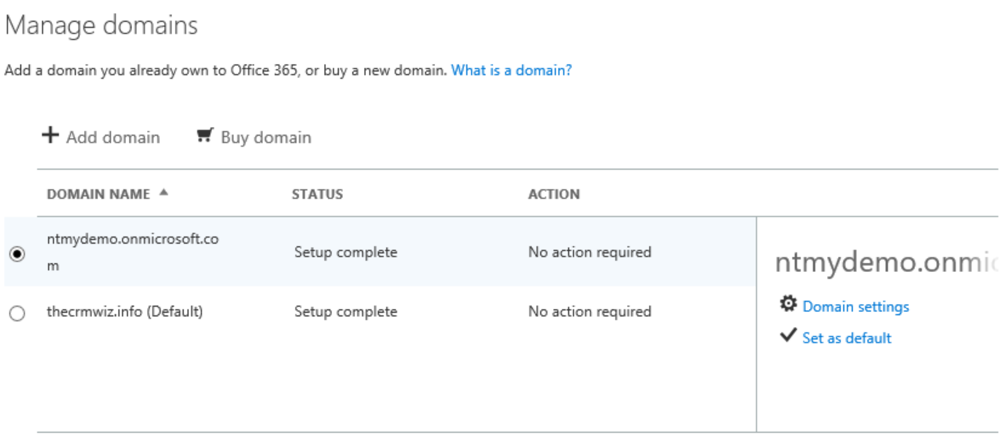
Add a new domain in Office 365
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Get ready to update DNS records to work with Office 365
Next, we'll determine which DNS records you need. You'll have to sign in to GoDaddy to update these DNS records.
What are DNS records?
Next

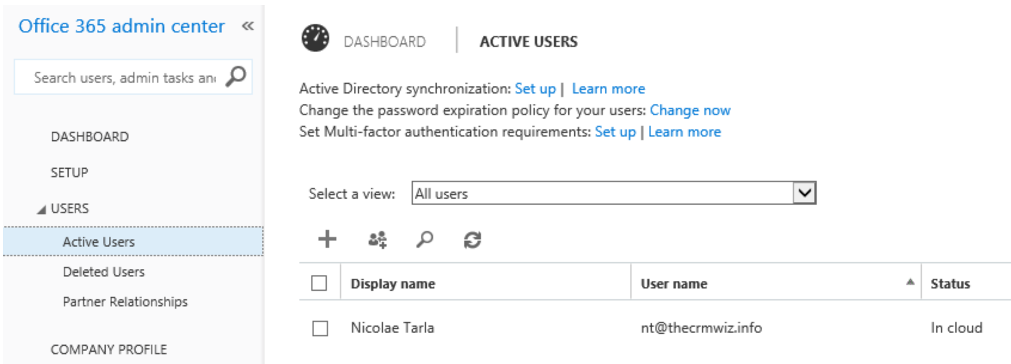

Add a new domain in Office 365
Do you want us to set up DNS records for Office 365 for you?
If you don't have a website published for www.thecrmwiz.info, we can make things easy for you by setting up and managing the DNS records for Office 365.
Yes, I want to transfer DNS management in the next step -- (You can't choose this option because your domain registrar isn't supported)
No, I have an existing website or prefer to manage my own DNS records
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Next
Back

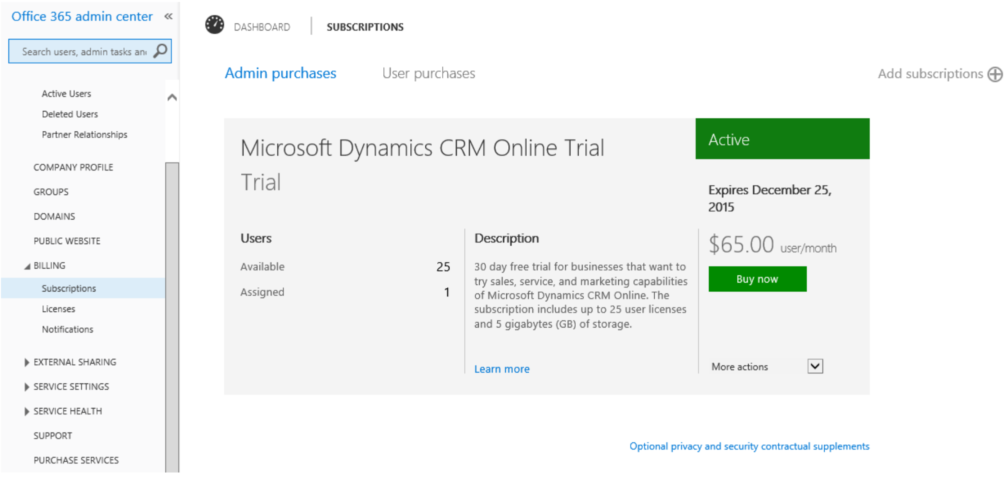

Add a new domain in Office 365
Which services do you want to use with thecrmwiz.info?
Outlook on the web for email, calendar, and contacts
Skype for Business for instant messaging and online meetings
Mobile Device Management for Office 365
Why aren't other services like SharePoint Online listed here?
Next, we'll show you the DNS records you need to add at GoDaddy. These records are required for your Office 365 services to work on thecrmwiz.info.
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Next
Back

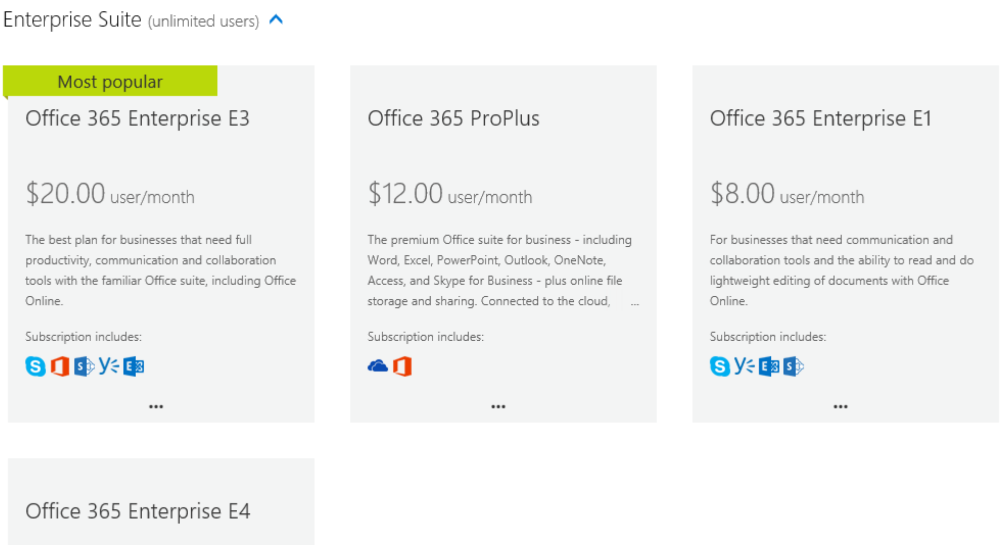

Add a new domain in Office 365
Now we'll add your DNS records at GoDaddy
View the DNS records we'll add
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Add records
If you prefer, you can add these records yourself
Back

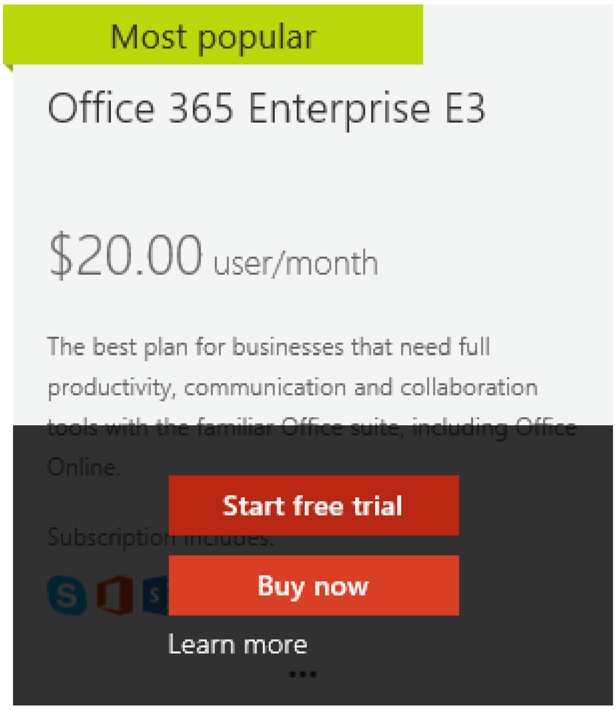

Add a new domain in Office 365
You're all set up
Rate your experience with Office 365 setup.
Step 1
Verify domain
Step 2
Add users
Step 3
Set up domain
Finish
Back


Manage domains
Add a domain you already own to Office 365, or buy a new domain. What is a domain?
Add domain
Buy domain
DOMAIN NAME
STATUS
ACTION
ntmydemo.onmicrosoft.com
Setup complete
No action required
thecrmwiz.info (Default)
Setup complete
No action required
ntmydemo.onmi
Domain settings
Set as default


Office 365 admin center
Search users, admin tasks an
DASHBOARD
SETUP
USERS
Active Users
Deleted Users
Partner Relationships
COMPANY PROFILE
DASHBOARD
ACTIVE USERS
Active Directory synchronization: Set up | Learn more
Change the password expiration policy for your users: Change now
Set Multi-factor authentication requirements: Set up | Learn more
Select a view:
All users
Display name
User name
Status
Nicolae Tarla
nt@thecrmwiz.info
In cloud


Office 365 admin center
Search users, admin tasks an
Active Users
Deleted Users
Partner Relationships
COMPANY PROFILE
GROUPS
DOMAINS
PUBLIC WEBSITE
BILLING
Subscriptions
Licenses
Notifications
EXTERNAL SHARING
SERVICE SETTINGS
SERVICE HEALTH
SUPPORT
PURCHASE SERVICES
DASHBOARD
SUBSCRIPTIONS
Admin purchases
User purchases
Add subscriptions
Microsoft Dynamics CRM Online Trial
Trial
Active
Expires December 25, 2015
Users
Available 25
Assigned 1
Description
30 day free trial for businesses that want to try sales, service, and marketing capabilities of Microsoft Dynamics CRM Online. The subscription includes up to 25 user licenses and 5 gigabytes (GB) of storage.
Learn more
$65.00 user/month
Buy now
More actions
Optional privacy and security contractual supplements


Enterprise Suite (unlimited users)
Most popular
Office 365 Enterprise E3
$20.00 user/month
The best plan for businesses that need full productivity, communication and collaboration tools with the familiar Office suite, including Office Online.
Subscription includes:
Office 365 ProPlus
$12.00 user/month
The premium Office suite for business - including Word, Excel, PowerPoint, Outlook, OneNote, Access, and Skype for Business - plus online file storage and sharing. Connected to the cloud, ...
Subscription includes:
Office 365 Enterprise E1
$8.00 user/month
For businesses that need communication and collaboration tools and the ability to read and do lightweight editing of documents with Office Online.
Subscription includes:
Office 365 Enterprise E4


Most popular
Office 365 Enterprise E3
$20.00 user/month
The best plan for businesses that need full productivity, communication and collaboration tools with the familiar Office suite, including Office Online.
Start free trial
Buy now
Learn more

Check out

confirm your order

Office 365 Enterprise E3 Trial | 30 day subscription
25 users

try now   Cancel

Office 365 | Admin

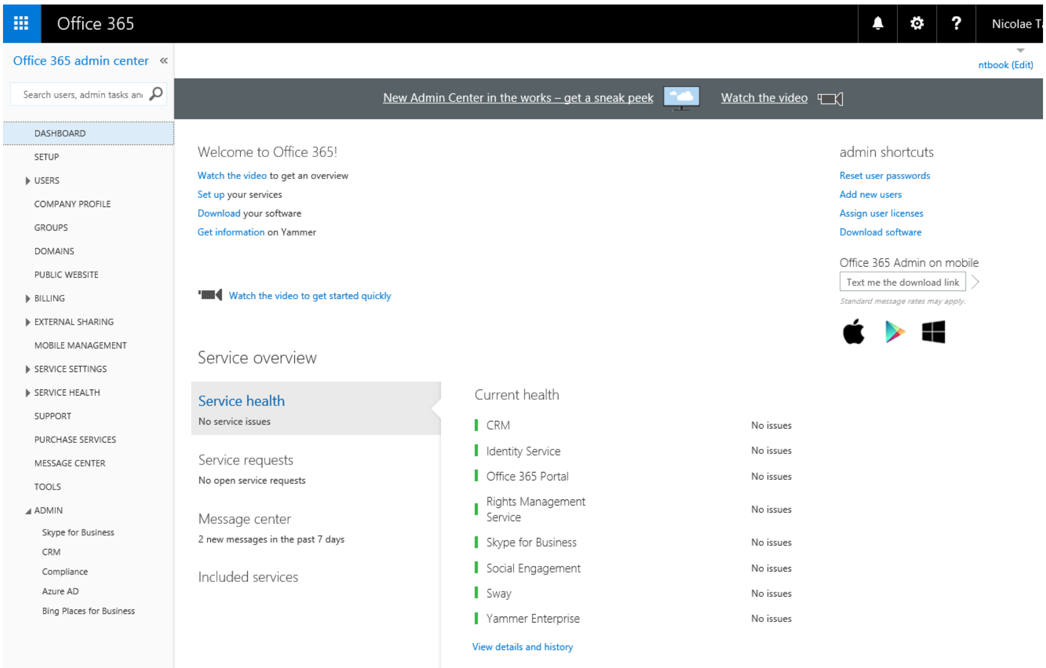
order receipt

Your confirmation number is: 6477256d-b809-4fd7-89bd-a09bd01eba6b
Important: To use your new licenses, make sure to assign them by editing users on the Users page.

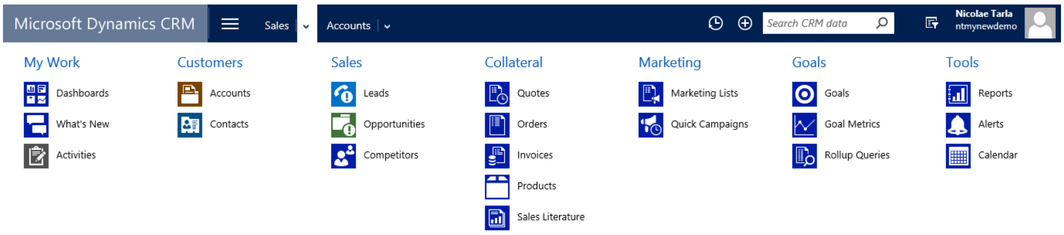
continue

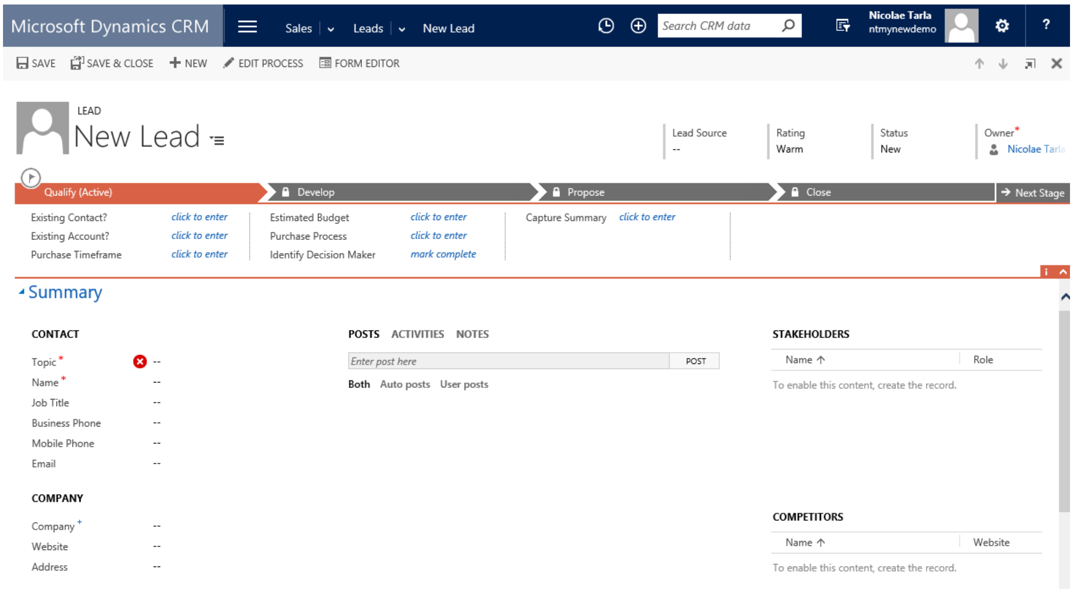
Order details

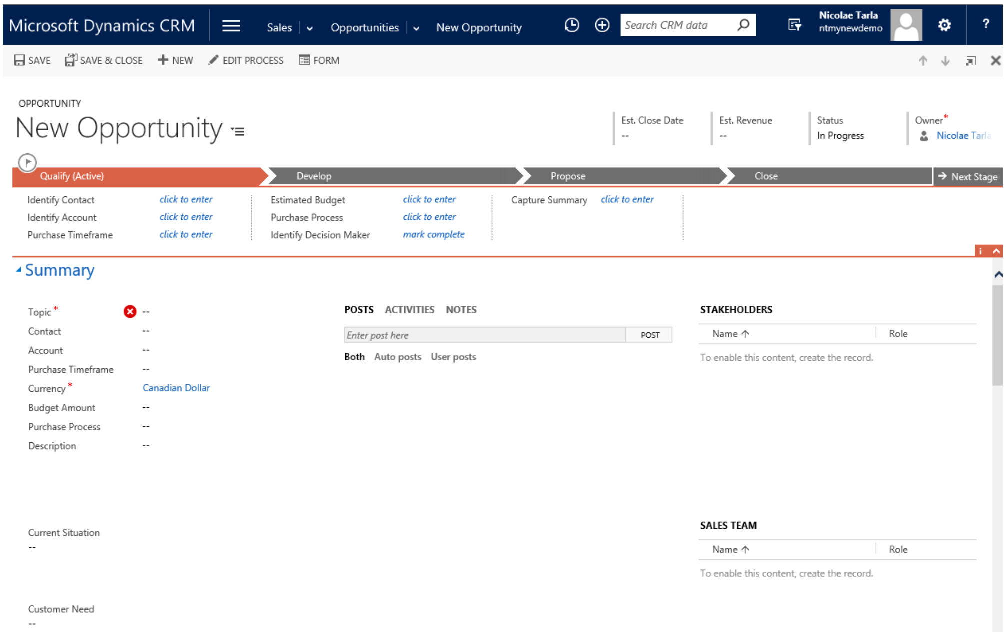
Office 365 Enterprise E3 Trial | 30 day subscription
25 users

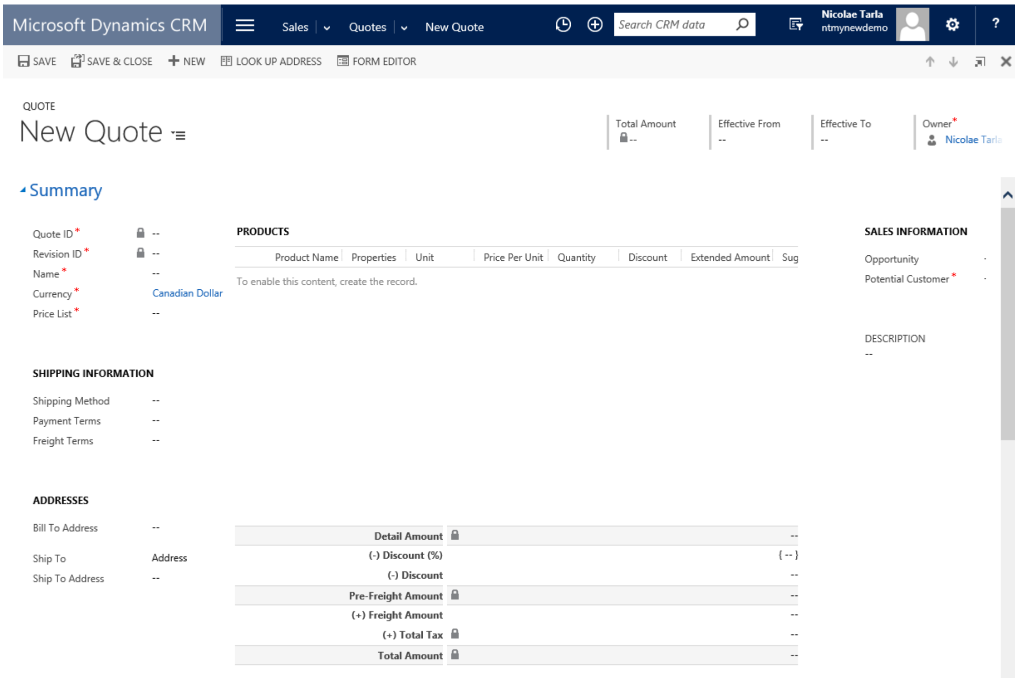

Office 365
Nicolae T
Office 365 admin center
ntbook (Edit)
Search users, admin tasks an
New Admin Center in the works – get a sneak peek
Watch the video
DASHBOARD
SETUP
USERS
COMPANY PROFILE
GROUPS
DOMAINS
PUBLIC WEBSITE
BILLING
EXTERNAL SHARING
MOBILE MANAGEMENT
SERVICE SETTINGS
SERVICE HEALTH
SUPPORT
PURCHASE SERVICES
MESSAGE CENTER
TOOLS
ADMIN
Skype for Business
CRM
Compliance
Azure AD
Bing Places for Business
Welcome to Office 365!
Watch the video to get an overview
Set up your services
Download your software
Get information on Yammer
Watch the video to get started quickly
admin shortcuts
Reset user passwords
Add new users
Assign user licenses
Download software
Office 365 Admin on mobile
Text me the download link
Standard message rates may apply.
Service overview
Service health
No service issues
Service requests
No open service requests
Message center
2 new messages in the past 7 days
Included services
Current health
CRM No issues
Identity Service No issues
Office 365 Portal No issues
Rights Management Service No issues
Skype for Business No issues
Social Engagement No issues
Sway No issues
Yammer Enterprise No issues
View details and history

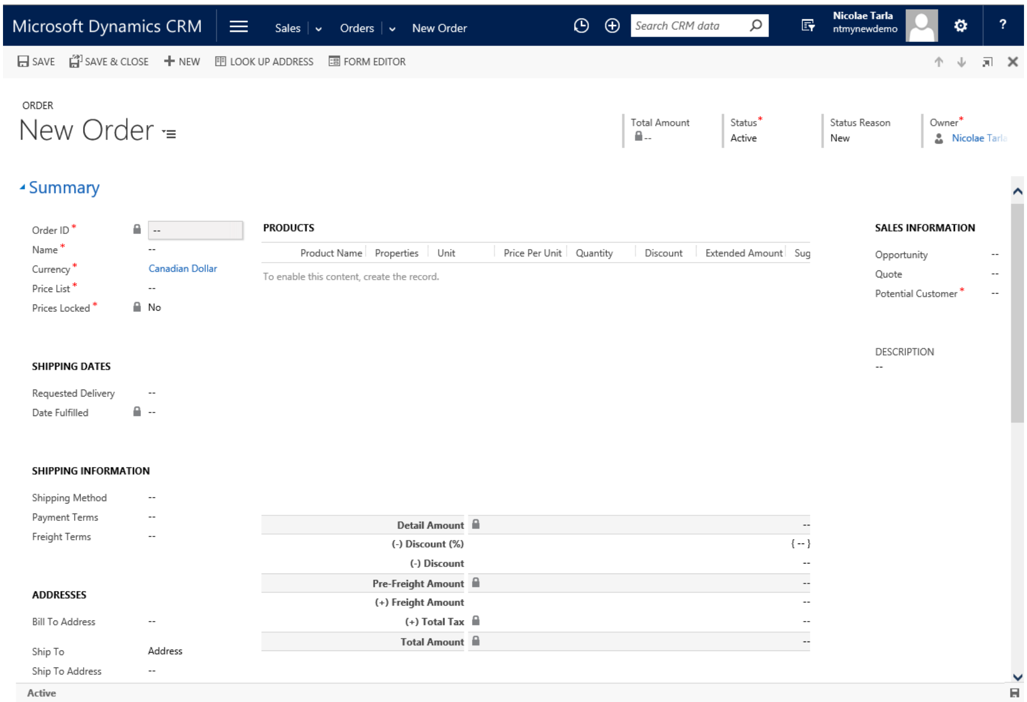
Chapter 2: The Dynamics CRM Application Structure

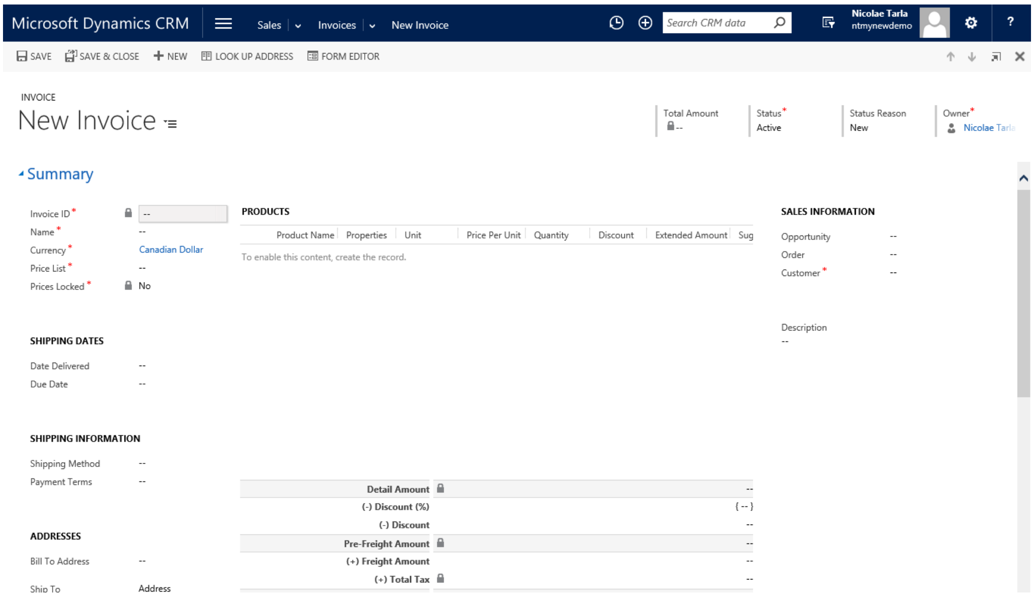
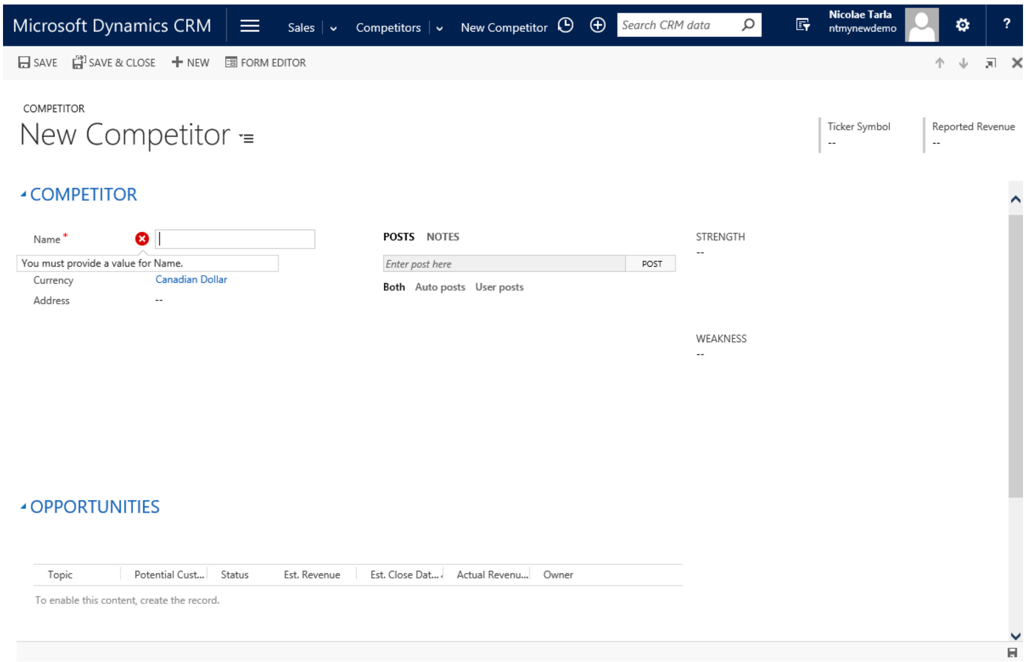


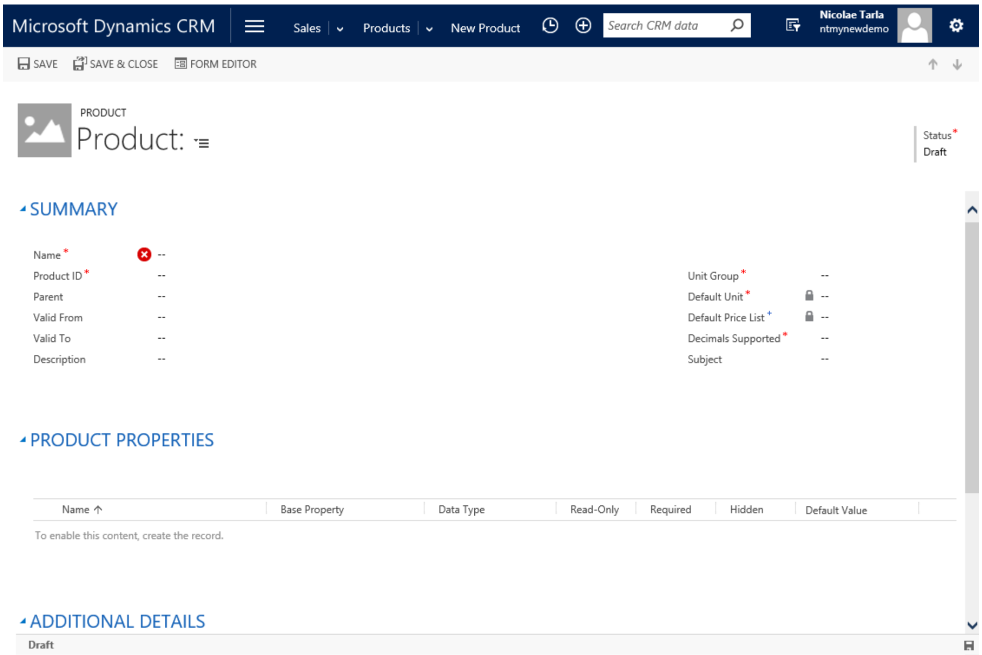


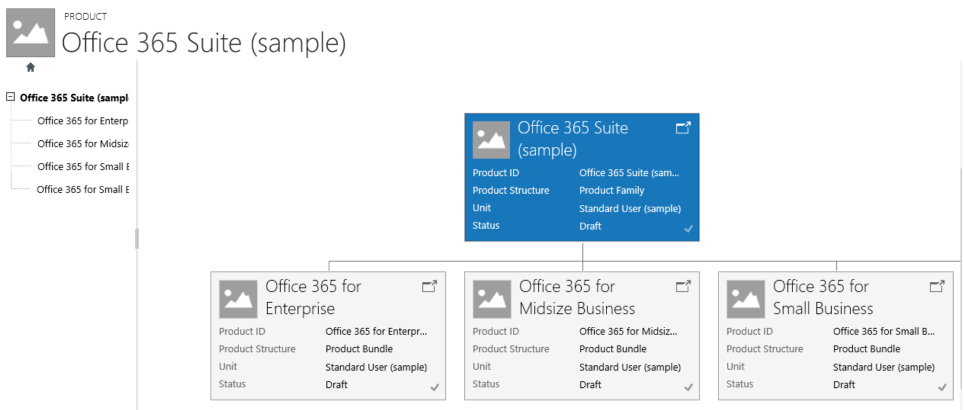


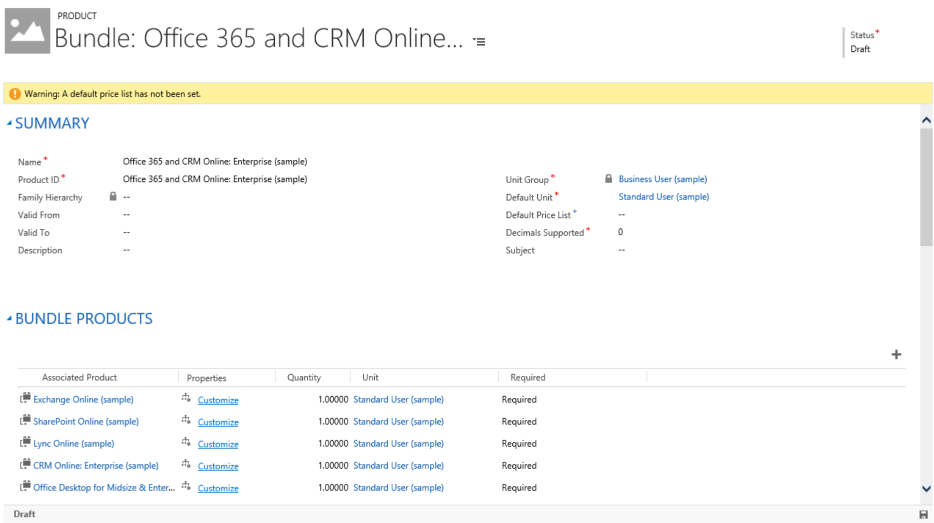

Microsoft Dynamics CRM
Sales
Quotes
New Quote
Search CRM data
Nicolae Tarla
ntmynewdemo
SAVE
SAVE & CLOSE
NEW
LOOK UP ADDRESS
FORM EDITOR
QUOTE
New Quote
Total Amount
Effective From
Effective To
Owner
Nicolae Tarla
Summary
Quote ID
Revision ID
Name
Currency
Canadian Dollar
Price List
PRODUCTS
Product Name
Properties
Unit
Price Per Unit
Quantity
Discount
Extended Amount
To enable this content, create the record.
SALES INFORMATION
Opportunity
Potential Customer
DESCRIPTION
SHIPPING INFORMATION
Shipping Method
Payment Terms
Freight Terms
ADDRESSES
Bill To Address
Ship To
Address
Ship To Address
Detail Amount
(-) Discount (%)
(-) Discount
Pre-Freight Amount
(+) Freight Amount
(+) Total Tax
Total Amount

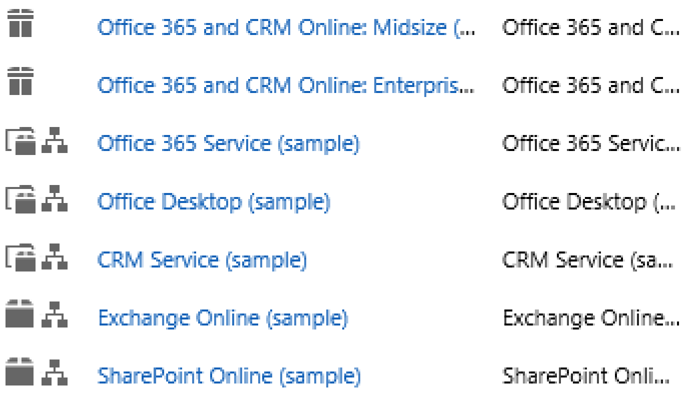

Microsoft Dynamics CRM
Sales
Orders
New Order
Search CRM data
Nicolae Tarla
ntmynewdemo
SAVE
SAVE & CLOSE
NEW
LOOK UP ADDRESS
FORM EDITOR
ORDER
New Order
Total Amount
Status
Active
Status Reason
New
Owner
Nicolae Tarla
Summary
Order ID
Name
Currency
Canadian Dollar
Price List
Prices Locked
No
PRODUCTS
Product Name
Properties
Unit
Price Per Unit
Quantity
Discount
Extended Amount
To enable this content, create the record.
SALES INFORMATION
Opportunity
Quote
Potential Customer
DESCRIPTION
SHIPPING DATES
Requested Delivery
Date Fulfilled
SHIPPING INFORMATION
Shipping Method
Payment Terms
Freight Terms
ADDRESSES
Bill To Address
Ship To
Address
Ship To Address
Detail Amount
(-) Discount (%)
(-) Discount
Pre-Freight Amount
(+) Freight Amount
(+) Total Tax
Total Amount
Active

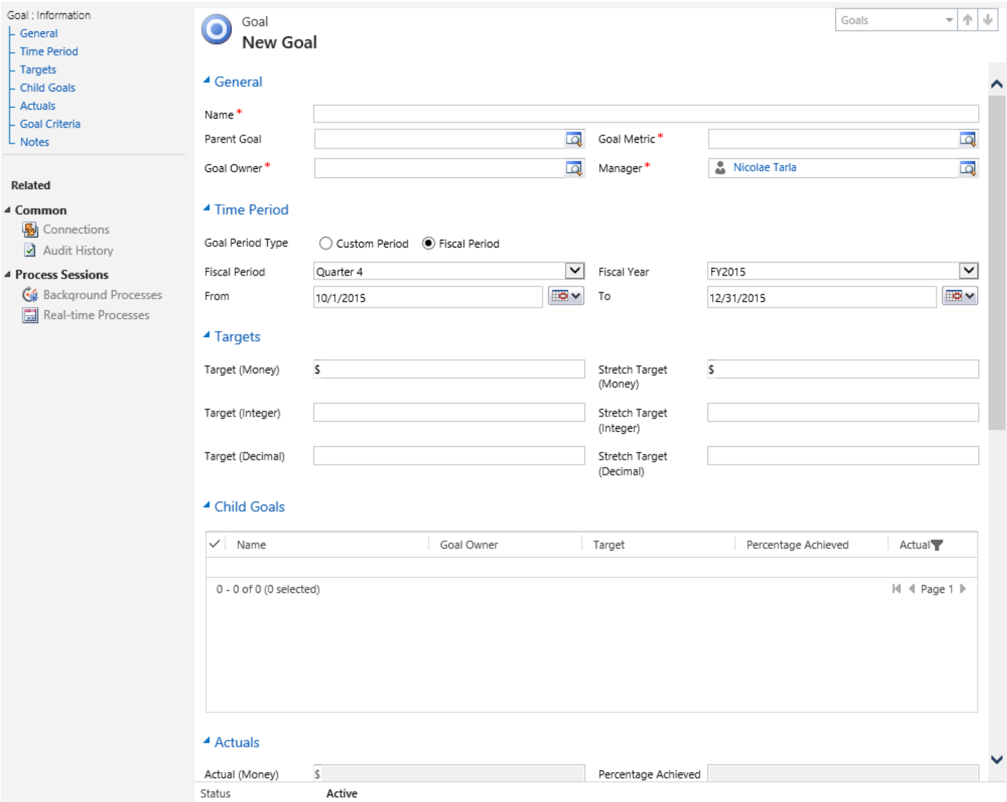

Microsoft Dynamics CRM
Sales
Invoices
New Invoice
Search CRM data
Nicolae Tarla
ntmynewdemo
SAVE
SAVE & CLOSE
NEW
LOOK UP ADDRESS
FORM EDITOR
INVOICE
New Invoice
Total Amount
Status
Active
Status Reason
New
Owner
Nicolae Tarla
Summary
Invoice ID
Name
Currency
Canadian Dollar
Price List
Prices Locked
No
PRODUCTS
Product Name
Properties
Unit
Price Per Unit
Quantity
Discount
Extended Amount
To enable this content, create the record.
SALES INFORMATION
Opportunity
Order
Customer
Description
SHIPPING DATES
Date Delivered
Due Date
SHIPPING INFORMATION
Shipping Method
Payment Terms
Detail Amount
(-) Discount (%)
(-) Discount
Pre-Freight Amount
(+) Freight Amount
(+) Total Tax
ADDRESSES
Bill To Address
Ship To
Address

Microsoft Dynamics CRM
Sales
Competitors
New Competitor
Search CRM data
Nicolae Tarla
ntmynewdemo
SAVE
SAVE & CLOSE
NEW
FORM EDITOR
COMPETITOR
New Competitor
Ticker Symbol
Reported Revenue
COMPETITOR
Name
You must provide a value for Name.
Currency
Canadian Dollar
Address
POSTS
NOTES
Enter post here
POST
Both
Auto posts
User posts
STRENGTH
WEAKNESS
OPPORTUNITIES
Topic
Potential Cust...
Status
Est. Revenue
Est. Close Dat...
Actual Revenu...
Owner
To enable this content, create the record.


Microsoft Dynamics CRM
Sales
Products
New Product
Search CRM data
Nicolae Tarla
ntmynewdemo
SAVE
SAVE & CLOSE
FORM EDITOR
PRODUCT
Product:
Status
Draft
SUMMARY
Name
Product ID
Parent
Valid From
Valid To
Description
Unit Group
Default Unit
Default Price List
Decimals Supported
Subject
PRODUCT PROPERTIES
Name
Base Property
Data Type
Read-Only
Required
Hidden
Default Value
To enable this content, create the record.
ADDITIONAL DETAILS
Draft

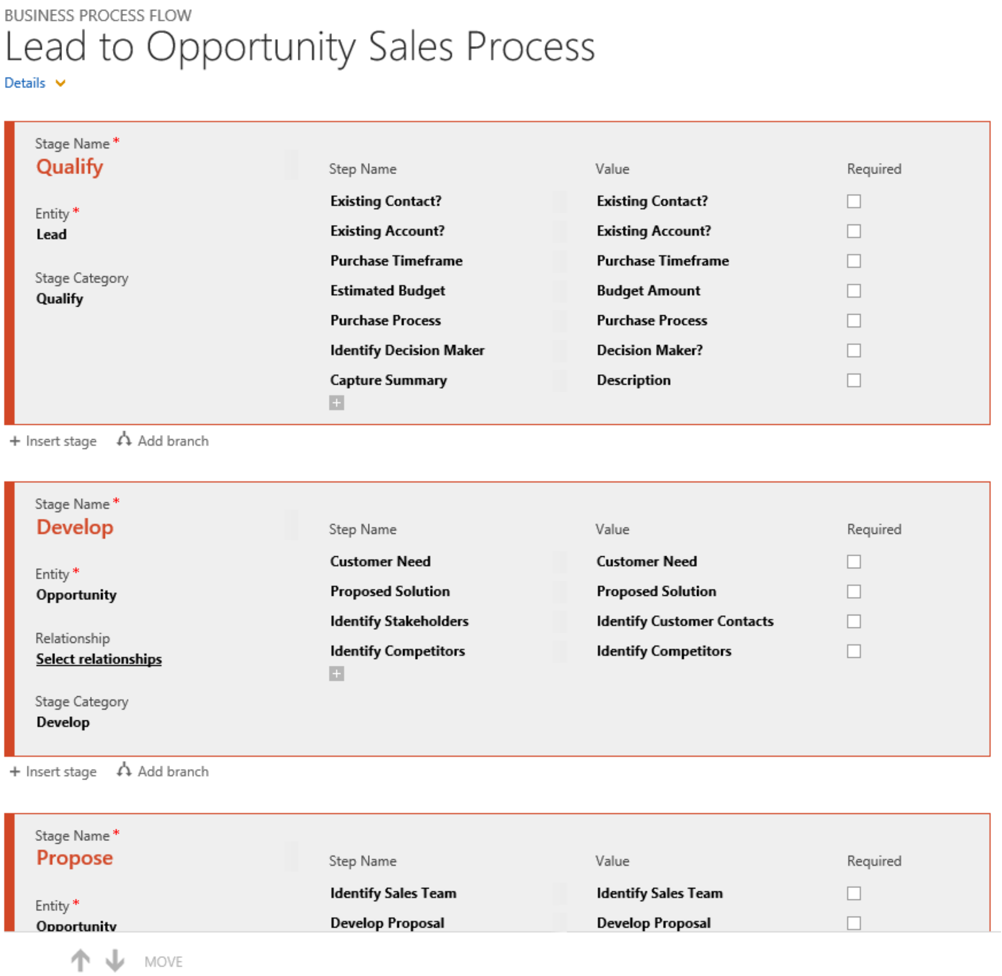

PRODUCT
Office 365 Suite (sample)
Office 365 Suite (sampl
Office 365 for Enterp
Office 365 for Midsiz
Office 365 for Small E
Office 365 for Small E
Office 365 Suite (sample)
Product ID
Office 365 Suite (sam...
Product Structure
Product Family
Unit
Standard User (sample)
Status
Draft
Office 365 for Enterprise
Product ID
Office 365 for Enterpr...
Product Structure
Product Bundle
Unit
Standard User (sample)
Status
Draft
Office 365 for Midsize Business
Product ID
Office 365 for Midsiz...
Product Structure
Product Bundle
Unit
Standard User (sample)
Status
Draft
Office 365 for Small Business
Product ID
Office 365 for Small B...
Product Structure
Product Bundle
Unit
Standard User (sample)
Status
Draft


PRODUCT
Bundle: Office 365 and CRM Online...
Status
Draft
Warning: A default price list has not been set.
SUMMARY
Name
Office 365 and CRM Online: Enterprise (sample)
Product ID
Office 365 and CRM Online: Enterprise (sample)
Family Hierarchy
Valid From
Valid To
Description
Unit Group
Business User (sample)
Default Unit
Standard User (sample)
Default Price List
Decimals Supported
0
Subject
BUNDLE PRODUCTS
Associated Product
Properties
Quantity
Unit
Required
Exchange Online (sample)
Customize
1.00000
Standard User (sample)
Required
SharePoint Online (sample)
Customize
1.00000
Standard User (sample)
Required
Lync Online (sample)
Customize
1.00000
Standard User (sample)
Required
CRM Online: Enterprise (sample)
Customize
1.00000
Standard User (sample)
Required
Office Desktop for Midsize & Enter...
Customize
1.00000
Standard User (sample)
Required
Draft

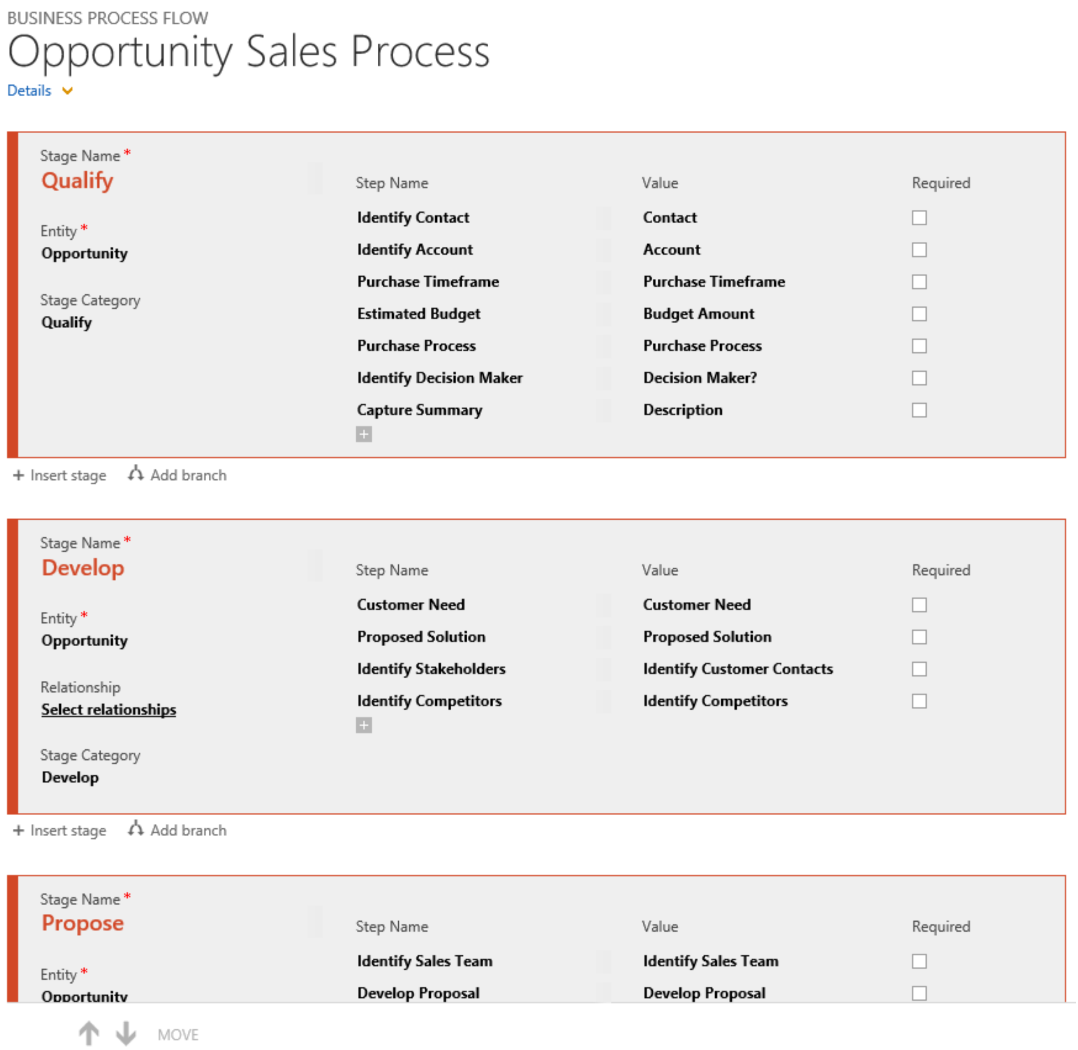

Office 365 and CRM Online: Midsize (...
Office 365 and C...
Office 365 and CRM Online: Enterpris...
Office 365 and C...
Office 365 Service (sample)
Office 365 Servic...
Office Desktop (sample)
Office Desktop (...
CRM Service (sample)
CRM Service (sa...
Exchange Online (sample)
Exchange Online...
SharePoint Online (sample)
SharePoint Onli...

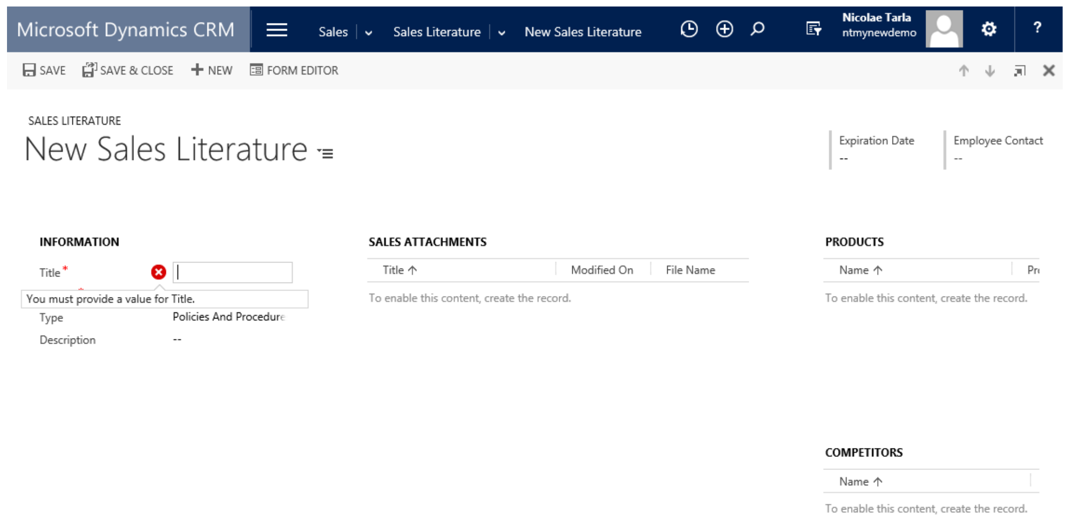

Goal : Information
General
Time Period
Targets
Child Goals
Actuals
Goal Criteria
Notes
Related
Common
Connections
Audit History
Process Sessions
Background Processes
Real-time Processes
Goal
New Goal
Goals
General
Name
Parent Goal
Goal Metric
Goal Owner
Manager
Nicolae Tarla
Time Period
Goal Period Type
Custom Period
Fiscal Period
Fiscal Period
Quarter 4
Fiscal Year
FY2015
From
10/1/2015
To
12/31/2015
Targets
Target (Money)
Stretch Target (Money)
Target (Integer)
Stretch Target (Integer)
Target (Decimal)
Stretch Target (Decimal)
Child Goals
Name
Goal Owner
Target
Percentage Achieved
Actual
0 - 0 of 0 (0 selected)
Page 1
Actuals
Actual (Money)
Percentage Achieved
Status
Active

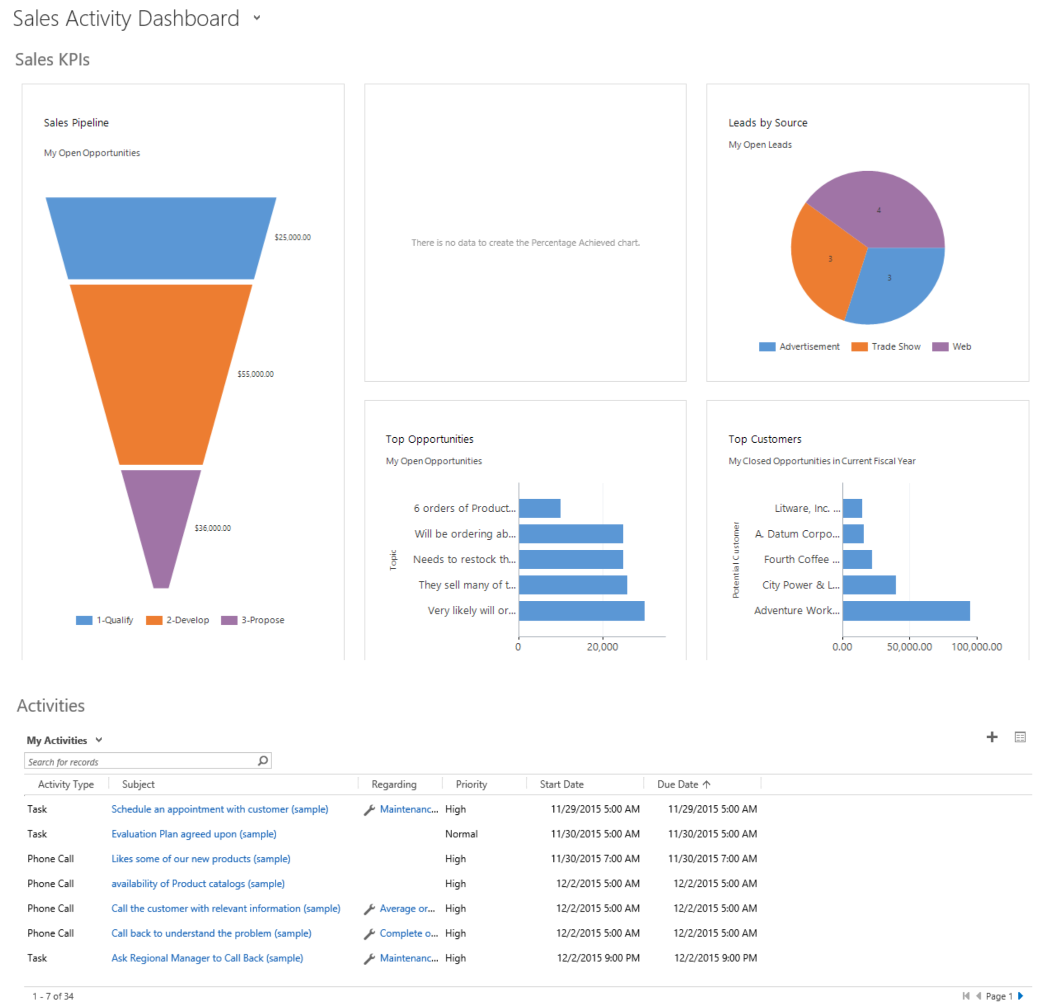

LEAD
New Lead
Lead Source
--
Rating
Warm
Status
New
Owner
Nicolae Tarla
Qualify (Active)
Develop
Propose
Close
Next Stage
Existing Contact?
click to enter
Existing Account?
click to enter
Purchase Timeframe
click to enter
Estimated Budget
click to enter
Purchase Process
click to enter
Identify Decision Maker
mark complete
Capture Summary
click to enter

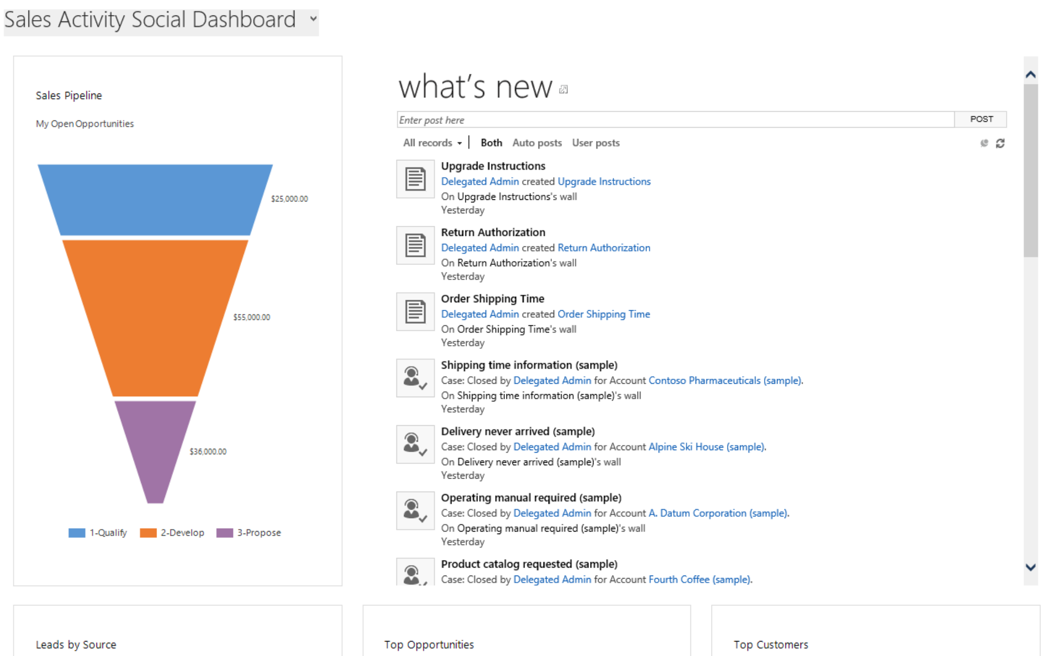


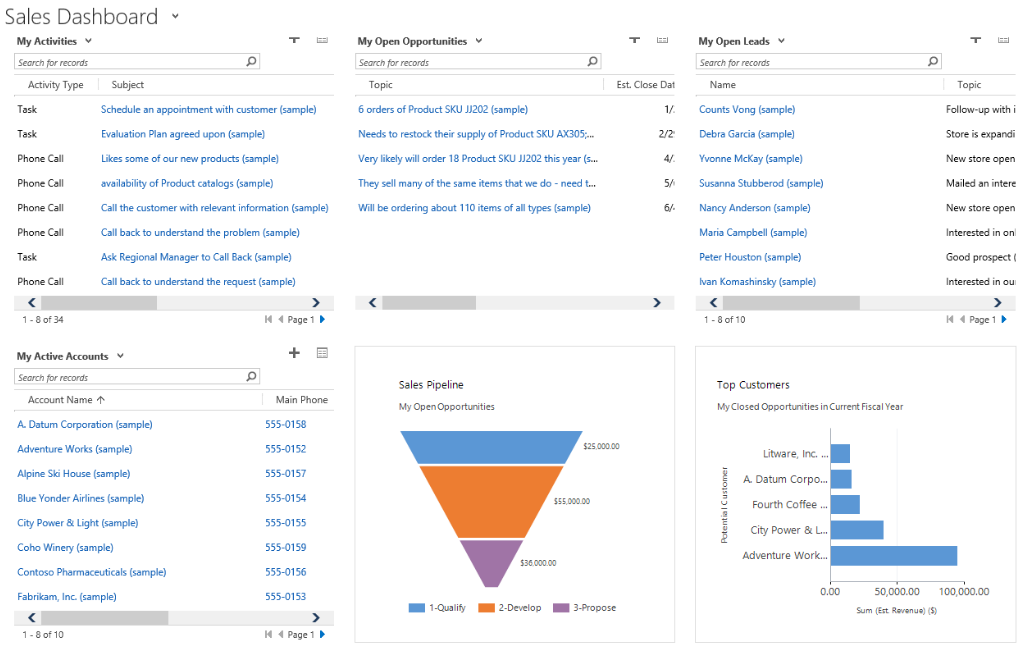
BUSINESS PROCESS FLOW
Lead to Opportunity Sales Process
Details
Stage Name *
Qualify
Entity *
Lead
Stage Category
Qualify
Step Name
Value
Required
Existing Contact?
Existing Contact?
Existing Account?
Existing Account?
Purchase Timeframe
Purchase Timeframe
Estimated Budget
Budget Amount
Purchase Process
Purchase Process
Identify Decision Maker
Decision Maker?
Capture Summary
Description
+ Insert stage
Add branch
Stage Name *
Develop
Entity *
Opportunity
Relationship
Select relationships
Stage Category
Develop
Step Name
Value
Required
Customer Need
Customer Need
Proposed Solution
Proposed Solution
Identify Stakeholders
Identify Customer Contacts
Identify Competitors
Identify Competitors
+ Insert stage
Add branch
Stage Name *
Propose
Entity *
Opportunity
Step Name
Value
Required
Identify Sales Team
Identify Sales Team
Develop Proposal
Develop Proposal
MOVE

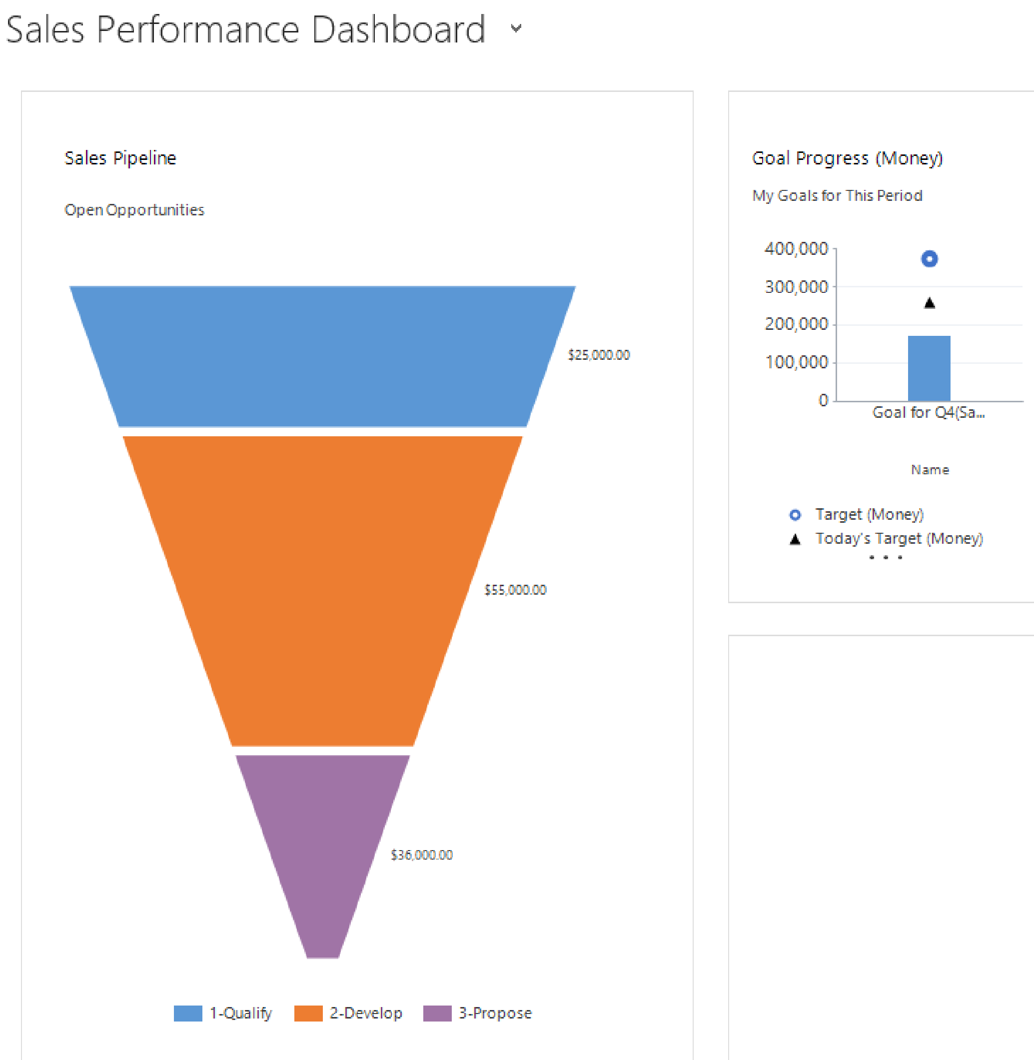

BUSINESS PROCESS FLOW
Opportunity Sales Process
Details
Stage Name *
Qualify
Entity *
Opportunity
Stage Category
Qualify
Step Name
Value
Required
Identify Contact
Contact
Identify Account
Account
Purchase Timeframe
Purchase Timeframe
Estimated Budget
Budget Amount
Purchase Process
Purchase Process
Identify Decision Maker
Decision Maker?
Capture Summary
Description
+ Insert stage
Add branch
Stage Name *
Develop
Entity *
Opportunity
Relationship
Select relationships
Stage Category
Develop
Step Name
Value
Required
Customer Need
Customer Need
Proposed Solution
Proposed Solution
Identify Stakeholders
Identify Customer Contacts
Identify Competitors
Identify Competitors
+ Insert stage
Add branch
Stage Name *
Propose
Entity *
Opportunity
Step Name
Value
Required
Identify Sales Team
Identify Sales Team
Develop Proposal
Develop Proposal
MOVE

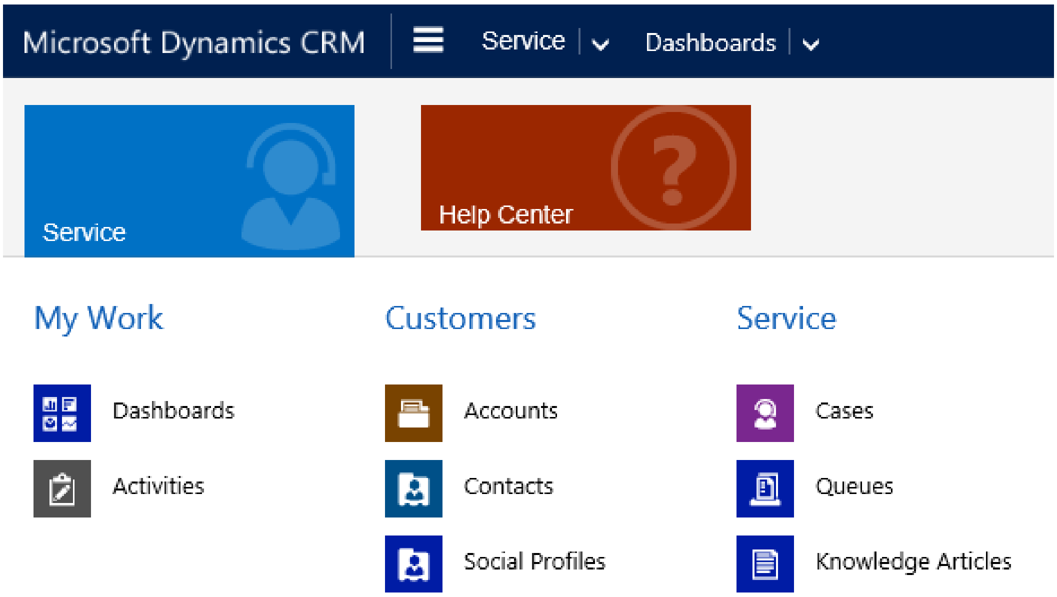

Microsoft Dynamics CRM
Sales
Sales Literature
New Sales Literature
Nicolae Tarla
ntmynewdemo
?
SAVE
SAVE & CLOSE
NEW
FORM EDITOR
SALES LITERATURE
New Sales Literature
Expiration Date
--
Employee Contact
--
INFORMATION
Title *
You must provide a value for Title.
Type
Policies And Procedure
Description
--
SALES ATTACHMENTS
Title
Modified On
File Name
To enable this content, create the record.
PRODUCTS
Name
To enable this content, create the record.
COMPETITORS
Name
To enable this content, create the record.

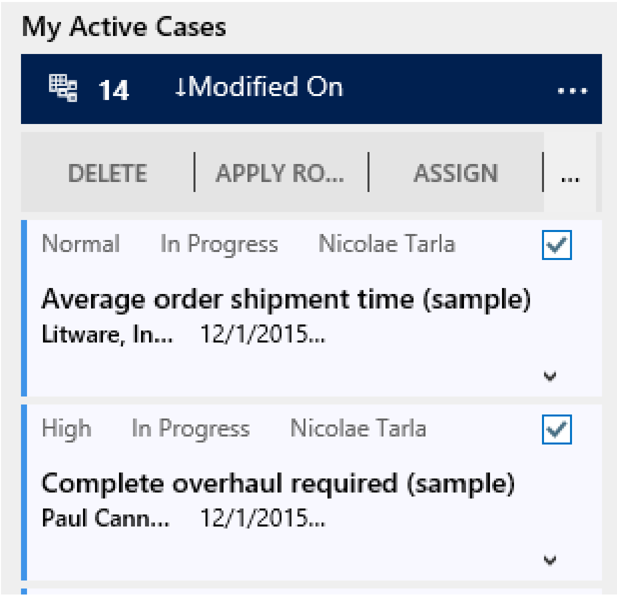

Sales Activity Dashboard
Sales KPIs
Sales Pipeline
My Open Opportunities
$25,000.00
$55,000.00
$36,000.00
1-Qualify
2-Develop
3-Propose
There is no data to create the Percentage Achieved chart.
Leads by Source
My Open Leads
4
3
3
Advertisement
Trade Show
Web
Top Opportunities
My Open Opportunities
Topic
6 orders of Product...
Will be ordering ab...
Needs to restock th...
They sell many of t...
Very likely will or...
0
20,000
Top Customers
My Closed Opportunities in Current Fiscal Year
Potential Customer
Litware, Inc. ...
A. Datum Corpo...
Fourth Coffee ...
City Power & L...
Adventure Work...
0.00
50,000.00
100,000.00
Activities
My Activities
Search for records
Activity Type
Subject
Regarding
Priority
Start Date
Due Date
Task
Schedule an appointment with customer (sample)
Maintenanc...
High
11/29/2015 5:00 AM
11/29/2015 5:00 AM
Task
Evaluation Plan agreed upon (sample)
Normal
11/30/2015 5:00 AM
11/30/2015 5:00 AM
Phone Call
Likes some of our new products (sample)
High
11/30/2015 7:00 AM
11/30/2015 7:00 AM
Phone Call
availability of Product catalogs (sample)
High
12/2/2015 5:00 AM
12/2/2015 5:00 AM
Phone Call
Call the customer with relevant information (sample)
Average or...
High
12/2/2015 5:00 AM
12/2/2015 5:00 AM
Phone Call
Call back to understand the problem (sample)
Complete o...
High
12/2/2015 5:00 AM
12/2/2015 5:00 AM
Task
Ask Regional Manager to Call Back (sample)
Maintenanc...
High
12/2/2015 9:00 PM
12/2/2015 9:00 PM
1 - 7 of 34
Page 1

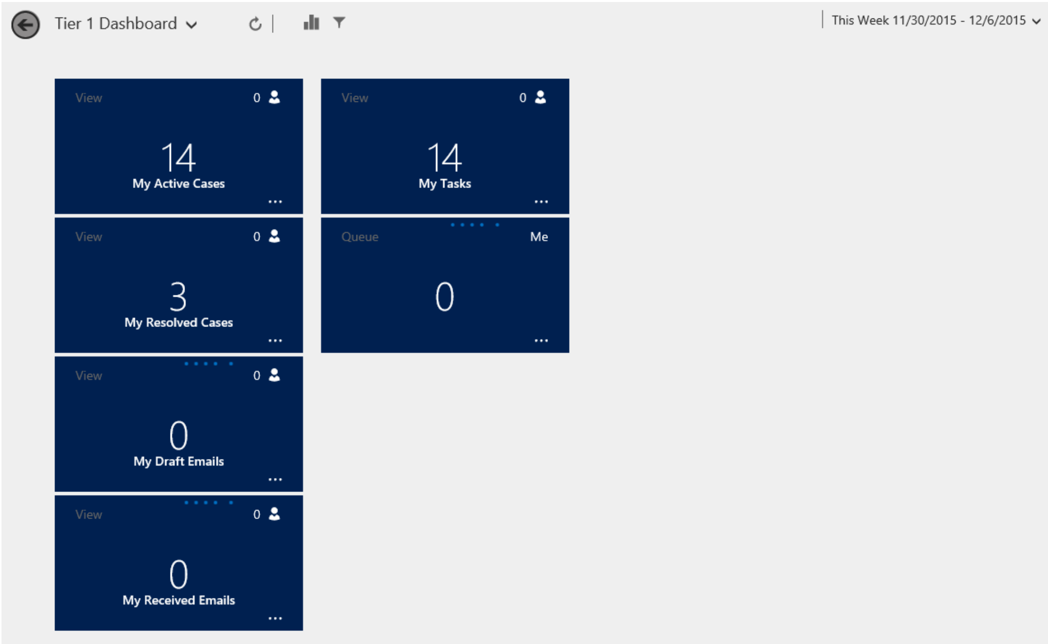

Sales Activity Social Dashboard
Sales Pipeline
My Open Opportunities
$25,000.00
$55,000.00
$36,000.00
1-Qualify
2-Develop
3-Propose
what's new
Enter post here
POST
All records
Both
Auto posts
User posts
Upgrade Instructions
Delegated Admin created Upgrade Instructions
On Upgrade Instructions's wall
Yesterday
Return Authorization
Delegated Admin created Return Authorization
On Return Authorization's wall
Yesterday
Order Shipping Time
Delegated Admin created Order Shipping Time
On Order Shipping Time's wall
Yesterday
Shipping time information (sample)
Case: Closed by Delegated Admin for Account Contoso Pharmaceuticals (sample).
On Shipping time information (sample)'s wall
Yesterday
Delivery never arrived (sample)
Case: Closed by Delegated Admin for Account Alpine Ski House (sample).
On Delivery never arrived (sample)'s wall
Yesterday
Operating manual required (sample)
Case: Closed by Delegated Admin for Account A. Datum Corporation (sample).
On Operating manual required (sample)'s wall
Yesterday
Product catalog requested (sample)
Case: Closed by Delegated Admin for Account Fourth Coffee (sample).
Leads by Source
Top Opportunities
Top Customers

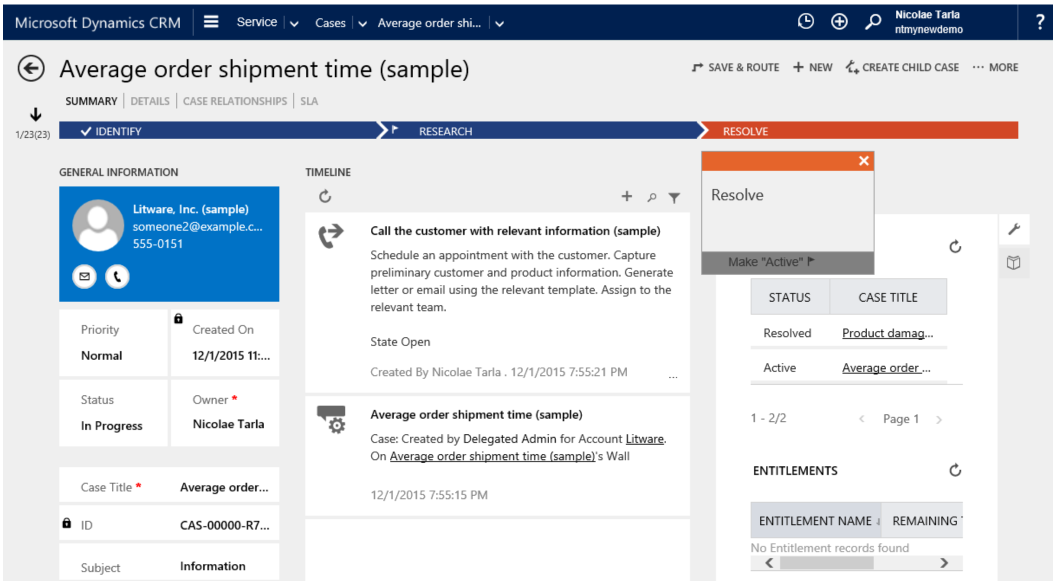

Sales Dashboard
My Activities
Search for records
Activity Type
Subject
Task
Schedule an appointment with customer (sample)
Task
Evaluation Plan agreed upon (sample)
Phone Call
Likes some of our new products (sample)
Phone Call
availability of Product catalogs (sample)
Phone Call
Call the customer with relevant information (sample)
Phone Call
Call back to understand the problem (sample)
Task
Ask Regional Manager to Call Back (sample)
Phone Call
Call back to understand the request (sample)
1 - 8 of 34
Page 1
My Open Opportunities
Search for records
Topic
Est. Close Dat
6 orders of Product SKU JJ202 (sample)
Needs to restock their supply of Product SKU AX305;...
Very likely will order 18 Product SKU JJ202 this year (s...
They sell many of the same items that we do - need t...
Will be ordering about 110 items of all types (sample)
My Open Leads
Search for records
Name
Topic
Counts Vong (sample)
Follow-up with i
Debra Garcia (sample)
Store is expandi
Yvonne McKay (sample)
New store open
Susanna Stubberod (sample)
Mailed an intere
Nancy Anderson (sample)
New store open
Maria Campbell (sample)
Interested in onl
Peter Houston (sample)
Good prospect (
Ivan Komashinsky (sample)
Interested in ou
1 - 8 of 10
Page 1
My Active Accounts
Search for records
Account Name
Main Phone
A. Datum Corporation (sample)
555-0158
Adventure Works (sample)
555-0152
Alpine Ski House (sample)
555-0157
Blue Yonder Airlines (sample)
555-0154
City Power & Light (sample)
555-0155
Coho Winery (sample)
555-0159
Contoso Pharmaceuticals (sample)
555-0156
Fabrikam, Inc. (sample)
555-0153
1 - 8 of 10
Page 1
Sales Pipeline
My Open Opportunities
$25,000.00
$55,000.00
$36,000.00
1-Qualify
2-Develop
3-Propose
Top Customers
My Closed Opportunities in Current Fiscal Year
Litware, Inc. ...
A. Datum Corpo...
Fourth Coffee ...
City Power & L...
Adventure Work...
Potential Customer
0.00
50,000.00
100,000.00
Sum (Est. Revenue) ($)

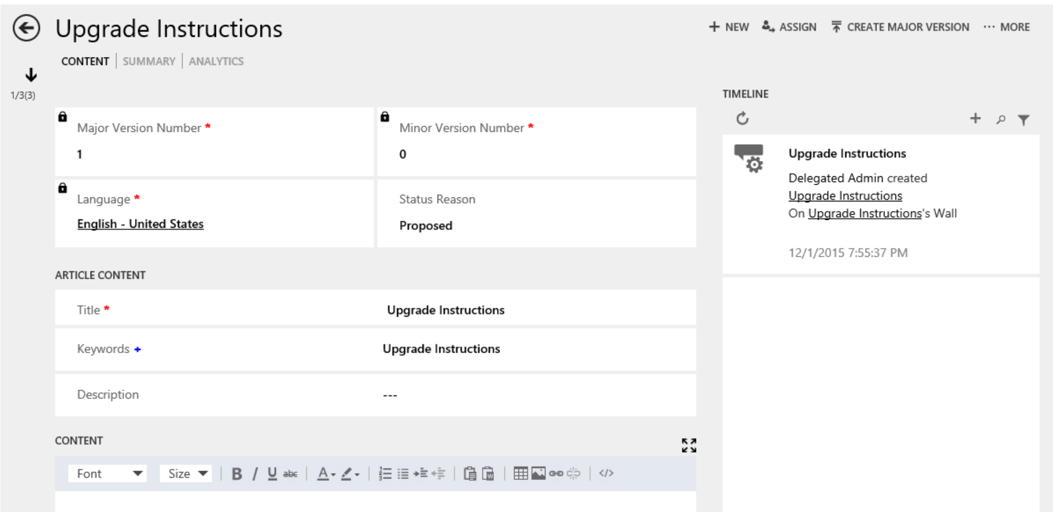

Sales Performance Dashboard
Sales Pipeline
Open Opportunities
$25,000.00
$55,000.00
$36,000.00
1-Qualify
2-Develop
3-Propose
Goal Progress (Money)
My Goals for This Period
400,000
300,000
200,000
100,000
0
Goal for Q4(Sa...
Name
Target (Money)
Today's Target (Money)


Microsoft Dynamics CRM
Service
Dashboards
Service
Help Center
My Work
Dashboards
Activities
Customers
Accounts
Contacts
Social Profiles
Service
Cases
Queues
Knowledge Articles

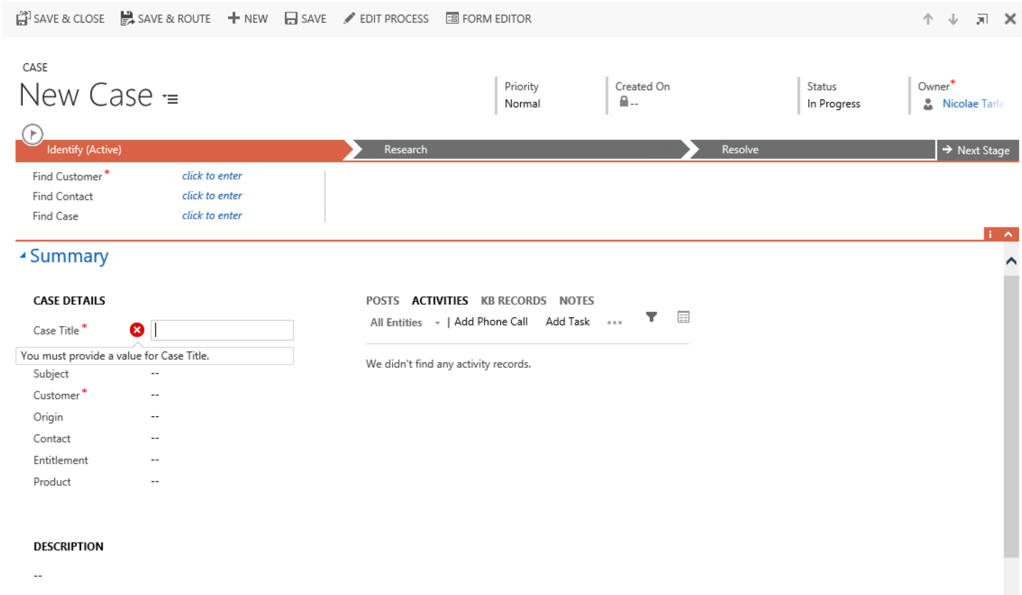

My Active Cases
14
↓Modified On
DELETE
APPLY RO...
ASSIGN
...
Normal
In Progress
Nicolae Tarla
Average order shipment time (sample)
Litware, In...
12/1/2015...
High
In Progress
Nicolae Tarla
Complete overhaul required (sample)
Paul Cann...
12/1/2015...

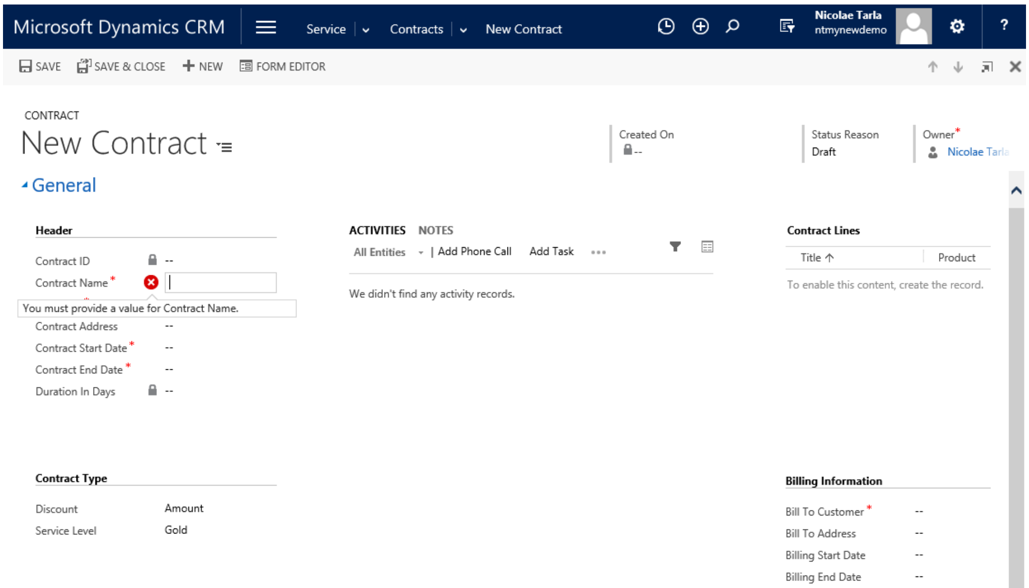

Tier 1 Dashboard
This Week 11/30/2015 - 12/6/2015
View 0
14
My Active Cases
View 0
14
My Tasks
View 0
3
My Resolved Cases
Queue Me
0
View 0
0
My Draft Emails
View 0
0
My Received Emails

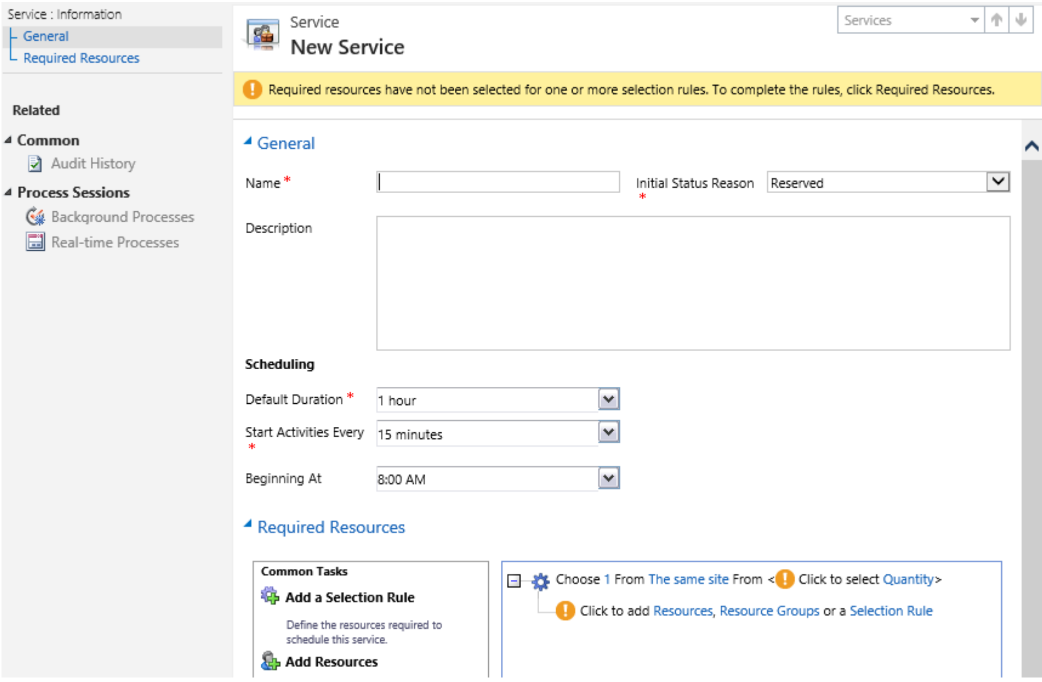

Microsoft Dynamics CRM
Service
Cases
Average order shi...
Nicolae Tarla
ntmynewdemo
Average order shipment time (sample)
SAVE & ROUTE
NEW
CREATE CHILD CASE
MORE
SUMMARY
DETAILS
CASE RELATIONSHIPS
SLA
1/23(23)
IDENTIFY
RESEARCH
RESOLVE
GENERAL INFORMATION
Litware, Inc. (sample)
someone2@example.c...
555-0151
Priority
Normal
Created On
12/1/2015 11:...
Status
In Progress
Owner *
Nicolae Tarla
Case Title *
Average order...
ID
CAS-00000-R7...
Subject
Information
TIMELINE
Call the customer with relevant information (sample)
Schedule an appointment with the customer. Capture preliminary customer and product information. Generate letter or email using the relevant template. Assign to the relevant team.
State Open
Created By Nicolae Tarla . 12/1/2015 7:55:21 PM
Average order shipment time (sample)
Case: Created by Delegated Admin for Account Litware.
On Average order shipment time (sample)'s Wall
12/1/2015 7:55:15 PM
Resolve
Make "Active"
STATUS
CASE TITLE
Resolved
Product damag...
Active
Average order ...
1 - 2/2
Page 1
ENTITLEMENTS
ENTITLEMENT NAME
REMAINING
No Entitlement records found

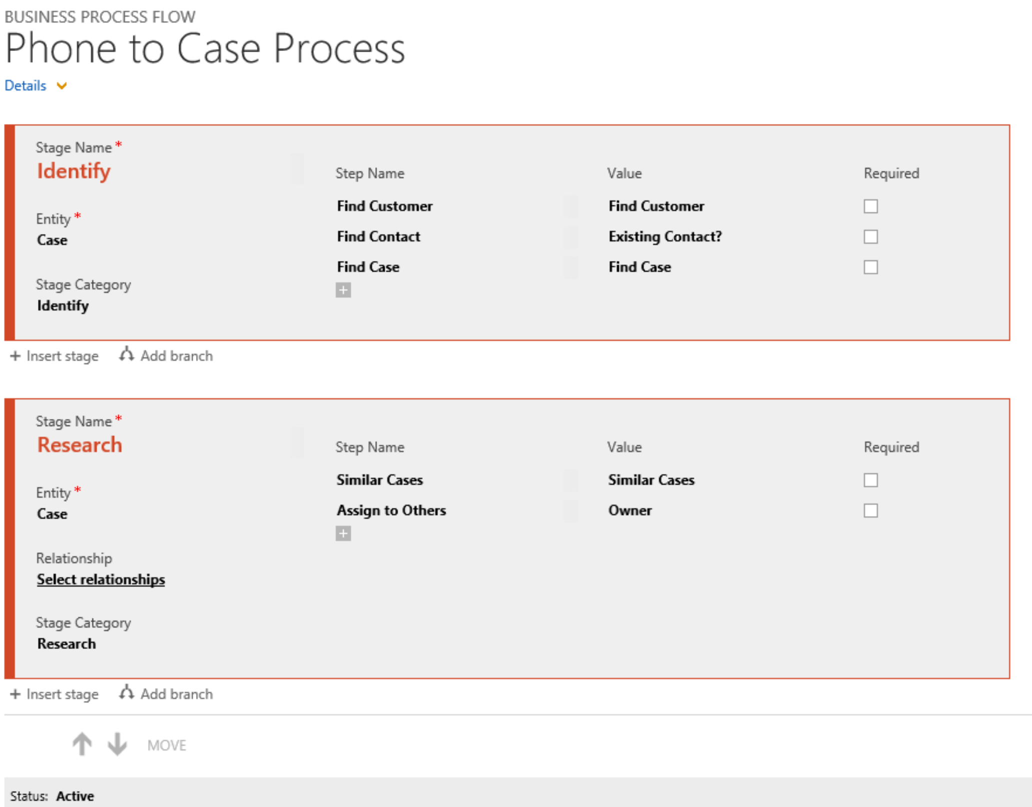

Upgrade Instructions
NEW
ASSIGN
CREATE MAJOR VERSION
MORE
CONTENT
SUMMARY
ANALYTICS
1/3(3)
Major Version Number *
1
Minor Version Number *
0
Language *
English - United States
Status Reason
Proposed
ARTICLE CONTENT
Title *
Upgrade Instructions
Keywords +
Upgrade Instructions
Description

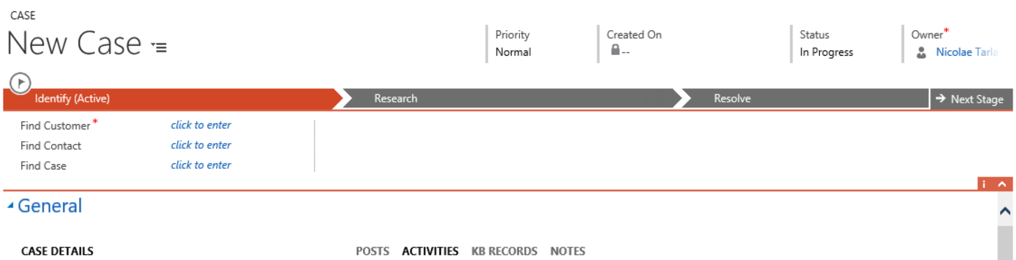
CONTENT
Font
Size
TIMELINE
Upgrade Instructions
Delegated Admin created
Upgrade Instructions
On Upgrade Instructions's Wall
12/1/2015 7:55:37 PM

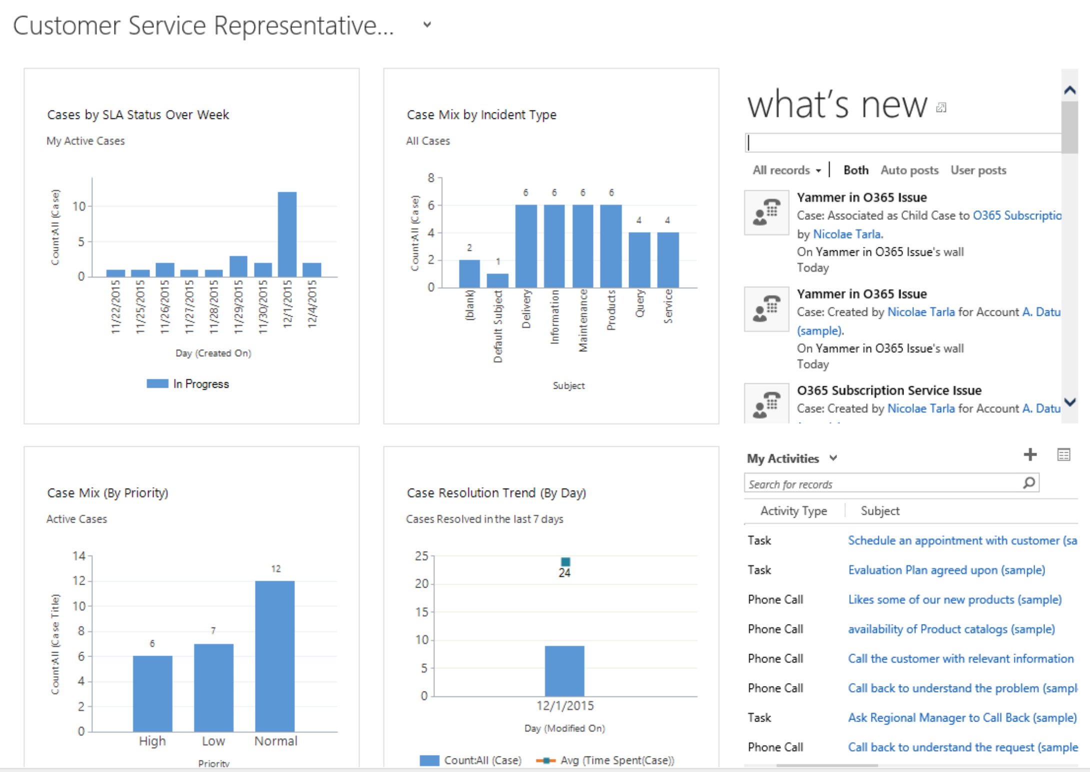

SAVE & CLOSE
SAVE & ROUTE
NEW
SAVE
EDIT PROCESS
FORM EDITOR
CASE
New Case
Priority
Normal
Created On
--
Status
In Progress
Owner
Nicolae Tarla
Identify (Active)
Research
Resolve
Next Stage
Find Customer
Find Contact
Find Case
click to enter
click to enter
click to enter
Summary
CASE DETAILS
Case Title
You must provide a value for Case Title.
Subject
Customer
Origin
Contact
Entitlement
Product
POSTS
ACTIVITIES
KB RECORDS
NOTES
All Entities
Add Phone Call
Add Task
We didn't find any activity records.
DESCRIPTION
--

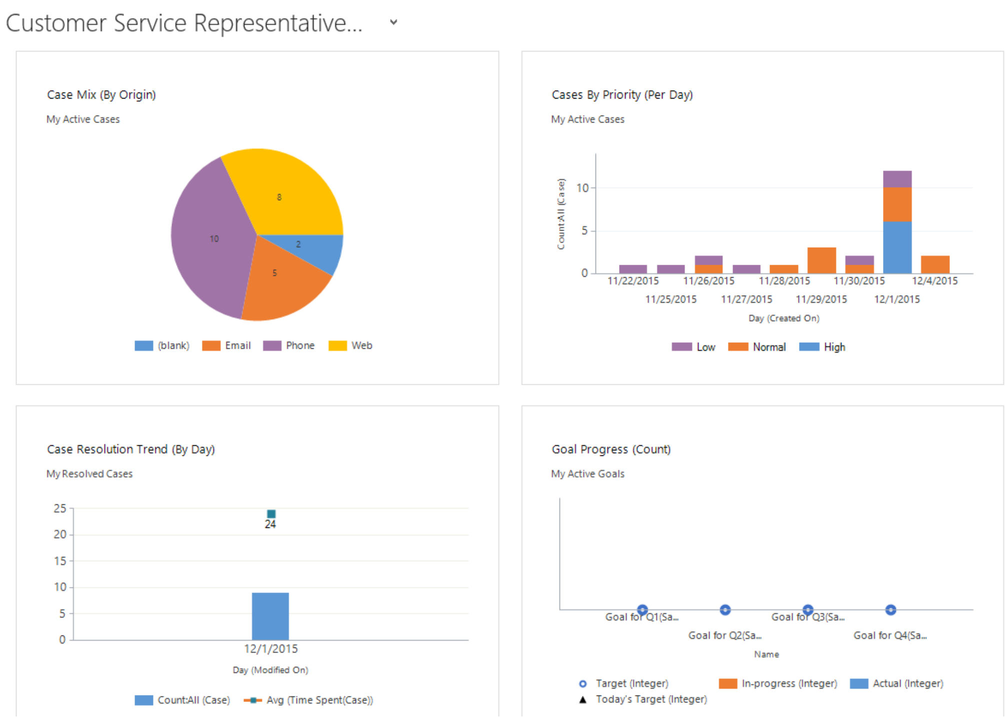

Microsoft Dynamics CRM
Service
Contracts
New Contract
Nicolae Tarla
ntmynewdemo
SAVE
SAVE & CLOSE
NEW
FORM EDITOR
CONTRACT
New Contract
Created On
--
Status Reason
Draft
Owner
Nicolae Tarla
General
Header
Contract ID
Contract Name
You must provide a value for Contract Name.
Contract Address
Contract Start Date
Contract End Date
Duration In Days
ACTIVITIES
NOTES
All Entities
Add Phone Call
Add Task
We didn't find any activity records.
Contract Lines
Title
Product
To enable this content, create the record.
Contract Type
Discount
Amount
Service Level
Gold
Billing Information
Bill To Customer
Bill To Address
Billing Start Date
Billing End Date

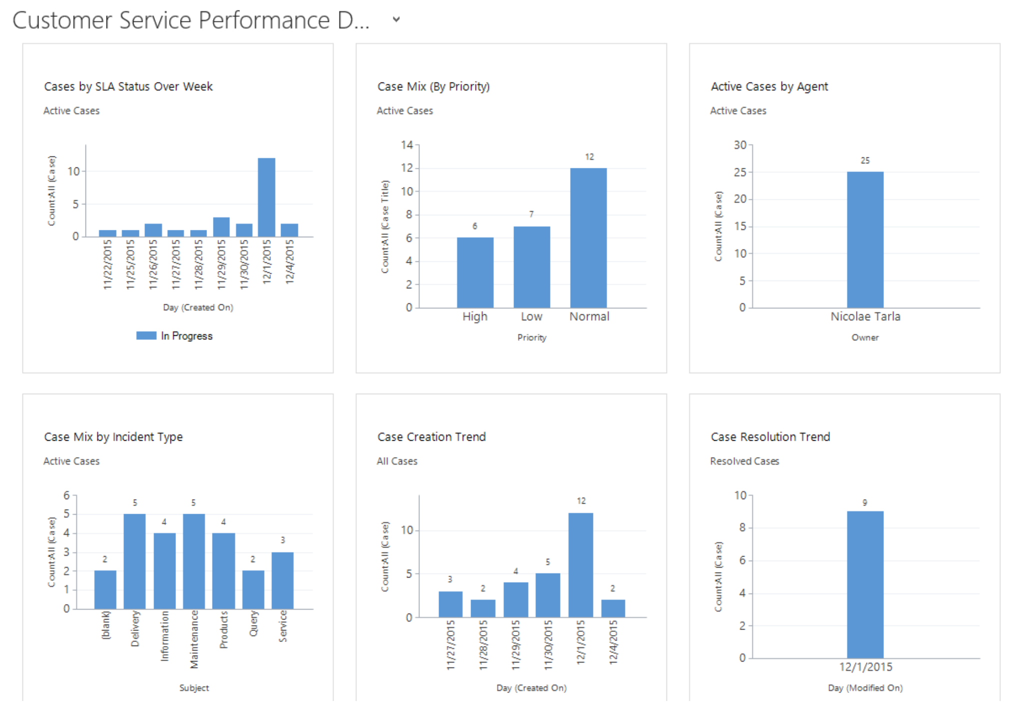

Service : Information
General
Required Resources
Related
Common
Audit History
Process Sessions
Background Processes
Real-time Processes
Service
New Service
Services
Required resources have not been selected for one or more selection rules. To complete the rules, click Required Resources.
General
Name *
Initial Status Reason *
Reserved
Description
Scheduling
Default Duration *
1 hour
Start Activities Every *
15 minutes
Beginning At
8:00 AM
Required Resources
Common Tasks
Add a Selection Rule
Define the resources required to schedule this service.
Add Resources
Choose 1 From The same site From < Click to select Quantity>
Click to add Resources, Resource Groups or a Selection Rule


BUSINESS PROCESS FLOW
Phone to Case Process
Details
Stage Name *
Identify
Entity *
Case
Stage Category
Identify
Step Name
Find Customer
Find Contact
Find Case
Value
Find Customer
Existing Contact?
Find Case
Required
+ Insert stage
Add branch
Stage Name *
Research
Entity *
Case
Relationship
Select relationships
Stage Category
Research
Step Name
Similar Cases
Assign to Others
Value
Similar Cases
Owner
Required
+ Insert stage
Add branch
MOVE
Status: Active

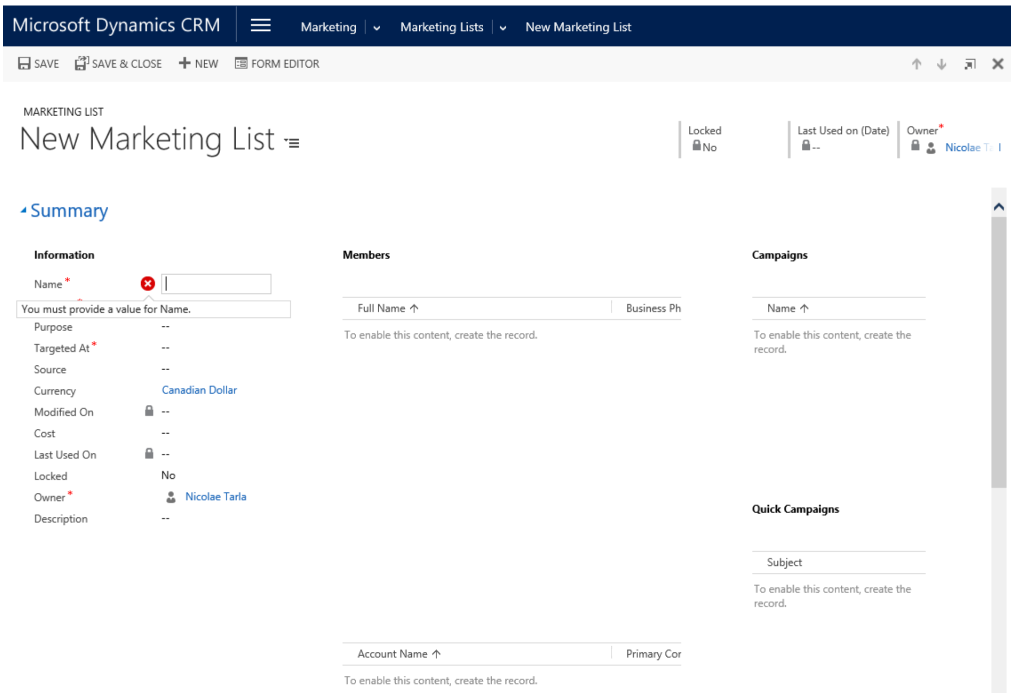

CASE
New Case
Priority
Normal
Created On
Status
In Progress
Owner *
Identify (Active)
Research
Resolve
Next Stage
Find Customer *
Find Contact
Find Case
click to enter
click to enter
click to enter
General
CASE DETAILS
POSTS
ACTIVITIES
KB RECORDS
NOTES


Customer Service Representative...
Cases by SLA Status Over Week
My Active Cases
CountAll (Case)
Day (Created On)
In Progress
Case Mix by Incident Type
All Cases
(blank)
Default Subject
Delivery
Information
Maintenance
Products
Query
Service
Subject
what's new
All records
Both
Auto posts
User posts
Yammer in O365 Issue
Case: Associated as Child Case to O365 Subscriptio
by Nicolae Tarla.
On Yammer in O365 Issue's wall
Today
Yammer in O365 Issue
Case: Created by Nicolae Tarla for Account A. Datu
(sample).
On Yammer in O365 Issue's wall
Today
O365 Subscription Service Issue
Case: Created by Nicolae Tarla for Account A. Datu
Case Mix (By Priority)
Active Cases
CountAll (Case Title)
High
Low
Normal
Priority
Case Resolution Trend (By Day)
Cases Resolved in the last 7 days
12/1/2015
Day (Modified On)
CountAll (Case)
Avg (Time Spent(Case))
My Activities
Search for records
Activity Type
Subject
Task
Schedule an appointment with customer (sa
Task
Evaluation Plan agreed upon (sample)
Phone Call
Likes some of our new products (sample)
Phone Call
availability of Product catalogs (sample)
Phone Call
Call the customer with relevant information
Phone Call
Call back to understand the problem (sampl
Task
Ask Regional Manager to Call Back (sample)
Phone Call
Call back to understand the request (sample

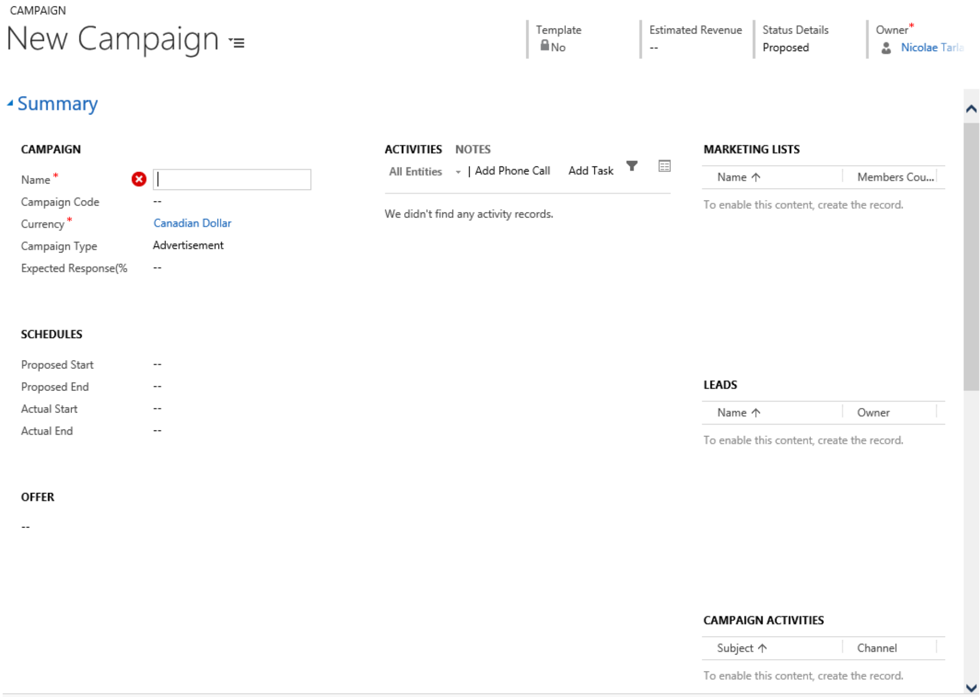

Customer Service Representative...
Case Mix (By Origin)
My Active Cases
(blank)
Email
Phone
Web
Cases By Priority (Per Day)
My Active Cases
CountAll (Case)
Day (Created On)
Low
Normal
High
Case Resolution Trend (By Day)
My Resolved Cases
12/1/2015
Day (Modified On)
CountAll (Case)
Avg (Time Spent(Case))
Goal Progress (Count)
My Active Goals
Goal for Q1(Sa...
Goal for Q2(Sa...
Goal for Q3(Sa...
Goal for Q4(Sa...
Name
Target (Integer)
In-progress (Integer)
Actual (Integer)
Today's Target (Integer)

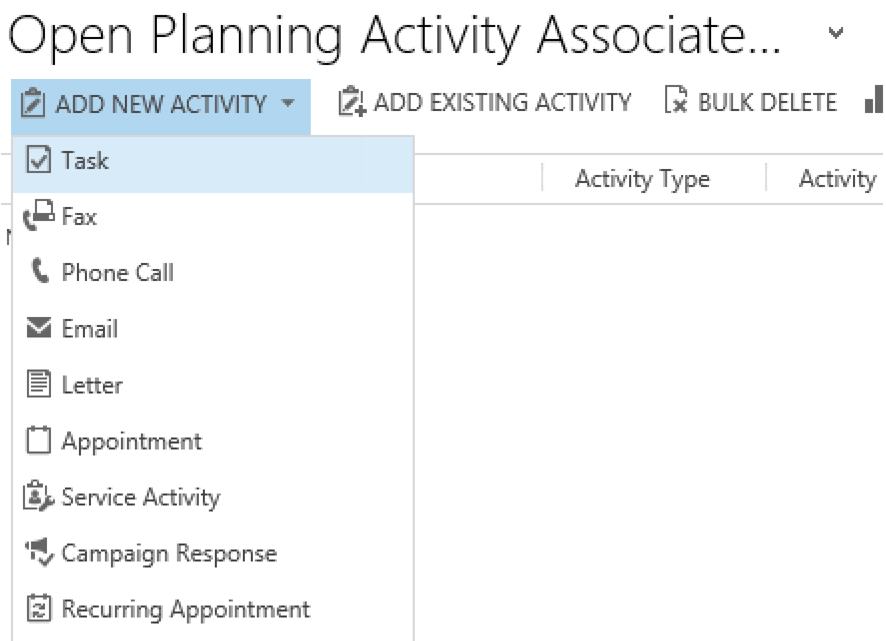


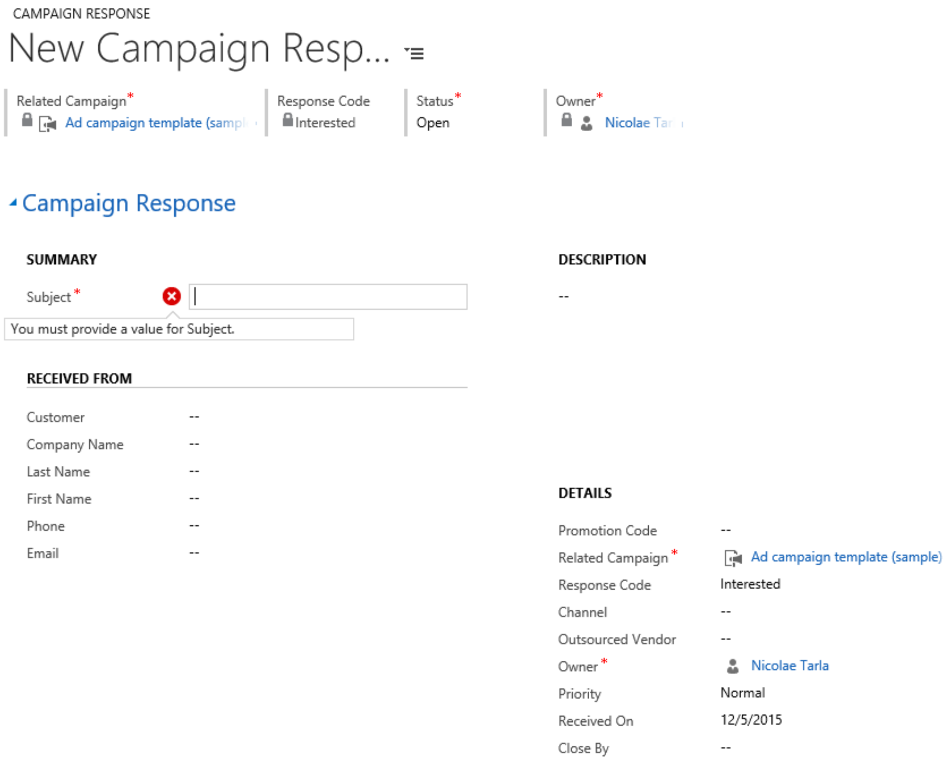
Customer Service Performance D...
Cases by SLA Status Over Week
Active Cases
In Progress
Day (Created On)
Case Mix (By Priority)
Active Cases
High
Low
Normal
Priority
Active Cases by Agent
Active Cases
Nicolae Tarla
Owner
Case Mix by Incident Type
Active Cases
(blank)
Delivery
Information
Maintenance
Products
Query
Service
Subject
Case Creation Trend
All Cases
Day (Created On)
Case Resolution Trend
Resolved Cases
12/1/2015
Day (Modified On)

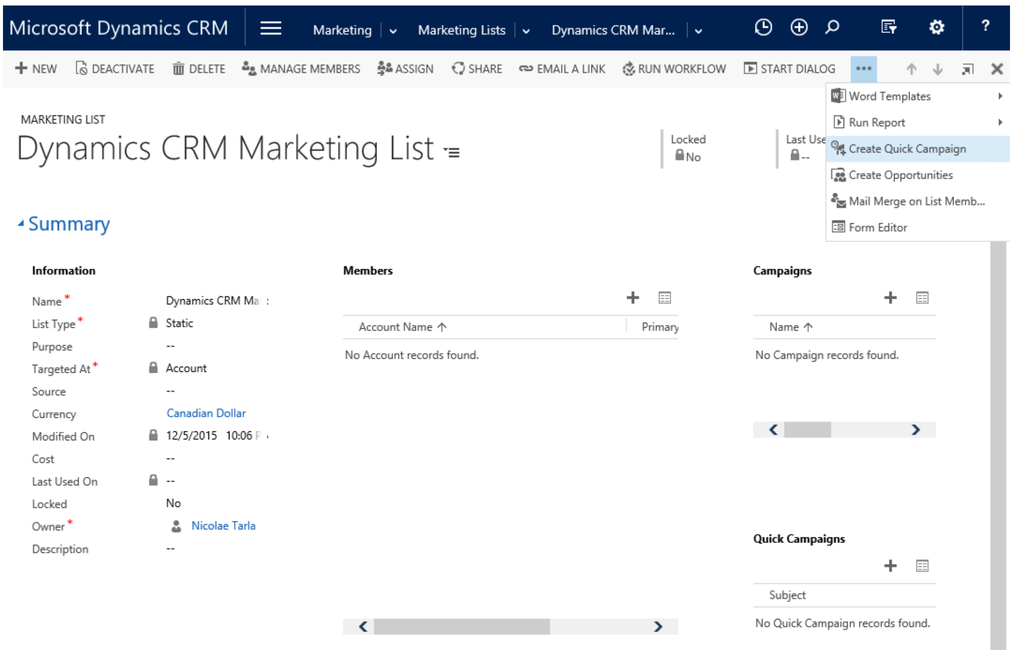


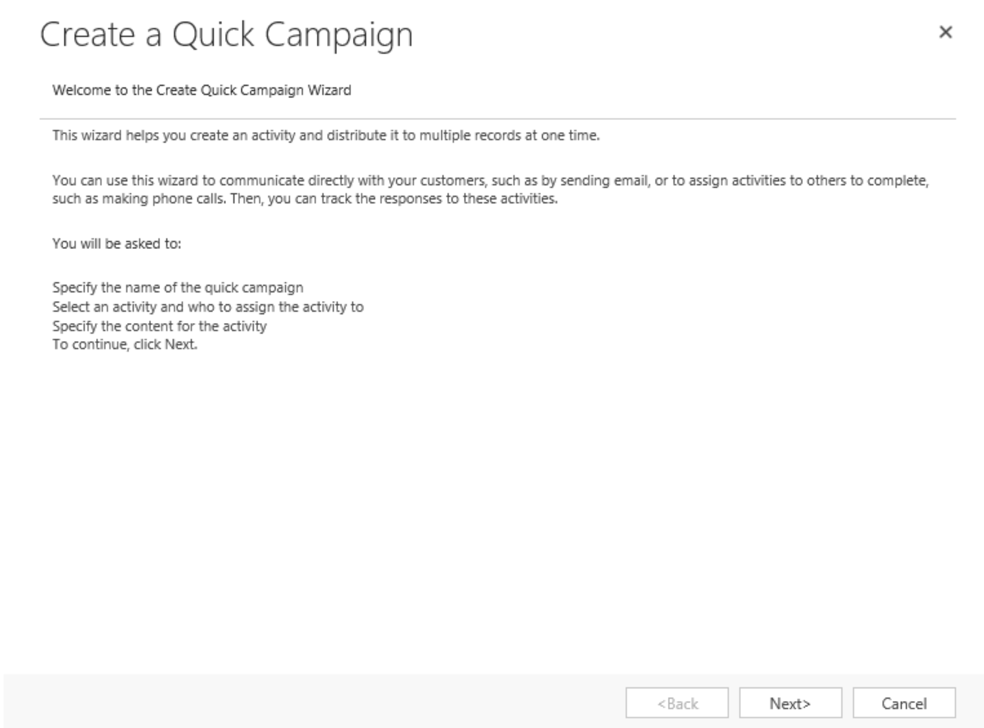
Microsoft Dynamics CRM
Marketing
Marketing Lists
New Marketing List
SAVE
SAVE & CLOSE
NEW
FORM EDITOR
MARKETING LIST
New Marketing List
Locked
No
Last Used on (Date)
Owner
Summary
Information
Name
You must provide a value for Name.
Purpose
Targeted At
Source
Currency
Canadian Dollar
Modified On
Cost
Last Used On
Locked
No
Owner
Nicolae Tarla
Description
Members
Full Name
To enable this content, create the record.
Account Name
To enable this content, create the record.
Campaigns
Name
To enable this content, create the record.
Quick Campaigns
Subject
To enable this content, create the record.

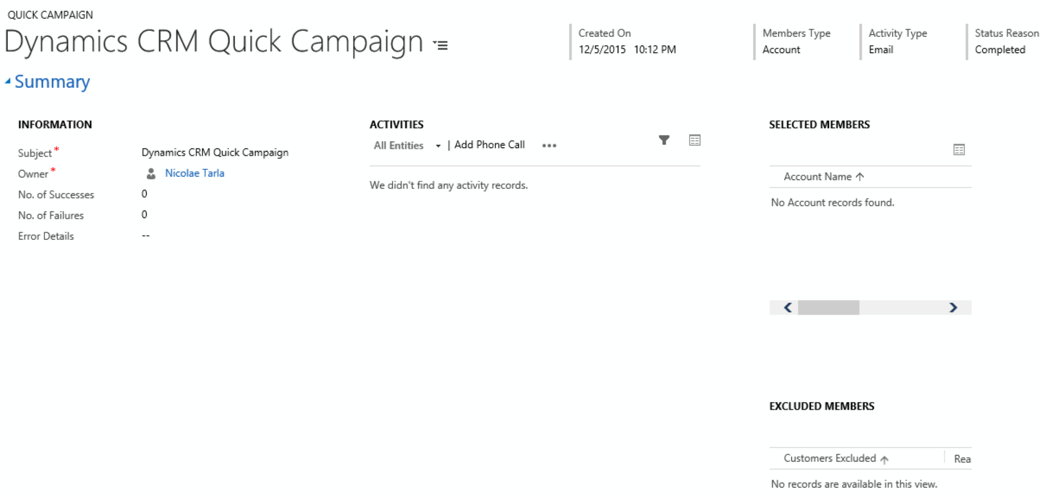

CAMPAIGN
New Campaign
Template
No
Estimated Revenue
Status Details
Proposed
Owner
Nicolae Tarla
Summary
CAMPAIGN
Name
Campaign Code
Currency
Canadian Dollar
Campaign Type
Advertisement
Expected Response(%
ACTIVITIES
NOTES
All Entities
Add Phone Call
Add Task
We didn't find any activity records.
MARKETING LISTS
Name
Members Cou...
To enable this content, create the record.
SCHEDULES
Proposed Start
Proposed End
Actual Start
Actual End
LEADS
Name
Owner
To enable this content, create the record.
OFFER
CAMPAIGN ACTIVITIES
Subject
Channel
To enable this content, create the record.

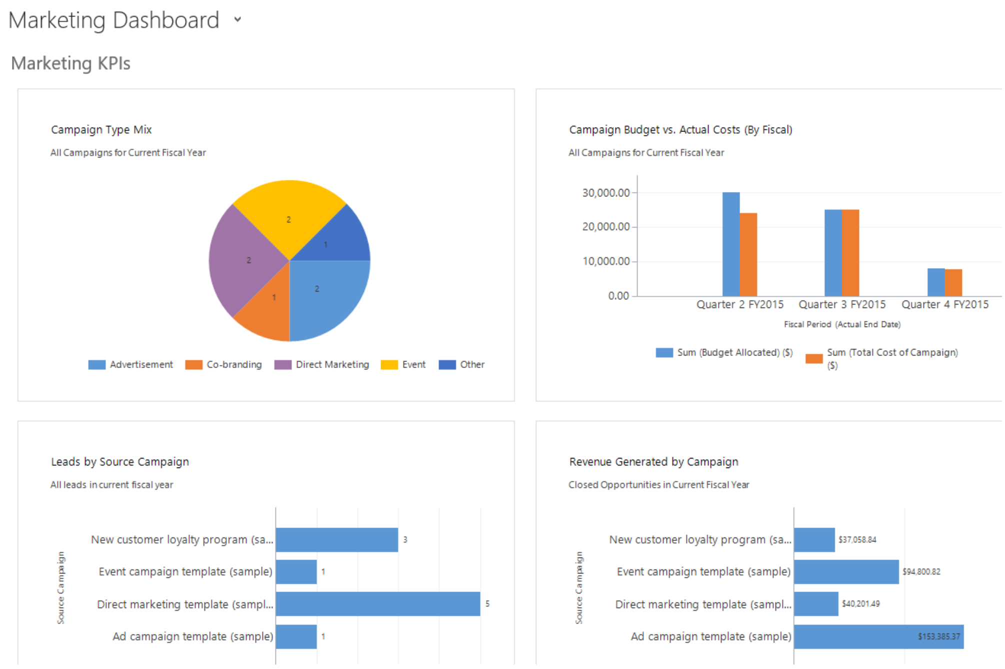

Open Planning Activity Associate...
ADD NEW ACTIVITY
ADD EXISTING ACTIVITY
BULK DELETE
Task
Fax
Phone Call
Email
Letter
Appointment
Service Activity
Campaign Response
Recurring Appointment
Activity Type
Activity

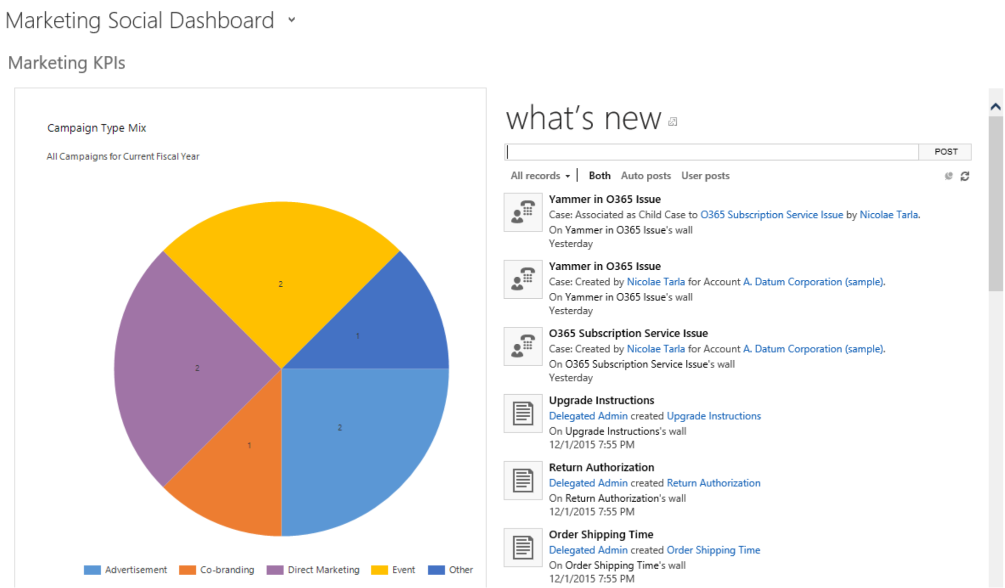

CAMPAIGN RESPONSE
New Campaign Resp...
Related Campaign*
Ad campaign template (samp
Response Code
Interested
Status*
Open
Owner*
Nicolae Ta
Campaign Response
SUMMARY
Subject*
You must provide a value for Subject.
RECEIVED FROM
Customer --
Company Name --
Last Name --
First Name --
Phone --
Email --
DESCRIPTION
--
DETAILS
Promotion Code --
Related Campaign* Ad campaign template (sample)
Response Code Interested
Channel --
Outsourced Vendor --
Owner* Nicolae Tarla
Priority Normal
Received On 12/5/2015
Close By --

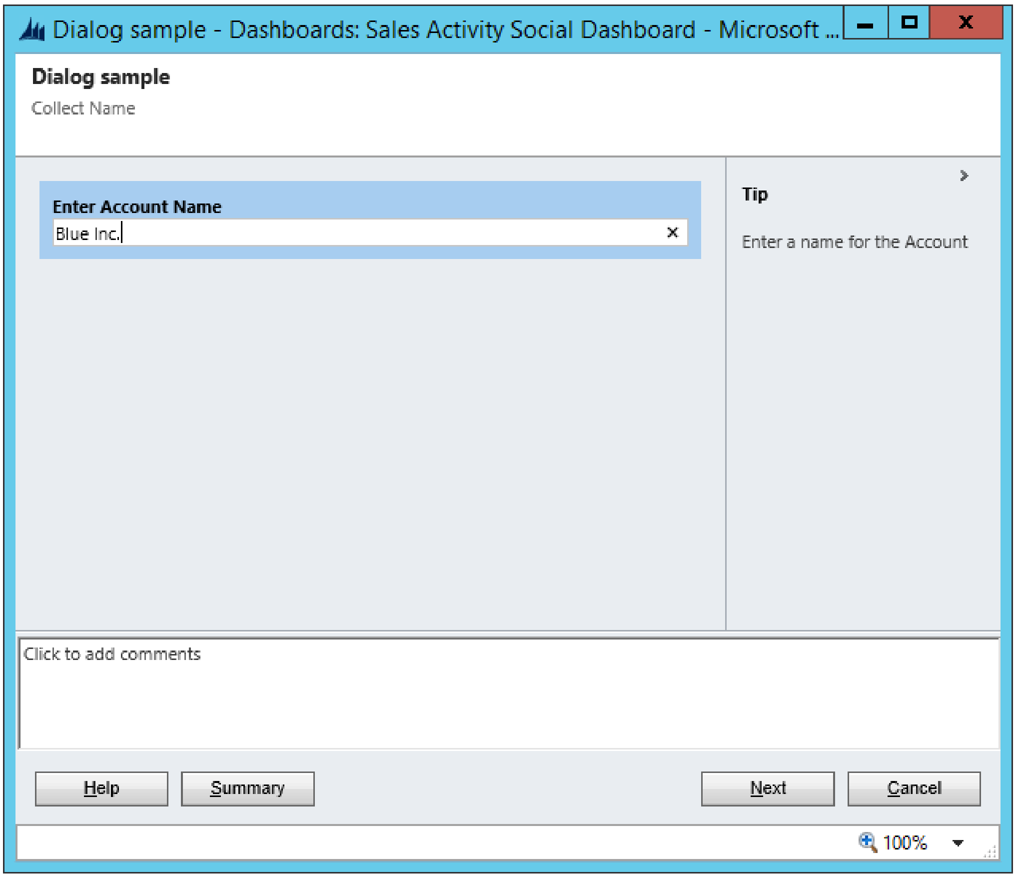

Microsoft Dynamics CRM
Marketing
Marketing Lists
Dynamics CRM Mar...
NEW
DEACTIVATE
DELETE
MANAGE MEMBERS
ASSIGN
SHARE
EMAIL A LINK
RUN WORKFLOW
START DIALOG
Word Templates
Run Report
Create Quick Campaign
Create Opportunities
Mail Merge on List Memb...
Form Editor
MARKETING LIST
Dynamics CRM Marketing List
Locked
No
Last Use
--
Summary
Information
Name* Dynamics CRM Ma
List Type* Static
Purpose --
Targeted At* Account
Source --
Currency Canadian Dollar
Modified On 12/5/2015 10:06
Cost --
Last Used On --
Locked No
Owner* Nicolae Tarla
Description --
Members
Account Name
Primary
No Account records found.
Campaigns
Name
No Campaign records found.
Quick Campaigns
Subject
No Quick Campaign records found.

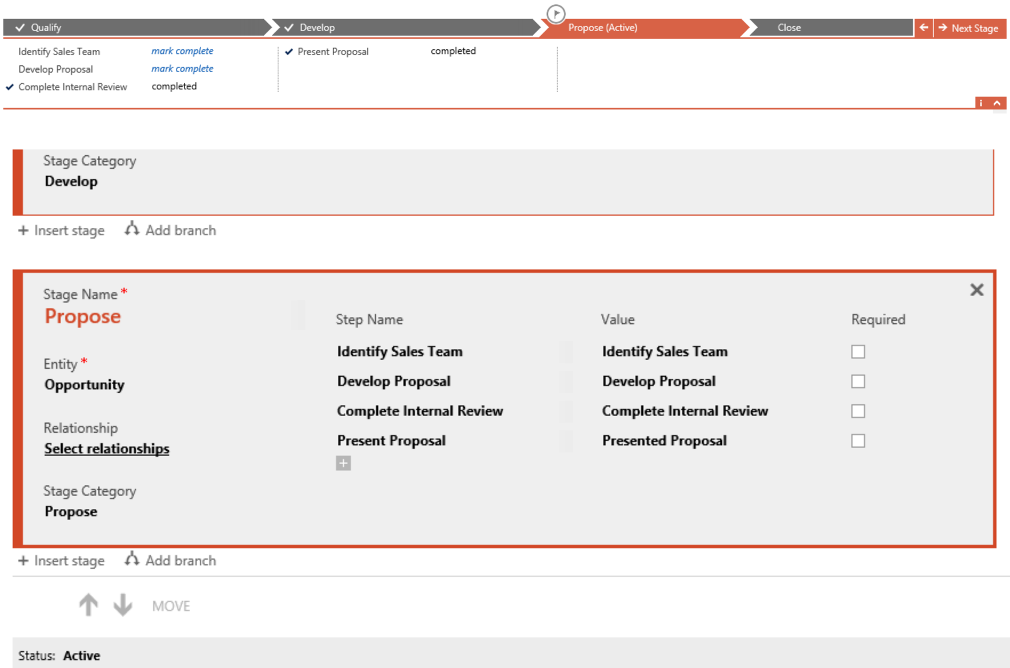

Create a Quick Campaign
Welcome to the Create Quick Campaign Wizard
This wizard helps you create an activity and distribute it to multiple records at one time.
You can use this wizard to communicate directly with your customers, such as by sending email, or to assign activities to others to complete, such as making phone calls. Then, you can track the responses to these activities.
You will be asked to:
Specify the name of the quick campaign
Select an activity and who to assign the activity to
Specify the content for the activity
To continue, click Next.
<Back
Next>
Cancel

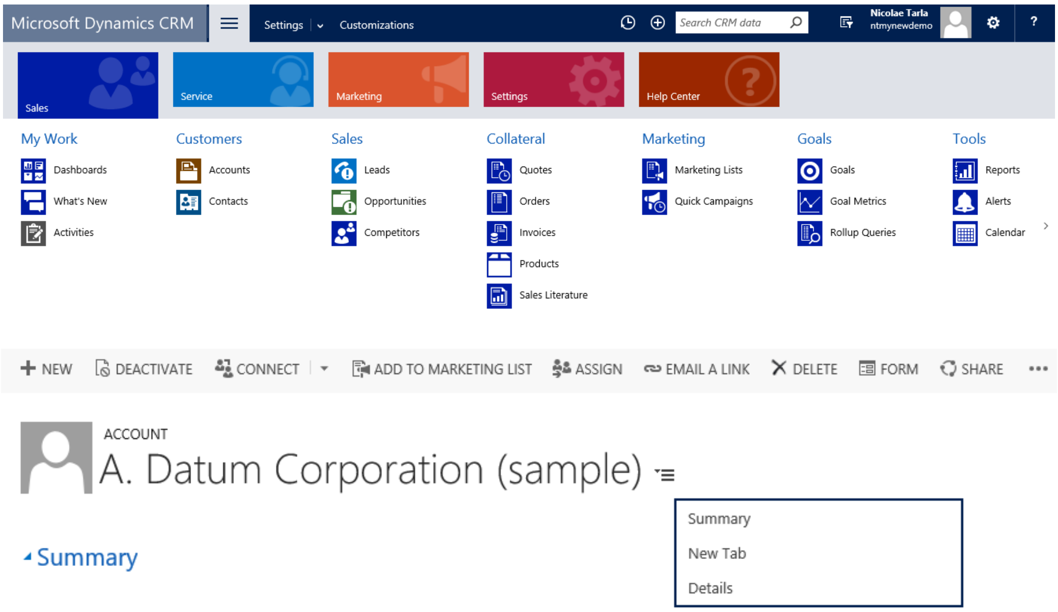

QUICK CAMPAIGN
Dynamics CRM Quick Campaign
Created On
12/5/2015 10:12 PM
Members Type
Account
Activity Type
Email
Status Reason
Completed
Summary
INFORMATION
Subject
Dynamics CRM Quick Campaign
Owner
Nicolae Tarla
No. of Successes
0
No. of Failures
0
Error Details
--
ACTIVITIES
All Entities
Add Phone Call
We didn't find any activity records.
SELECTED MEMBERS
Account Name
No Account records found.
EXCLUDED MEMBERS
Customers Excluded
Rea
No records are available in this view.


Marketing Dashboard
Marketing KPIs
Campaign Type Mix
All Campaigns for Current Fiscal Year
Advertisement
Co-branding
Direct Marketing
Event
Other
Campaign Budget vs. Actual Costs (By Fiscal)
All Campaigns for Current Fiscal Year
30,000.00
20,000.00
10,000.00
0.00
Quarter 2 FY2015
Quarter 3 FY2015
Quarter 4 FY2015
Fiscal Period (Actual End Date)
Sum (Budget Allocated) ($)
Sum (Total Cost of Campaign) ($)
Leads by Source Campaign
All leads in current fiscal year
Source Campaign
New customer loyalty program (sa...
Event campaign template (sample)
Direct marketing template (sampl...
Ad campaign template (sample)
Revenue Generated by Campaign
Closed Opportunities in Current Fiscal Year
Source Campaign
New customer loyalty program (sa...
Event campaign template (sample)
Direct marketing template (sampl...
Ad campaign template (sample)

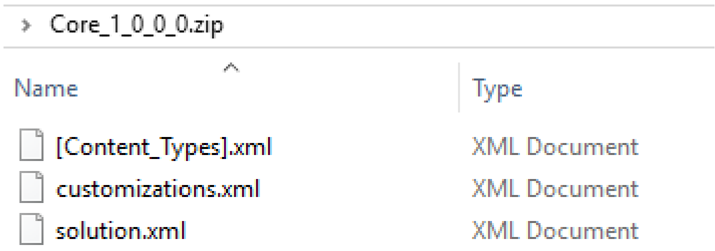

Marketing Social Dashboard
Marketing KPIs
Campaign Type Mix
All Campaigns for Current Fiscal Year
Advertisement
Co-branding
Direct Marketing
Event
Other
what's new
POST
All records
Both
Auto posts
User posts
Yammer in O365 Issue
Case: Associated as Child Case to O365 Subscription Service Issue by Nicolae Tarla.
On Yammer in O365 Issue's wall
Yesterday
Yammer in O365 Issue
Case: Created by Nicolae Tarla for Account A. Datum Corporation (sample).
On Yammer in O365 Issue's wall
Yesterday
O365 Subscription Service Issue
Case: Created by Nicolae Tarla for Account A. Datum Corporation (sample).
On O365 Subscription Service Issue's wall
Yesterday
Upgrade Instructions
Delegated Admin created Upgrade Instructions
On Upgrade Instructions's wall
12/1/2015 7:55 PM
Return Authorization
Delegated Admin created Return Authorization
On Return Authorization's wall
12/1/2015 7:55 PM
Order Shipping Time
Delegated Admin created Order Shipping Time
On Order Shipping Time's wall
12/1/2015 7:55 PM

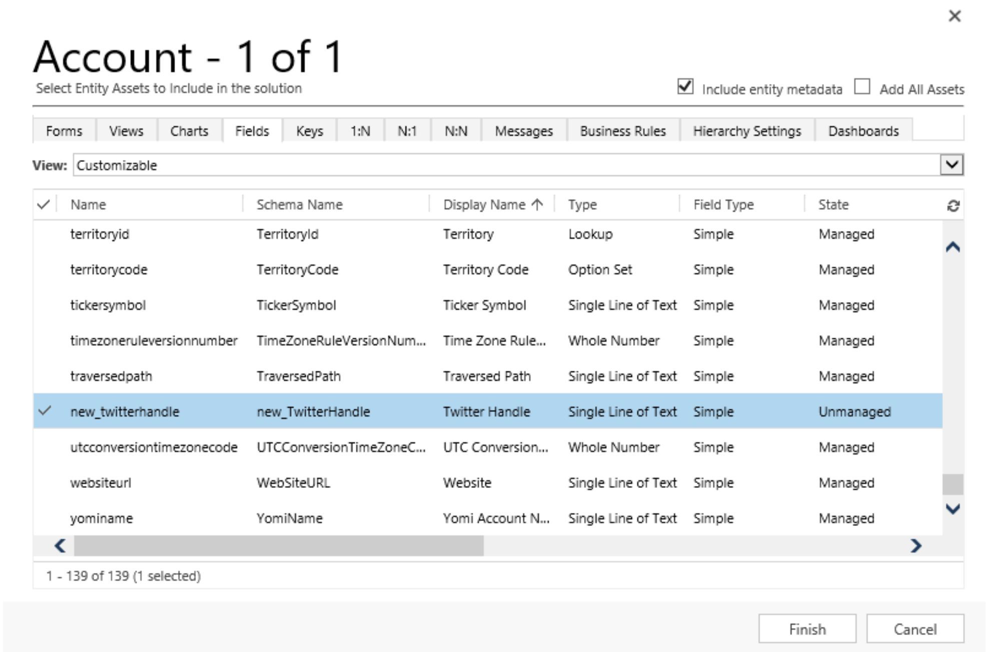

Dialog sample - Dashboards: Sales Activity Social Dashboard - Microsoft ...
Dialog sample
Collect Name
Enter Account Name
Blue Inc.
Tip
Enter a name for the Account
Click to add comments
Help
Summary
Next
Cancel
100%

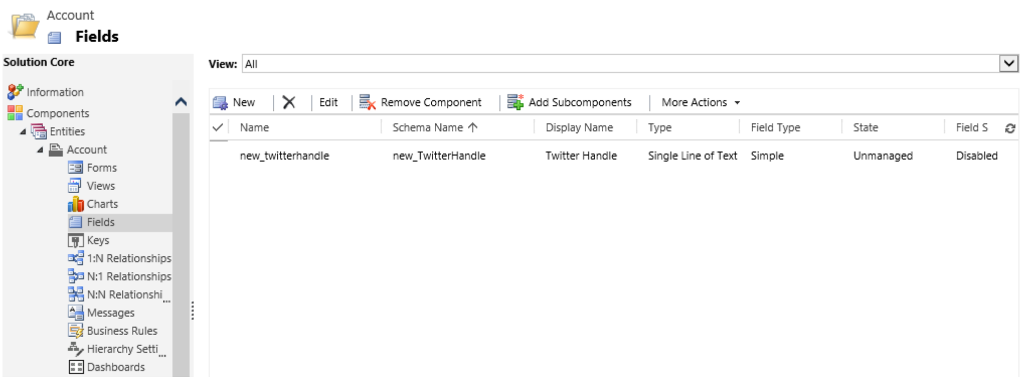

Qualify
Develop
Propose (Active)
Close
Next Stage
Identify Sales Team
mark complete
Develop Proposal
mark complete
Complete Internal Review
completed
Present Proposal
completed
Stage Category
Develop
Insert stage
Add branch
Stage Name *
Propose
Step Name
Value
Required
Identify Sales Team
Identify Sales Team
Develop Proposal
Develop Proposal
Complete Internal Review
Complete Internal Review
Present Proposal
Presented Proposal
Entity *
Opportunity
Relationship
Select relationships
Stage Category
Propose
Insert stage
Add branch
MOVE
Status: Active

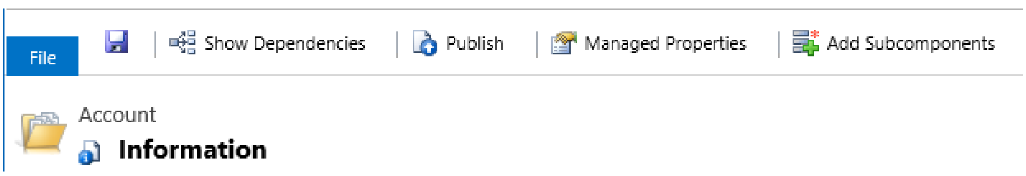

Microsoft Dynamics CRM
Settings
Customizations
Search CRM data
Nicolae Tarla
ntmynewdemo
Sales
Service
Marketing
Settings
Help Center
My Work
Dashboards
What's New
Activities
Customers
Accounts
Contacts
Sales
Leads
Opportunities
Competitors
Collateral
Quotes
Orders
Invoices
Products
Sales Literature
Marketing
Marketing Lists
Quick Campaigns
Goals
Goals
Goal Metrics
Rollup Queries
Tools
Reports
Alerts
Calendar
NEW
DEACTIVATE
CONNECT
ADD TO MARKETING LIST
ASSIGN
EMAIL A LINK
DELETE
FORM
SHARE
ACCOUNT
A. Datum Corporation (sample)
Summary
Summary
New Tab
Details

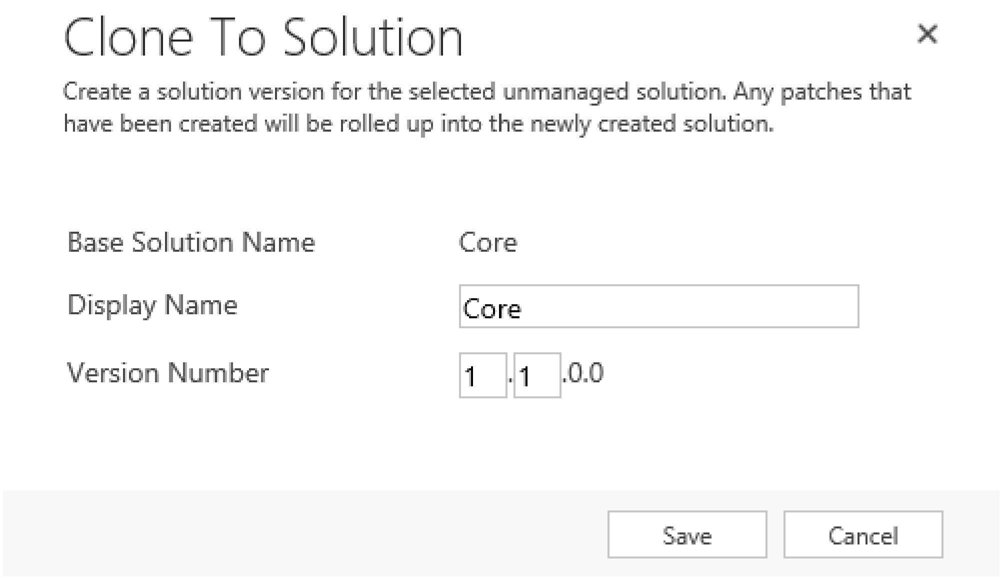
Chapter 3: Dynamic CRM Customization



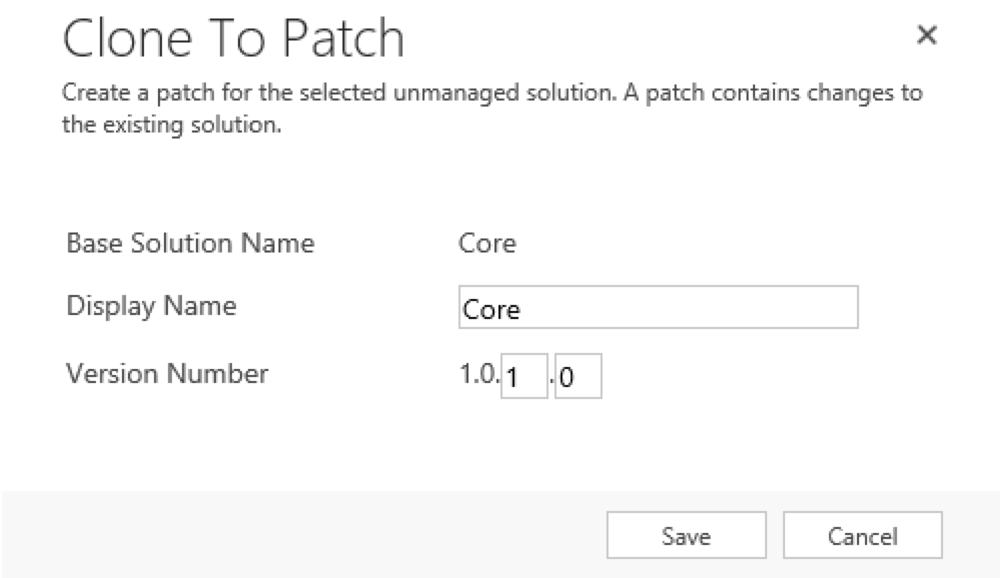


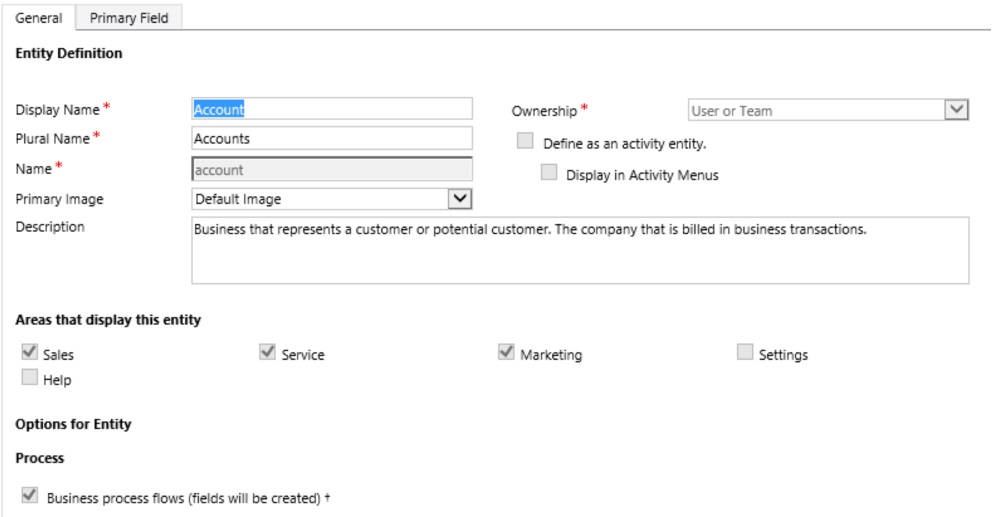


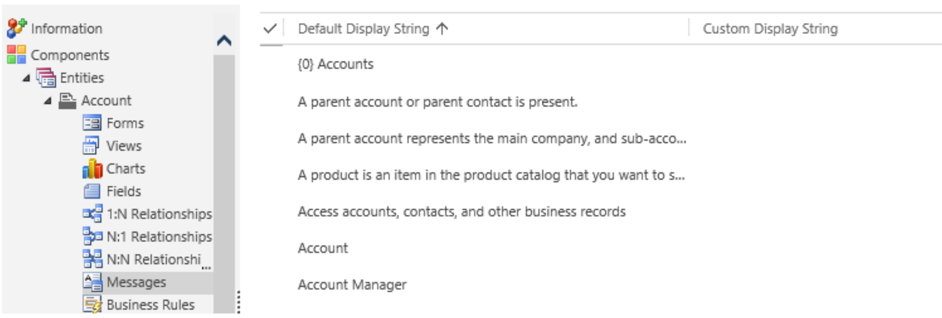


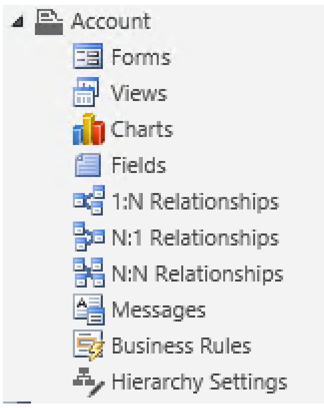

Clone To Solution
Create a solution version for the selected unmanaged solution. Any patches that have been created will be rolled up into the newly created solution.
Base Solution Name
Core
Display Name
Core
Version Number
1 .1 .0.0
Save
Cancel

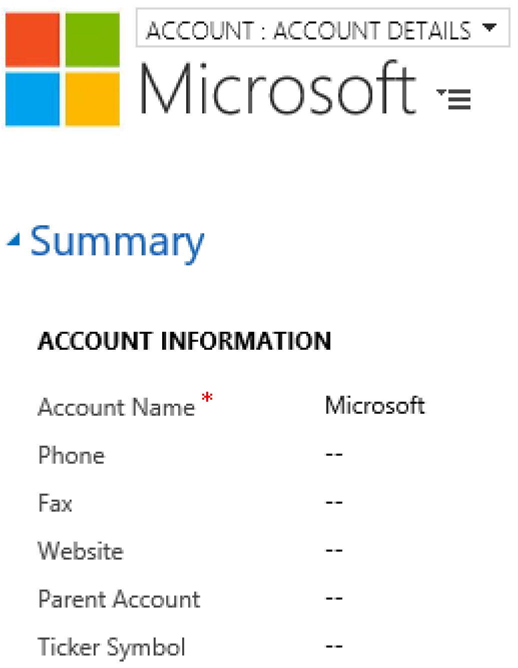

All Solutions
More Actions

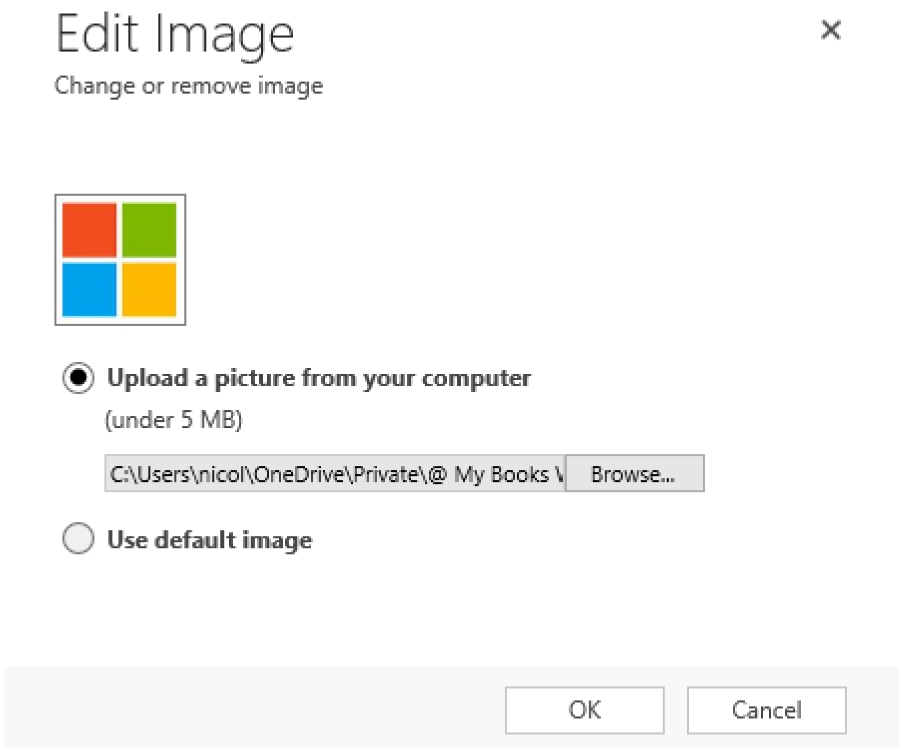

Clone To Patch
Create a patch for the selected unmanaged solution. A patch contains changes to the existing solution.
Base Solution Name
Core
Display Name
Core
Version Number
1.0. 1 .0
Save
Cancel

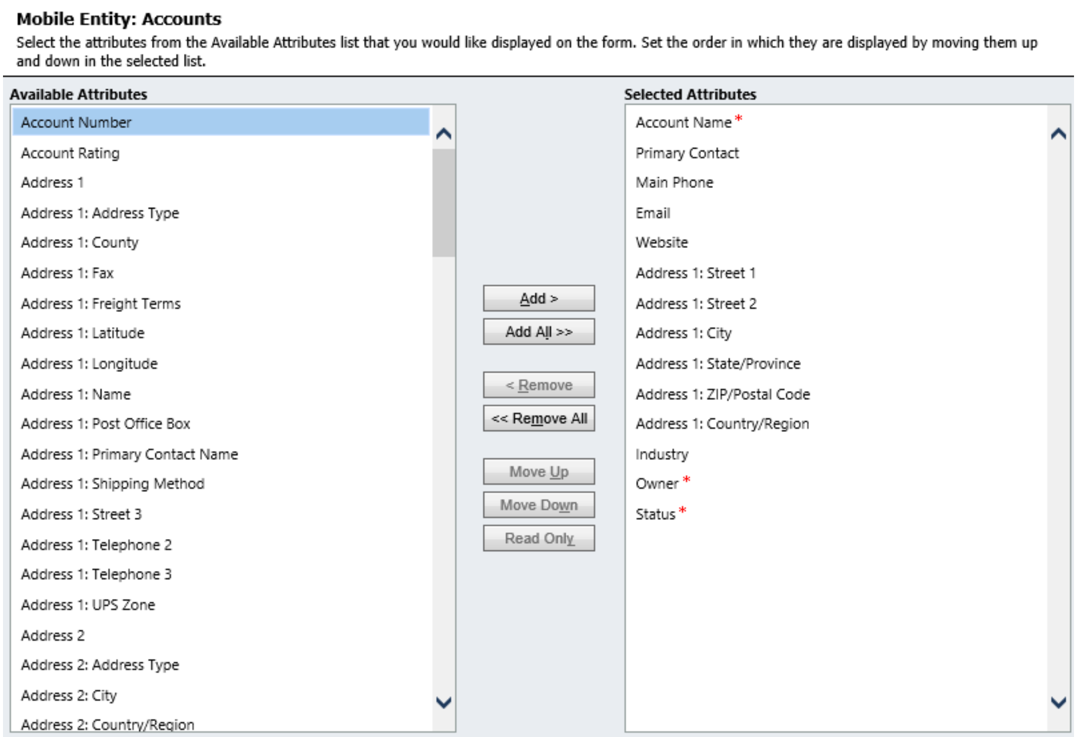

General
Primary Field
Entity Definition
Display Name *
Account
Plural Name *
Accounts
Name *
account
Primary Image
Default Image
Description
Business that represents a customer or potential customer. The company that is billed in business transactions.
Ownership *
User or Team
Define as an activity entity.
Display in Activity Menus
Areas that display this entity
Sales
Service
Marketing
Settings
Help
Options for Entity
Process
Business process flows (fields will be created) †

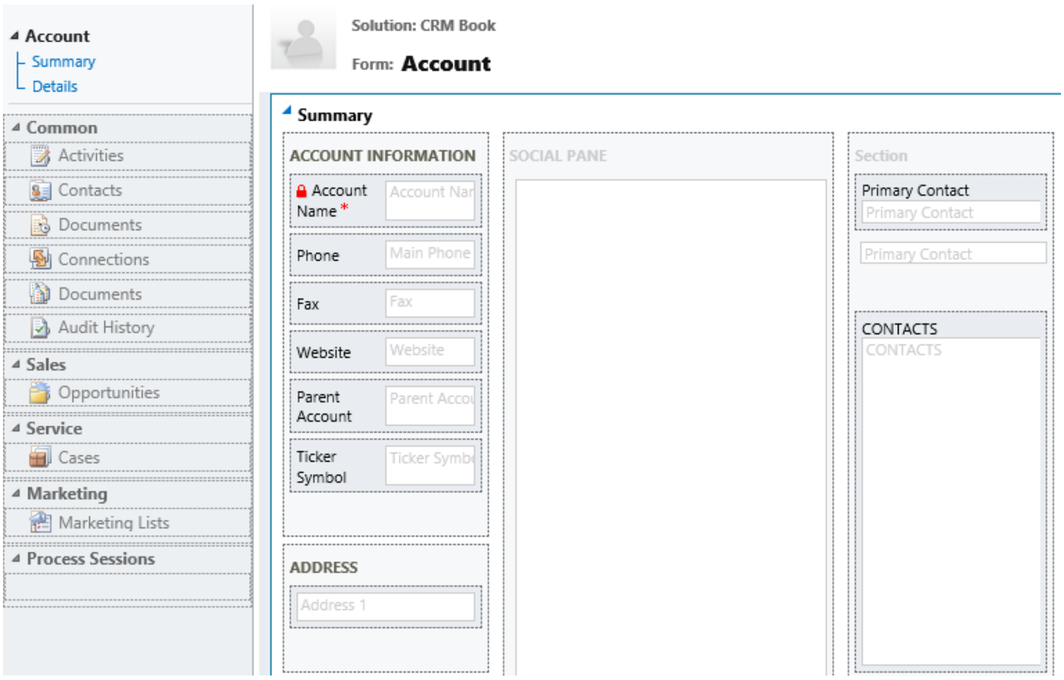

Information
Components
Entities
Account
Forms
Views
Charts
Fields
1:N Relationships
N:1 Relationships
N:N Relationshi...
Messages
Business Rules
Default Display String
Custom Display String
{0} Accounts
A parent account or parent contact is present.
A parent account represents the main company, and sub-acco...
A product is an item in the product catalog that you want to s...
Access accounts, contacts, and other business records
Account
Account Manager

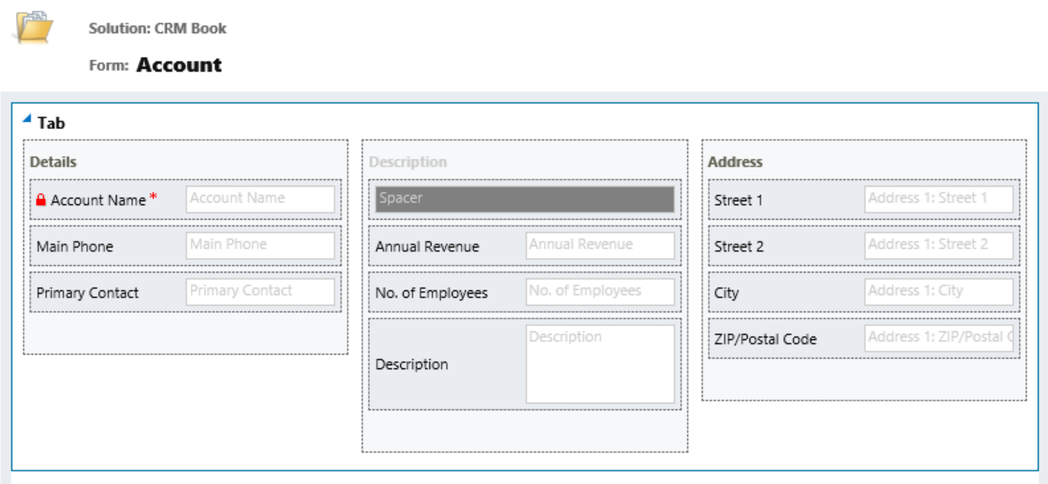

Account
Forms
Views
Charts
Fields
1:N Relationships
N:1 Relationships
N:N Relationships
Messages
Business Rules
Hierarchy Settings

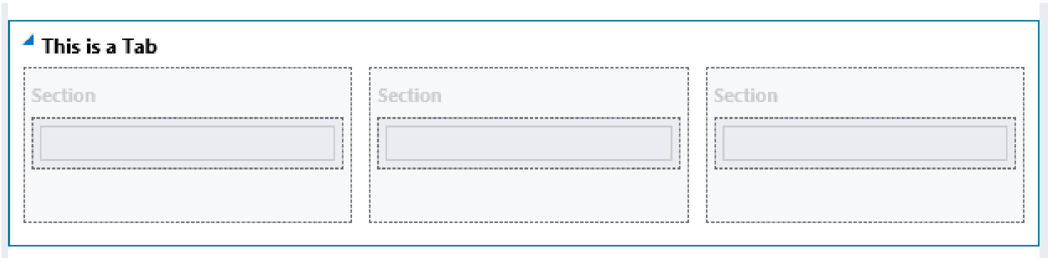

ACCOUNT : ACCOUNT DETAILS
Microsoft
Summary
ACCOUNT INFORMATION
Account Name *
Microsoft
Phone
--
Fax
--
Website
--
Parent Account
--
Ticker Symbol
--

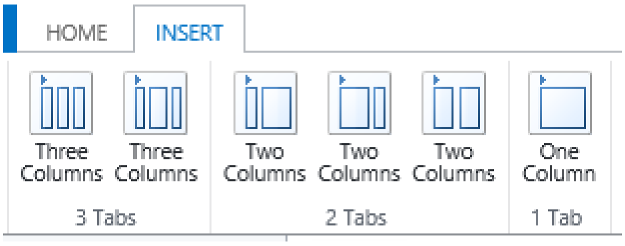

Edit Image
Change or remove image
Upload a picture from your computer
(under 5 MB)
C:\Users\nicol\OneDrive\Private\@ My Books \
Browse...
Use default image
OK
Cancel

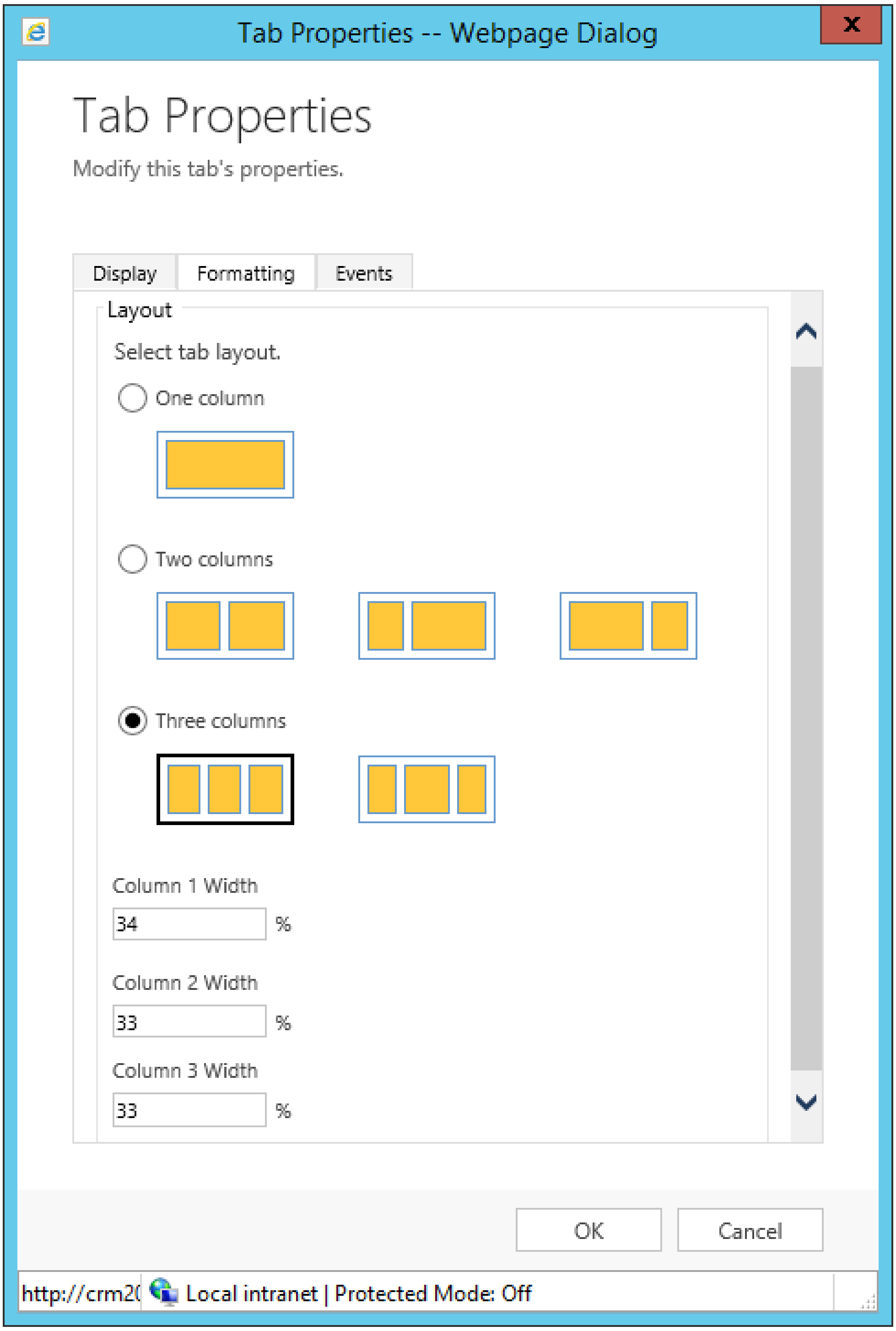

Mobile Entity: Accounts
Select the attributes from the Available Attributes list that you would like displayed on the form. Set the order in which they are displayed by moving them up and down in the selected list.
Available Attributes
Account Number
Account Rating
Address 1
Address 1: Address Type
Address 1: County
Address 1: Fax
Address 1: Freight Terms
Address 1: Latitude
Address 1: Longitude
Address 1: Name
Address 1: Post Office Box
Address 1: Primary Contact Name
Address 1: Shipping Method
Address 1: Street 3
Address 1: Telephone 2
Address 1: Telephone 3
Address 1: UPS Zone
Address 2
Address 2: Address Type
Address 2: City
Address 2: Country/Region
Add >
Add All >>
< Remove
<< Remove All
Move Up
Move Down
Read Only
Selected Attributes
Account Name *
Primary Contact
Main Phone
Email
Website
Address 1: Street 1
Address 1: Street 2
Address 1: City
Address 1: State/Province
Address 1: ZIP/Postal Code
Address 1: Country/Region
Industry
Owner *
Status *

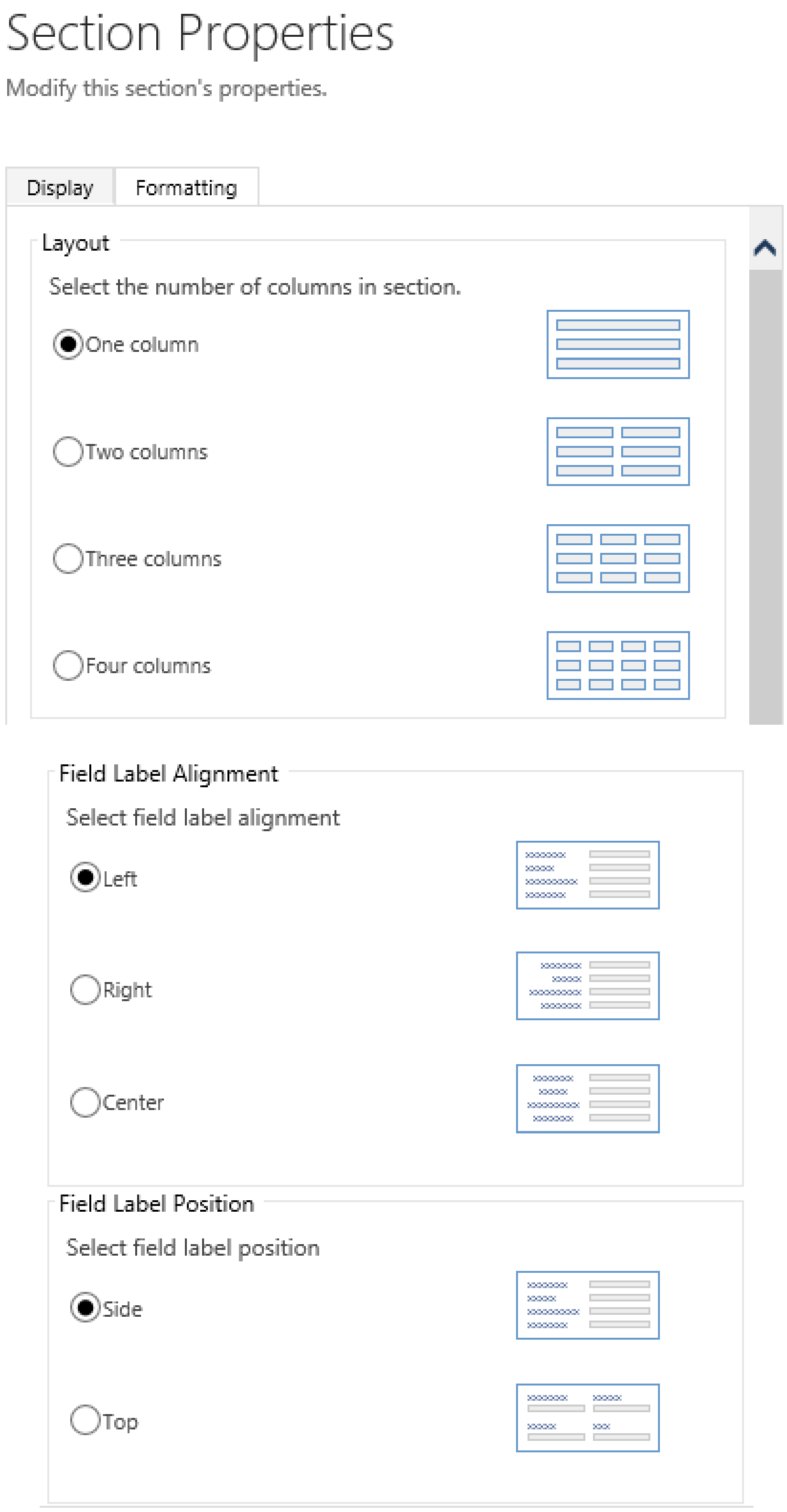

Account
Summary
Details
Common
Activities
Contacts
Documents
Connections
Documents
Audit History
Sales
Opportunities
Service
Cases
Marketing
Marketing Lists
Process Sessions
Solution: CRM Book
Form: Account
Summary
ACCOUNT INFORMATION
Account Name *
Phone
Fax
Website
Parent Account
Ticker Symbol
ADDRESS
Address 1
SOCIAL PANE
Section
Primary Contact
CONTACTS

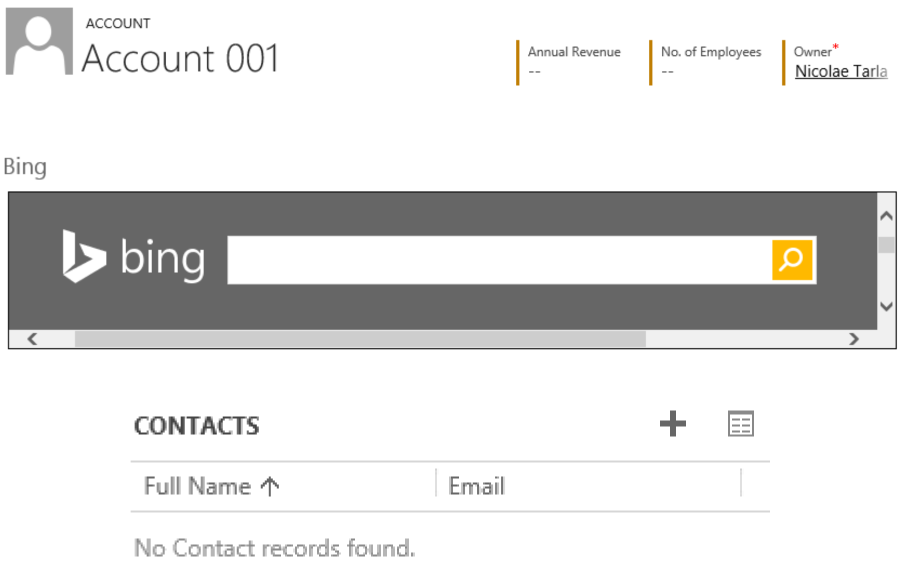

Solution: CRM Book
Form: Account
Tab
Details
Account Name *
Account Name
Main Phone
Main Phone
Primary Contact
Primary Contact
Description
Spacer
Annual Revenue
Annual Revenue
No. of Employees
No. of Employees
Description
Description
Address
Street 1
Address 1: Street 1
Street 2
Address 1: Street 2
City
Address 1: City
ZIP/Postal Code
Address 1: ZIP/Postal C

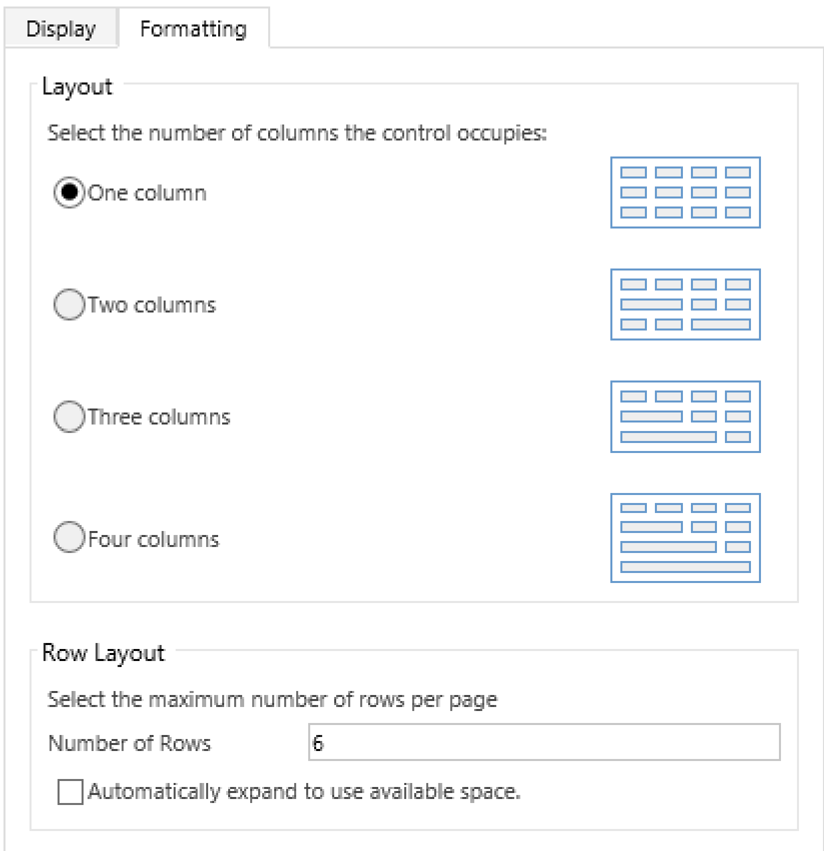

This is a Tab
Section
Section
Section

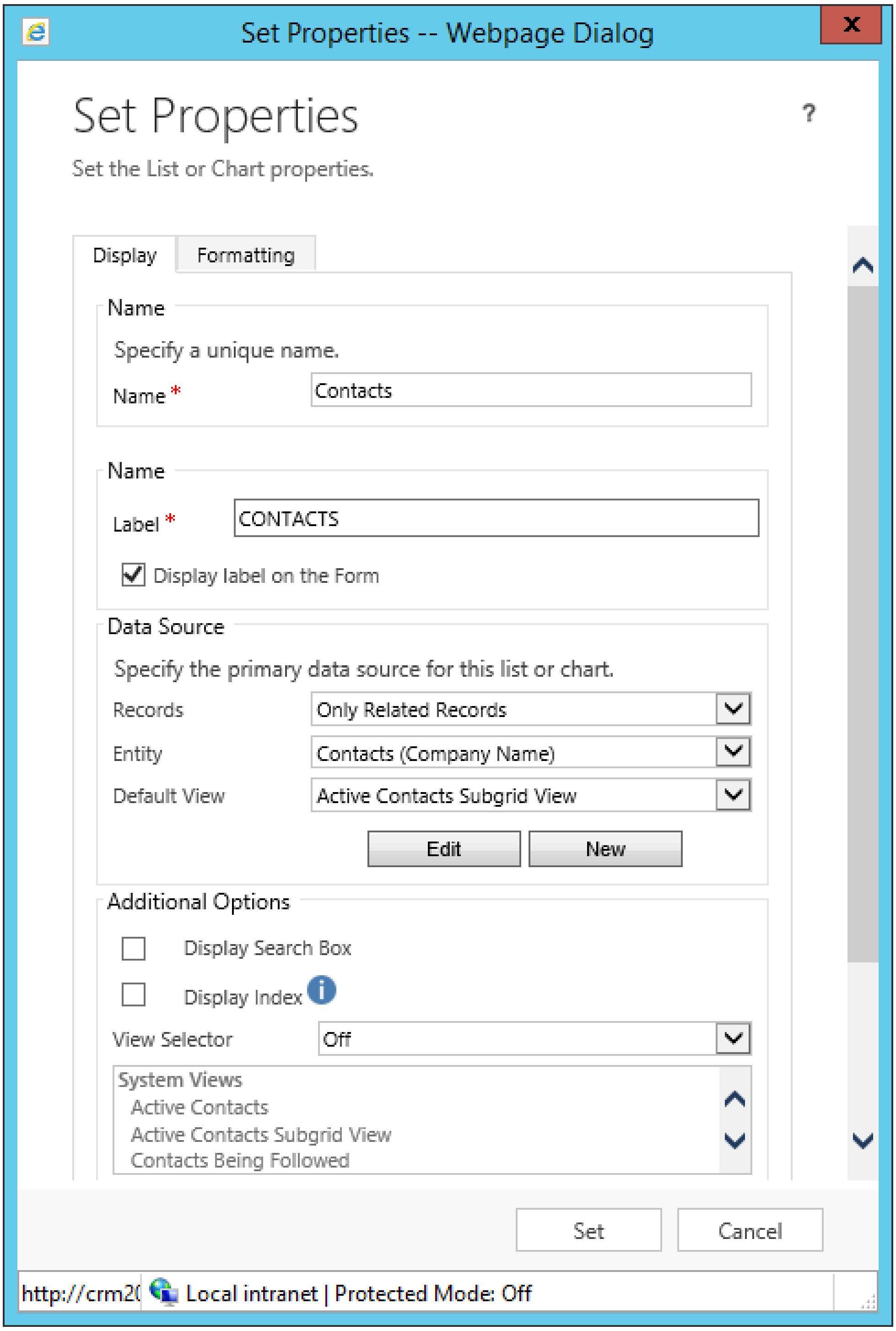

HOME
INSERT
Three Columns
Three Columns
Two Columns
Two Columns
Two Columns
One Column
3 Tabs
2 Tabs
1 Tab

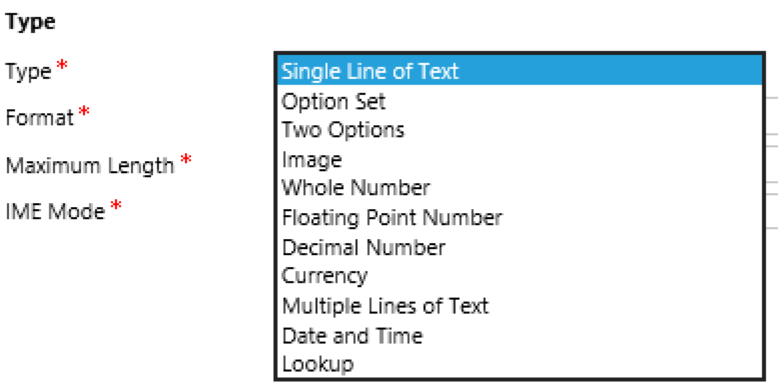

Tab Properties -- Webpage Dialog
Tab Properties
Modify this tab's properties.
Display
Formatting
Events
Layout
Select tab layout.
One column
Two columns
Three columns
Column 1 Width
34
%
Column 2 Width
33
%
Column 3 Width
33
%
OK
Cancel
http://crm2(
Local intranet | Protected Mode: Off


Section Properties
Modify this section's properties.
Display
Formatting
Layout
Select the number of columns in section.
One column
Two columns
Three columns
Four columns
Field Label Alignment
Select field label alignment
Left
Right
Center
Field Label Position
Select field label position
Side
Top

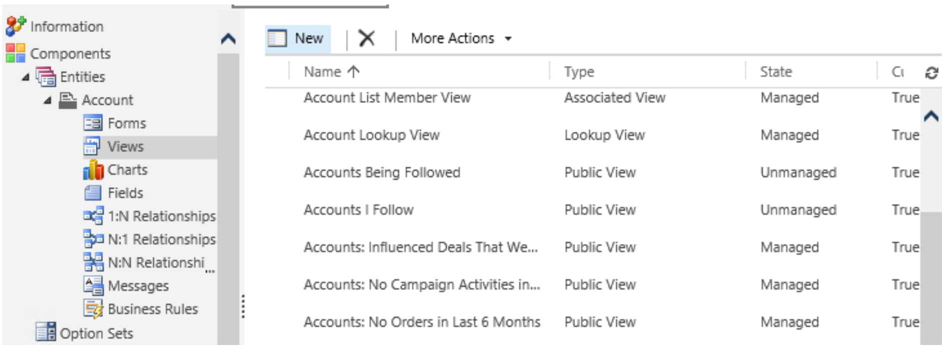

ACCOUNT
Account 001
Annual Revenue
--
No. of Employees
--
Owner*
Nicolae Tarla
Bing
bing
CONTACTS
Full Name
Email
No Contact records found.

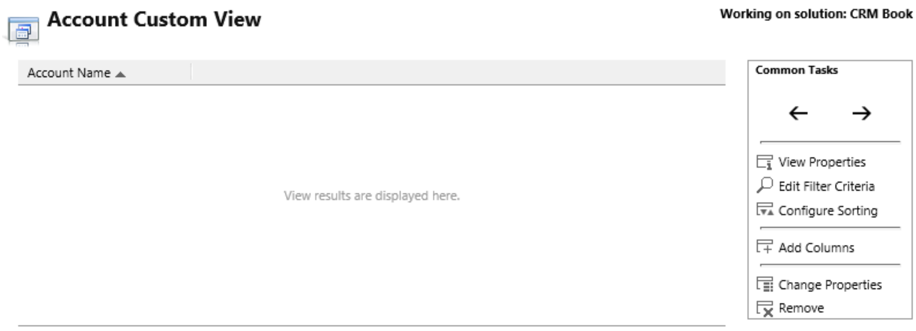

Display
Formatting
Layout
Select the number of columns the control occupies:
One column
Two columns
Three columns
Four columns
Row Layout
Select the maximum number of rows per page
Number of Rows
6
Automatically expand to use available space.

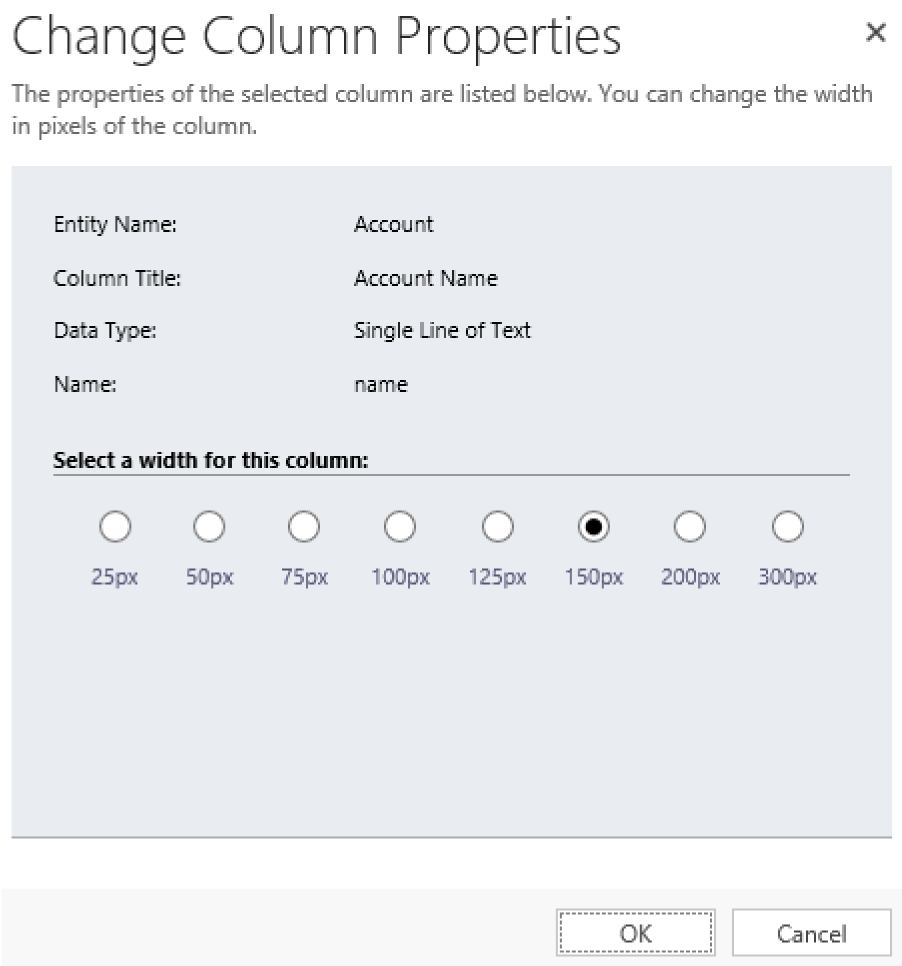

Set Properties -- Webpage Dialog
Set Properties
Set the List or Chart properties.
Display
Formatting
Name
Specify a unique name.
Name *
Contacts
Name
Label *
CONTACTS
Display label on the Form
Data Source
Specify the primary data source for this list or chart.
Records
Only Related Records
Entity
Contacts (Company Name)
Default View
Active Contacts Subgrid View
Edit
New
Additional Options
Display Search Box
Display Index
View Selector
Off
System Views
Active Contacts
Active Contacts Subgrid View
Contacts Being Followed
Set
Cancel
http://crm2(
Local intranet | Protected Mode: Off

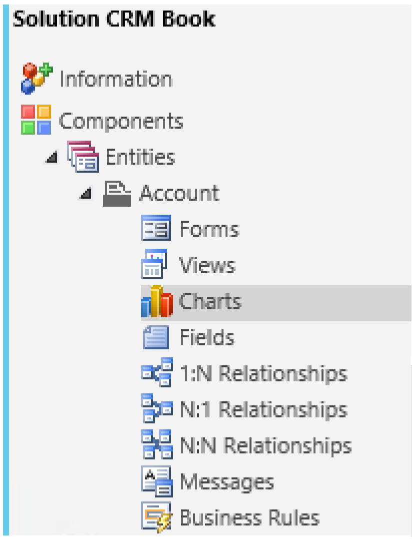

Type
Type *
Format *
Maximum Length *
IME Mode *
Single Line of Text
Option Set
Two Options
Image
Whole Number
Floating Point Number
Decimal Number
Currency
Multiple Lines of Text
Date and Time
Lookup

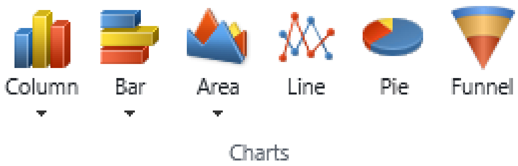

Spacer
RECENT OPPORTUNITIES
RECENT OPPORTUNITIES

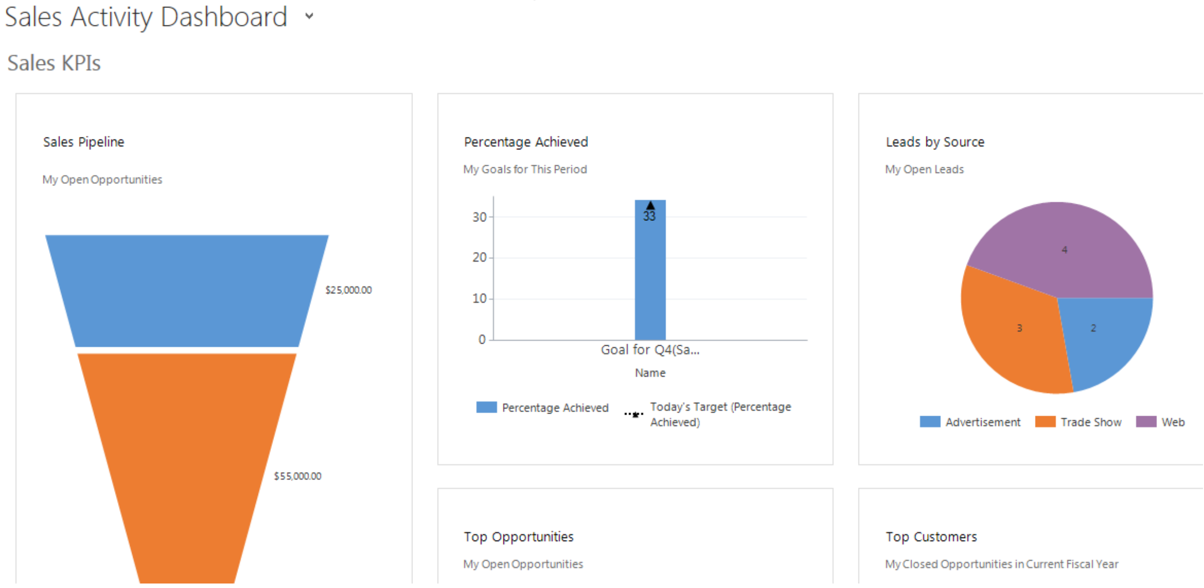

Information
Components
Entities
Account
Forms
Views
Charts
Fields
1:N Relationships
N:1 Relationships
N:N Relationshi...
Messages
Business Rules
Option Sets
New
More Actions
Name
Type
State
Account List Member View
Associated View
Managed
True
Account Lookup View
Lookup View
Managed
True
Accounts Being Followed
Public View
Unmanaged
True
Accounts I Follow
Public View
Unmanaged
True
Accounts: Influenced Deals That We...
Public View
Managed
True
Accounts: No Campaign Activities in...
Public View
Managed
True
Accounts: No Orders in Last 6 Months
Public View
Managed
True

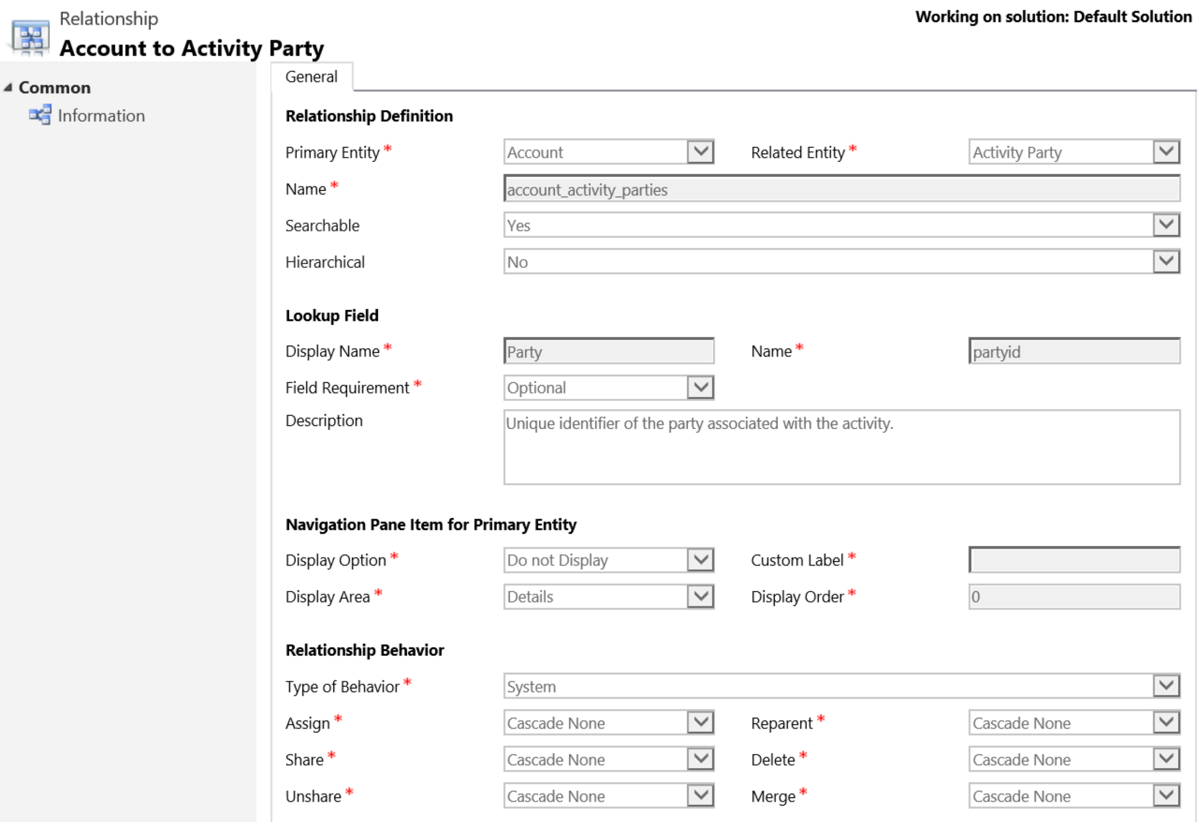

Account Custom View
Working on solution: CRM Book
Account Name
View results are displayed here.
Common Tasks
View Properties
Edit Filter Criteria
Configure Sorting
Add Columns
Change Properties
Remove

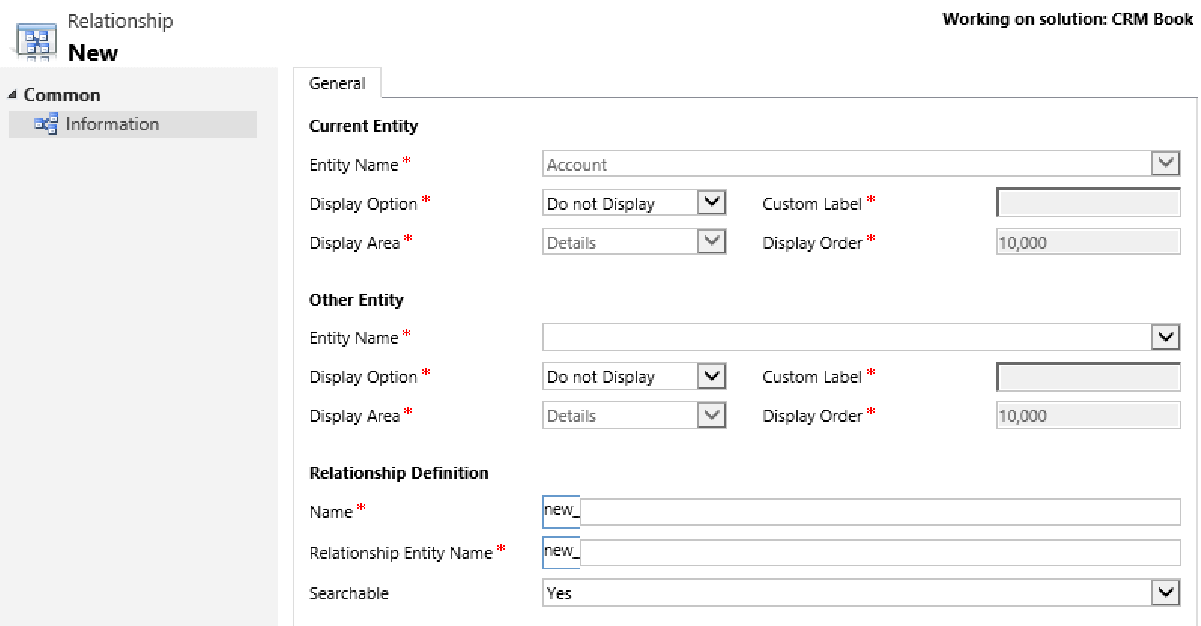

Change Column Properties
The properties of the selected column are listed below. You can change the width in pixels of the column.
Entity Name: Account
Column Title: Account Name
Data Type: Single Line of Text
Name: name
Select a width for this column:
25px
50px
75px
100px
125px
150px
200px
300px
OK
Cancel

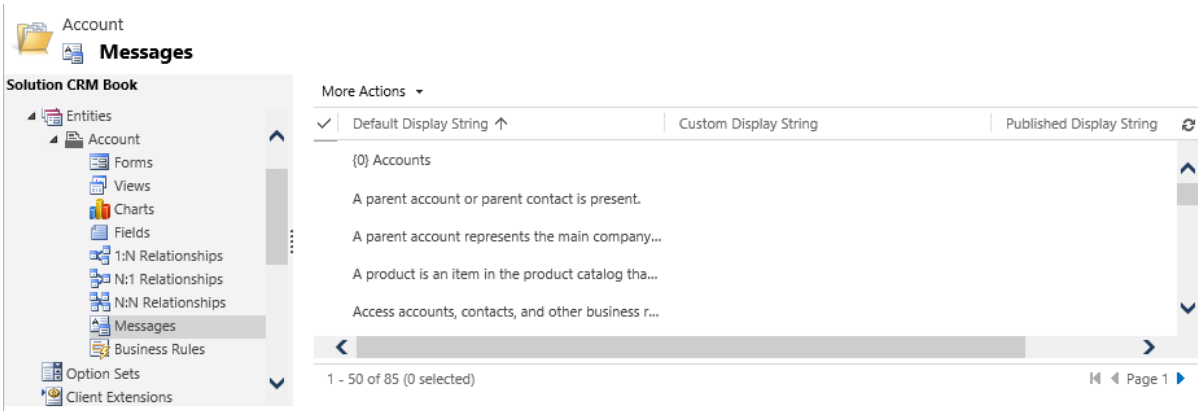

Solution CRM Book
Information
Components
Entities
Account
Forms
Views
Charts
Fields
1:N Relationships
N:1 Relationships
N:N Relationships
Messages
Business Rules

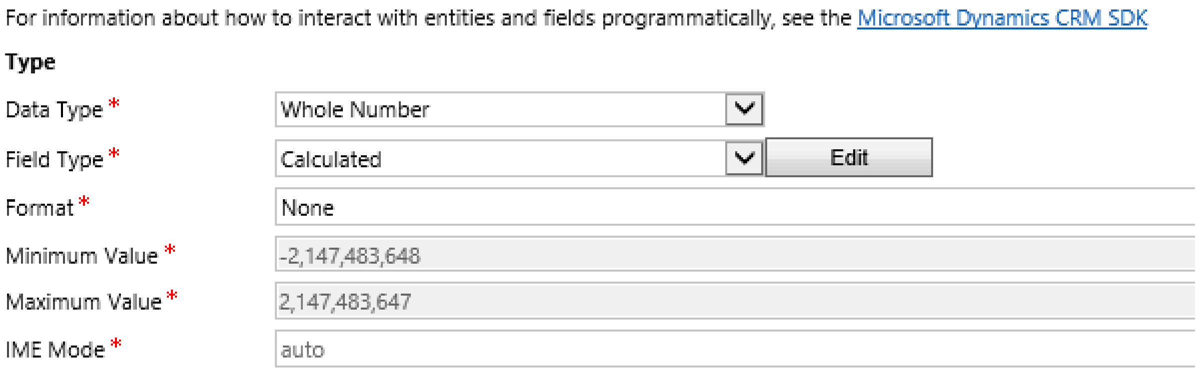

Column
Bar
Area
Line
Pie
Funnel
Charts

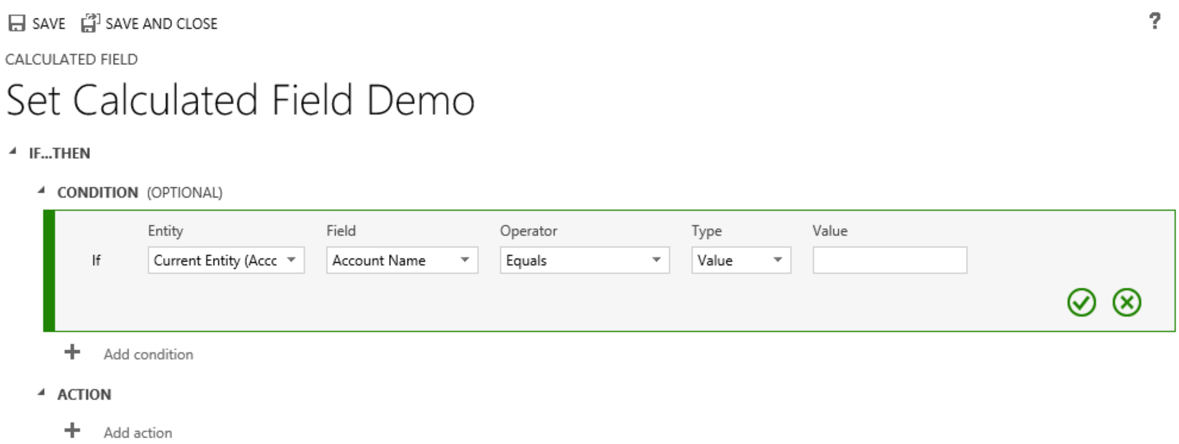

Sales Activity Dashboard
Sales KPIs
Sales Pipeline
My Open Opportunities
$25,000.00
$55,000.00
Percentage Achieved
My Goals for This Period
30
20
10
0
33
Goal for Q4(Sa...
Name
Percentage Achieved
Today's Target (Percentage Achieved)
Leads by Source
My Open Leads
4
3
2
Advertisement
Trade Show
Web
Top Opportunities
My Open Opportunities
Top Customers
My Closed Opportunities in Current Fiscal Year

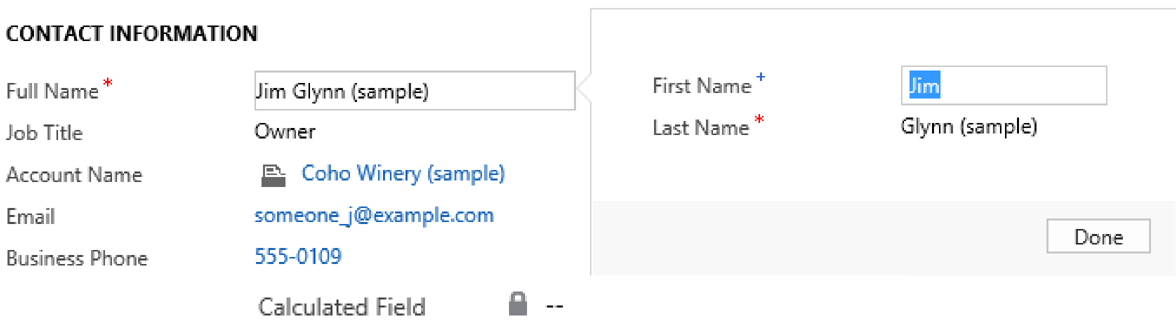

Relationship
Account to Activity Party
Working on solution: Default Solution
Common
Information
General
Relationship Definition
Primary Entity *
Account
Related Entity *
Activity Party
Name *
account_activity_parties
Searchable
Yes
Hierarchical
No
Lookup Field
Display Name *
Party
Name *
partyid
Field Requirement *
Optional
Description
Unique identifier of the party associated with the activity.
Navigation Pane Item for Primary Entity
Display Option *
Do not Display
Custom Label *
Display Area *
Details
Display Order *
0
Relationship Behavior
Type of Behavior *
System
Assign *
Cascade None
Reparent *
Cascade None
Share *
Cascade None
Delete *
Cascade None
Unshare *
Cascade None
Merge *
Cascade None


Relationship
New
Working on solution: CRM Book
Common
Information
General
Current Entity
Entity Name *
Account
Display Option *
Do not Display
Custom Label *
Display Area *
Details
Display Order *
10,000
Other Entity
Entity Name *
Display Option *
Do not Display
Custom Label *
Display Area *
Details
Display Order *
10,000
Relationship Definition
Name *
new_
Relationship Entity Name *
new_
Searchable
Yes


Account
Messages
Solution CRM Book
Entities
Account
Forms
Views
Charts
Fields
1:N Relationships
N:1 Relationships
N:N Relationships
Messages
Business Rules
Option Sets
Client Extensions
More Actions
Default Display String
Custom Display String
Published Display String
{0} Accounts
A parent account or parent contact is present.
A parent account represents the main company...
A product is an item in the product catalog tha...
Access accounts, contacts, and other business r...
1 - 50 of 85 (0 selected)
Page 1


For information about how to interact with entities and fields programmatically, see the Microsoft Dynamics CRM SDK
Type
Data Type *
Whole Number
Field Type *
Calculated
Edit
Format *
None
Minimum Value *
-2,147,483,648
Maximum Value *
2,147,483,647
IME Mode *
auto


SAVE
SAVE AND CLOSE
?
CALCULATED FIELD
Set Calculated Field Demo
IF...THEN
CONDITION (OPTIONAL)
Entity
Field
Operator
Type
Value
If
Current Entity (Acco
Account Name
Equals
Value
Add condition
ACTION
Add action


CONTACT INFORMATION
Full Name *
Jim Glynn (sample)
Job Title
Owner
Account Name
Coho Winery (sample)
Email
someone_j@example.com
Business Phone
555-0109
Calculated Field
--
First Name +
Jim
Last Name *
Glynn (sample)
Done

Type

Data Type *	Decimal Number
Field Type *	Rollup (Edit)
Precision *	2
Minimum Value *	-100,000,000,000.00
Maximum Value *	100,000,000,000.00
IME Mode *	auto

SAVE   SAVE AND CLOSE

ROLLUP FIELD

Rollup Field

SOURCE ENTITY

Source: **Account**

Use Hierarchy: **YES**   Relationship: **account_parent_account**

FILTERS (OPTIONAL)

+ Add condition

RELATED ENTITY (OPTIONAL)

Related: **Opportunities (Account)**

FILTERS (OPTIONAL)

+ Add condition

AGGREGATION

COUNT of **Opportunity**

The "Mass calculate the account.new_rollupfield rollup field" mass calculation job will automatically be scheduled to run approximately 12 hours from the time that the rollup field is saved. If you need to change the time when its run, a system administrator can access this job from the Recurring System Jobs view and change the time.

Rollup Field --

Rollup Field --

Service Terms

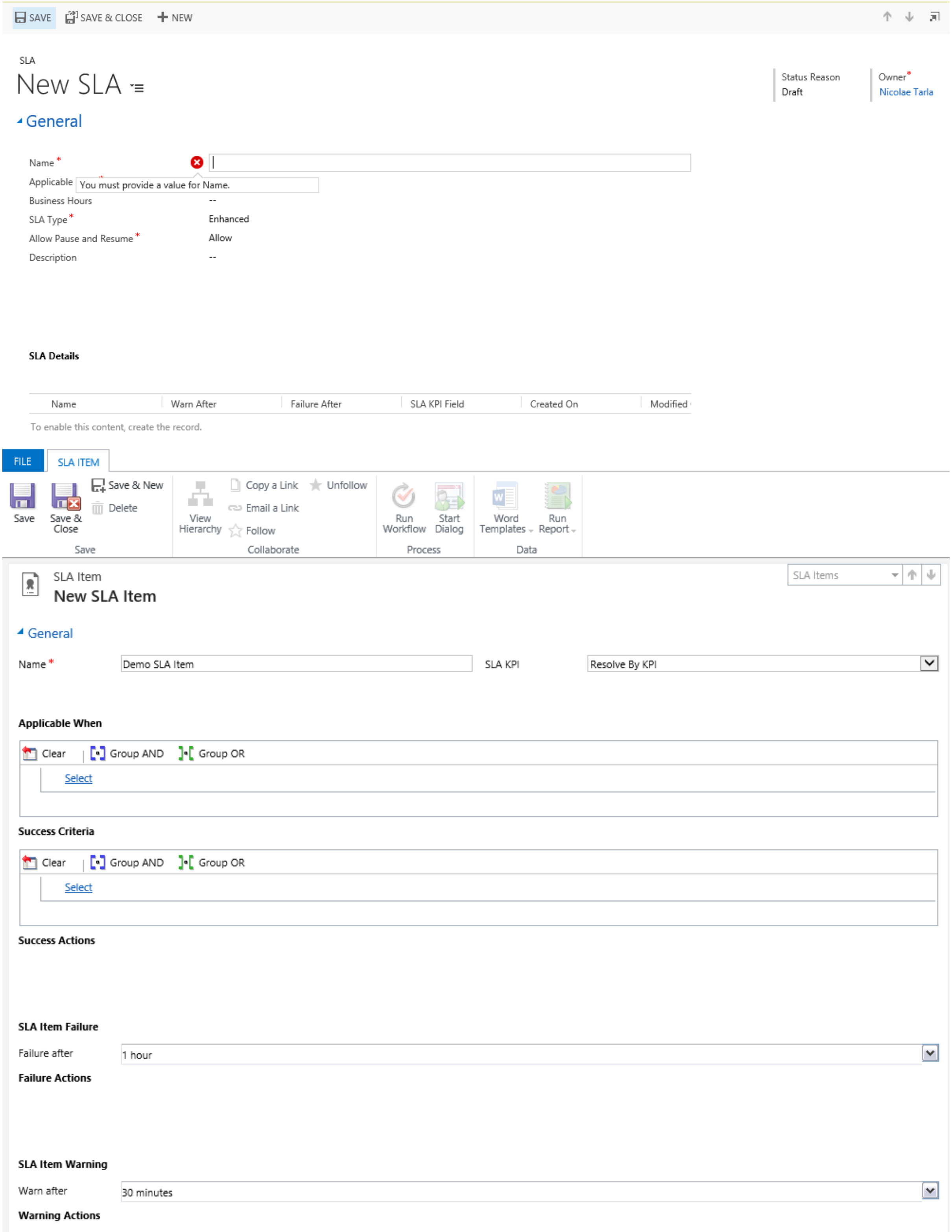
Service Level Agreements
Create and manage service level agreements (SLAs), and associate them to a customer service schedule. Define failure and warning violation time, and the actions associated with SLAs.

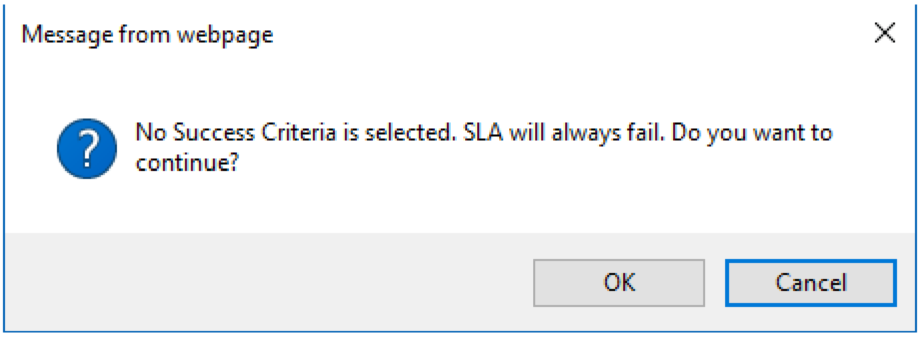
Entitlements
Create and manage entitlements, and associate them with a customer. Define and manage entitlement terms of service for multiple channels.

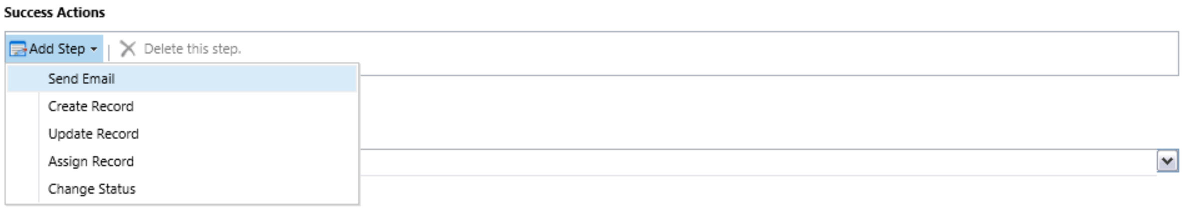
Holiday Schedule
Create and manage a list of holidays for the customer service schedule. Associating the holiday schedule with a service schedule determines SLA time calculations.

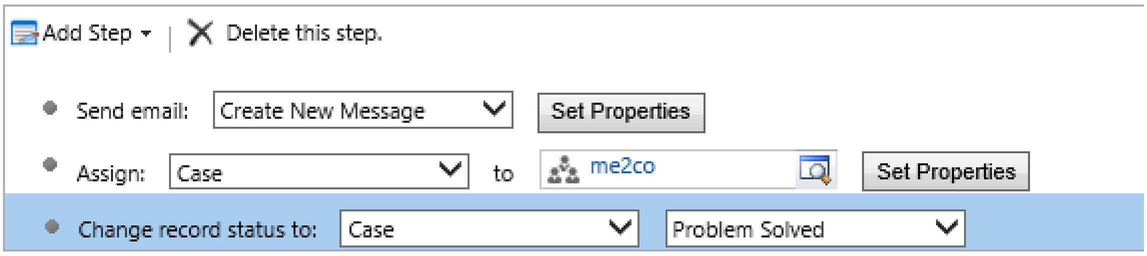
Service Configuration Settings
Set system-level service settings for your organization.

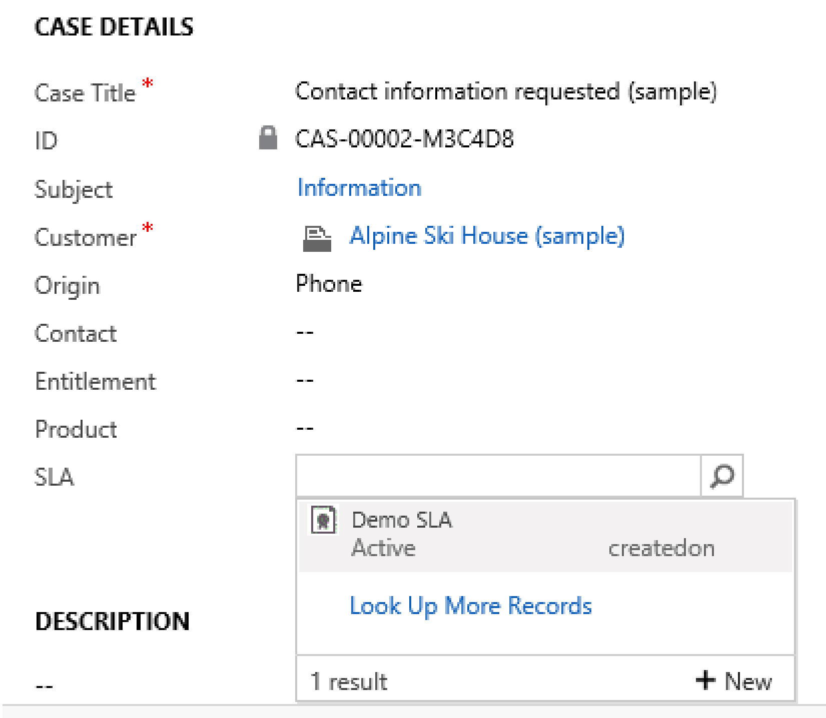
Customer Service Schedule
Create and manage customer service schedules for the organization.

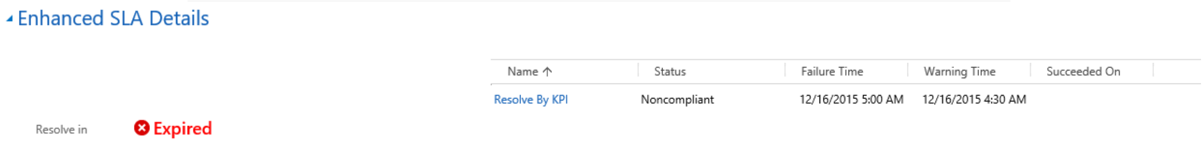

SAVE
SAVE & CLOSE
NEW
SLA
New SLA
Status Reason
Draft
Owner
Nicolae Tarla
General
Name
You must provide a value for Name.
Applicable
Business Hours
SLA Type
Enhanced
Allow Pause and Resume
Allow
Description
SLA Details
Name
Warn After
Failure After
SLA KPI Field
Created On
Modified
To enable this content, create the record.
FILE
SLA ITEM
Save
Save & Close
Save & New
Delete
View Hierarchy
Copy a Link
Email a Link
Unfollow
Follow
Collaborate
Run Workflow
Start Dialog
Process
Word Templates
Run Report
Data
SLA Item
New SLA Item
SLA Items
General
Name
Demo SLA Item
SLA KPI
Resolve By KPI
Applicable When
Clear
Group AND
Group OR
Select
Success Criteria
Clear
Group AND
Group OR
Select
Success Actions
SLA Item Failure
Failure after
1 hour
Failure Actions
SLA Item Warning
Warn after
30 minutes
Warning Actions


Message from webpage
No Success Criteria is selected. SLA will always fail. Do you want to continue?
OK
Cancel


Success Actions
Add Step
Delete this step.
Send Email
Create Record
Update Record
Assign Record
Change Status


Add Step
Delete this step.
Send email: Create New Message
Set Properties
Assign: Case
to
me2co
Set Properties
Change record status to: Case
Problem Solved


CASE DETAILS
Case Title *
Contact information requested (sample)
ID
CAS-00002-M3C4D8
Subject
Information
Customer *
Alpine Ski House (sample)
Origin
Phone
Contact
--
Entitlement
--
Product
--
SLA
Demo SLA
Active
createdon
Look Up More Records
1 result
+ New
DESCRIPTION
--


Enhanced SLA Details
Name
Status
Failure Time
Warning Time
Succeeded On
Resolve By KPI
Noncompliant
12/16/2015 5:00 AM
12/16/2015 4:30 AM
Resolve in
Expired


Communication & Collaboration
Notes (includes attachments) †

Document Management

Which feature would you like to work with?

Document Management Settings
Select default document management settings for your organization.

Install List Component
Install List Component

SharePoint Sites
A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.

SharePoint Document Locations
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics CRM record.

Enable Server-Based SharePoint Integration
We recommend that you enable server-based SharePoint integration. Your current SharePoint integration relies on installing a list component on a sandbox solution in SharePoint. SharePoint will no longer be supporting the sandbox solution feature.

Enable OneDrive for Business
Enable users to manage files stored in OneDrive for Business directly in Dynamics CRM.

Manage Office Graph Integration
Enable Office Graph integration and specify default settings for your organization.

Enable Server-Based SharePoint Integration

After you enable server-based SharePoint integration, you'll notice the following changes if you used the previous SharePoint integration:

- You can perform SharePoint actions in the CRM command bar.

- SharePoint documents display in Microsoft Dynamics CRM lists.

- There's no list component installation required for the SharePoint site.

If you're already connected to SharePoint sites, all the sites must be valid for server-based SharePoint integration.

Enable Server-Based SharePoint Integration

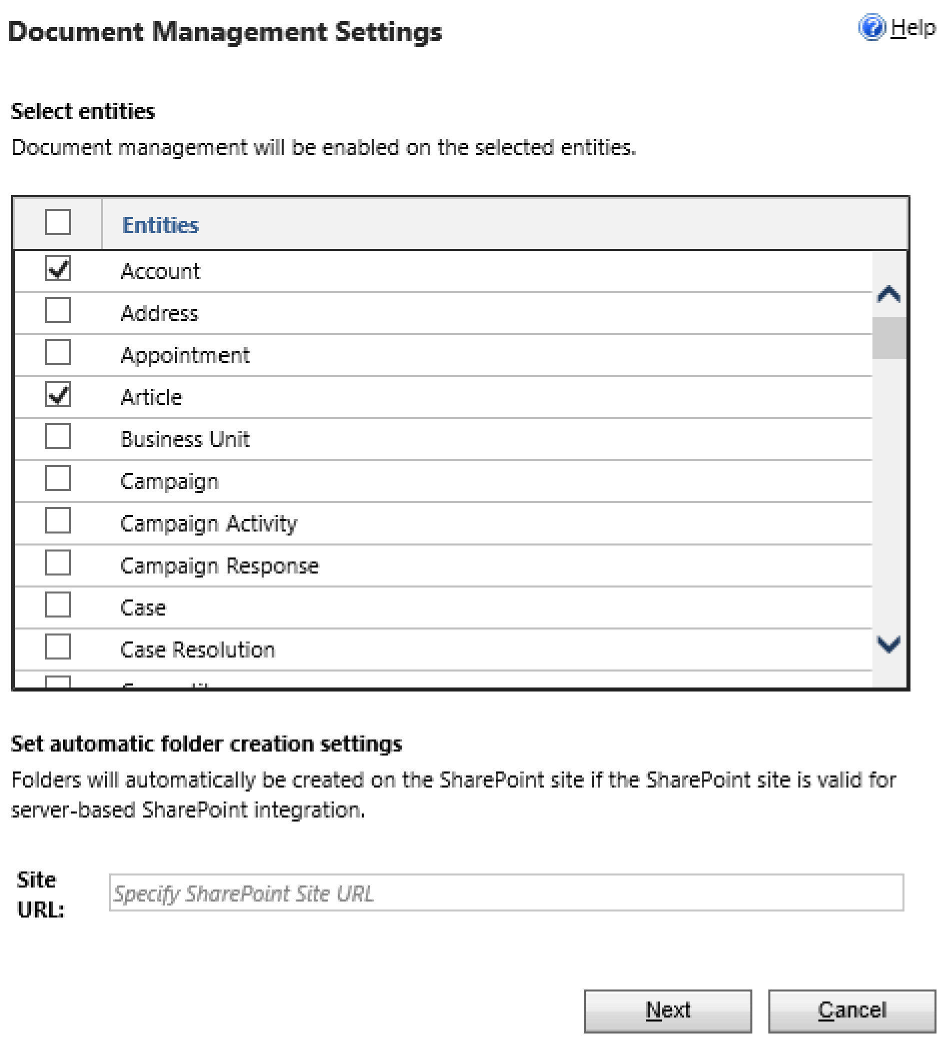
Congratulations!

Server-based SharePoint integration is now complete!

You've added a new SharePoint site URL, but you'll need to go to the Document Management Settings Wizard and enable the automatic folder generation for the site before you can view your documents in CRM.

☐ Open Document Management Settings Wizard

Finish


Document Management Settings
Help
Select entities
Document management will be enabled on the selected entities.
Entities
Account
Address
Appointment
Article
Business Unit
Campaign
Campaign Activity
Campaign Response
Case
Case Resolution
Set automatic folder creation settings
Folders will automatically be created on the SharePoint site if the SharePoint site is valid for server-based SharePoint integration.
Site URL:
Specify SharePoint Site URL
Next
Cancel

Document Management Settings

Help

Document Library Creation Status

To be created:	8
Newly created:	8
Failed:	0
Already existing:	0

Creation Details

Entities	Document Library	Status	Failure Reason
Account	https://me2co.sharepoint.com/account	Succeeded	
Article	https://me2co.sharepoint.com/kbarticle	Succeeded	
Knowledge Ar...	https://me2co.sharepoint.com/knowl...	Succeeded	
Lead	https://me2co.sharepoint.com/lead	Succeeded	
Opportunity	https://me2co.sharepoint.com/opport...	Succeeded	
Product	https://me2co.sharepoint.com/product	Succeeded	
Quote	https://me2co.sharepoint.com/quote	Succeeded	
Sales Literature	https://me2co.sharepoint.com/saleslit...	Succeeded	

Back Finish Cancel

Create Folder

×

Would you like to create a folder at this location:
https://me2co.sharepoint.com/account/A- Datum Corporation (sample)
_2C5C898331A6E51180D69CB654958330

Confirm Cancel

ACCOUNT : ACCOUNT DETAILS

A. Datum Corporation (sample)

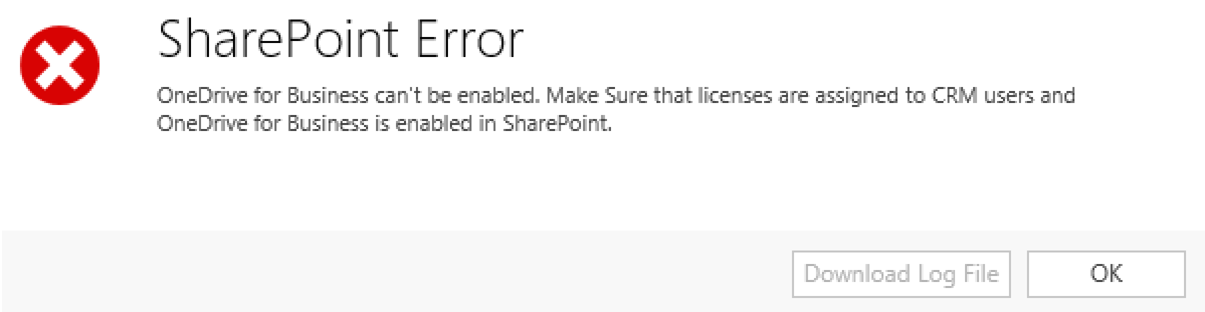
Annual Revenue	No. of Employees	Owner*
$10,000.00	6,200	Nic

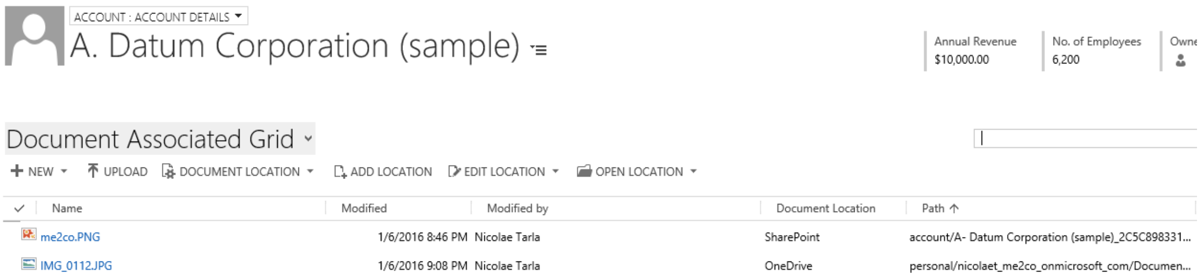
Document Associated Grid

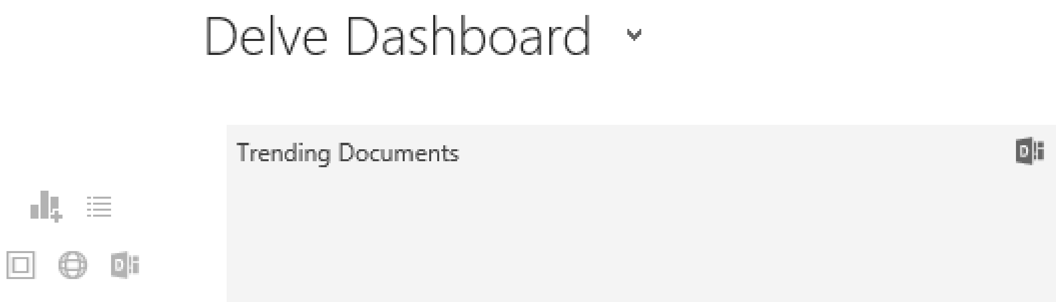
Search for records

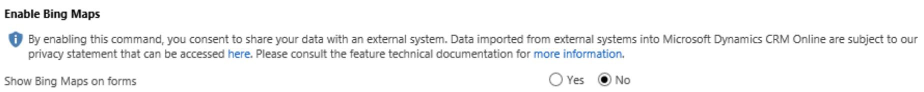
+ NEW ▾ UPLOAD DOCUMENT LOCATION ▾ ADD LOCATION EDIT LOCATION ▾ OPEN LOCATION ▾

Name	Modified	Modified by	Document Location	Path ↑
me2co.PNG	1/6/2016 8:46 PM	Nicolae Tarla	SharePoint	account/A- Datum Corporation (sample)_2C5C898331...


SharePoint Error
OneDrive for Business can't be enabled. Make Sure that licenses are assigned to CRM users and OneDrive for Business is enabled in SharePoint.
Download Log File
OK


ACCOUNT : ACCOUNT DETAILS
A. Datum Corporation (sample)
Annual Revenue
$10,000.00
No. of Employees
6,200
Document Associated Grid
NEW
UPLOAD
DOCUMENT LOCATION
ADD LOCATION
EDIT LOCATION
OPEN LOCATION
Name
Modified
Modified by
Document Location
Path
me2co.PNG
1/6/2016 8:46 PM
Nicolae Tarla
SharePoint
account/A- Datum Corporation (sample)_2C5C898331...
IMG_0112.JPG
1/6/2016 9:08 PM
Nicolae Tarla
OneDrive
personal/nicolaet_me2co_onmicrosoft_com/Documen...


Delve Dashboard
Trending Documents


Enable Bing Maps
By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics CRM Online are subject to our privacy statement that can be accessed here. Please consult the feature technical documentation for more information.
Show Bing Maps on forms
Yes
No

ACCOUNT

A. Datum Corporation (sample)

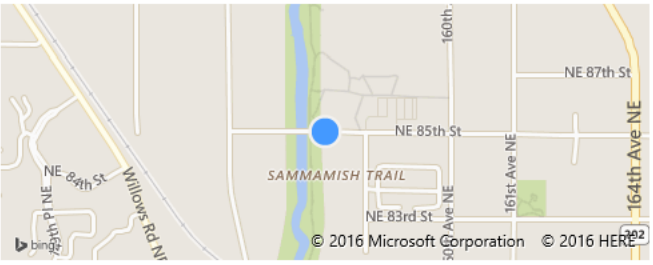
Summary

ACCOUNT INFORMATION

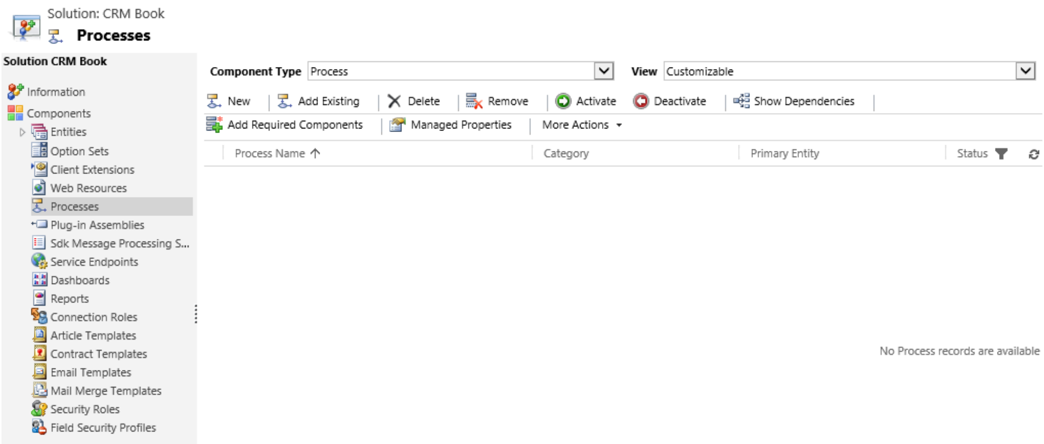
Account Name *	A. Datum Corporation (sample)
Phone	555-0158
Fax	--
Website	http://www.adatum.com/
Parent Account	--
Ticker Symbol	--

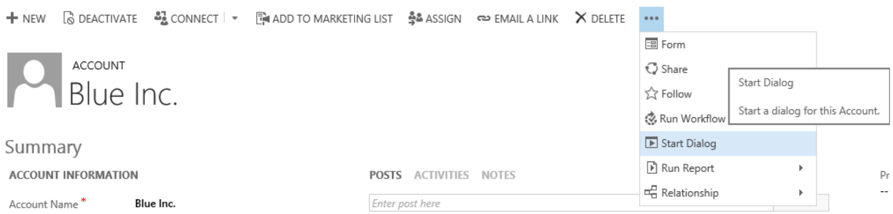
ADDRESS

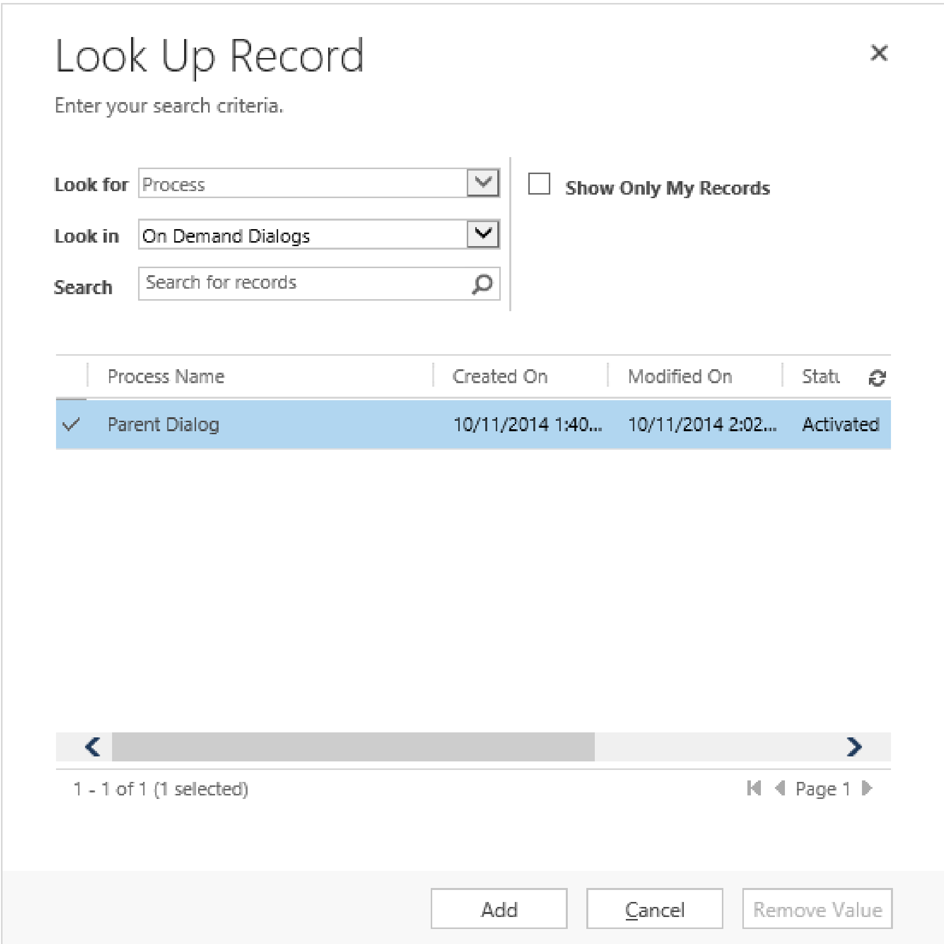
2137 Birchwood Dr
Redmond, WA 78214
U.S.

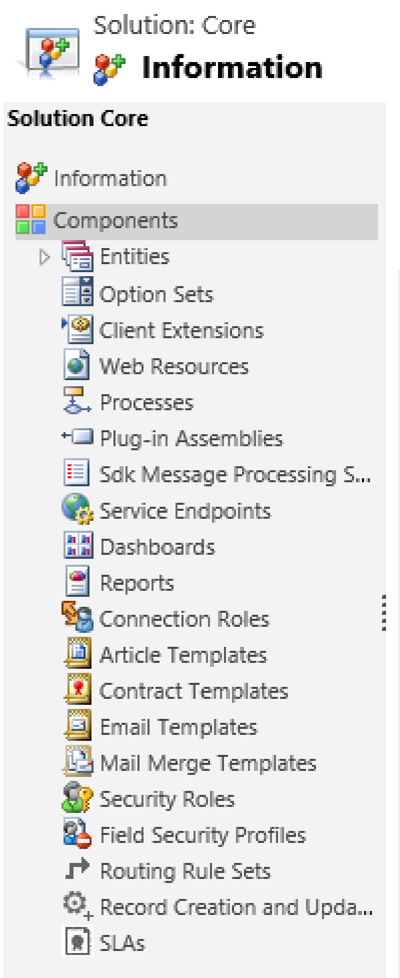


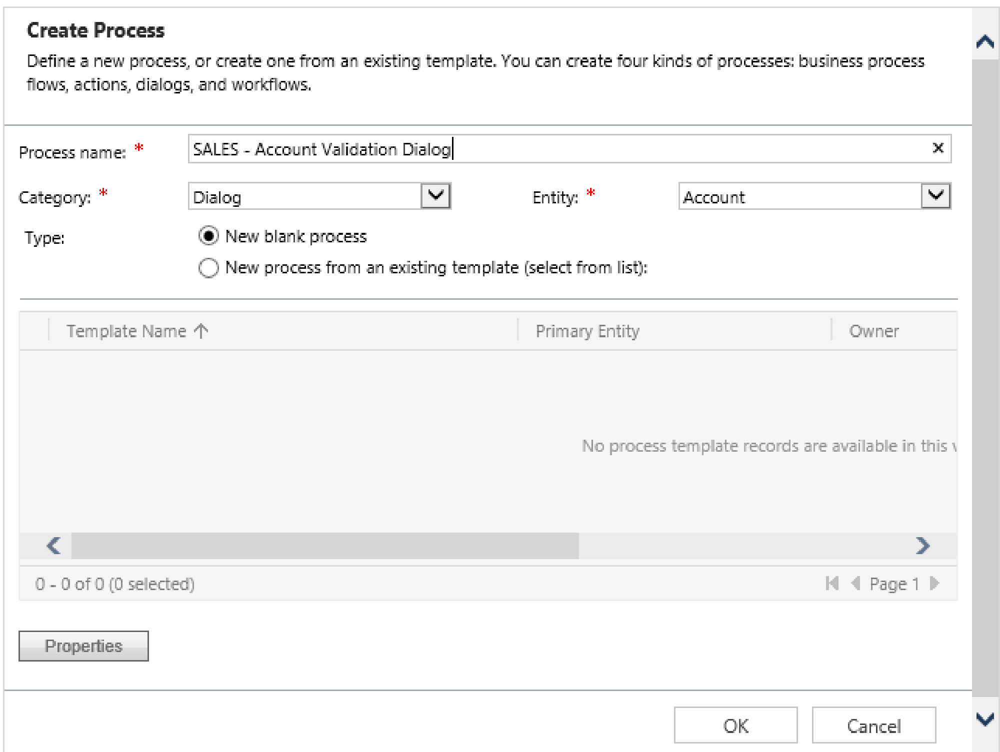
Chapter 4: Building Better Business Functionality

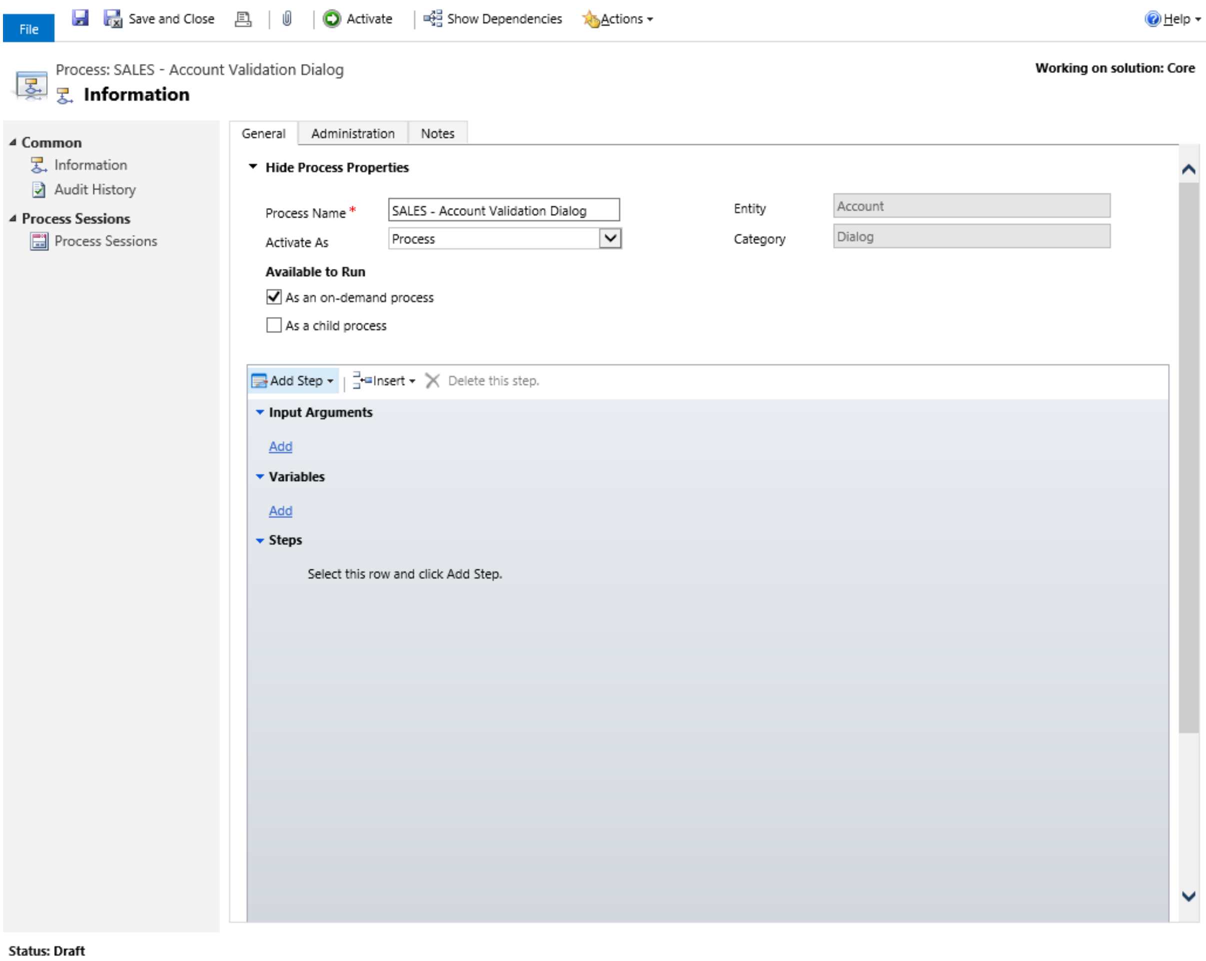


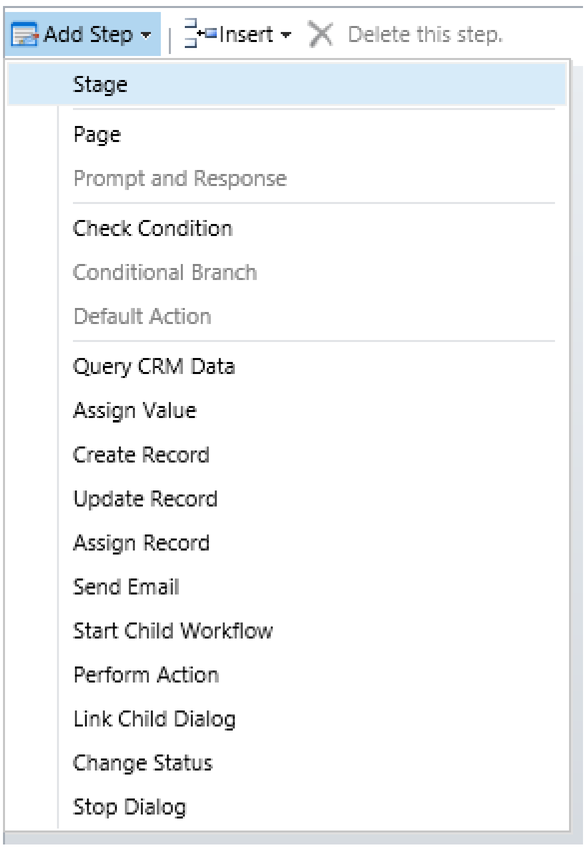


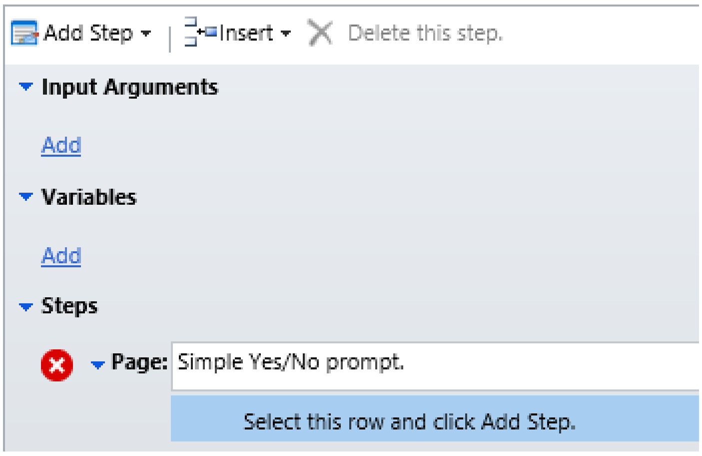


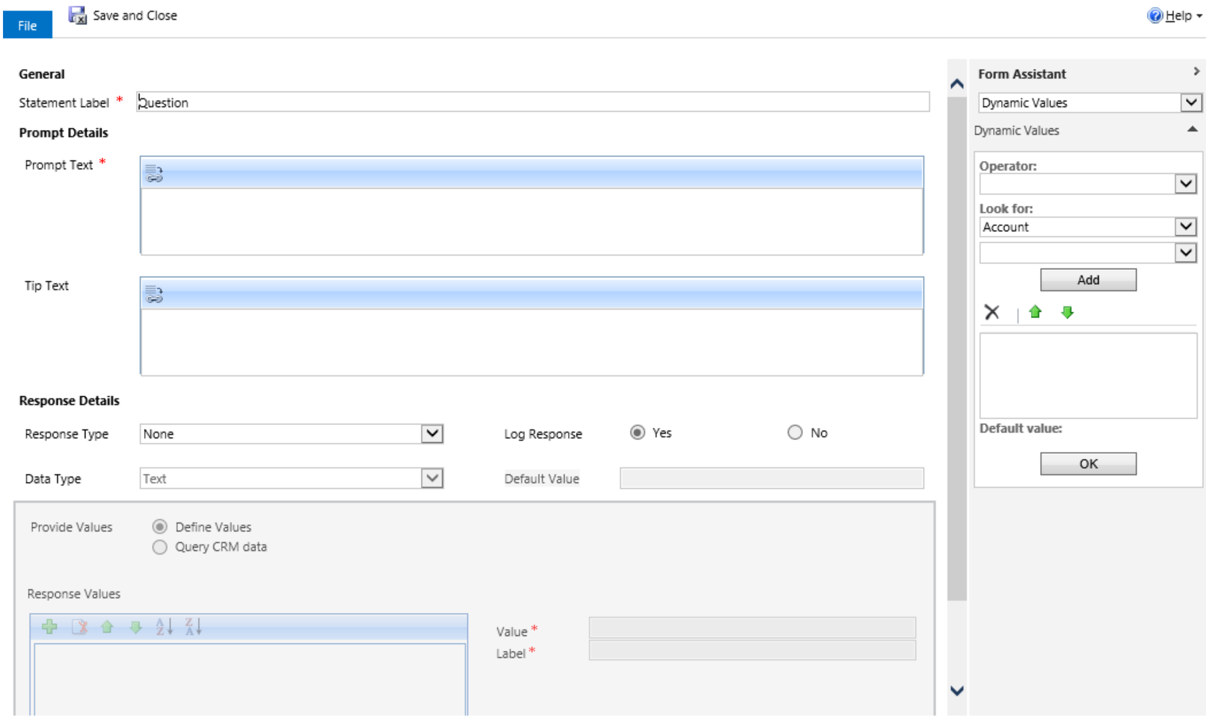

Solution: Core
Information
Solution Core
Information
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing S...
Service Endpoints
Dashboards
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles
Routing Rule Sets
Record Creation and Upda...
SLAs

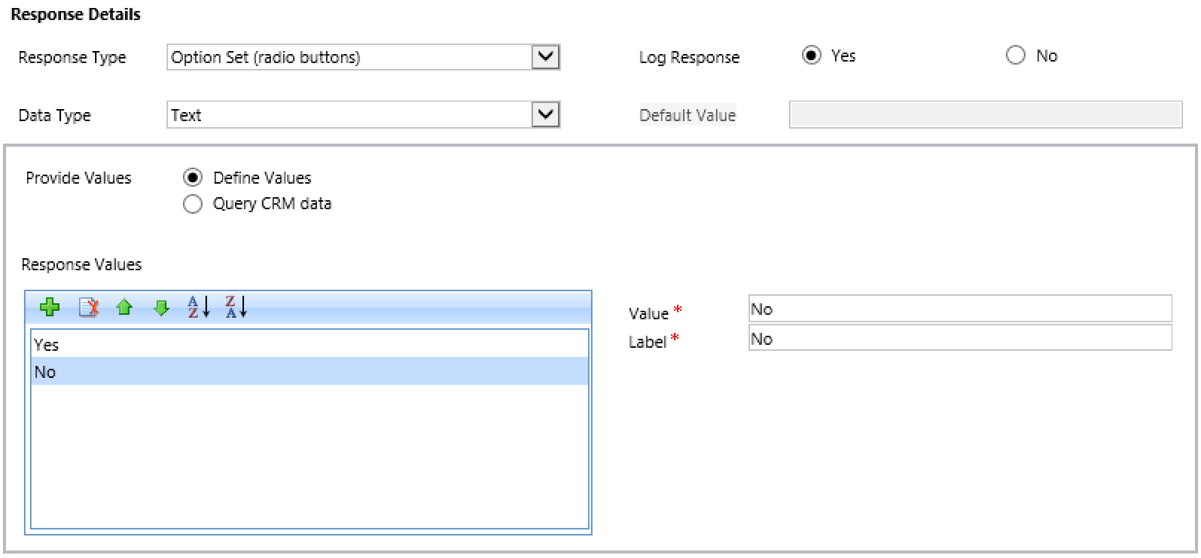

Create Process
Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.
Process name: *
SALES - Account Validation Dialog
Category: *
Dialog
Entity: *
Account
Type:
New blank process
New process from an existing template (select from list):
Template Name
Primary Entity
Owner
No process template records are available in this v
0 - 0 of 0 (0 selected)
Page 1
Properties
OK
Cancel

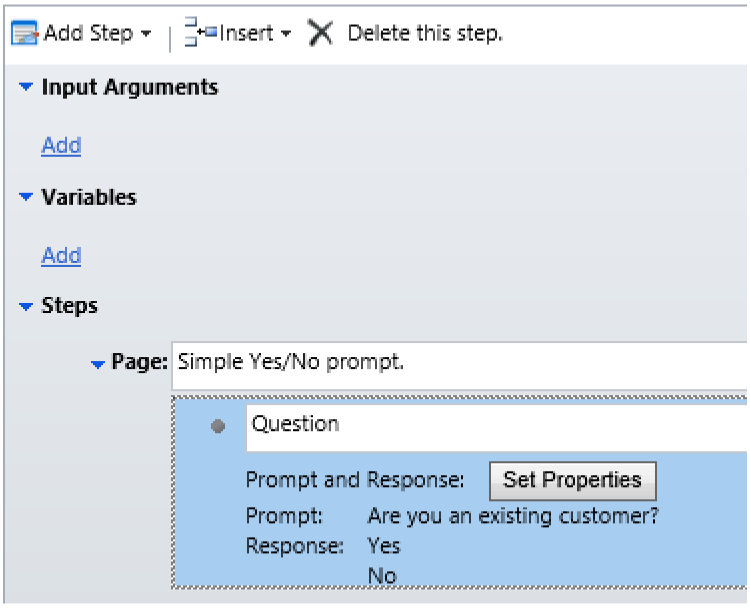

File
Save and Close
Activate
Show Dependencies
Actions
Help
Process: SALES - Account Validation Dialog
Information
Working on solution: Core
Common
Information
Audit History
Process Sessions
Process Sessions
General
Administration
Notes
Hide Process Properties
Process Name
SALES - Account Validation Dialog
Activate As
Process
Entity
Account
Category
Dialog
Available to Run
As an on-demand process
As a child process
Add Step
Insert
Delete this step.
Input Arguments
Add
Variables
Add
Steps
Select this row and click Add Step.
Status: Draft

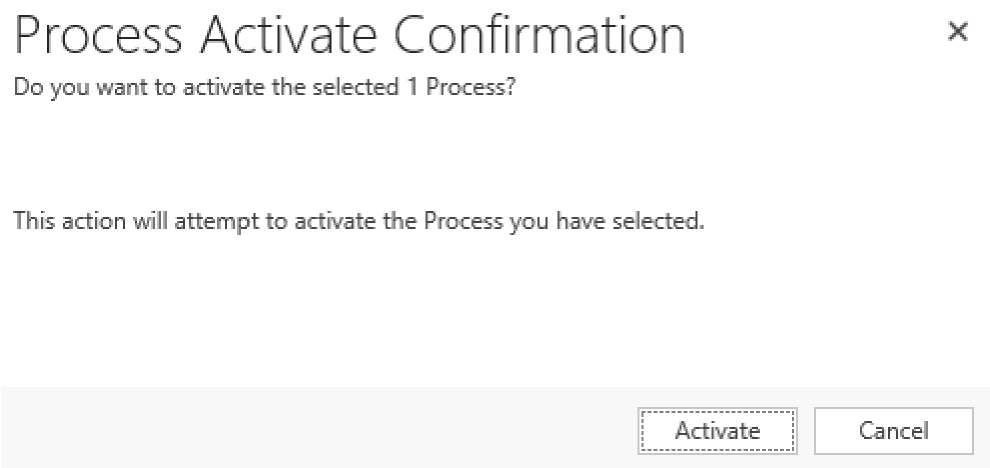

Add Step
Insert
Delete this step.
Stage
Page
Prompt and Response
Check Condition
Conditional Branch
Default Action
Query CRM Data
Assign Value
Create Record
Update Record
Assign Record
Send Email
Start Child Workflow
Perform Action
Link Child Dialog
Change Status
Stop Dialog

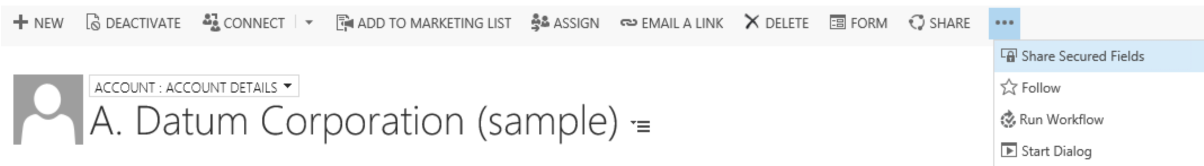

Add Step
Insert
Delete this step.
Input Arguments
Add
Variables
Add
Steps
Page: Simple Yes/No prompt.
Select this row and click Add Step.

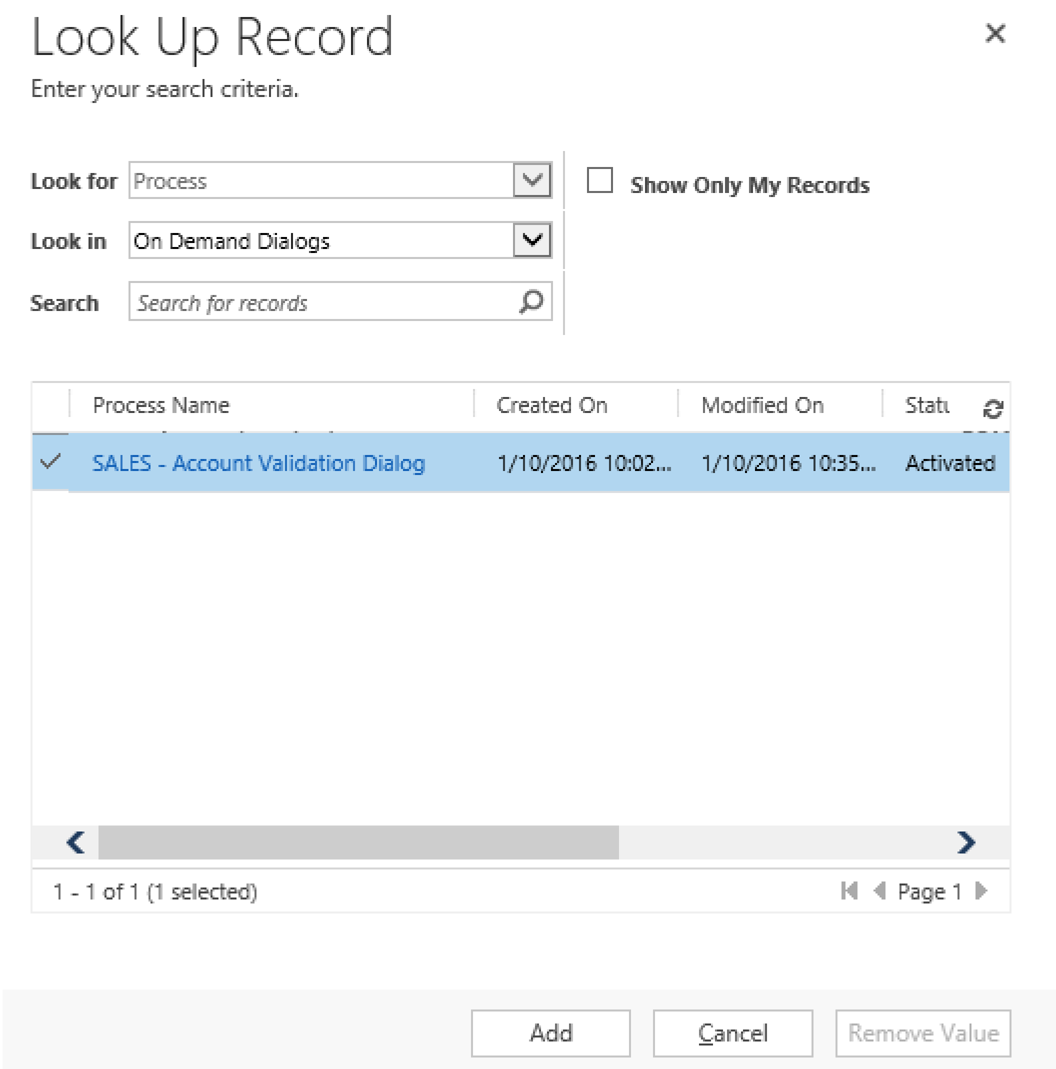

File
Save and Close
Help
General
Statement Label *
Question
Prompt Details
Prompt Text *
Tip Text
Response Details
Response Type
None
Log Response
Yes
No
Data Type
Text
Default Value
Provide Values
Define Values
Query CRM data
Response Values
Value *
Label *
Form Assistant
Dynamic Values
Dynamic Values
Operator:
Look for:
Account
Add
Default value:
OK

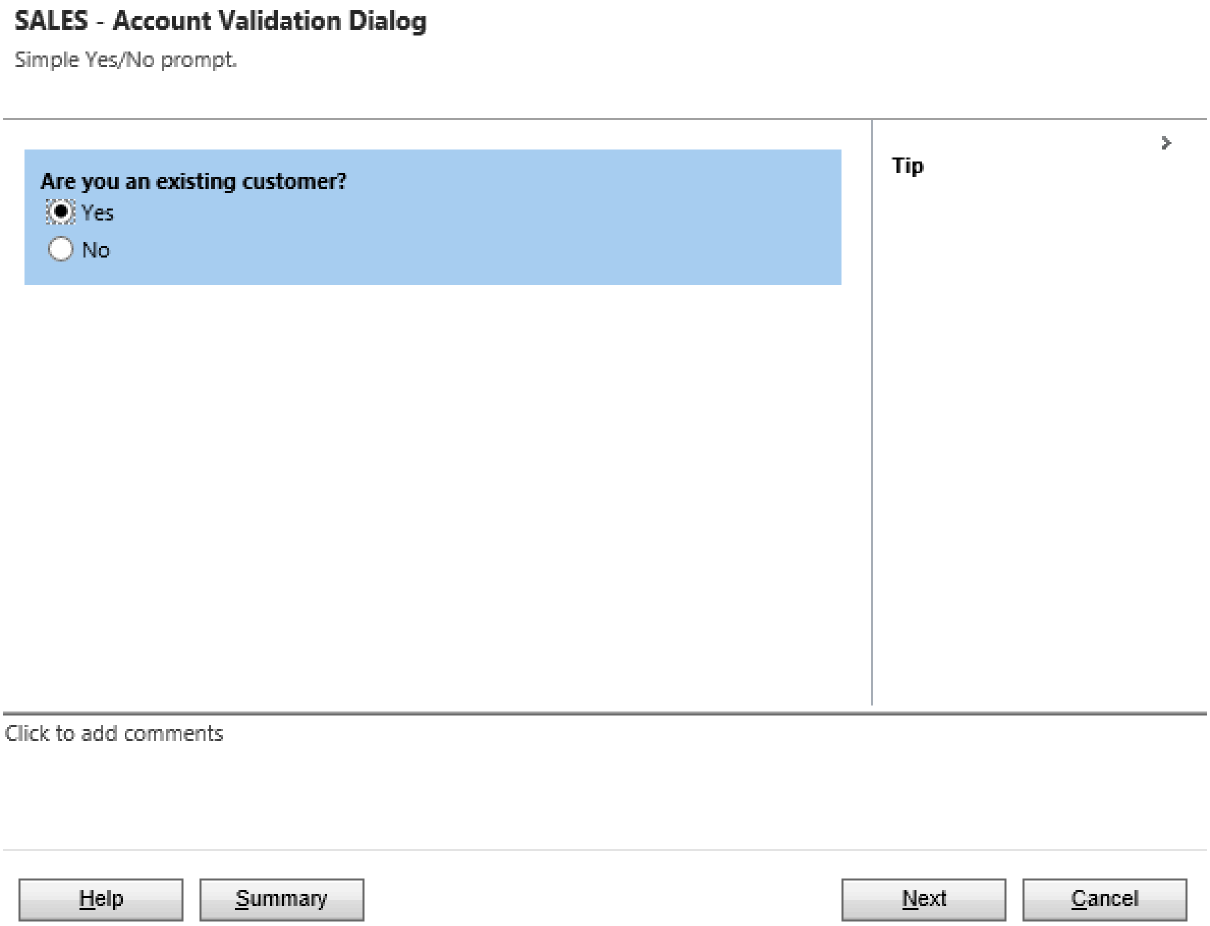

Response Details
Response Type
Option Set (radio buttons)
Log Response
Yes
No
Data Type
Text
Default Value
Provide Values
Define Values
Query CRM data
Response Values
Yes
No
Value *
No
Label *
No

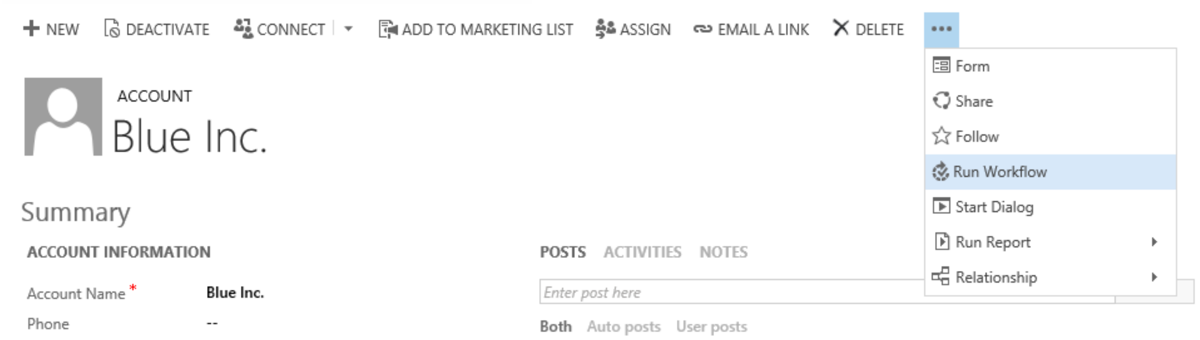

Add Step
Insert
Delete this step.
Input Arguments
Add
Variables
Add
Steps
Page: Simple Yes/No prompt.
Question
Prompt and Response: Set Properties
Prompt: Are you an existing customer?
Response: Yes
No

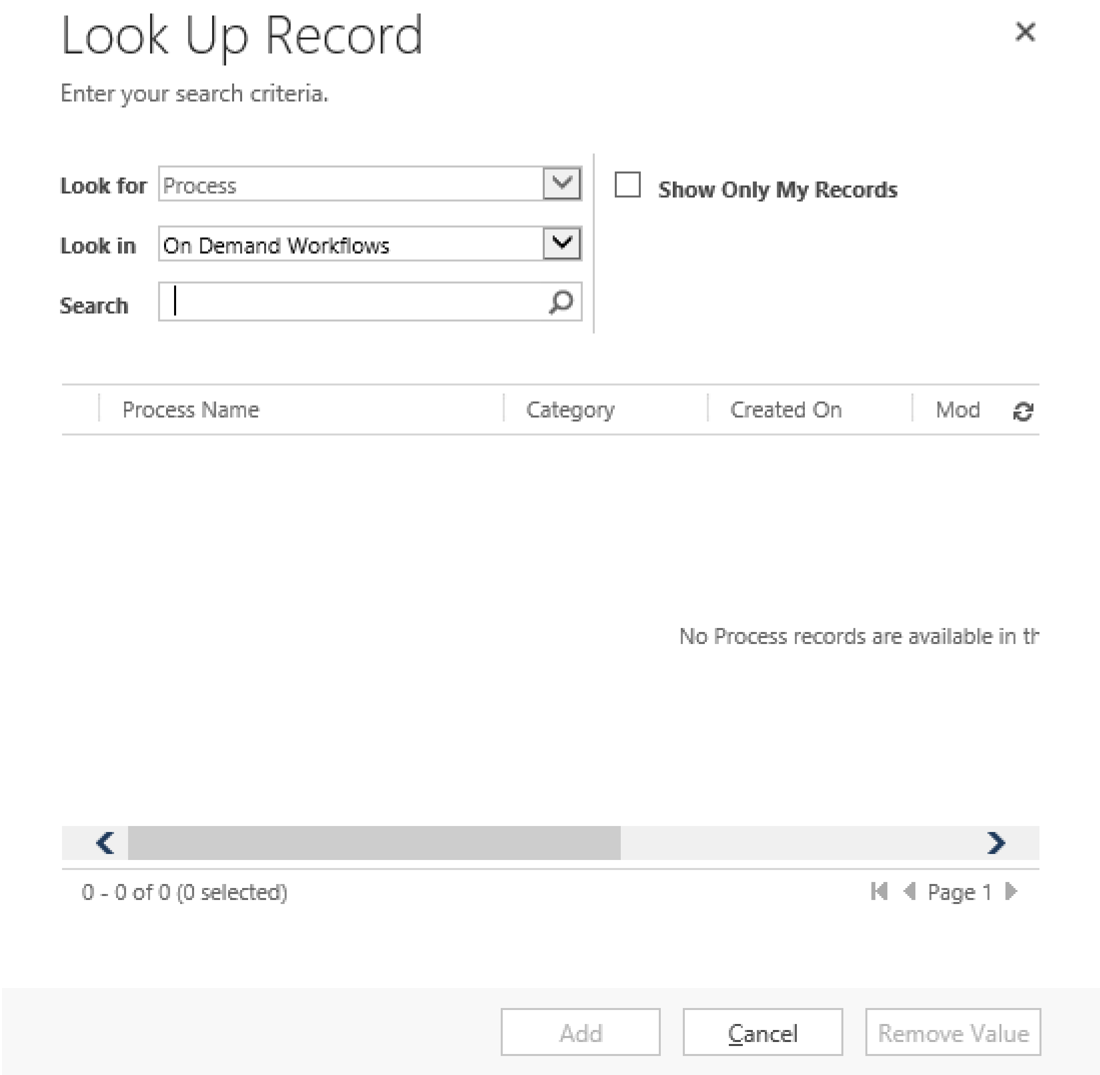

Process Activate Confirmation
Do you want to activate the selected 1 Process?
This action will attempt to activate the Process you have selected.
Activate
Cancel

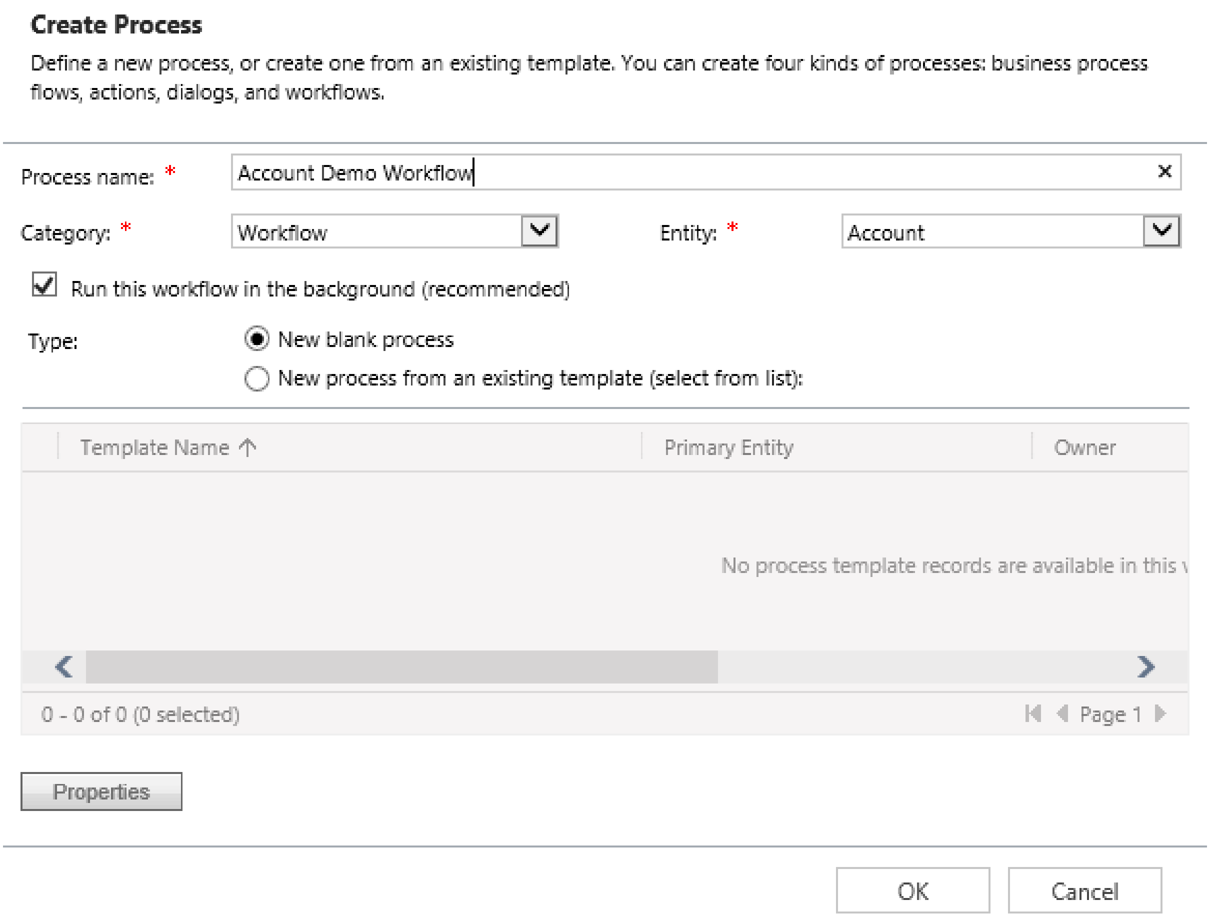

NEW
DEACTIVATE
CONNECT
ADD TO MARKETING LIST
ASSIGN
EMAIL A LINK
DELETE
FORM
SHARE
Share Secured Fields
Follow
Run Workflow
Start Dialog
ACCOUNT : ACCOUNT DETAILS
A. Datum Corporation (sample)

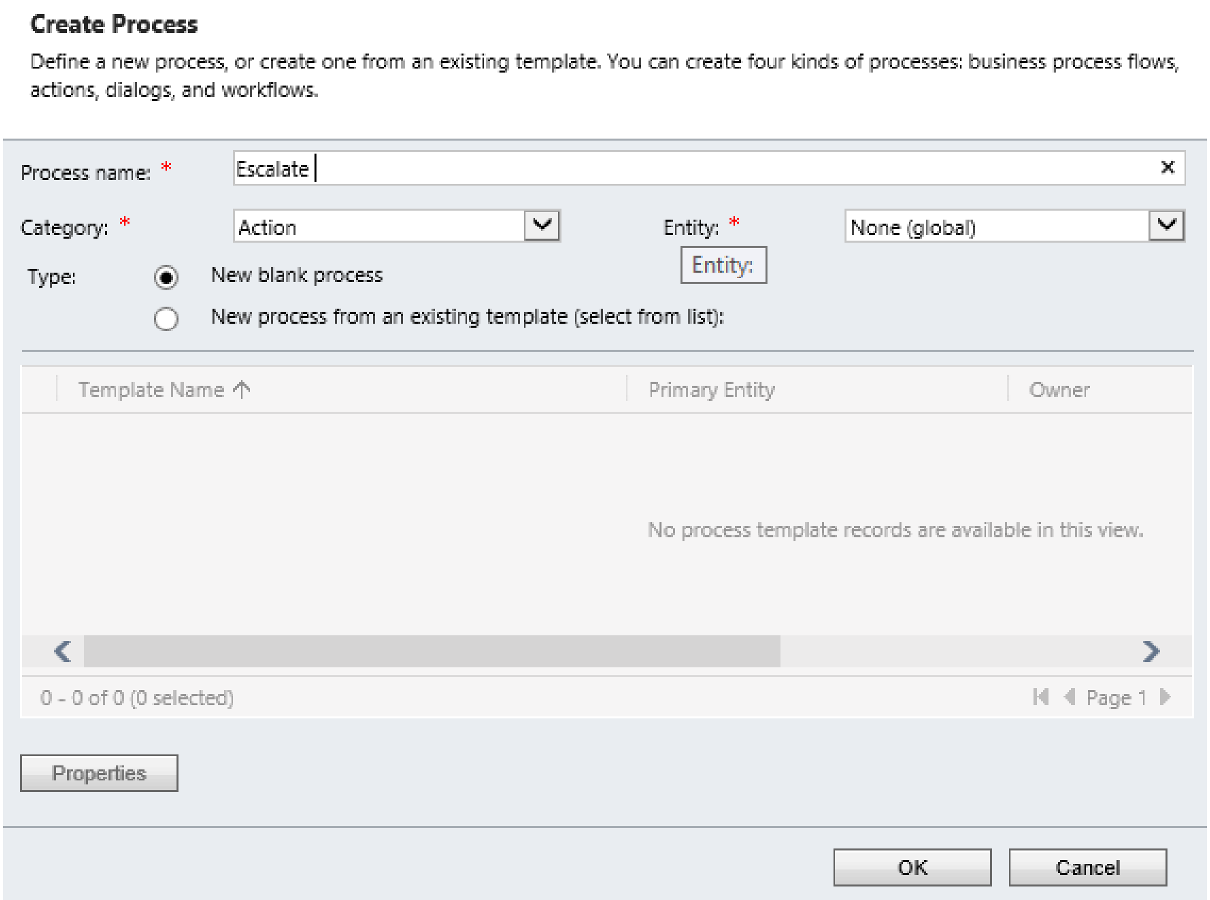

Look Up Record
Enter your search criteria.
Look for
Process
Look in
On Demand Dialogs
Search
Search for records
Show Only My Records
Process Name
Created On
Modified On
Statu
SALES - Account Validation Dialog
1/10/2016 10:02...
1/10/2016 10:35...
Activated
1 - 1 of 1 (1 selected)
Page 1
Add
Cancel
Remove Value

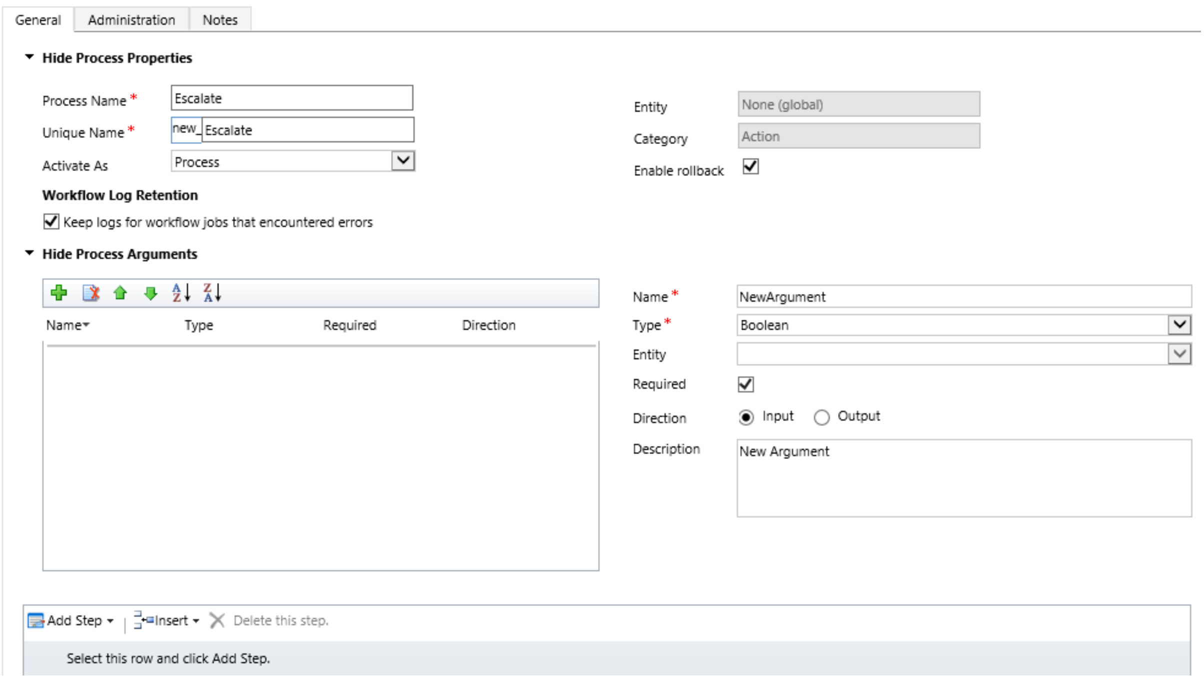

SALES - Account Validation Dialog
Simple Yes/No prompt.
Are you an existing customer?
Yes
No
Tip
Click to add comments
Help
Summary
Next
Cancel

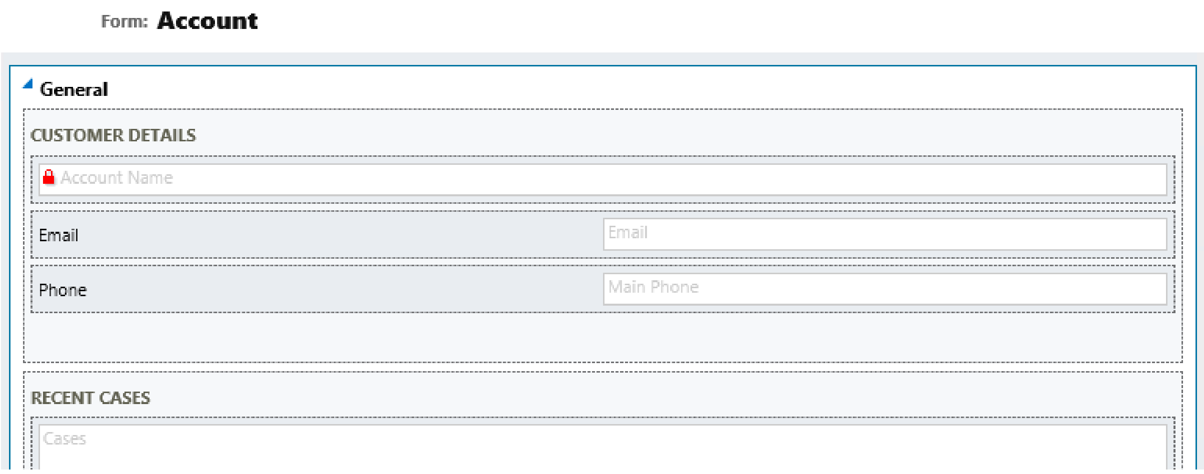

NEW
DEACTIVATE
CONNECT
ADD TO MARKETING LIST
ASSIGN
EMAIL A LINK
DELETE
Form
Share
Follow
Run Workflow
Start Dialog
Run Report
Relationship
ACCOUNT
Blue Inc.
Summary
ACCOUNT INFORMATION
Account Name *
Blue Inc.
Phone
--
POSTS
ACTIVITIES
NOTES
Enter post here
Both
Auto posts
User posts

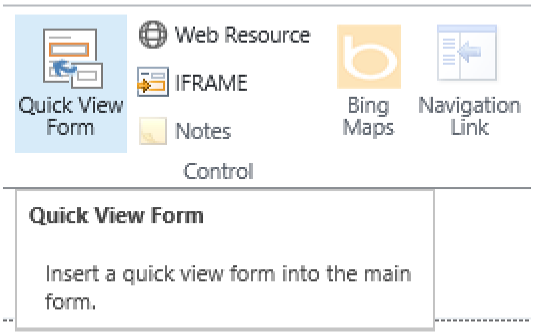

Look Up Record
Enter your search criteria.
Look for
Process
Look in
On Demand Workflows
Search
Show Only My Records
Process Name
Category
Created On
Mod
No Process records are available in th
0 - 0 of 0 (0 selected)
Page 1
Add
Cancel
Remove Value

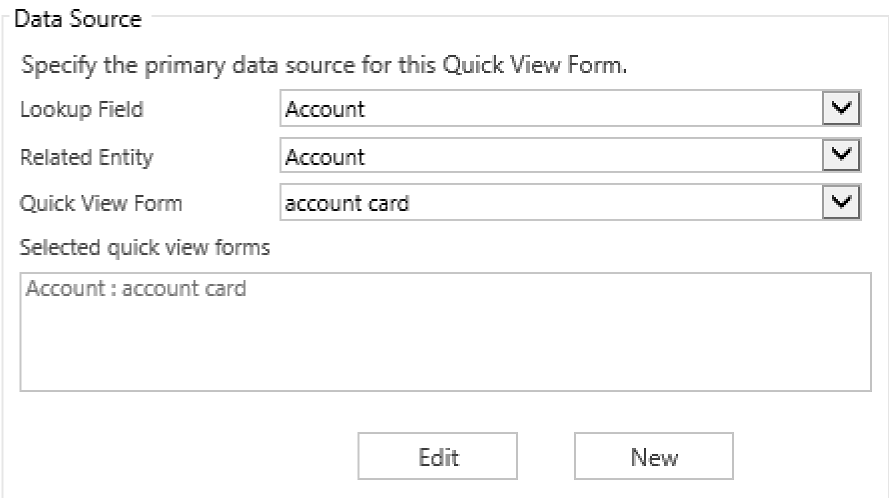

Create Process
Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.
Process name: *
Account Demo Workflow
Category: *
Workflow
Entity: *
Account
Run this workflow in the background (recommended)
Type:
New blank process
New process from an existing template (select from list):
Template Name
Primary Entity
Owner
No process template records are available in this v
0 - 0 of 0 (0 selected)
Page 1
Properties
OK
Cancel

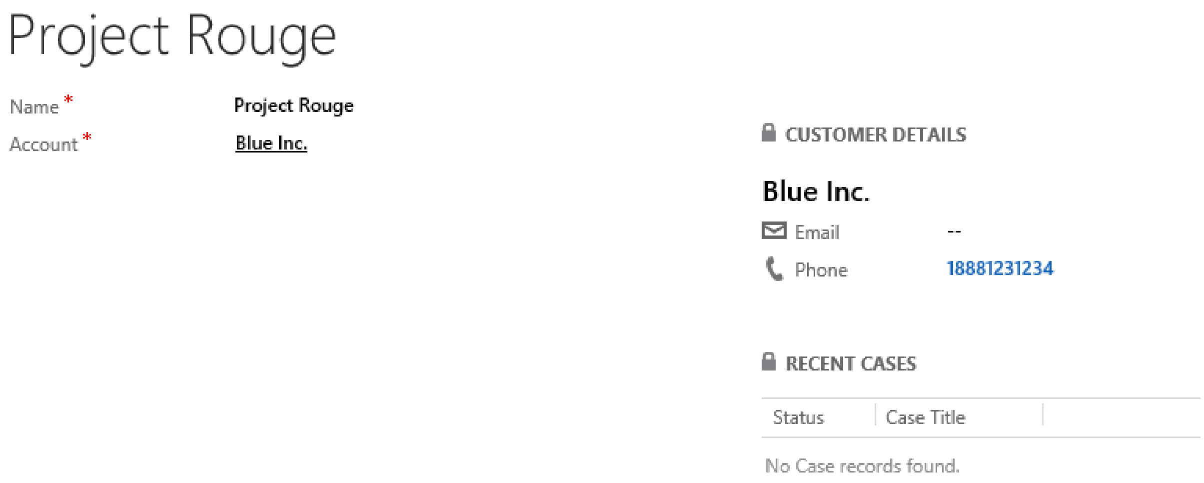

Create Process
Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.
Process name: *
Escalate
Category: *
Action
Entity: *
None (global)
Type:
New blank process
Entity:
New process from an existing template (select from list):
Template Name
Primary Entity
Owner
No process template records are available in this view.
0 - 0 of 0 (0 selected)
Page 1
Properties
OK
Cancel

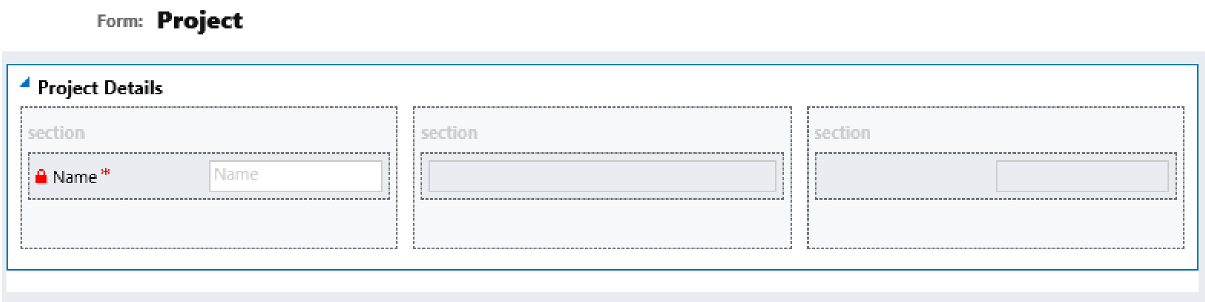

General
Administration
Notes
Hide Process Properties
Process Name *
Escalate
Unique Name *
new_
Escalate
Activate As
Process
Entity
None (global)
Category
Action
Enable rollback
Workflow Log Retention
Keep logs for workflow jobs that encountered errors
Hide Process Arguments
Name
Type
Required
Direction
Name *
NewArgument
Type *
Boolean
Entity
Required
Direction
Input
Output
Description
New Argument
Add Step
Insert
Delete this step.
Select this row and click Add Step.

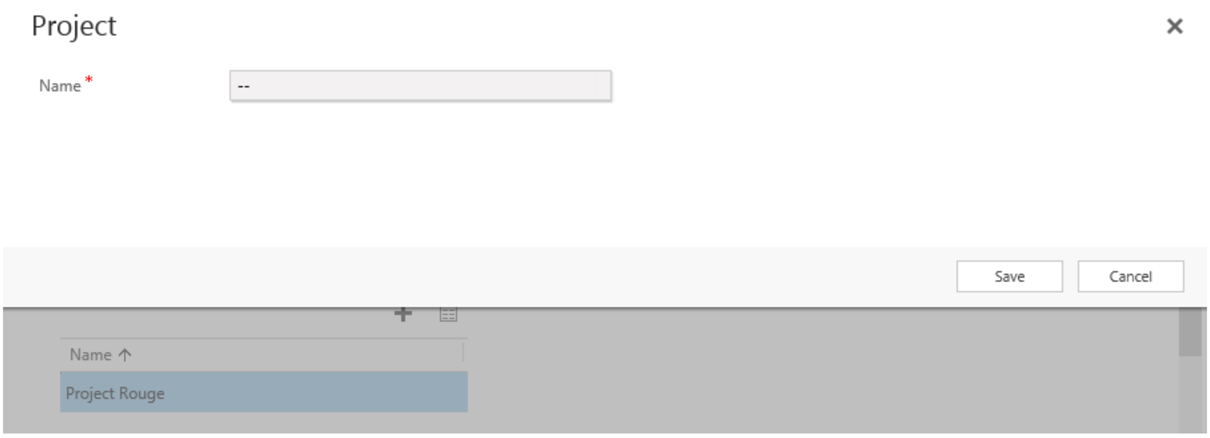

Form: Account
General
CUSTOMER DETAILS
Account Name
Email
Email
Phone
Main Phone
RECENT CASES
Cases

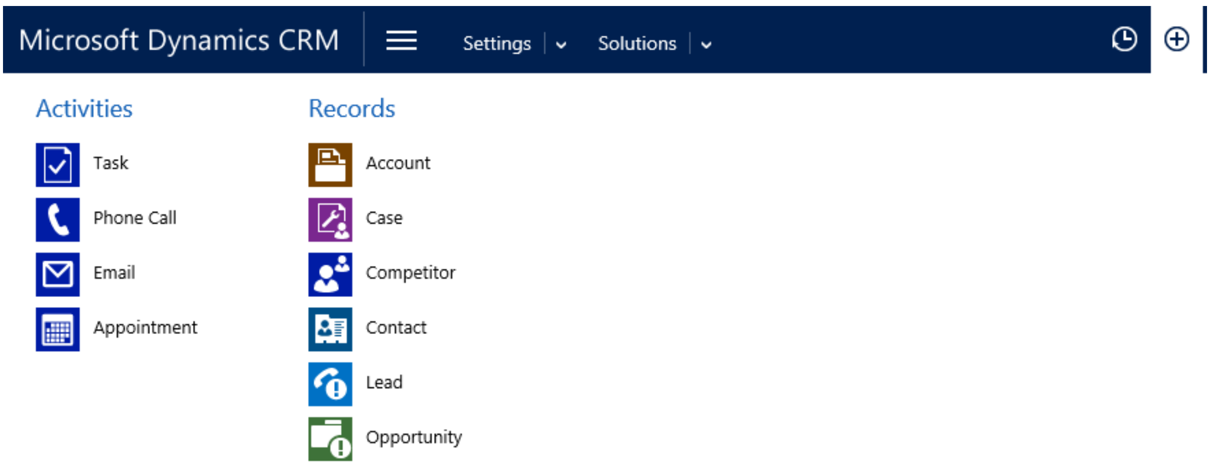

Quick View Form
Web Resource
IFRAME
Notes
Bing Maps
Navigation Link
Control
Quick View Form
Insert a quick view form into the main form.

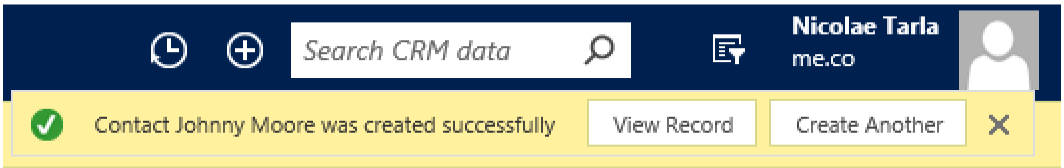

Data Source
Specify the primary data source for this Quick View Form.
Lookup Field
Account
Related Entity
Account
Quick View Form
account card
Selected quick view forms
Account : account card
Edit
New


Project Rouge
Name *
Project Rouge
Account *
Blue Inc.
CUSTOMER DETAILS
Blue Inc.
Email --
Phone 18881231234
RECENT CASES
Status
Case Title
No Case records found.

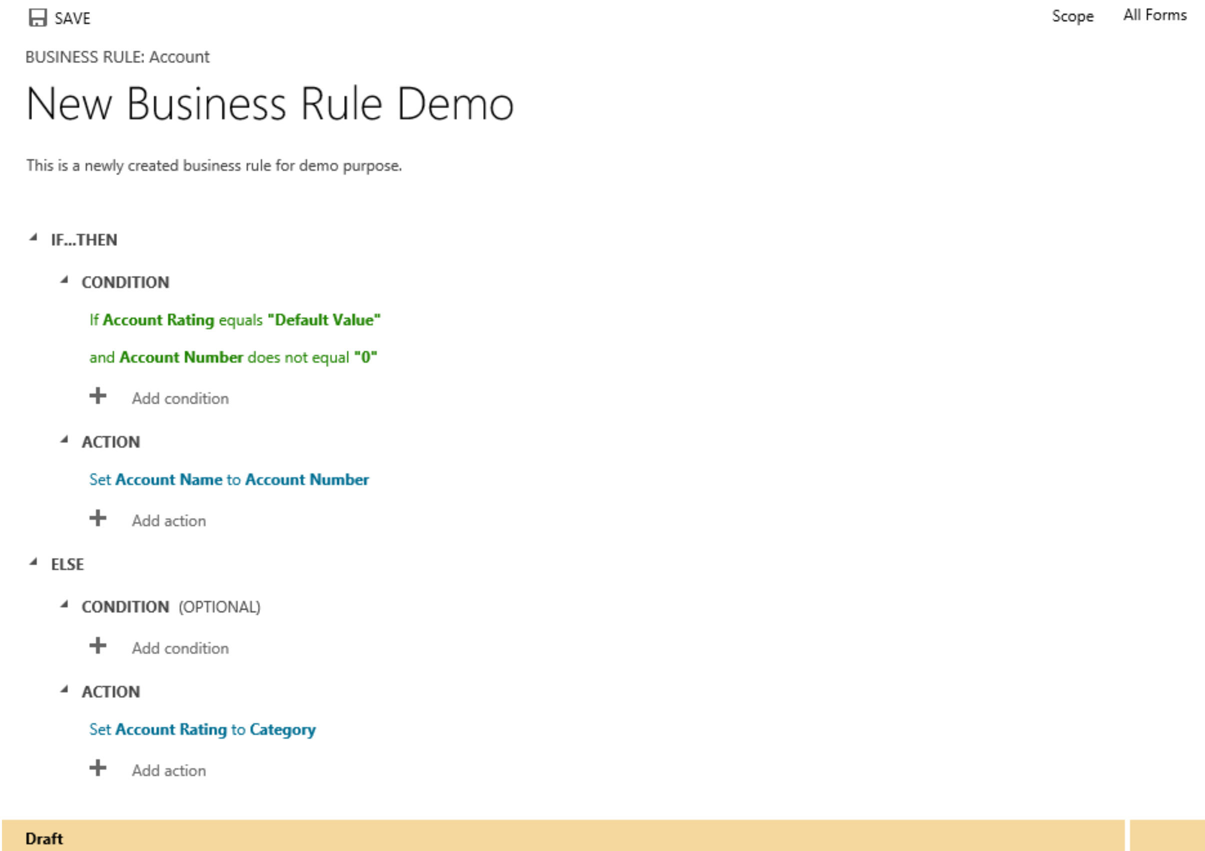

Form: Project
Project Details
section
Name *
Name
section
section


Project
Name *
--
Save
Cancel
Name
Project Rouge

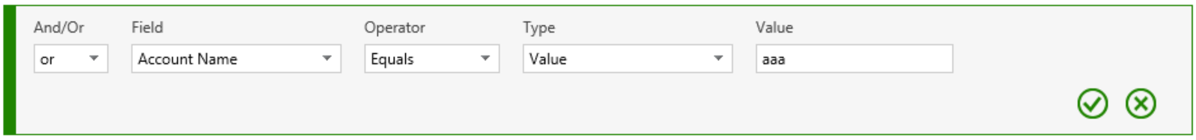

Microsoft Dynamics CRM
Settings
Solutions
Activities
Task
Phone Call
Email
Appointment
Records
Account
Case
Competitor
Contact
Lead
Opportunity



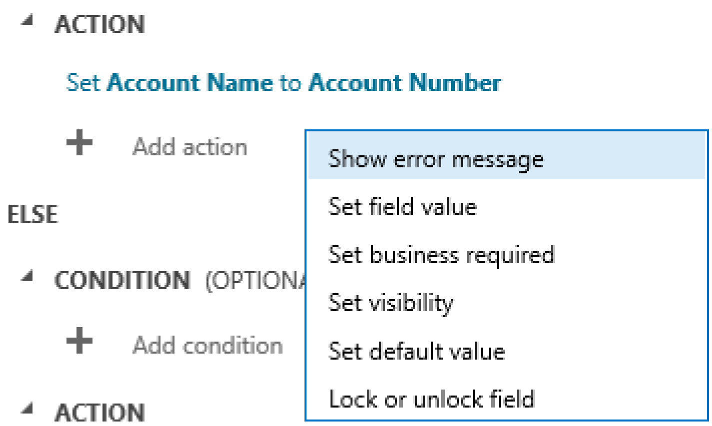
Search CRM data
Nicolae Tarla
me.co
Contact Johnny Moore was created successfully
View Record
Create Another



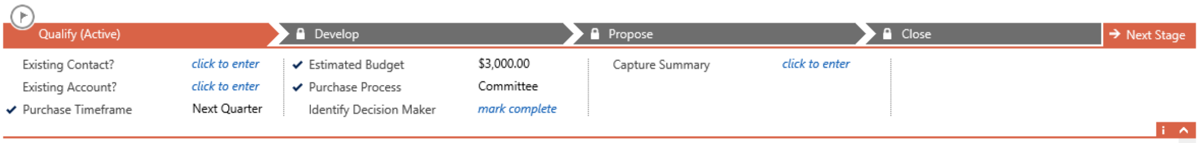
SAVE
Scope
All Forms
BUSINESS RULE: Account
New Business Rule Demo
This is a newly created business rule for demo purpose.
IF...THEN
CONDITION
If Account Rating equals "Default Value"
and Account Number does not equal "0"
Add condition
ACTION
Set Account Name to Account Number
Add action
ELSE
CONDITION (OPTIONAL)
Add condition
ACTION
Set Account Rating to Category
Add action
Draft



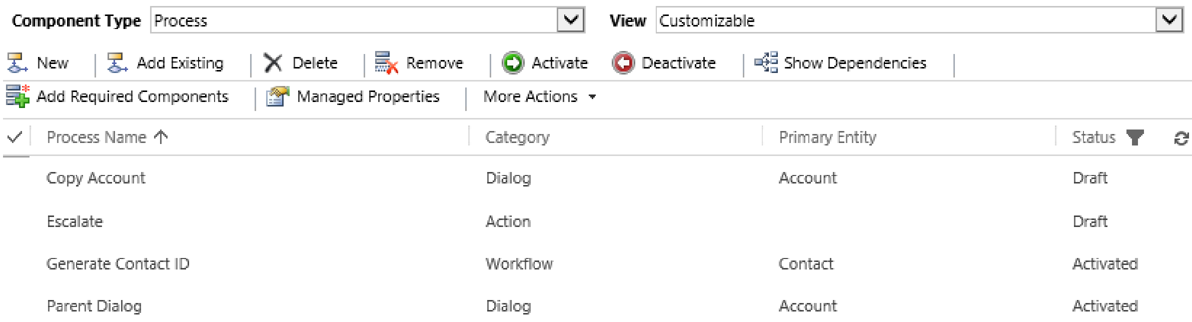
And/Or
Field
Operator
Type
Value
or
Account Name
Equals
Value
aaa

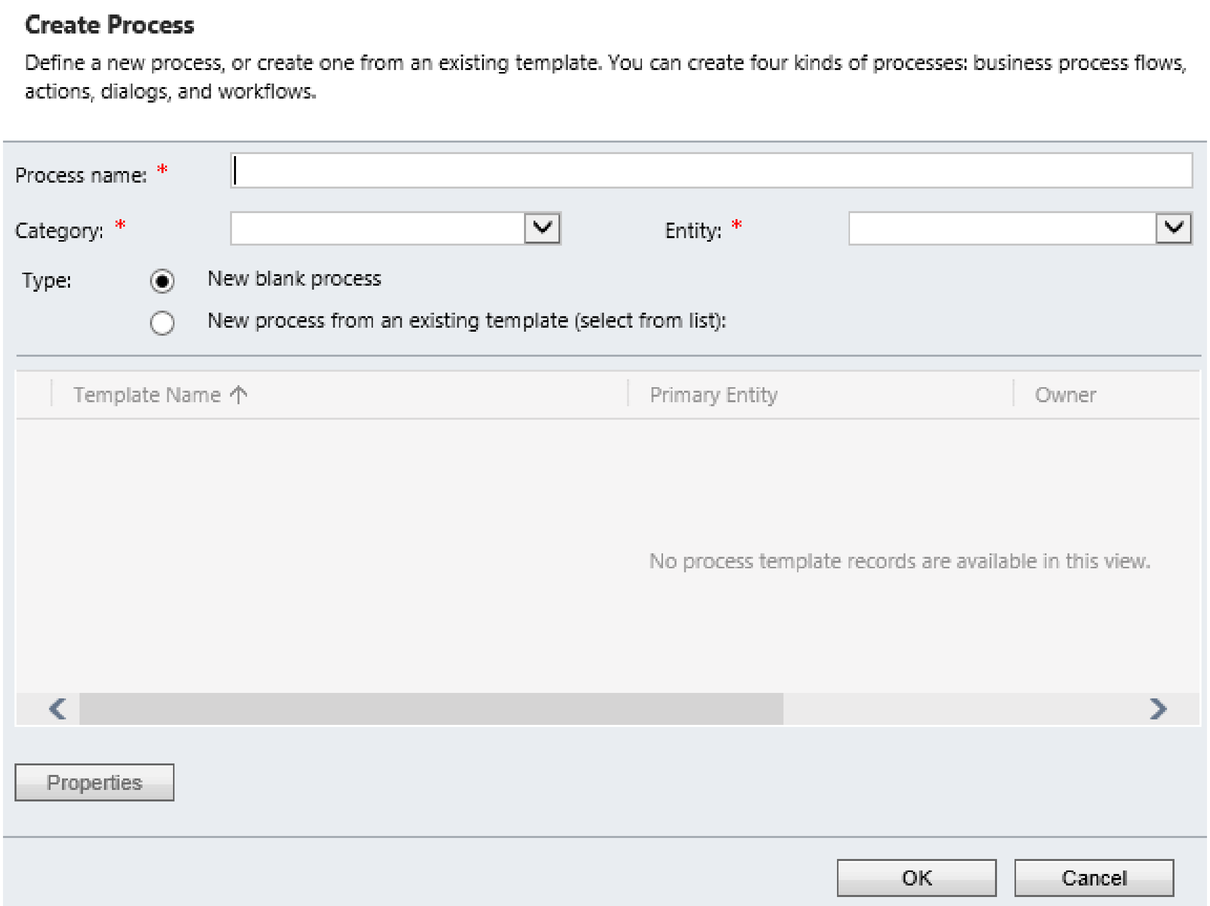


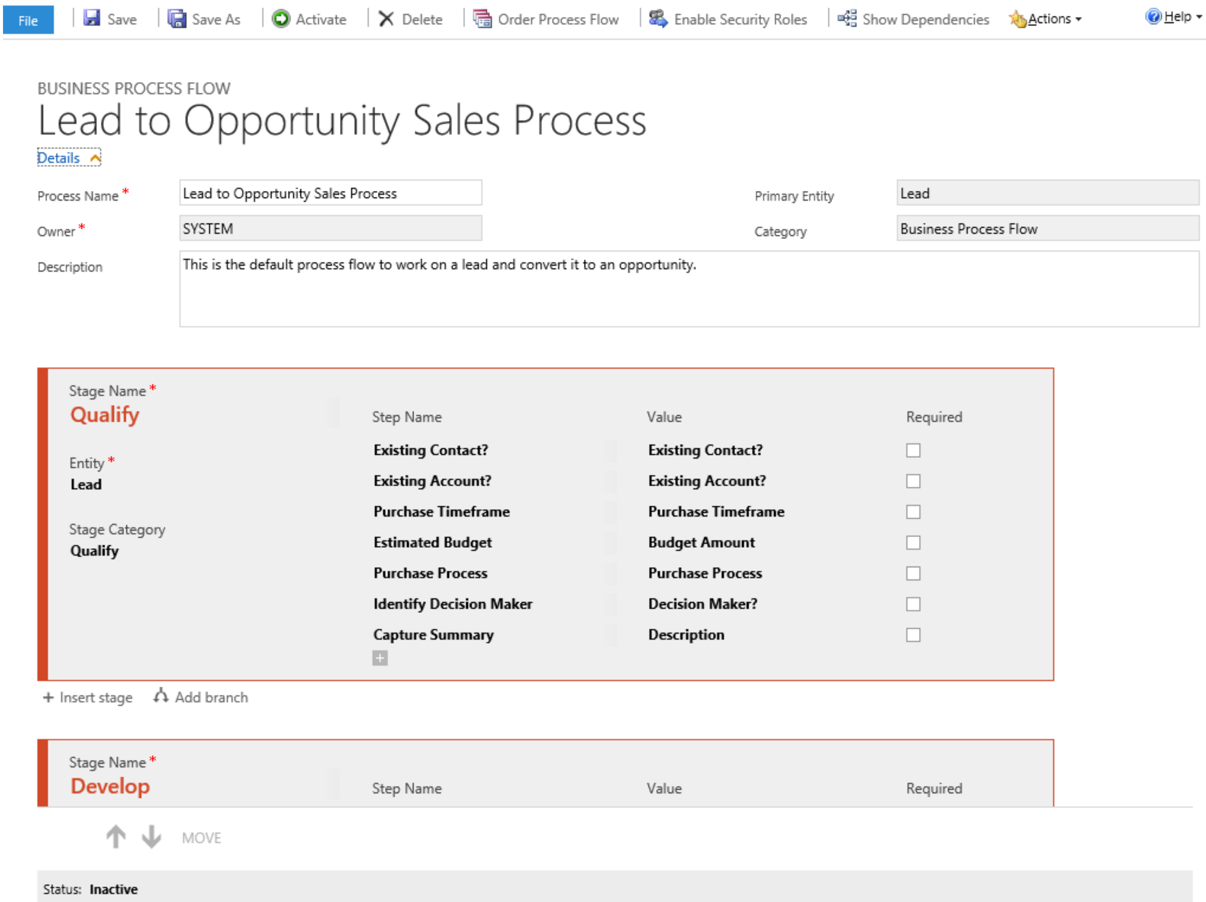
ACTION
Set Account Name to Account Number
Add action
ELSE
CONDITION (OPTIONA
Add condition
ACTION
Show error message
Set field value
Set business required
Set visibility
Set default value
Lock or unlock field

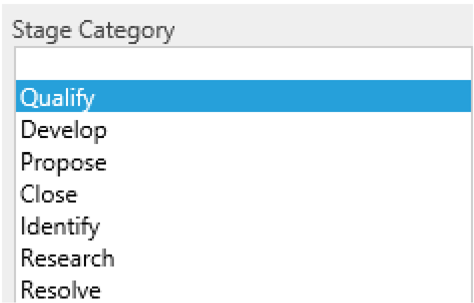

Qualify (Active)
Develop
Propose
Close
Next Stage
Existing Contact? click to enter
Existing Account? click to enter
Purchase Timeframe Next Quarter
Estimated Budget $3,000.00
Purchase Process Committee
Identify Decision Maker mark complete
Capture Summary click to enter

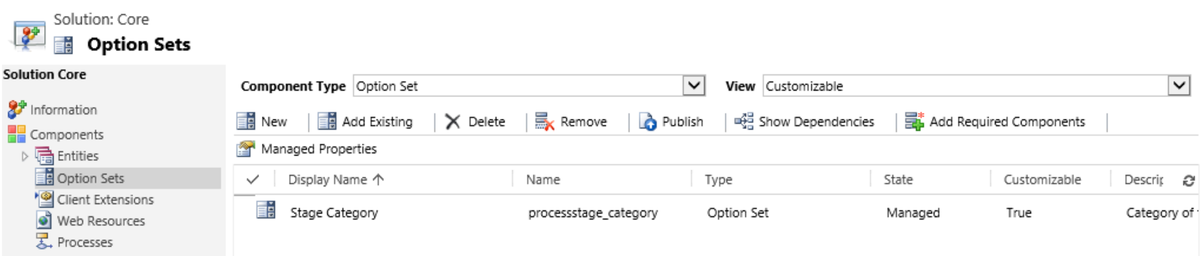

Qualify
Develop (Active)
Propose
Close
Next Stage
Customer Need click to enter
Proposed Solution click to enter
Identify Stakeholders mark complete
Identify Competitors mark complete

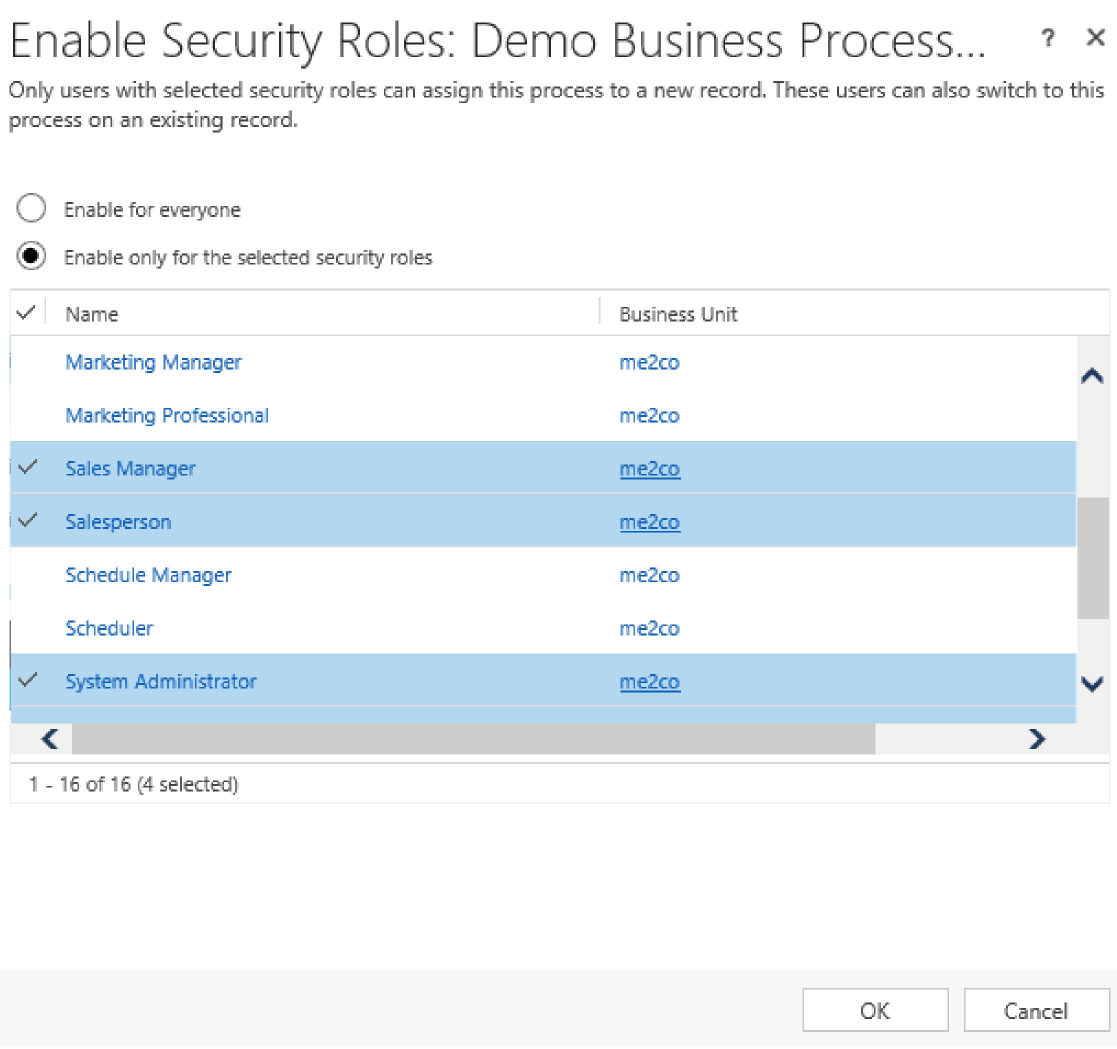

Component Type Process
View Customizable
New
Add Existing
Delete
Remove
Activate
Deactivate
Show Dependencies
Add Required Components
Managed Properties
More Actions
Process Name
Category
Primary Entity
Status
Copy Account Dialog Account Draft
Escalate Action Draft
Generate Contact ID Workflow Contact Activated
Parent Dialog Dialog Account Activated

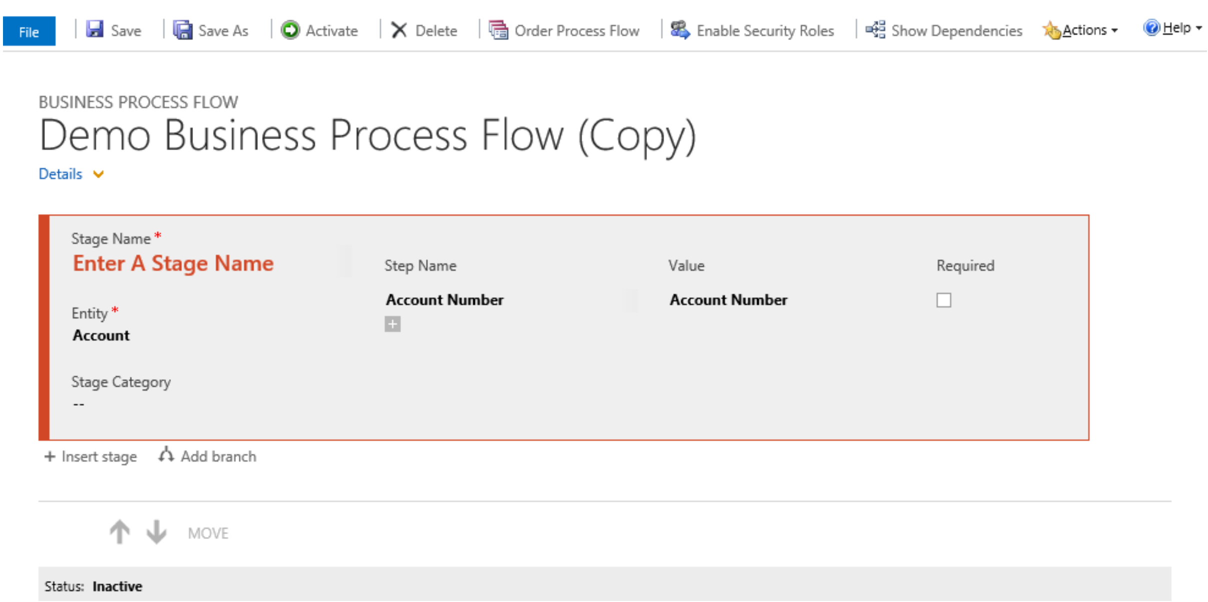

Create Process
Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.
Process name: *
Category: *
Entity: *
Type:
New blank process
New process from an existing template (select from list):
Template Name
Primary Entity
Owner
No process template records are available in this view.
Properties
OK
Cancel

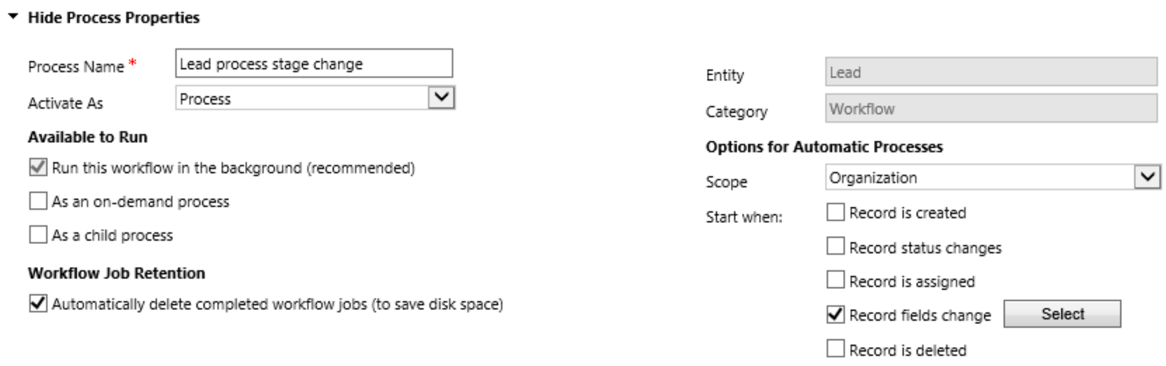

File
Save
Save As
Activate
Delete
Order Process Flow
Enable Security Roles
Show Dependencies
Actions
Help
BUSINESS PROCESS FLOW
Lead to Opportunity Sales Process
Details
Process Name *
Lead to Opportunity Sales Process
Primary Entity
Lead
Owner *
SYSTEM
Category
Business Process Flow
Description
This is the default process flow to work on a lead and convert it to an opportunity.
Stage Name *
Qualify
Entity *
Lead
Stage Category
Qualify
Step Name
Value
Required
Existing Contact?
Existing Contact?
Existing Account?
Existing Account?
Purchase Timeframe
Purchase Timeframe
Estimated Budget
Budget Amount
Purchase Process
Purchase Process
Identify Decision Maker
Decision Maker?
Capture Summary
Description
+ Insert stage
Add branch
Stage Name *
Develop
Step Name
Value
Required
MOVE
Status: Inactive

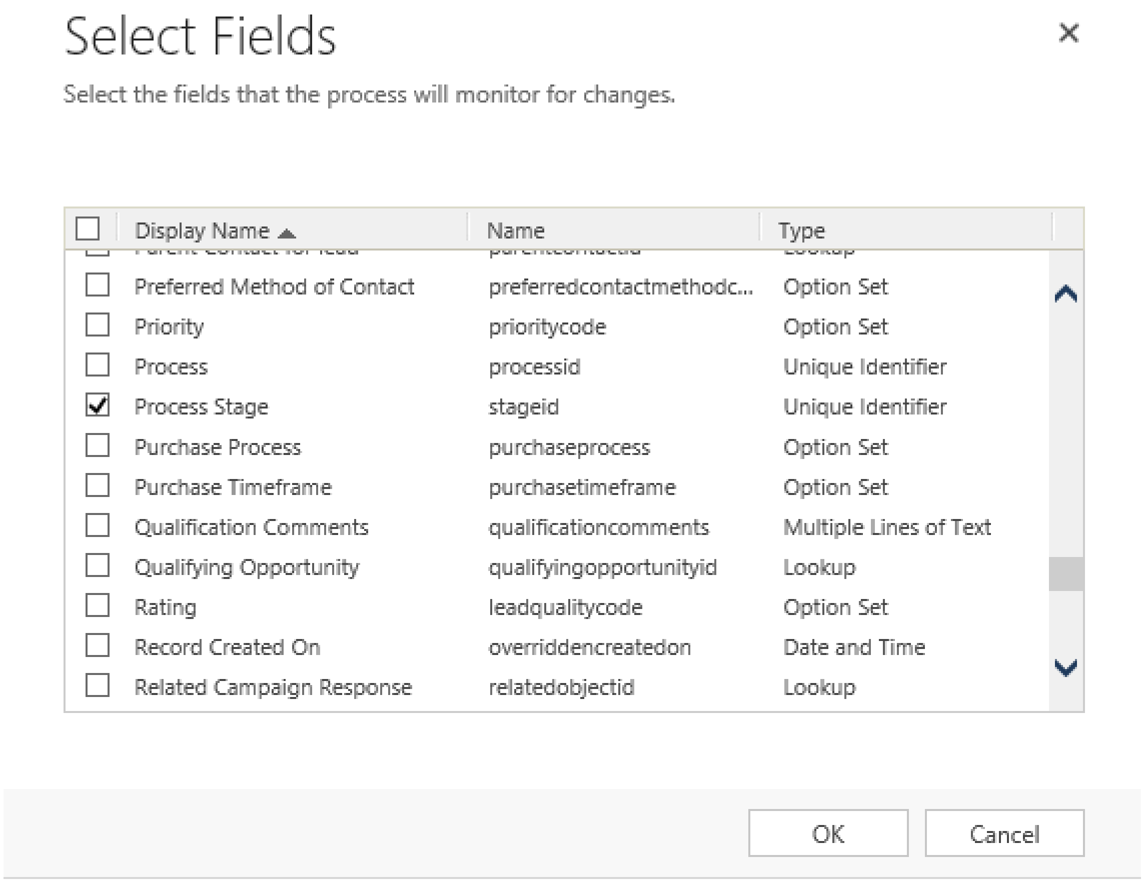

Stage Category
Qualify
Develop
Propose
Close
Identify
Research
Resolve

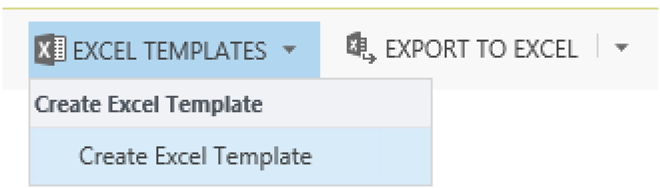

Solution: Core
Option Sets
Solution Core
Information
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Component Type
Option Set
View
Customizable
New
Add Existing
Delete
Remove
Publish
Show Dependencies
Add Required Components
Managed Properties
Display Name
Name
Type
State
Customizable
Descrip
Stage Category
processstage_category
Option Set
Managed
True
Category of

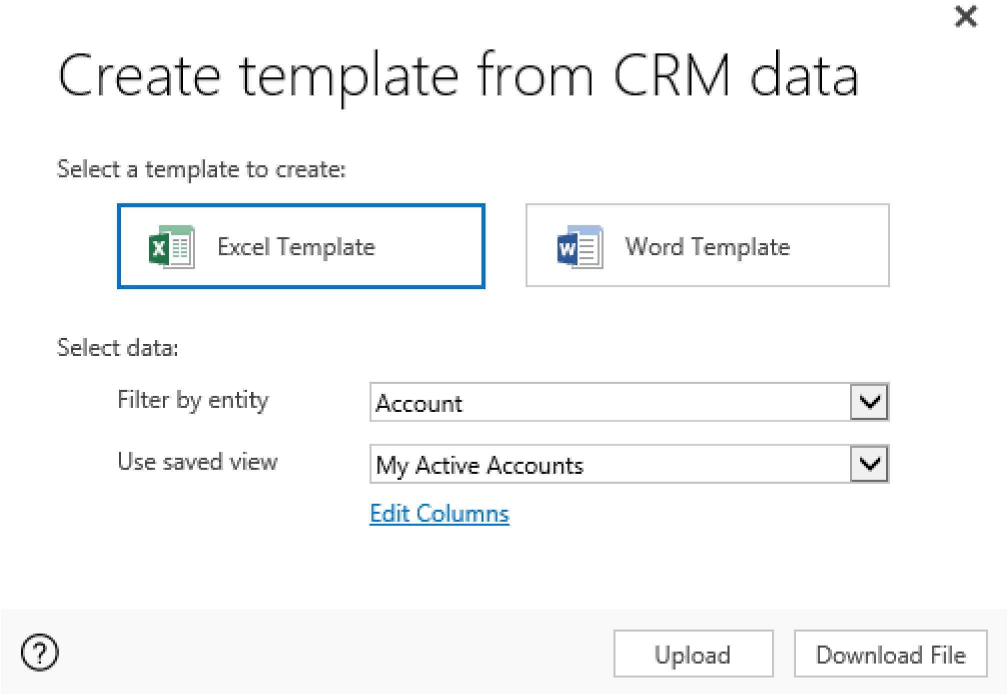

Enable Security Roles: Demo Business Process...
Only users with selected security roles can assign this process to a new record. These users can also switch to this process on an existing record.
Enable for everyone
Enable only for the selected security roles
Name
Business Unit
Marketing Manager
me2co
Marketing Professional
me2co
Sales Manager
me2co
Salesperson
me2co
Schedule Manager
me2co
Scheduler
me2co
System Administrator
me2co
1 - 16 of 16 (4 selected)
OK
Cancel

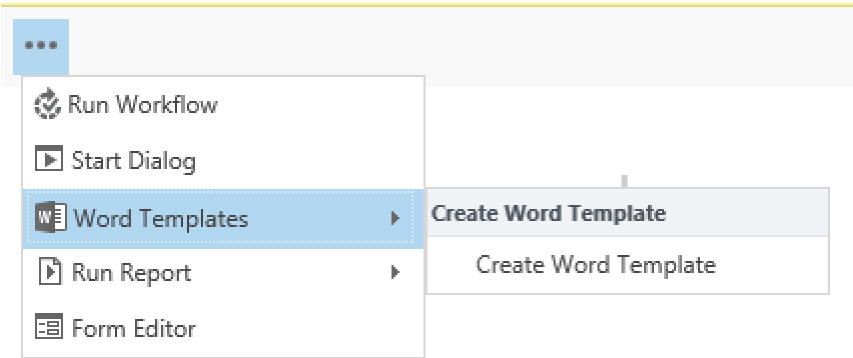

File
Save
Save As
Activate
Delete
Order Process Flow
Enable Security Roles
Show Dependencies
Actions
Help
BUSINESS PROCESS FLOW
Demo Business Process Flow (Copy)
Details
Stage Name *
Enter A Stage Name
Step Name
Value
Required
Account Number
Account Number
Entity *
Account
Stage Category
--
+ Insert stage
Add branch
MOVE
Status: Inactive

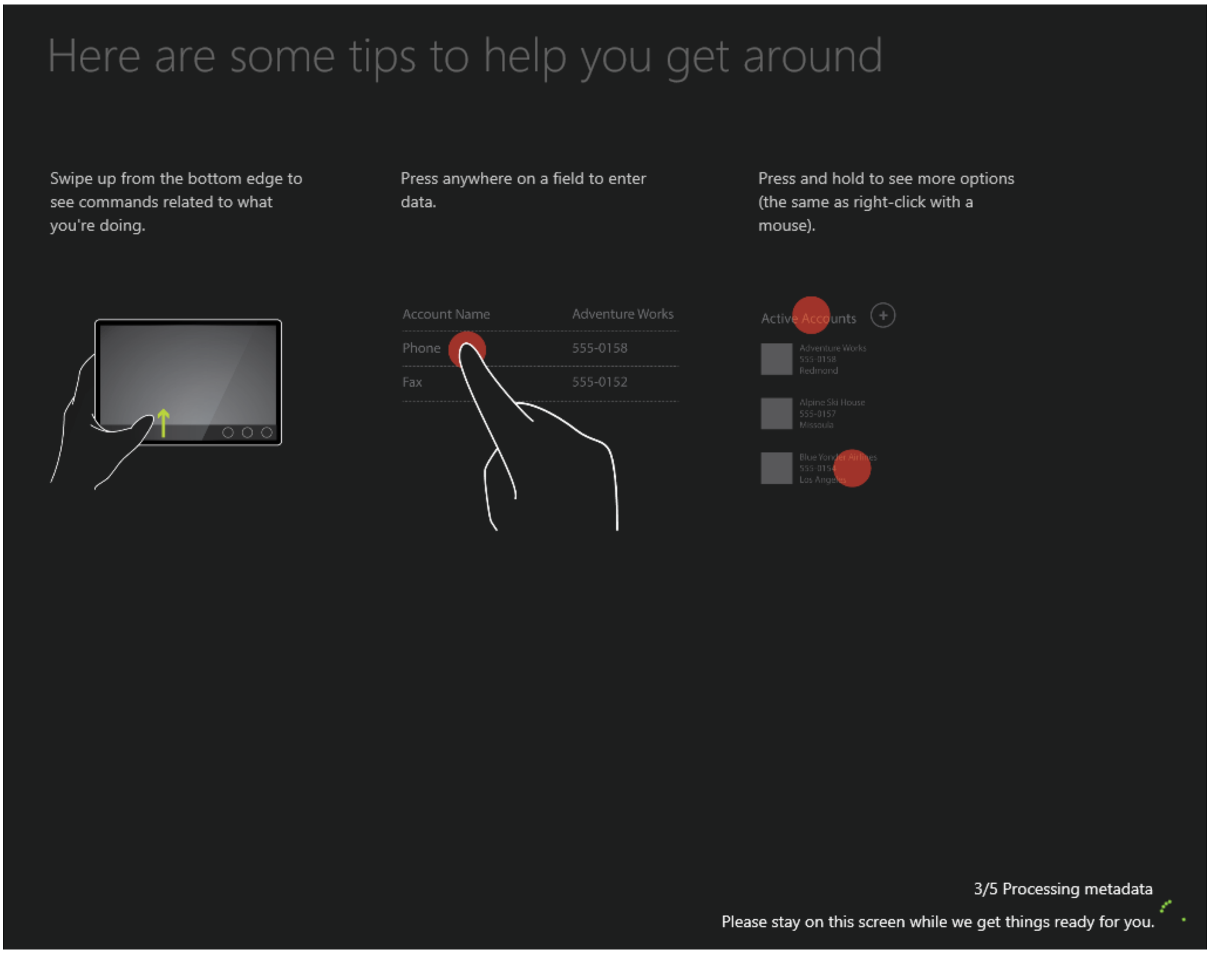

Hide Process Properties
Process Name *
Lead process stage change
Activate As
Process
Available to Run
Run this workflow in the background (recommended)
As an on-demand process
As a child process
Workflow Job Retention
Automatically delete completed workflow jobs (to save disk space)
Entity
Lead
Category
Workflow
Options for Automatic Processes
Scope
Organization
Start when:
Record is created
Record status changes
Record is assigned
Record fields change
Select
Record is deleted

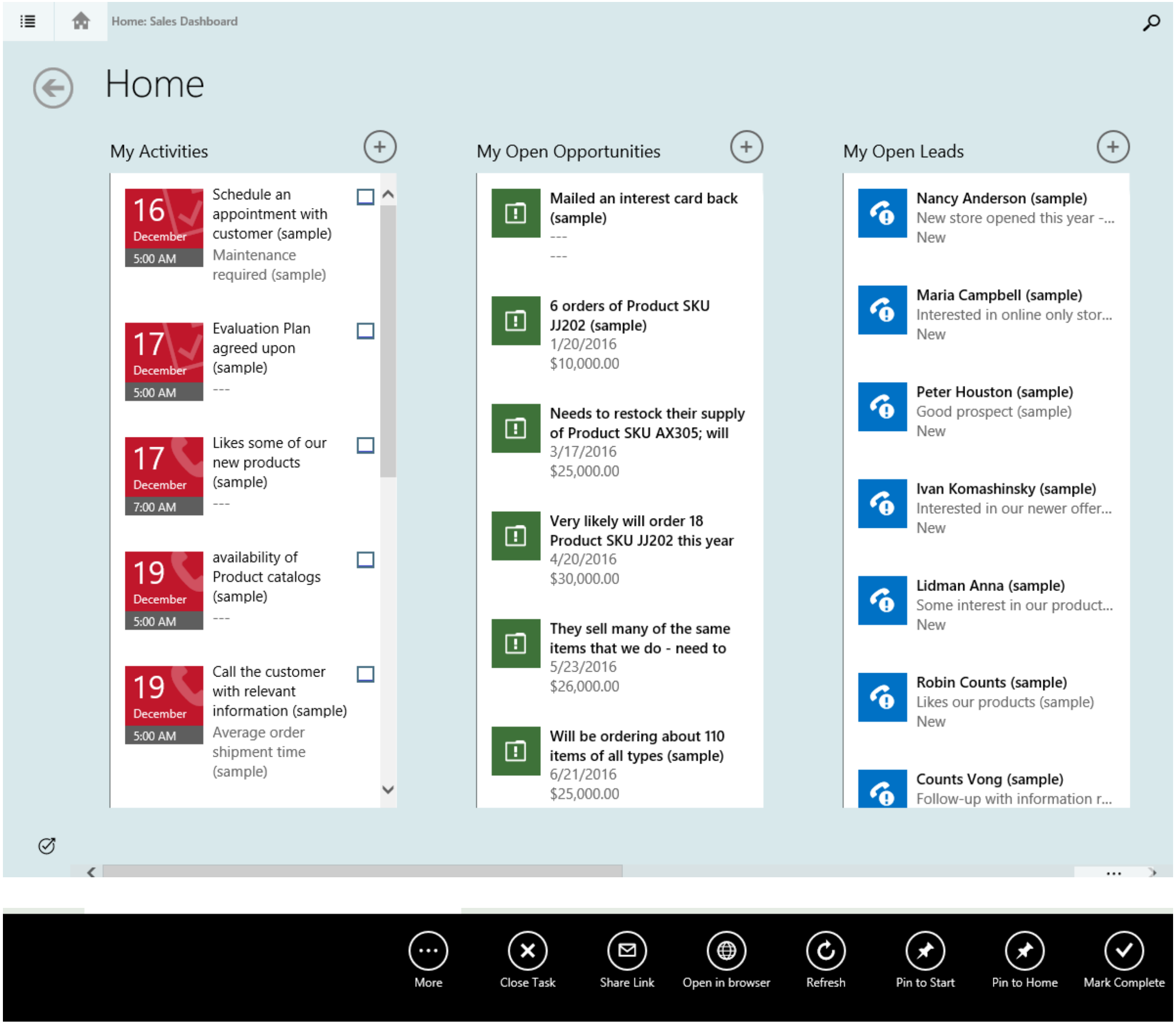

Select Fields
Select the fields that the process will monitor for changes.
Display Name
Name
Type
Preferred Method of Contact
preferredcontactmethodc...
Option Set
Priority
prioritycode
Option Set
Process
processid
Unique Identifier
Process Stage
stageid
Unique Identifier
Purchase Process
purchaseprocess
Option Set
Purchase Timeframe
purchasetimeframe
Option Set
Qualification Comments
qualificationcomments
Multiple Lines of Text
Qualifying Opportunity
qualifyingopportunityid
Lookup
Rating
leadqualitycode
Option Set
Record Created On
overriddencreatedon
Date and Time
Related Campaign Response
relatedobjectid
Lookup
OK
Cancel


EXCEL TEMPLATES
EXPORT TO EXCEL
Create Excel Template
Create Excel Template

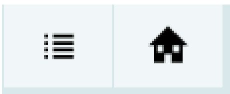

Create template from CRM data
Select a template to create:
Excel Template
Word Template
Select data:
Filter by entity
Account
Use saved view
My Active Accounts
Edit Columns
Upload
Download File

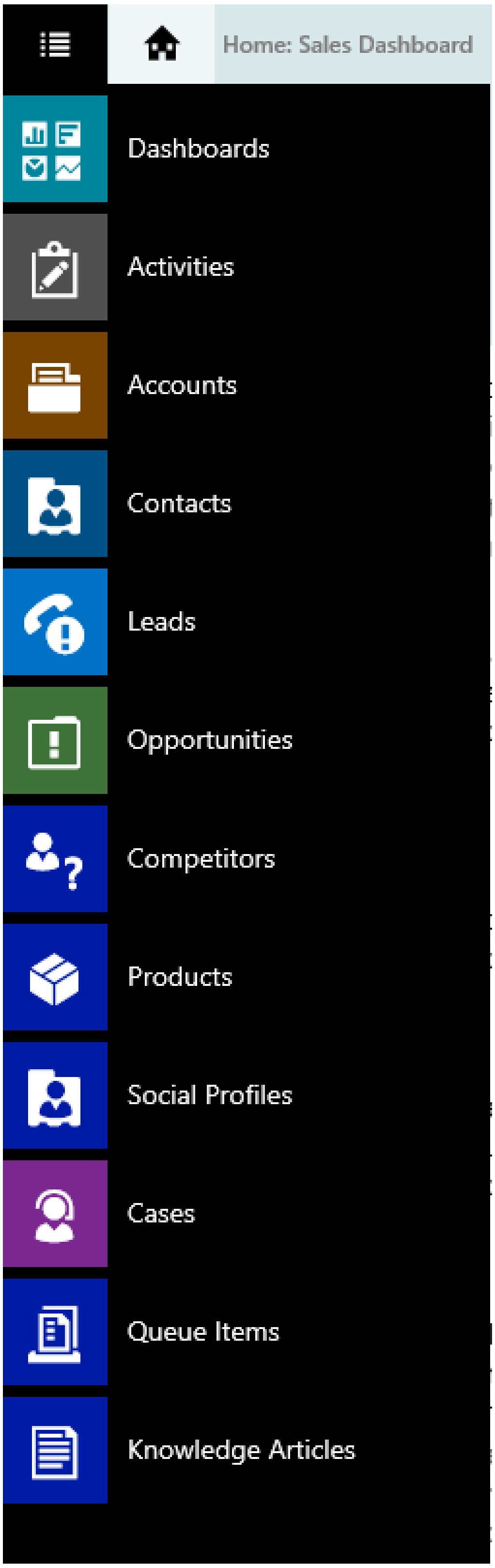

Run Workflow
Start Dialog
Word Templates
Run Report
Form Editor
Create Word Template
Create Word Template

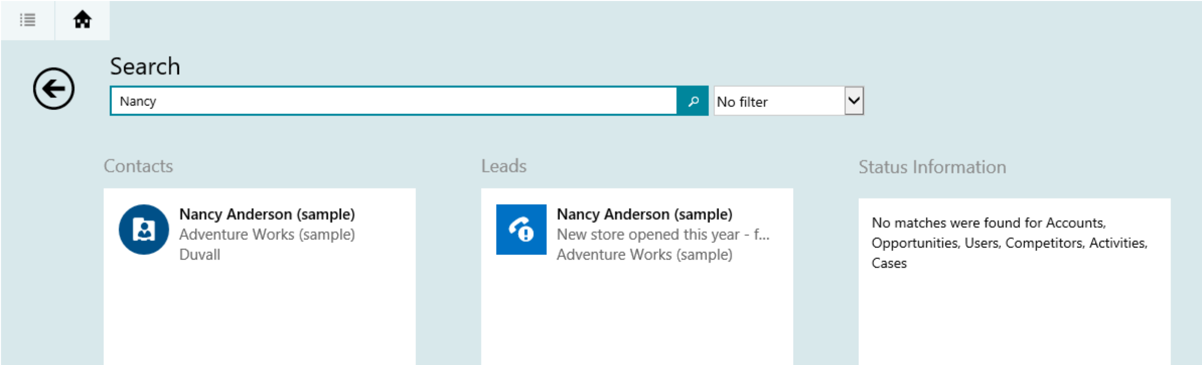

Here are some tips to help you get around
Swipe up from the bottom edge to see commands related to what you're doing.
Press anywhere on a field to enter data.
Press and hold to see more options (the same as right-click with a mouse).
Account Name
Adventure Works
Phone
555-0158
Fax
555-0152
Active Accounts
3/5 Processing metadata
Please stay on this screen while we get things ready for you.

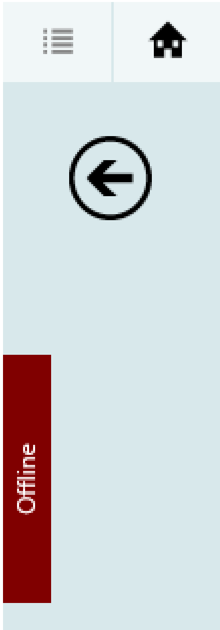

Home: Sales Dashboard
Home
My Activities
16 December 5:00 AM
Schedule an appointment with customer (sample)
Maintenance required (sample)
17 December 5:00 AM
Evaluation Plan agreed upon (sample)
---
17 December 7:00 AM
Likes some of our new products (sample)
---
19 December 5:00 AM
availability of Product catalogs (sample)
---
19 December 5:00 AM
Call the customer with relevant information (sample)
Average order shipment time (sample)
My Open Opportunities
Mailed an interest card back (sample)

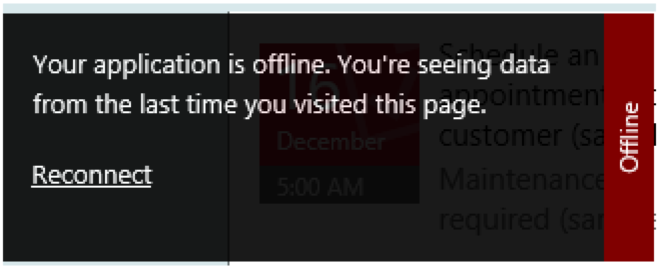
---
6 orders of Product SKU JJ202 (sample)
1/20/2016
$10,000.00
Needs to restock their supply of Product SKU AX305; will
3/17/2016
$25,000.00
Very likely will order 18 Product SKU JJ202 this year
4/20/2016
$30,000.00
They sell many of the same items that we do - need to
5/23/2016
$26,000.00
Will be ordering about 110 items of all types (sample)
6/21/2016
$25,000.00
My Open Leads
Nancy Anderson (sample)
New store opened this year -...
New
Maria Campbell (sample)
Interested in online only stor...
New
Peter Houston (sample)
Good prospect (sample)
New
Ivan Komashinsky (sample)
Interested in our newer offer...
New
Lidman Anna (sample)
Some interest in our product...
New
Robin Counts (sample)
Likes our products (sample)
New
Counts Vong (sample)
Follow-up with information r...
More
Close Task
Share Link
Open in browser
Refresh
Pin to Start
Pin to Home
Mark Complete

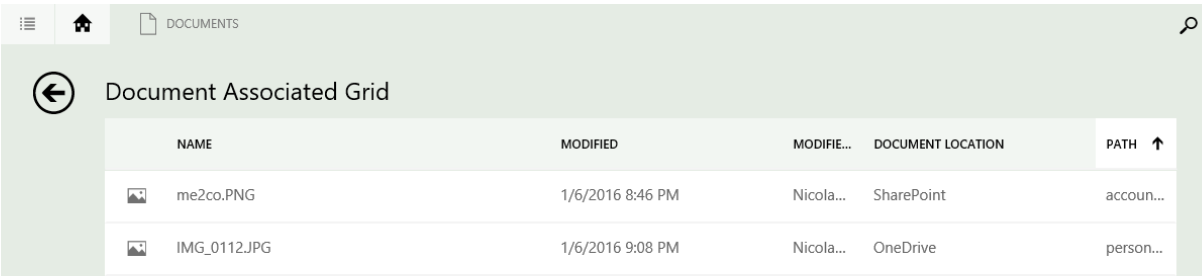


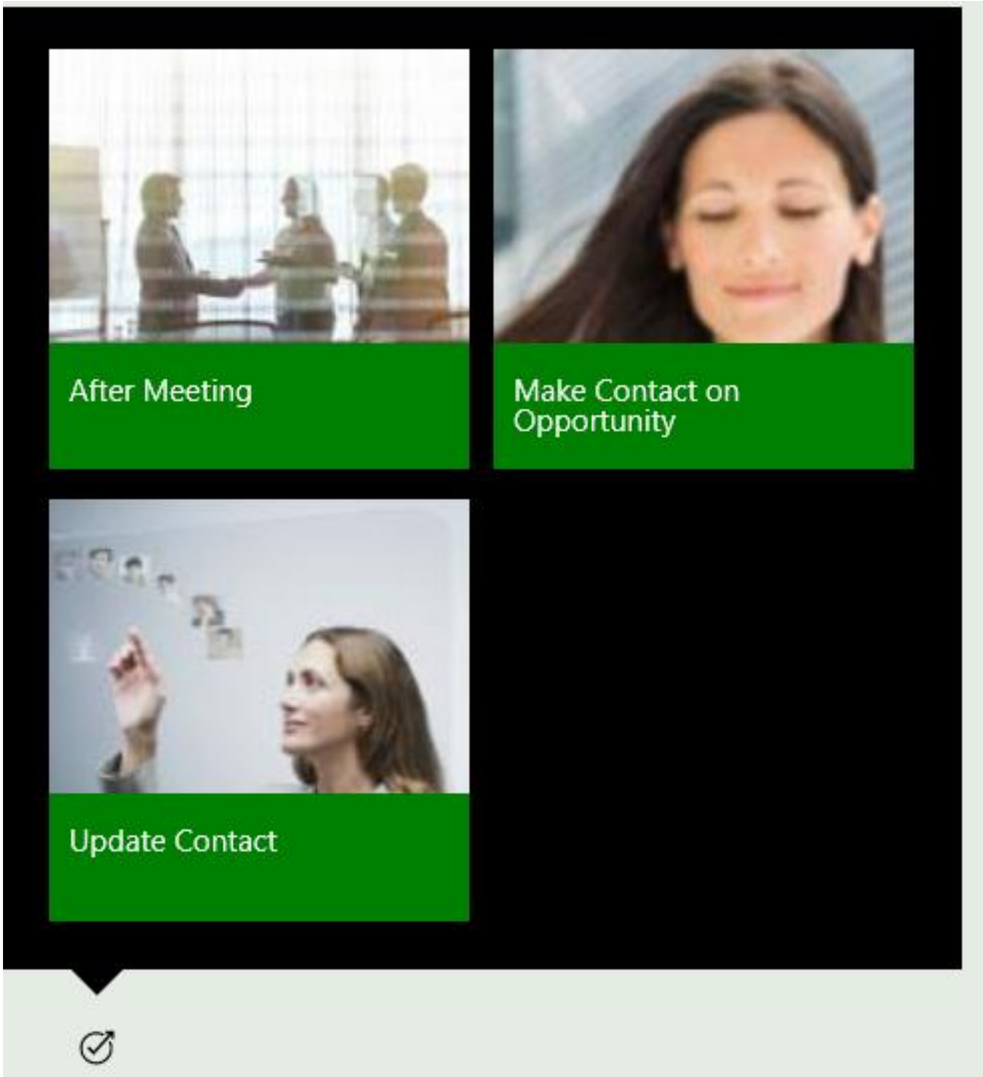

Home: Sales Dashboard
Dashboards
Activities
Accounts
Contacts
Leads
Opportunities
Competitors
Products
Social Profiles
Cases
Queue Items
Knowledge Articles

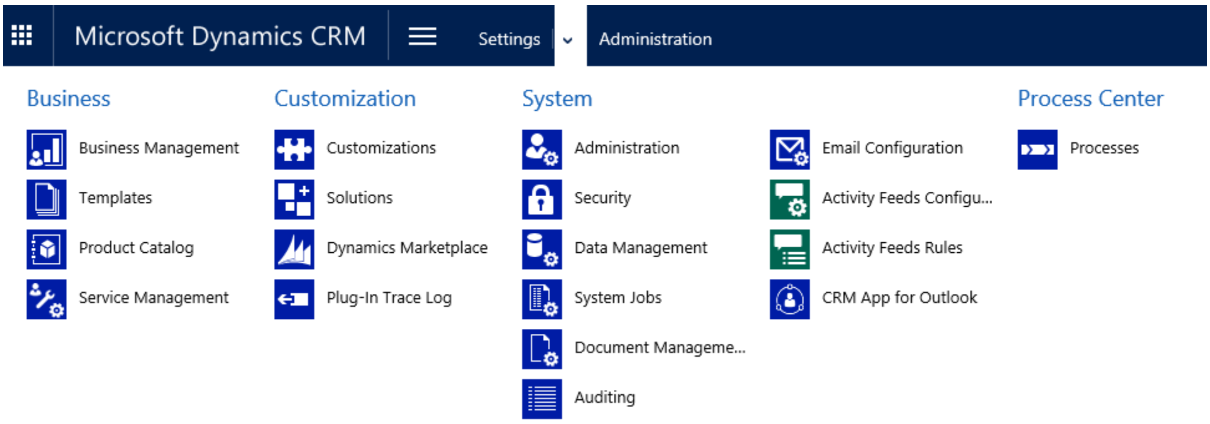

Search
Nancy
No filter
Contacts
Nancy Anderson (sample)
Adventure Works (sample)
Duvall
Leads
Nancy Anderson (sample)
New store opened this year - f...
Adventure Works (sample)
Status Information
No matches were found for Accounts, Opportunities, Users, Competitors, Activities, Cases

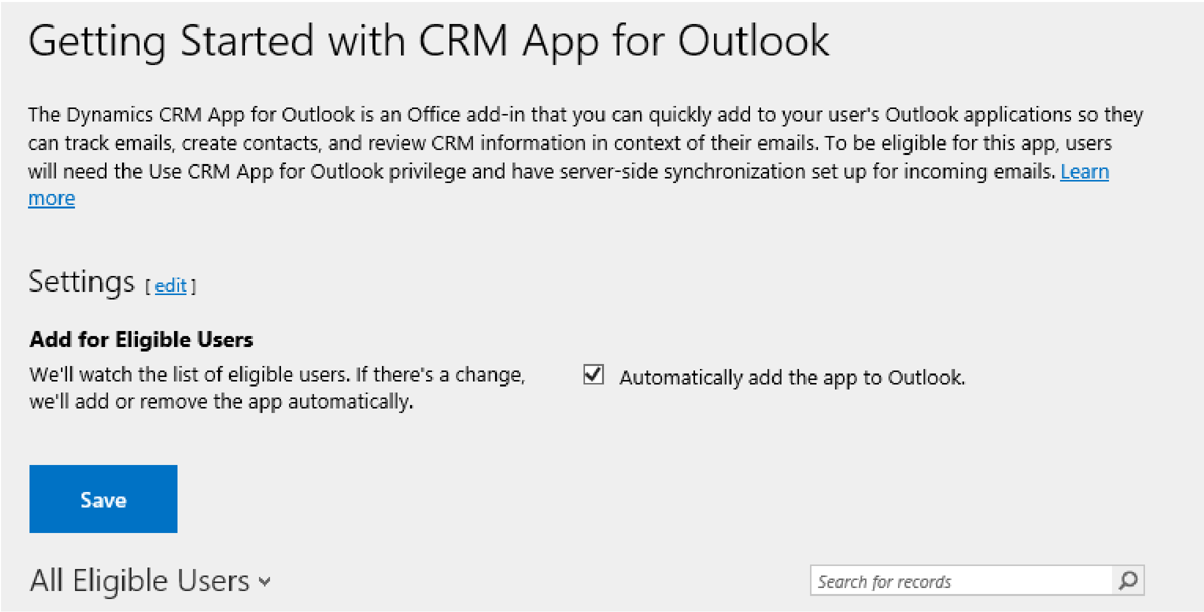

Offline

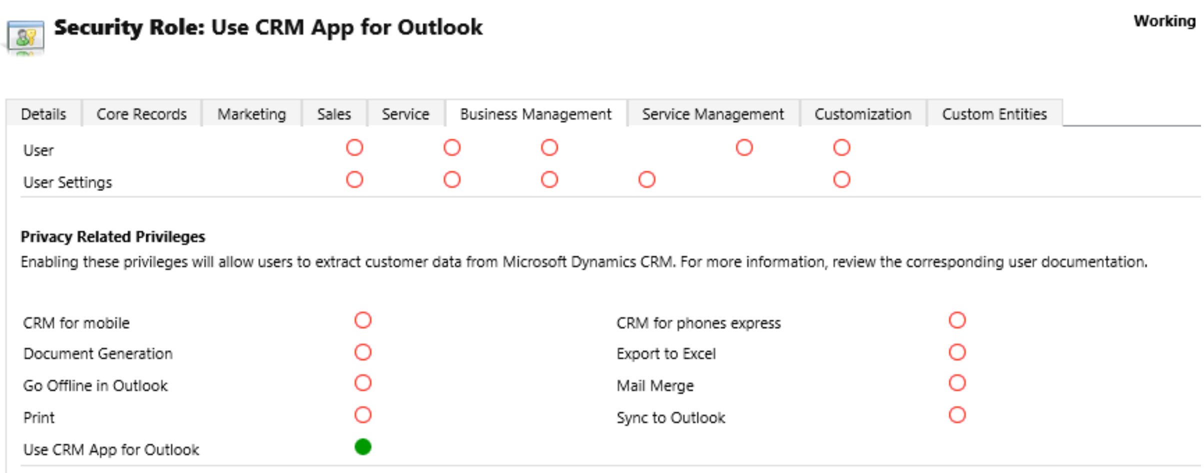

Your application is offline. You're seeing data from the last time you visited this page.
Reconnect
Offline

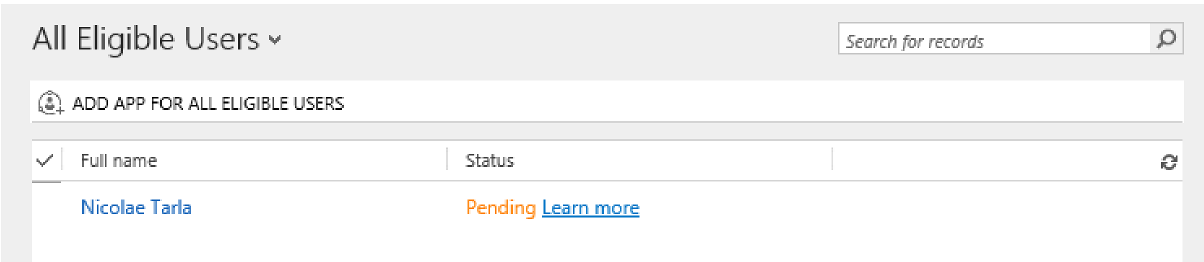

DOCUMENTS
Document Associated Grid
NAME
MODIFIED
MODIFIE...
DOCUMENT LOCATION
PATH
me2co.PNG
1/6/2016 8:46 PM
Nicola...
SharePoint
accoun...
IMG_0112.JPG
1/6/2016 9:08 PM
Nicola...
OneDrive
person...

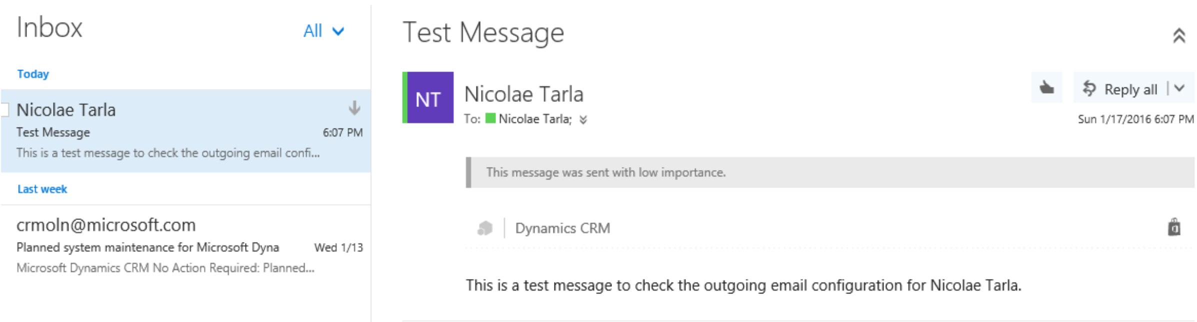

After Meeting
Make Contact on Opportunity
Update Contact

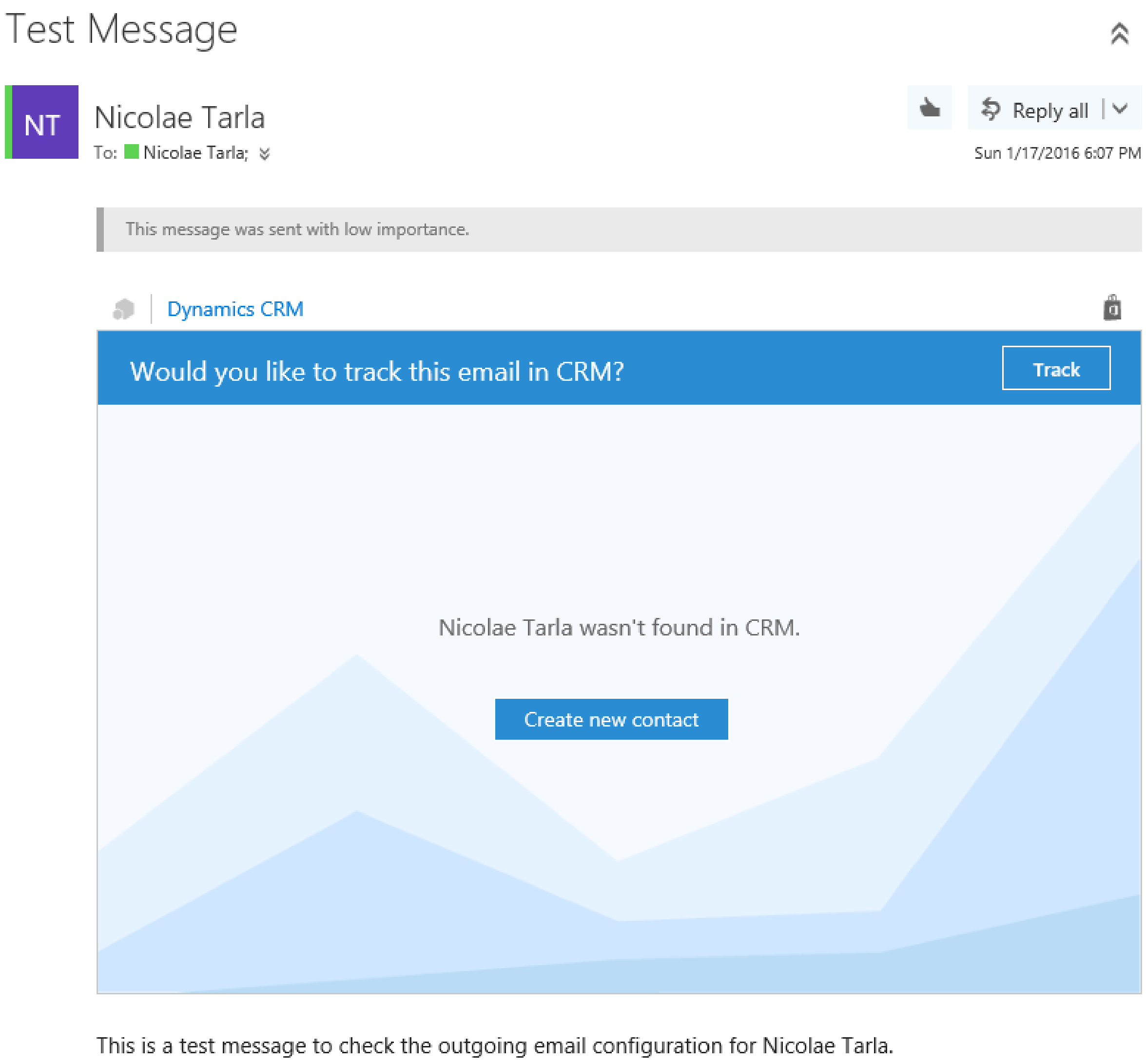

Microsoft Dynamics CRM
Settings
Administration
Business
Business Management
Templates
Product Catalog
Service Management
Customization
Customizations
Solutions
Dynamics Marketplace
Plug-In Trace Log
System
Administration
Security
Data Management
System Jobs
Document Manageme...
Auditing
Email Configuration
Activity Feeds Configu...
Activity Feeds Rules
CRM App for Outlook
Process Center
Processes

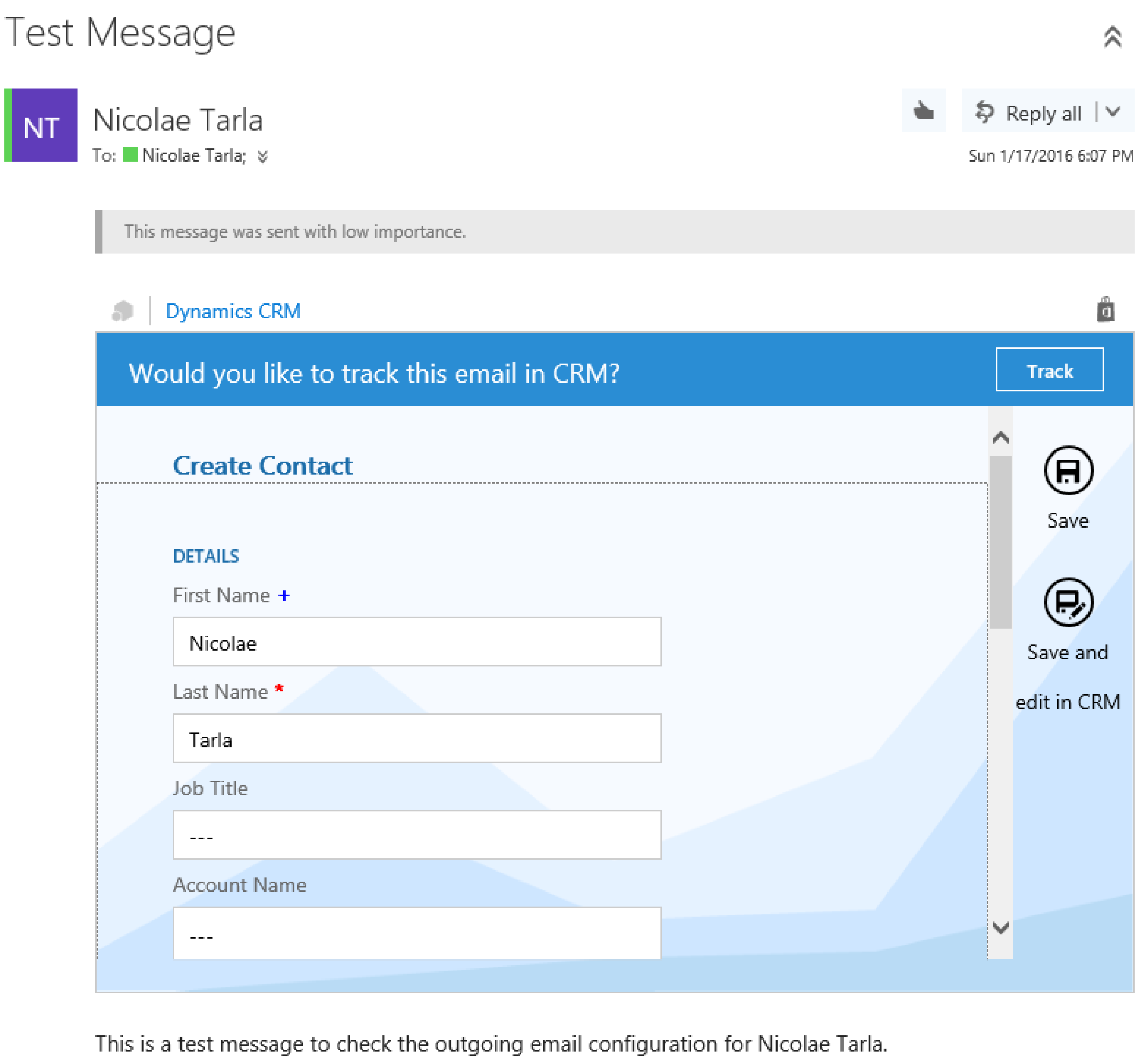

Getting Started with CRM App for Outlook
The Dynamics CRM App for Outlook is an Office add-in that you can quickly add to your user's Outlook applications so they can track emails, create contacts, and review CRM information in context of their emails. To be eligible for this app, users will need the Use CRM App for Outlook privilege and have server-side synchronization set up for incoming emails. Learn more
Settings [edit]
Add for Eligible Users
We'll watch the list of eligible users. If there's a change, we'll add or remove the app automatically.
Automatically add the app to Outlook.
Save
All Eligible Users
Search for records


Security Role: Use CRM App for Outlook
Working
Details
Core Records
Marketing
Sales
Service
Business Management
Service Management
Customization
Custom Entities
User
User Settings
Privacy Related Privileges
Enabling these privileges will allow users to extract customer data from Microsoft Dynamics CRM. For more information, review the corresponding user documentation.
CRM for mobile
Document Generation
Go Offline in Outlook
Print
Use CRM App for Outlook
CRM for phones express
Export to Excel
Mail Merge
Sync to Outlook


All Eligible Users
Search for records
ADD APP FOR ALL ELIGIBLE USERS
Full name
Status
Nicolae Tarla
Pending Learn more

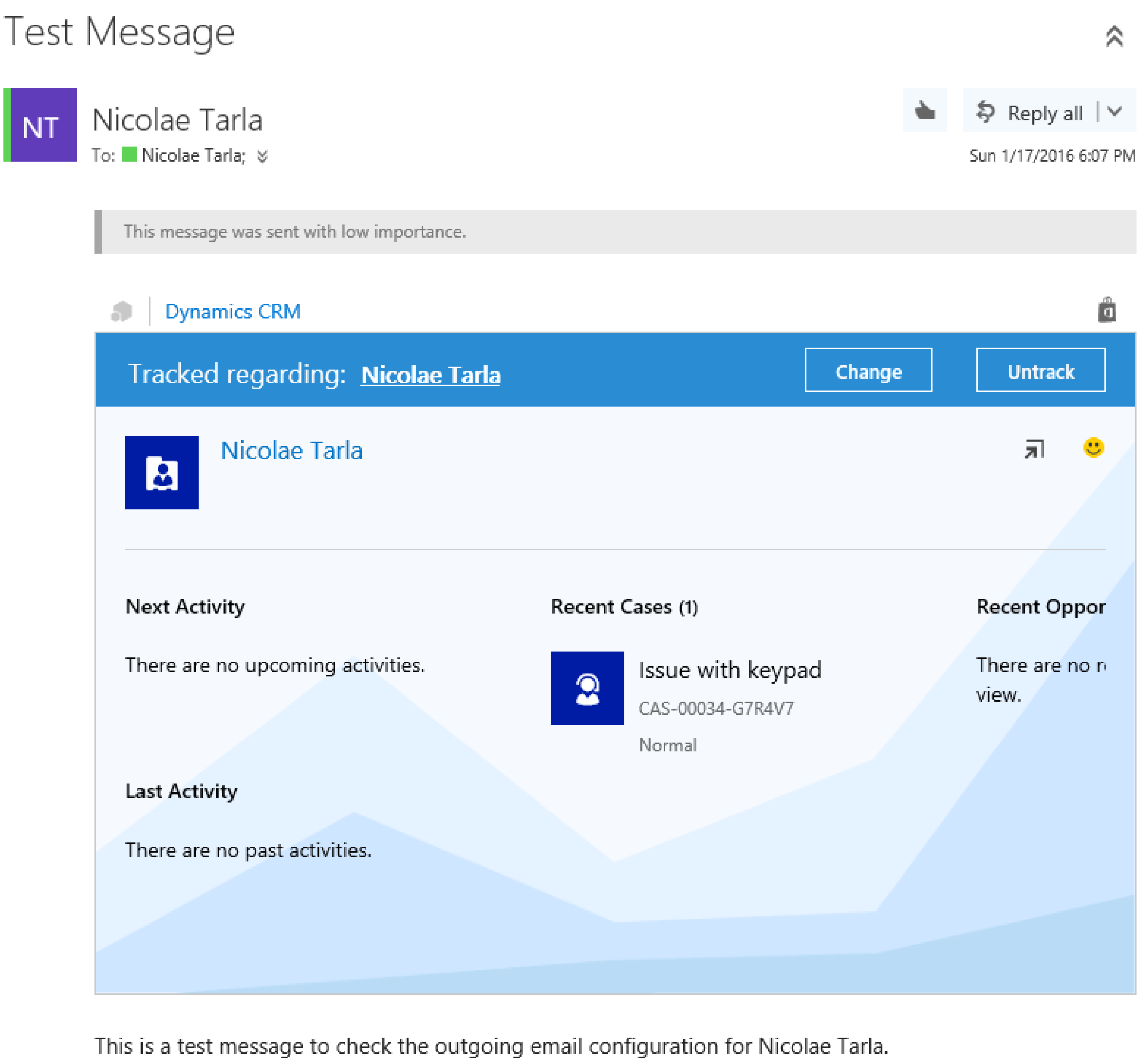

Inbox
All
Today
Nicolae Tarla
Test Message
6:07 PM
This is a test message to check the outgoing email confi...
Last week
crmoln@microsoft.com
Planned system maintenance for Microsoft Dyna
Wed 1/13
Microsoft Dynamics CRM No Action Required: Planned...
Test Message
NT
Nicolae Tarla
To: Nicolae Tarla;
Reply all
Sun 1/17/2016 6:07 PM
This message was sent with low importance.
Dynamics CRM
This is a test message to check the outgoing email configuration for Nicolae Tarla.

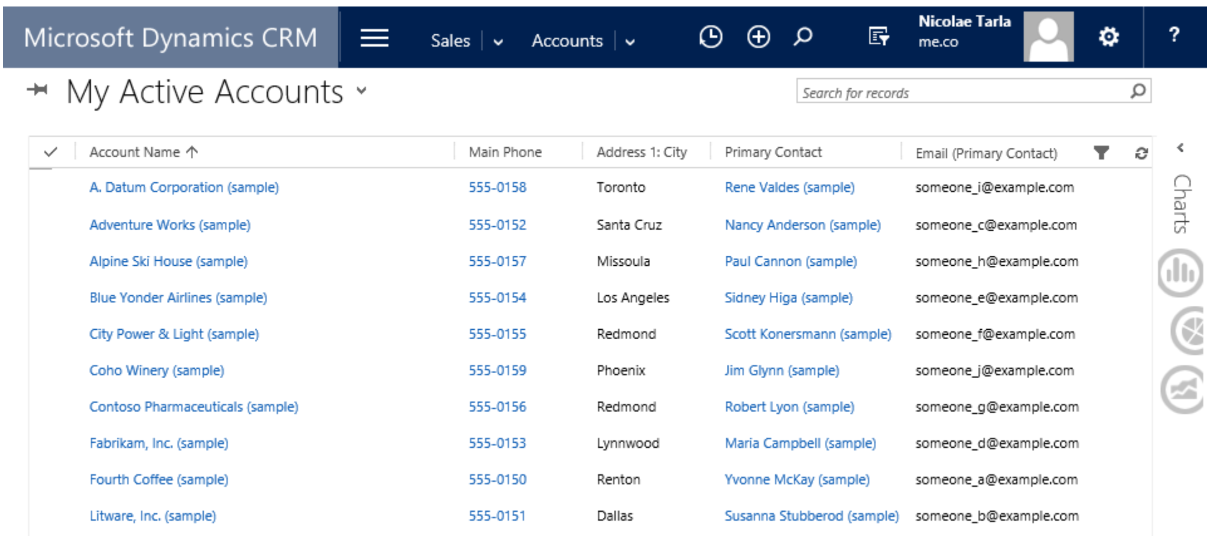

Test Message
NT
Nicolae Tarla
To: Nicolae Tarla;
Reply all
Sun 1/17/2016 6:07 PM
This message was sent with low importance.
Dynamics CRM
Would you like to track this email in CRM?
Track
Nicolae Tarla wasn't found in CRM.
Create new contact
This is a test message to check the outgoing email configuration for Nicolae Tarla.


Test Message
NT
Nicolae Tarla
To: Nicolae Tarla;
Reply all
Sun 1/17/2016 6:07 PM
This message was sent with low importance.
Dynamics CRM
Would you like to track this email in CRM?
Track
Create Contact
DETAILS
First Name +
Nicolae
Last Name *
Tarla
Job Title

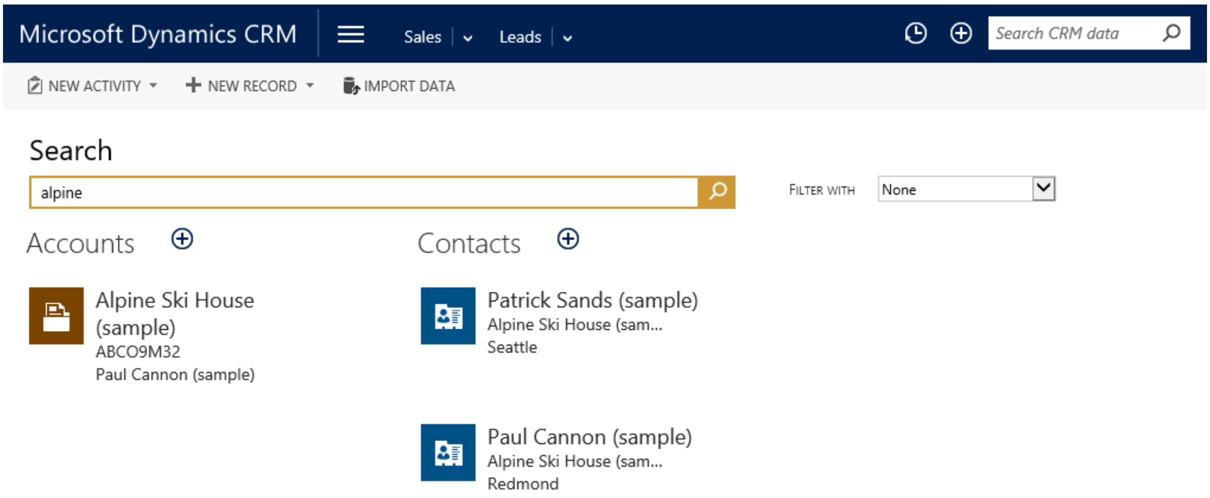
Account Name

Save
Save and edit in CRM
This is a test message to check the outgoing email configuration for Nicolae Tarla.

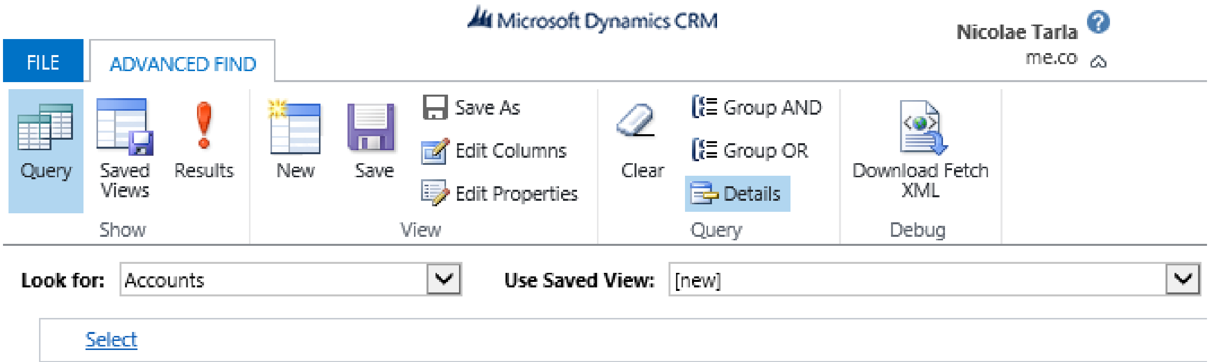

Test Message
NT
Nicolae Tarla
To: Nicolae Tarla;
Reply all
Sun 1/17/2016 6:07 PM
This message was sent with low importance.
Dynamics CRM
Tracked regarding: Nicolae Tarla
Change
Untrack
Nicolae Tarla
Next Activity
There are no upcoming activities.
Recent Cases (1)
Issue with keypad
CAS-00034-G7R4V7
Normal
Recent Oppor
There are no r
view.
Last Activity
There are no past activities.
This is a test message to check the outgoing email configuration for Nicolae Tarla.

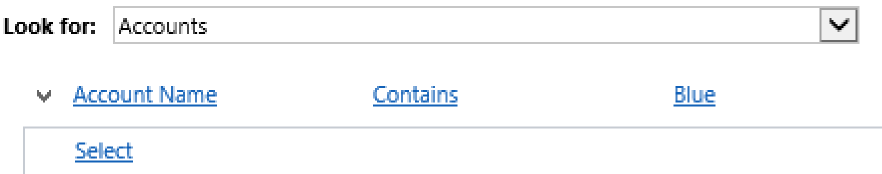

Microsoft Dynamics CRM
Sales
Accounts
Nicolae Tarla
me.co
My Active Accounts
Search for records
Account Name
Main Phone
Address 1: City
Primary Contact
Email (Primary Contact)
Charts
A. Datum Corporation (sample) 555-0158 Toronto Rene Valdes (sample) someone_i@example.com
Adventure Works (sample) 555-0152 Santa Cruz Nancy Anderson (sample) someone_c@example.com
Alpine Ski House (sample) 555-0157 Missoula Paul Cannon (sample) someone_h@example.com
Blue Yonder Airlines (sample) 555-0154 Los Angeles Sidney Higa (sample) someone_e@example.com
City Power & Light (sample) 555-0155 Redmond Scott Konersmann (sample) someone_f@example.com
Coho Winery (sample) 555-0159 Phoenix Jim Glynn (sample) someone_j@example.com
Contoso Pharmaceuticals (sample) 555-0156 Redmond Robert Lyon (sample) someone_g@example.com
Fabrikam, Inc. (sample) 555-0153 Lynnwood Maria Campbell (sample) someone_d@example.com
Fourth Coffee (sample) 555-0150 Renton Yvonne McKay (sample) someone_a@example.com
Litware, Inc. (sample) 555-0151 Dallas Susanna Stubberod (sample) someone_b@example.com

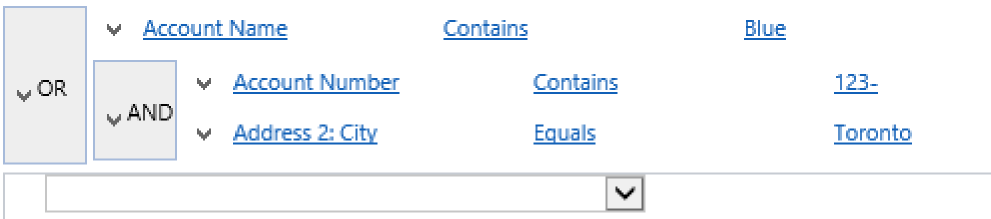

Microsoft Dynamics CRM
Sales
Accounts
Search CRM data
Nicolae Tarla
me.co

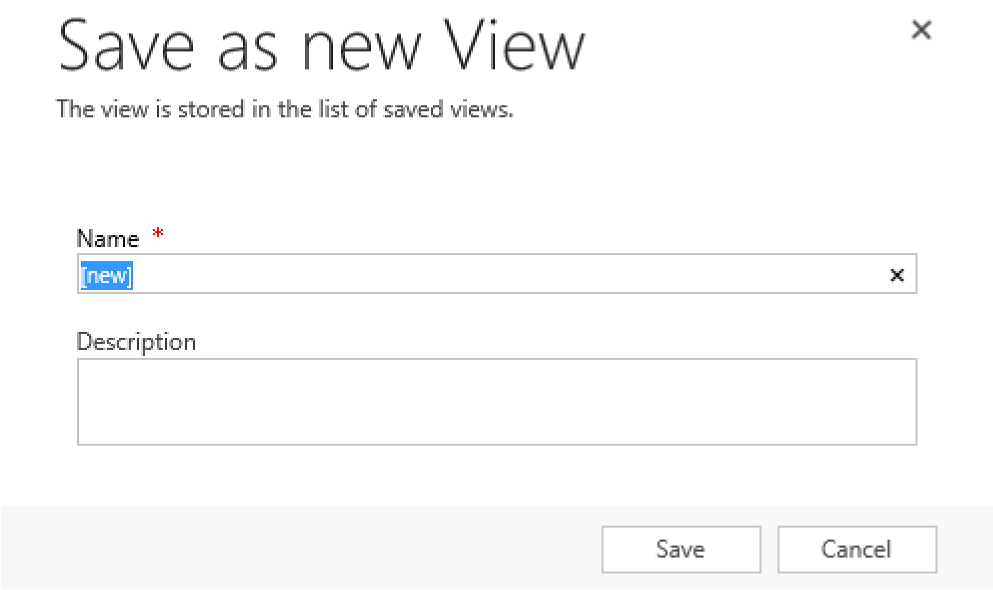

Microsoft Dynamics CRM
Sales
Leads
Search CRM data
NEW ACTIVITY
NEW RECORD
IMPORT DATA
Search
alpine
Filter with
None
Accounts
Contacts
Alpine Ski House (sample)
ABCO9M32
Paul Cannon (sample)
Patrick Sands (sample)
Alpine Ski House (sam...
Seattle
Paul Cannon (sample)
Alpine Ski House (sam...
Redmond

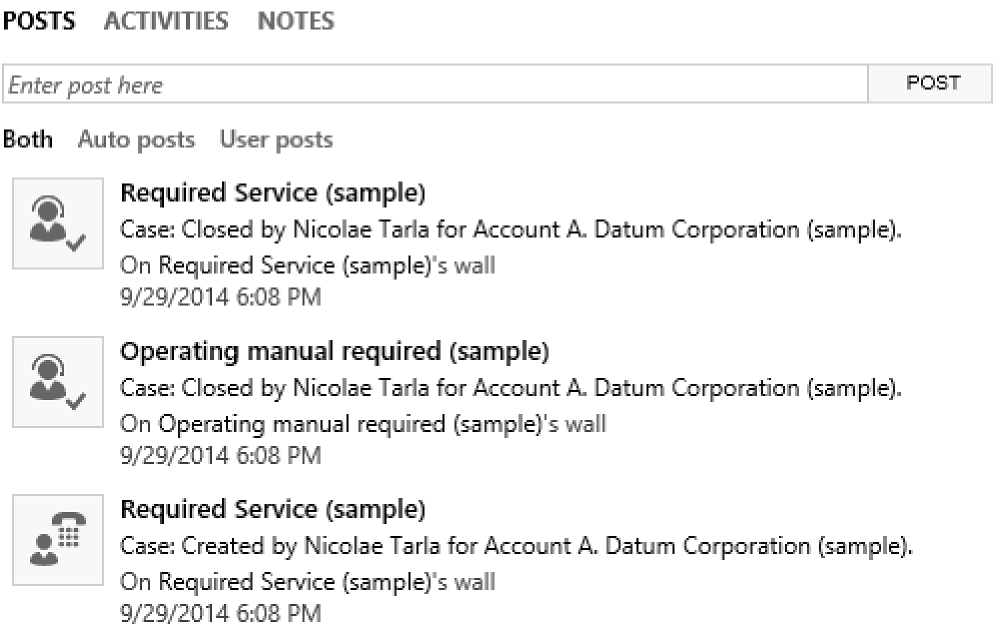

Search CRM data

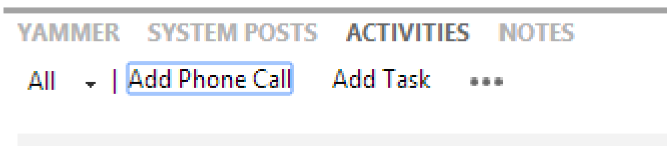

Microsoft Dynamics CRM
Nicolae Tarla
me.co
FILE
ADVANCED FIND
Query
Saved Views
Results
Show
New
Save
Save As
Edit Columns
Edit Properties
View
Clear
Group AND
Group OR
Details
Query
Download Fetch XML
Debug
Look for:
Accounts
Use Saved View:
[new]
Select

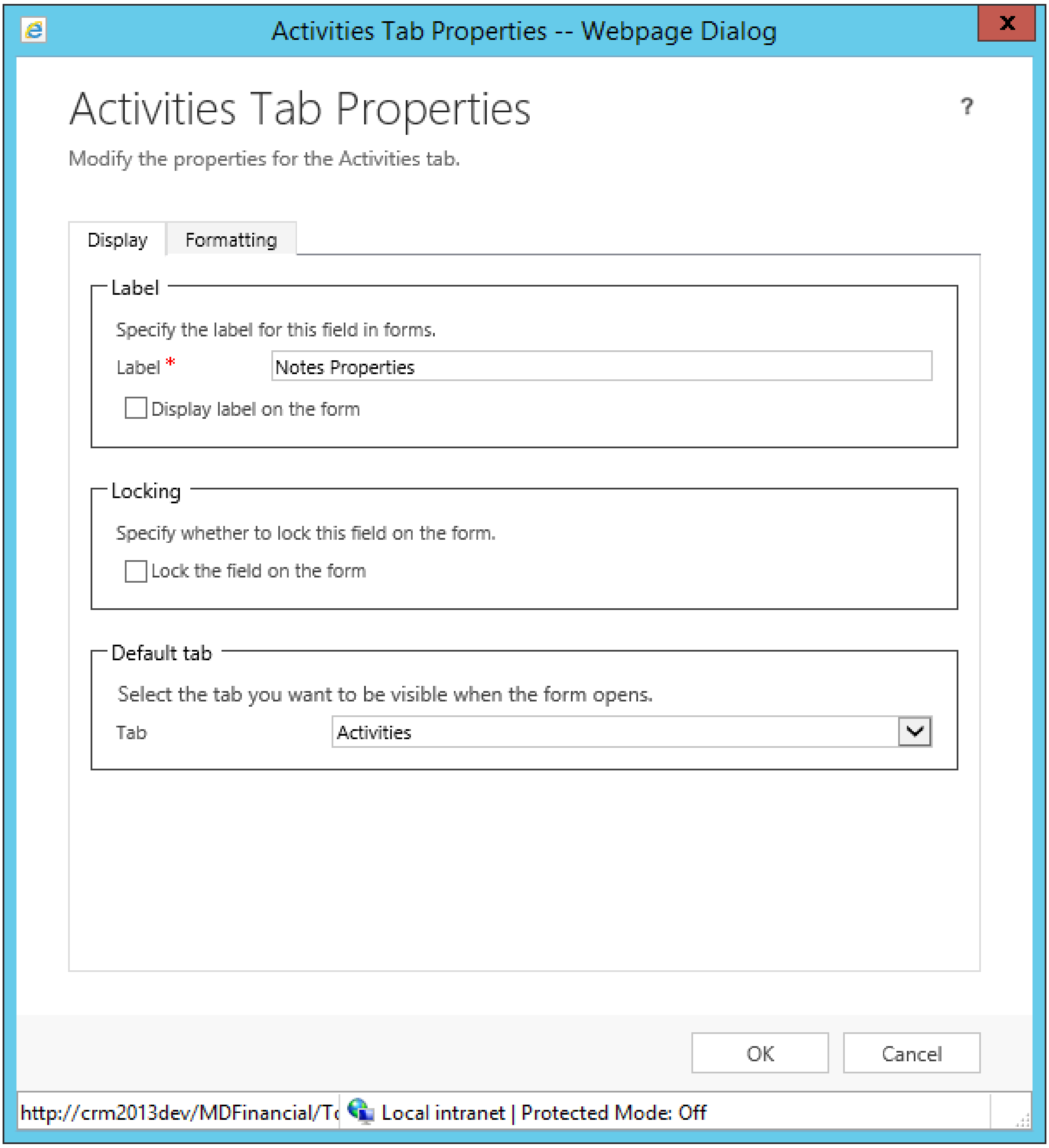

Look for:
Accounts
Account Name
Contains
Blue
Select

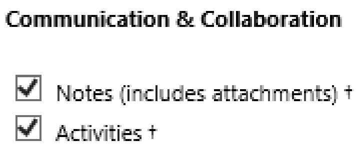

OR
AND
Account Name
Contains
Blue
Account Number
Contains
123-
Address 2: City
Equals
Toronto

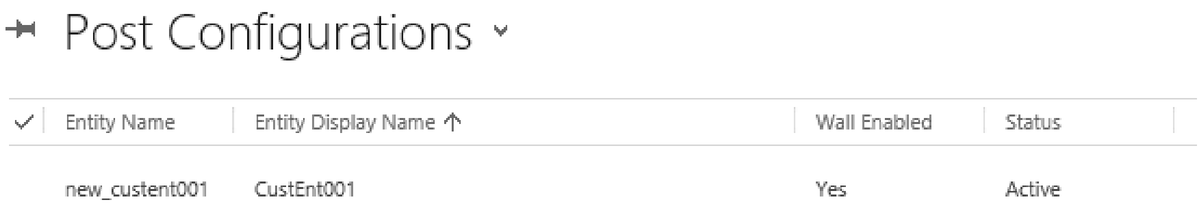

Save as new View
The view is stored in the list of saved views.
Name *
[new]
Description
Save
Cancel

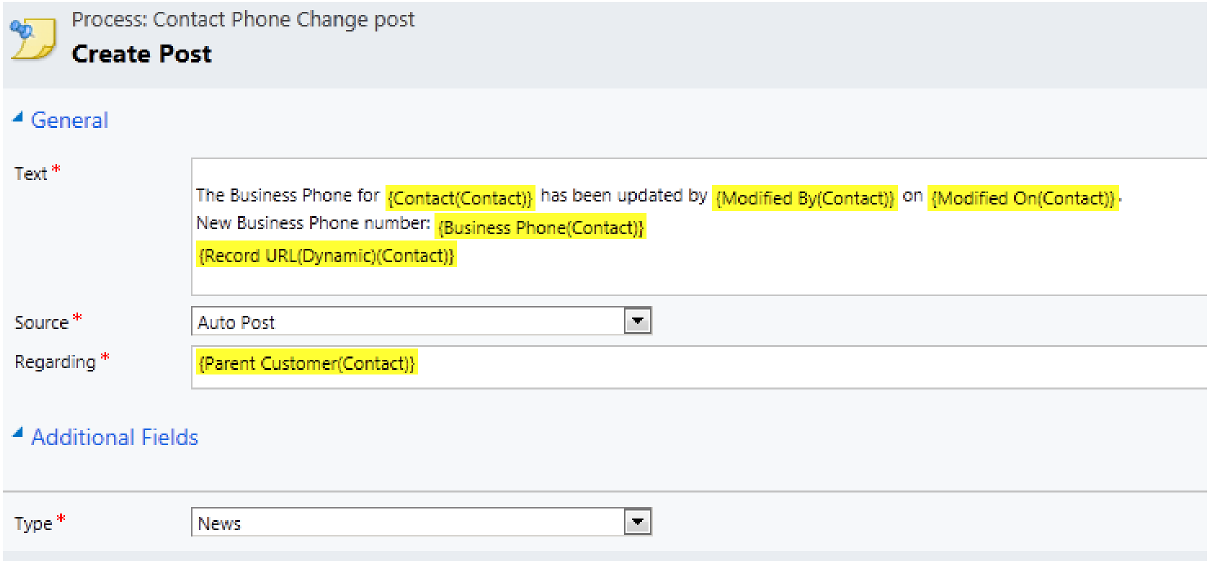

POSTS
ACTIVITIES
NOTES
Enter post here
POST
Both
Auto posts
User posts
Required Service (sample)
Case: Closed by Nicolae Tarla for Account A. Datum Corporation (sample).
On Required Service (sample)'s wall
9/29/2014 6:08 PM
Operating manual required (sample)
Case: Closed by Nicolae Tarla for Account A. Datum Corporation (sample).
On Operating manual required (sample)'s wall
9/29/2014 6:08 PM
Required Service (sample)
Case: Created by Nicolae Tarla for Account A. Datum Corporation (sample).
On Required Service (sample)'s wall
9/29/2014 6:08 PM


YAMMER
SYSTEM POSTS
ACTIVITIES
NOTES
All
Add Phone Call
Add Task


Activities Tab Properties -- Webpage Dialog
Activities Tab Properties
Modify the properties for the Activities tab.
Display
Formatting
Label
Specify the label for this field in forms.
Label *
Notes Properties
Display label on the form
Locking
Specify whether to lock this field on the form.
Lock the field on the form
Default tab
Select the tab you want to be visible when the form opens.
Tab
Activities
OK
Cancel
http://crm2013dev/MDFinancial/T
Local intranet | Protected Mode: Off

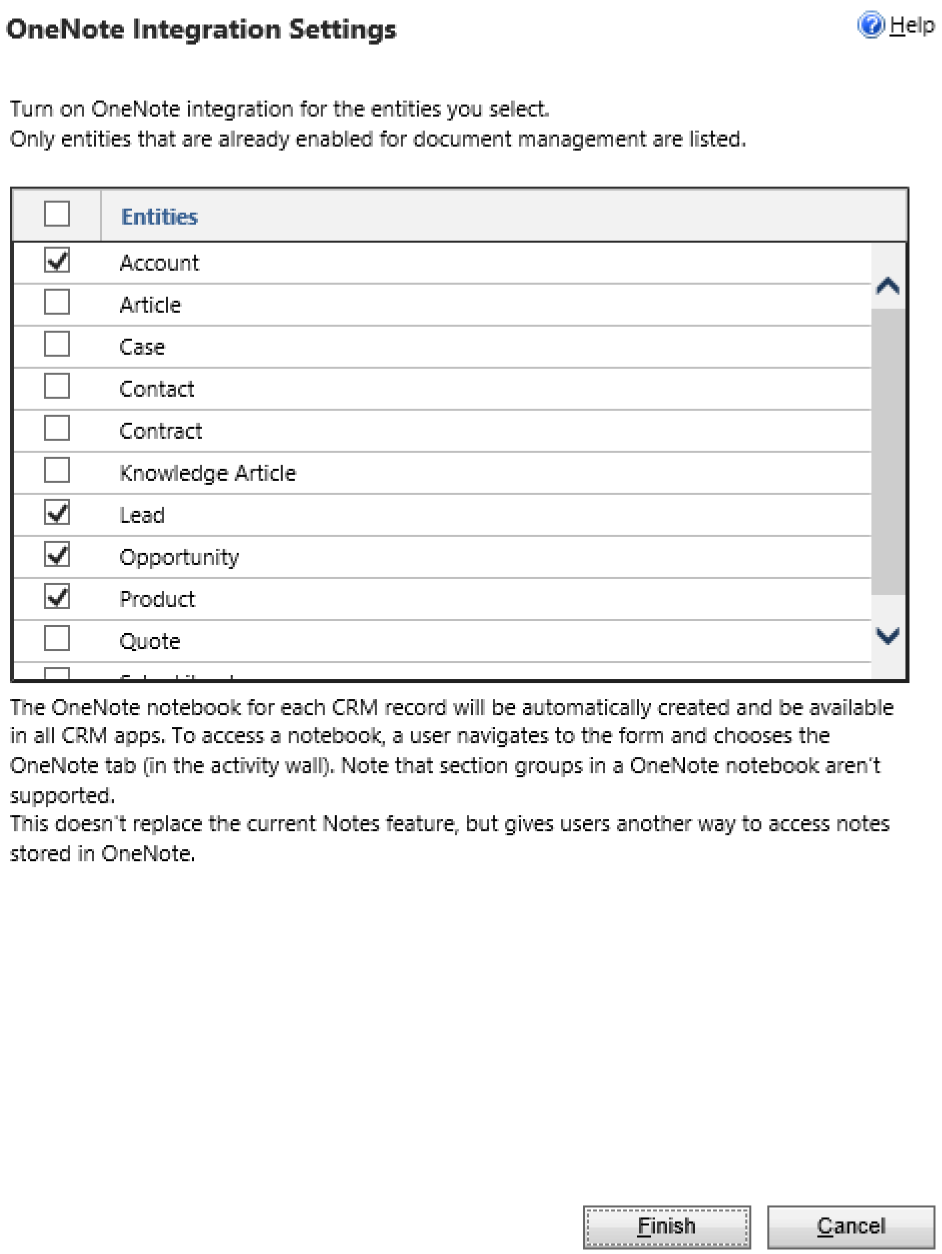

Communication & Collaboration
Notes (includes attachments) †
Activities †

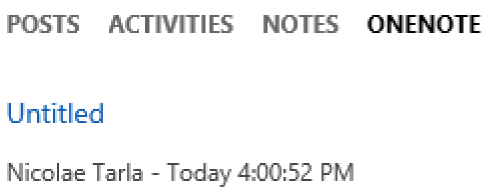

Post Configurations
Entity Name
Entity Display Name
Wall Enabled
Status
new_custent001
CustEnt001
Yes
Active

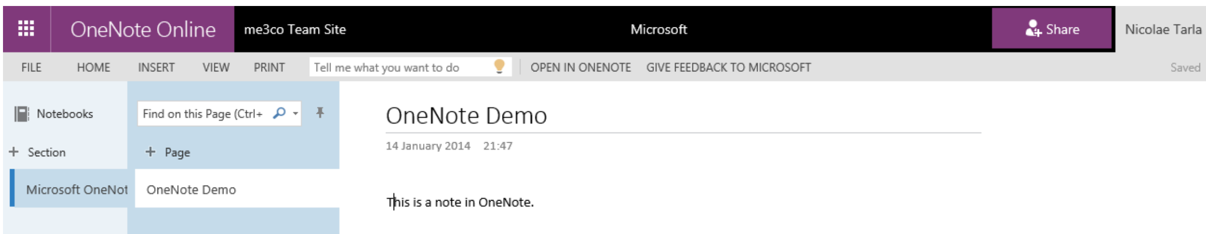


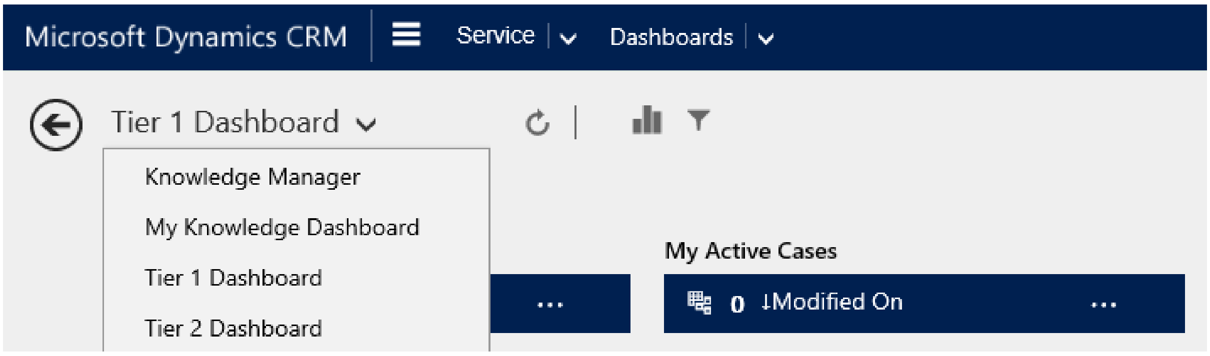
Process: Contact Phone Change post
Create Post
General
Text *
The Business Phone for {Contact(Contact)} has been updated by {Modified By(Contact)} on {Modified On(Contact)}.
New Business Phone number: {Business Phone(Contact)}
{Record URL(Dynamic)(Contact)}
Source *
Auto Post
Regarding *
{Parent Customer(Contact)}
Additional Fields
Type *
News

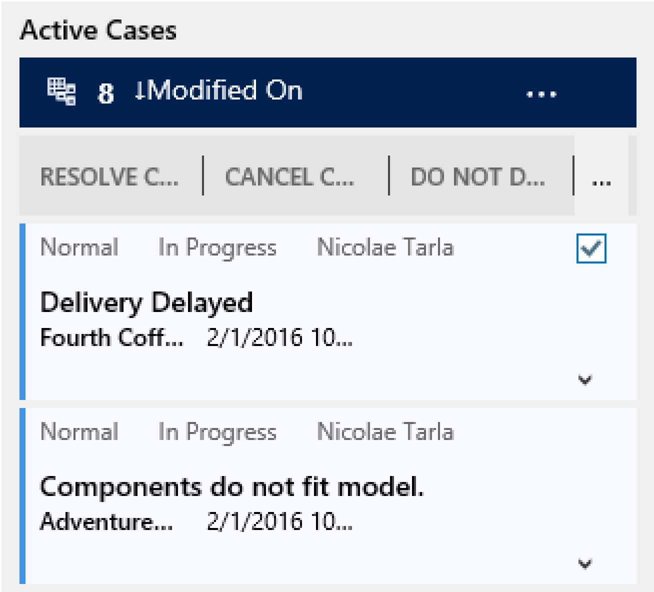
Document Management
Which feature would you like to work with?
Document Management Settings
Select default document management settings for your organization.
SharePoint Sites
A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.
SharePoint Document Locations
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics CRM record.
OneNote Integration
Set up OneNote Integration for selected entities so that a dedicated OneNote notebook is automatically created for each CRM record. Users will be able to easily access a notebook directly on the activity wall in CRM or from the record form in CRM mobile apps.
Enable OneDrive for Business
Enable users to manage files stored in OneDrive for Business directly in Dynamics CRM.
Manage Office Graph Integration
Enable Office Graph integration and specify default settings for your organization.

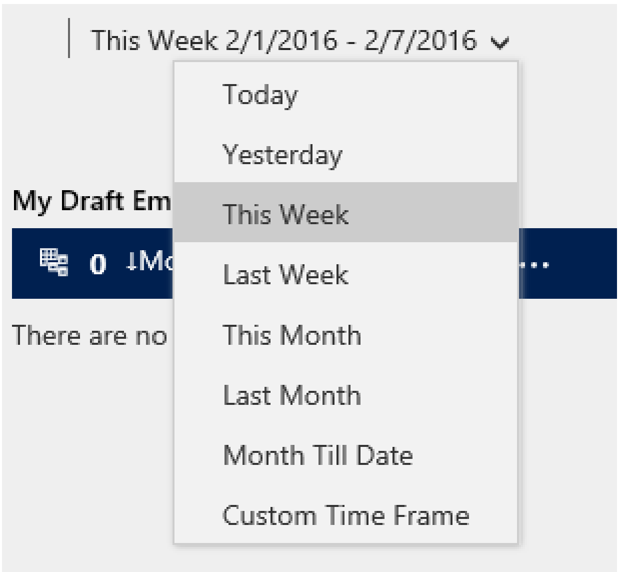

OneNote Integration Settings
Help
Turn on OneNote integration for the entities you select.
Only entities that are already enabled for document management are listed.
Entities
Account
Article
Case
Contact
Contract
Knowledge Article
Lead
Opportunity
Product
Quote
The OneNote notebook for each CRM record will be automatically created and be available in all CRM apps. To access a notebook, a user navigates to the form and chooses the OneNote tab (in the activity wall). Note that section groups in a OneNote notebook aren't supported.
This doesn't replace the current Notes feature, but gives users another way to access notes stored in OneNote.
Finish
Cancel


POSTS
ACTIVITIES
NOTES
ONENOTE
Untitled
Nicolae Tarla - Today 4:00:52 PM

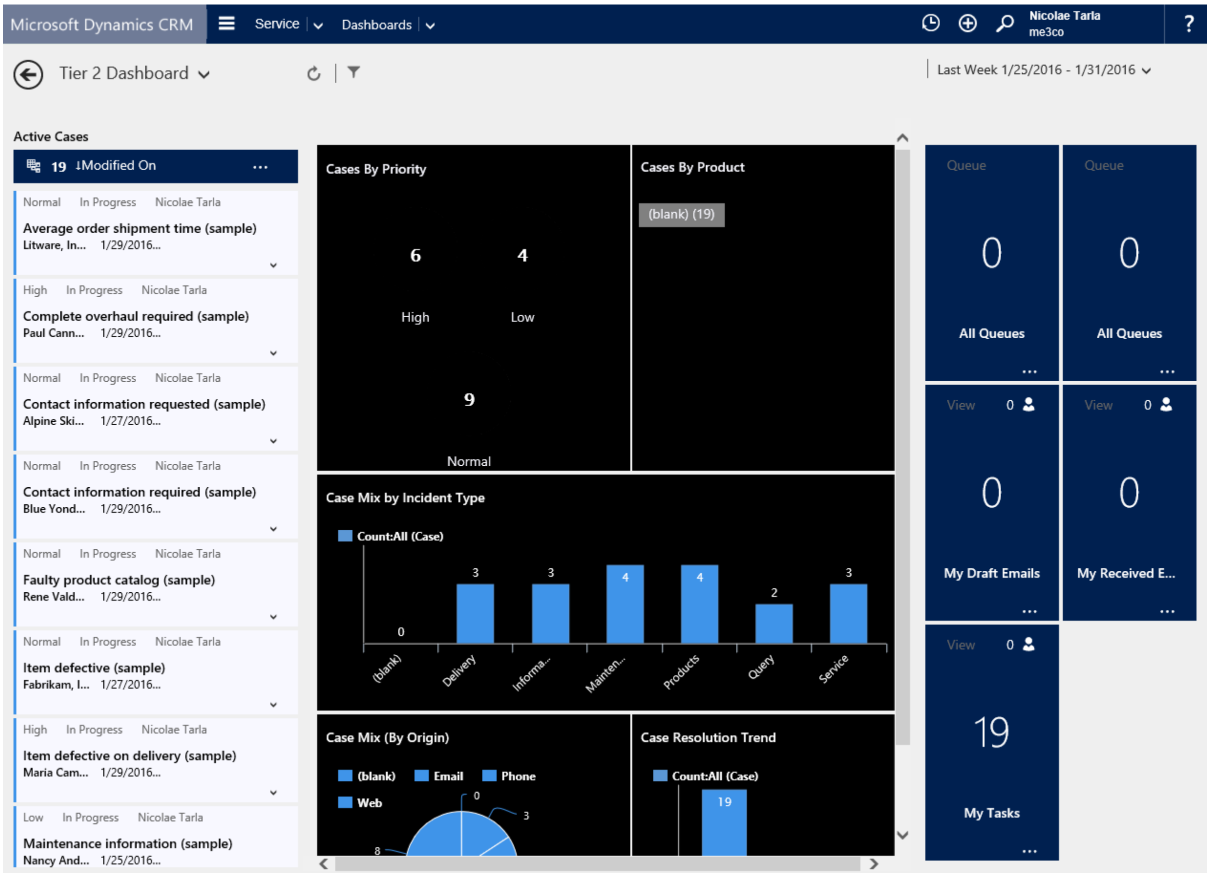

OneNote Online
me3co Team Site
Microsoft
Share
Nicolae Tarla
FILE
HOME
INSERT
VIEW
PRINT
Tell me what you want to do
OPEN IN ONENOTE
GIVE FEEDBACK TO MICROSOFT
Saved
Notebooks
Find on this Page (Ctrl+
Section
Page
Microsoft OneNot
OneNote Demo
OneNote Demo
14 January 2014 21:47
This is a note in OneNote.


Microsoft Dynamics CRM
Service
Dashboards
Tier 1 Dashboard
Knowledge Manager
My Knowledge Dashboard
Tier 1 Dashboard
Tier 2 Dashboard
My Active Cases
0 ↓Modified On

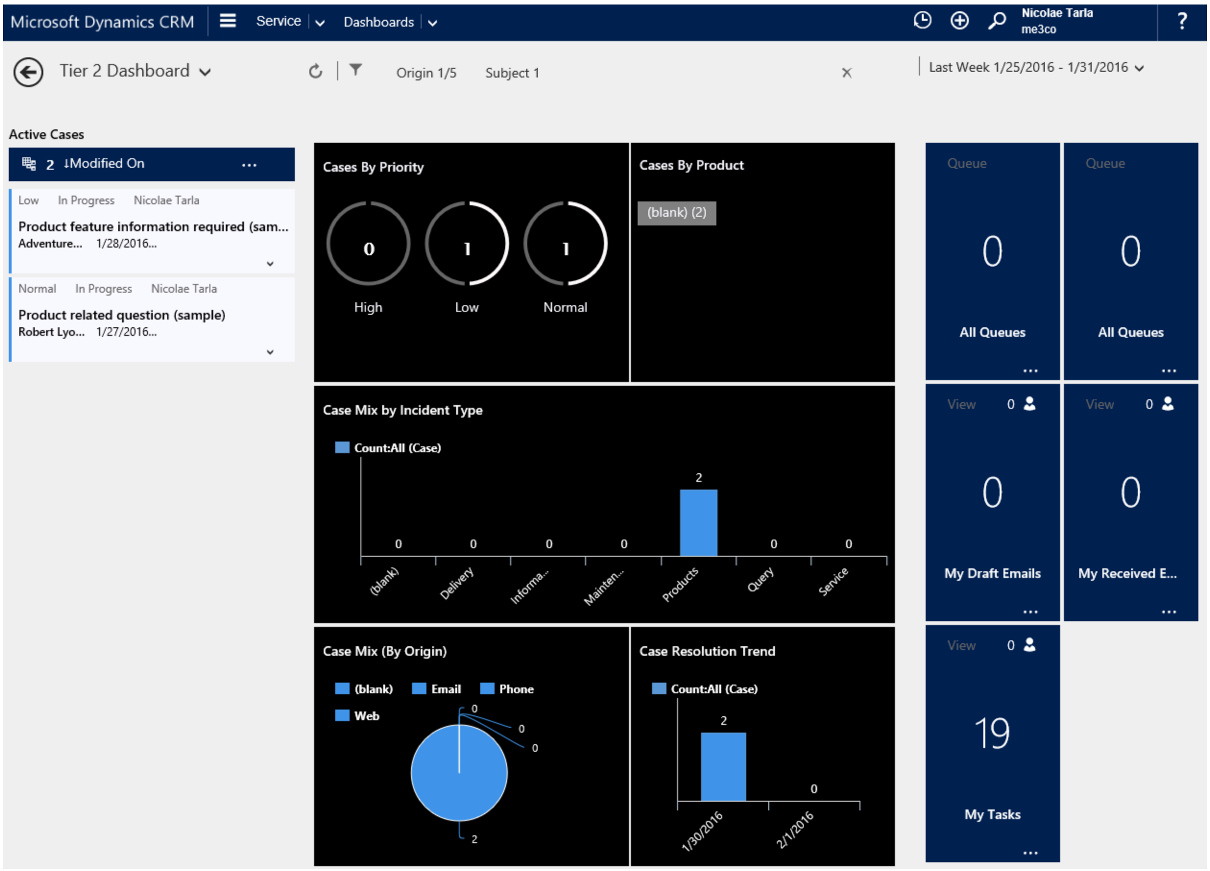

Active Cases
8 ↓Modified On
RESOLVE C...
CANCEL C...
DO NOT D...
Normal
In Progress
Nicolae Tarla
Delivery Delayed
Fourth Coff...
2/1/2016 10...
Normal
In Progress
Nicolae Tarla
Components do not fit model.
Adventure...
2/1/2016 10...


This Week 2/1/2016 - 2/7/2016
Today
Yesterday
This Week
Last Week
This Month
Last Month
Month Till Date
Custom Time Frame
My Draft Em
0 ↓Mo
There are no

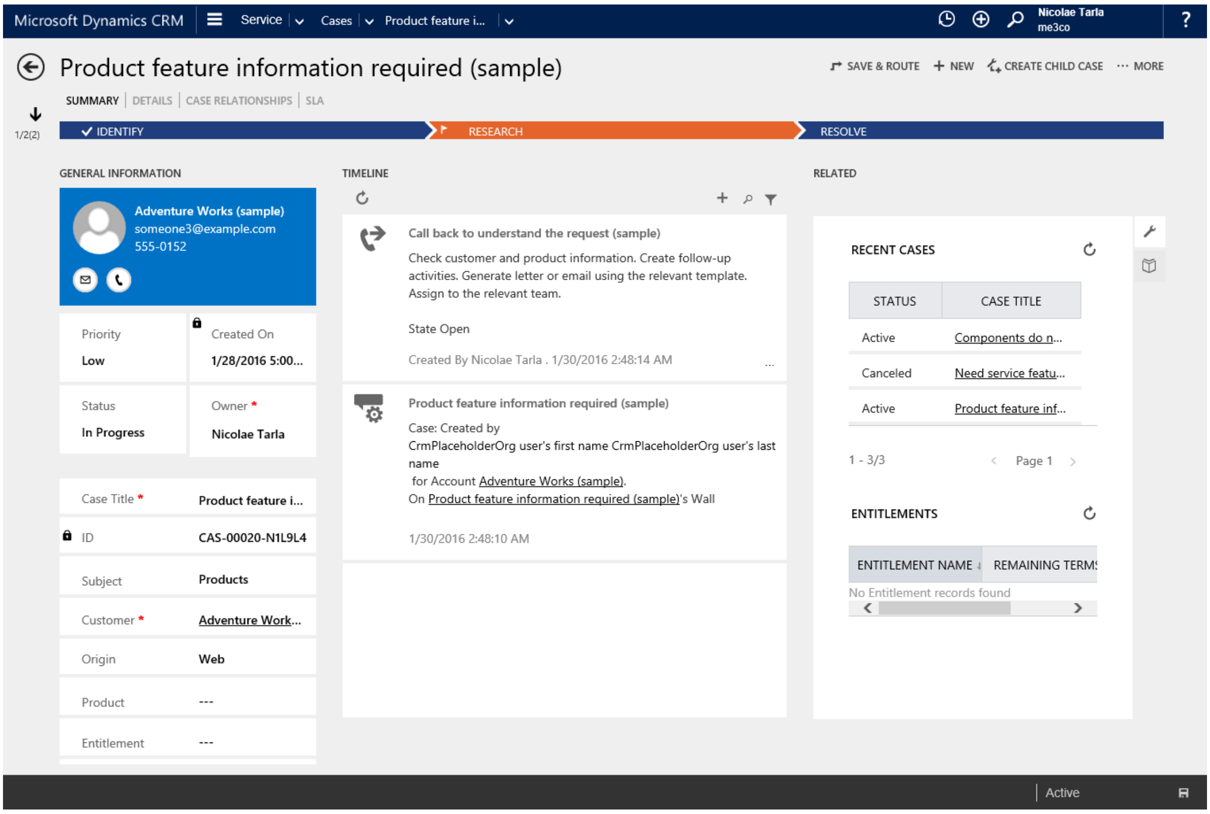

Tier 1 Dashboard



Microsoft Dynamics CRM
Service
Dashboards
Nicolae Tarla
me3co
Tier 2 Dashboard
Last Week 1/25/2016 - 1/31/2016
Active Cases
19 ↓Modified On
Average order shipment time (sample)
Complete overhaul required (sample)
Contact information requested (sample)
Contact information required (sample)
Faulty product catalog (sample)
Item defective (sample)
Item defective on delivery (sample)
Maintenance information (sample)
Cases By Priority
High
Low
Normal
Cases By Product
(blank) (19)
Case Mix by Incident Type
Count:All (Case)
Case Mix (By Origin)
(blank)
Email
Phone
Web
Case Resolution Trend
All Queues
My Draft Emails
My Received E...
My Tasks

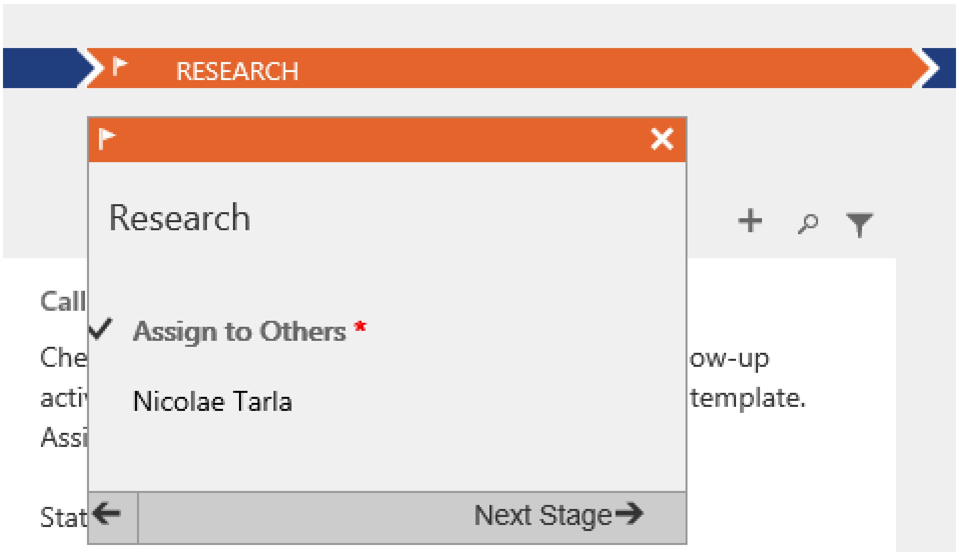


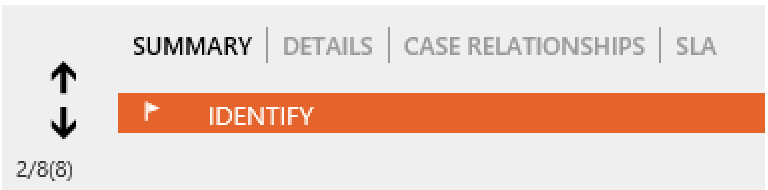
Microsoft Dynamics CRM
Service
Dashboards
Nicolae Tarla
me3co
Tier 2 Dashboard
Origin 1/5
Subject 1
Last Week 1/25/2016 - 1/31/2016
Active Cases
2 ↓Modified On
Product feature information required (sam...
Product related question (sample)
Cases By Priority
High
Low
Normal
Cases By Product
(blank) (2)
Case Mix by Incident Type
Count:All (Case)
Case Mix (By Origin)
(blank)
Email
Phone
Web
Case Resolution Trend
All Queues
My Draft Emails
My Received E...
My Tasks


Microsoft Dynamics CRM
Service
Cases
Product feature i...
Nicolae Tarla
me3co
Product feature information required (sample)
SAVE & ROUTE
NEW
CREATE CHILD CASE
MORE
SUMMARY | DETAILS | CASE RELATIONSHIPS | SLA
1/2(2)
IDENTIFY
RESEARCH
RESOLVE
GENERAL INFORMATION
Adventure Works (sample)
someone3@example.com
555-0152
Priority
Low
Created On
1/28/2016 5:00...
Status
In Progress
Owner *
Nicolae Tarla
Case Title *
Product feature i...
ID
CAS-00020-N1L9L4
Subject
Products
Customer *
Adventure Work...
Origin
Web
Product

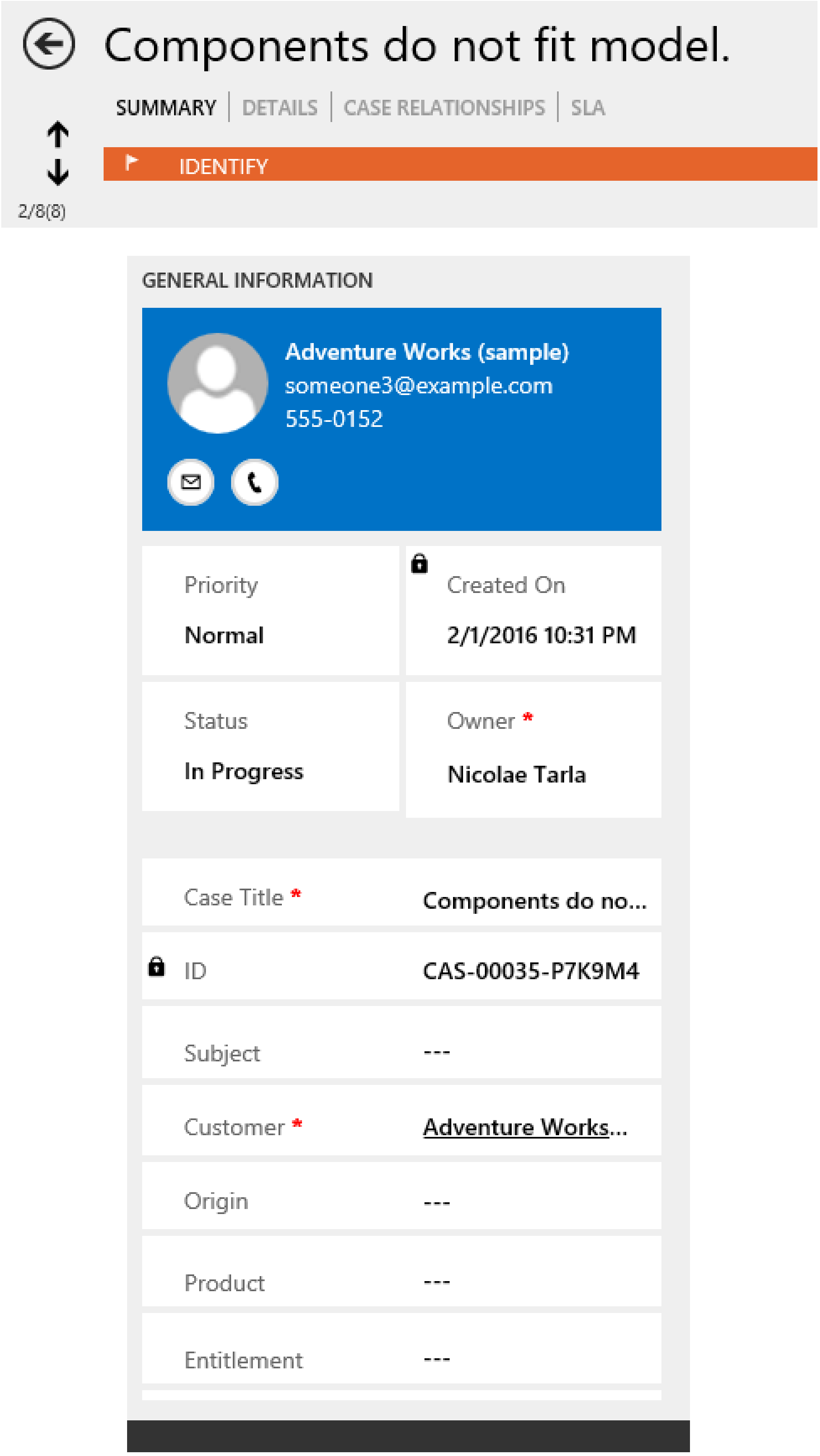
Entitlement

TIMELINE
Call back to understand the request (sample)
Check customer and product information. Create follow-up activities. Generate letter or email using the relevant template. Assign to the relevant team.
State Open
Created By Nicolae Tarla . 1/30/2016 2:48:14 AM
Product feature information required (sample)
Case: Created by
CrmPlaceholderOrg user's first name CrmPlaceholderOrg user's last name
for Account Adventure Works (sample).
On Product feature information required (sample)'s Wall
1/30/2016 2:48:10 AM
RELATED
RECENT CASES
STATUS
CASE TITLE
Active
Components do n...
Canceled
Need service featu...
Active
Product feature inf...
1 - 3/3
Page 1
ENTITLEMENTS
ENTITLEMENT NAME
REMAINING TERMS
No Entitlement records found
Active


RESEARCH
Research
Assign to Others *
Nicolae Tarla
Next Stage


SUMMARY | DETAILS | CASE RELATIONSHIPS | SLA
IDENTIFY
2/8(8)

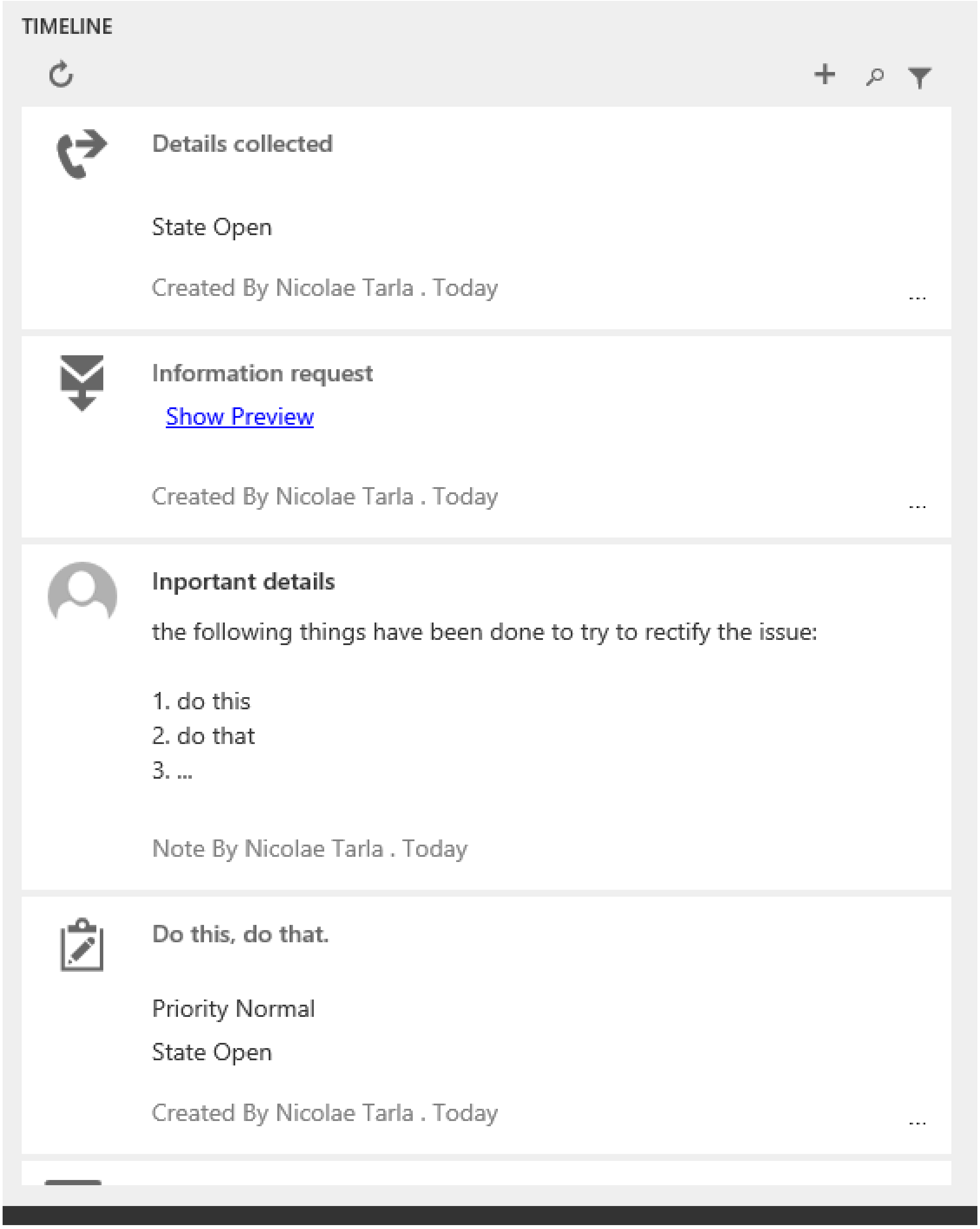

SAVE & ROUTE
NEW
CREATE CHILD CASE
MORE

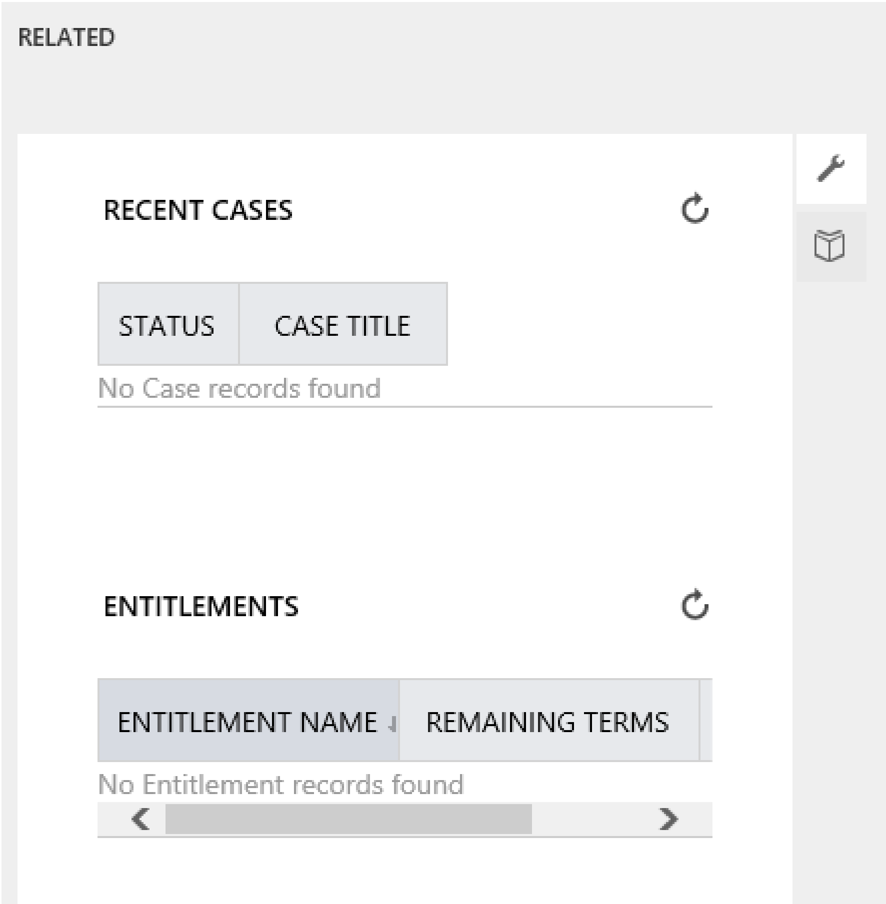

Components do not fit model.
SUMMARY
DETAILS
CASE RELATIONSHIPS
SLA
IDENTIFY
2/8(8)
GENERAL INFORMATION
Adventure Works (sample)
someone3@example.com
555-0152
Priority
Normal
Created On
2/1/2016 10:31 PM
Status
In Progress
Owner *
Nicolae Tarla
Case Title *
Components do no...
ID
CAS-00035-P7K9M4
Subject

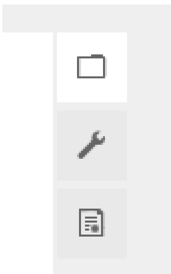
Customer *
Adventure Works...
Origin

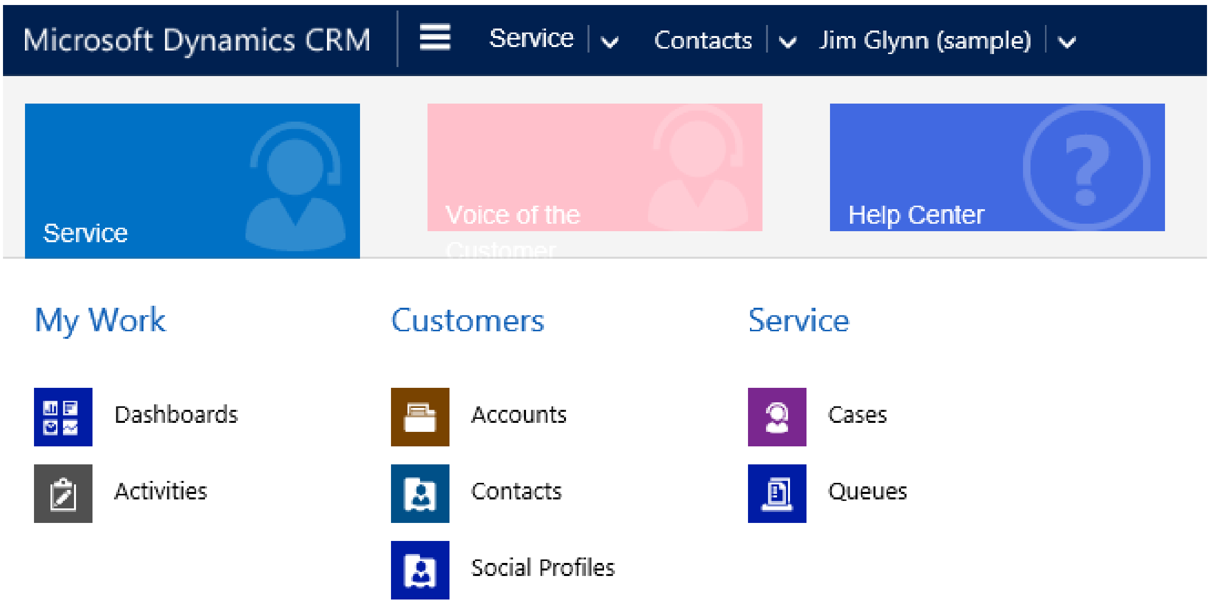
Product

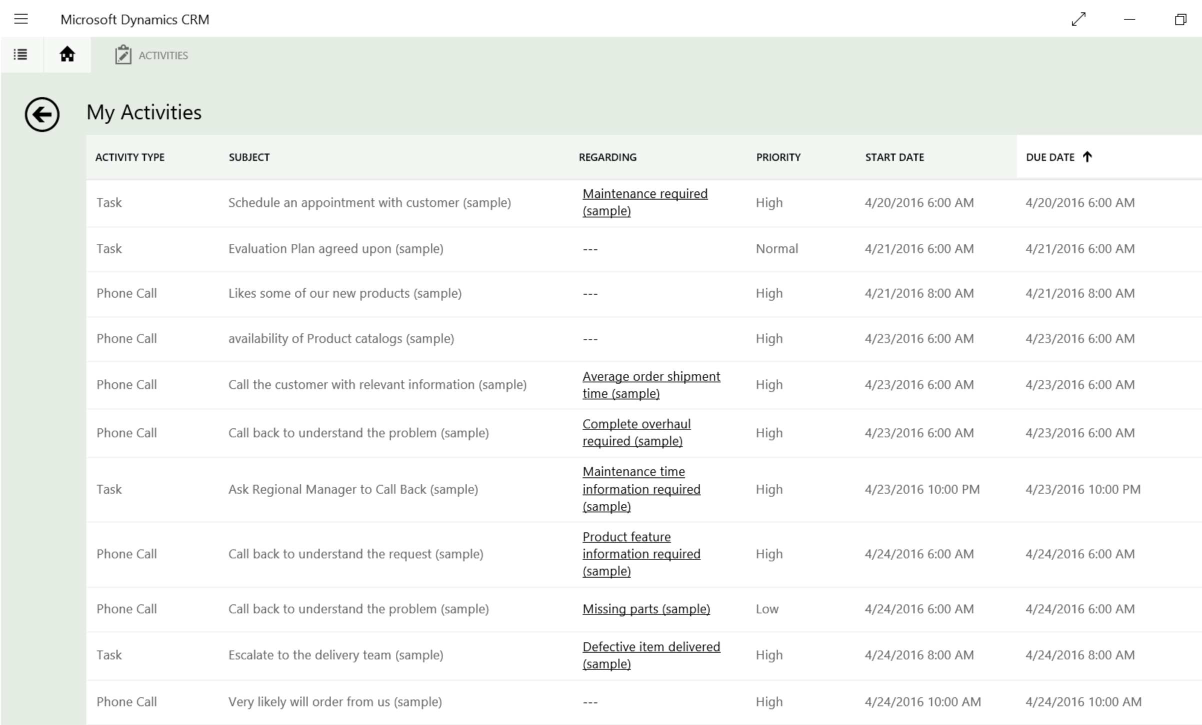
Entitlement

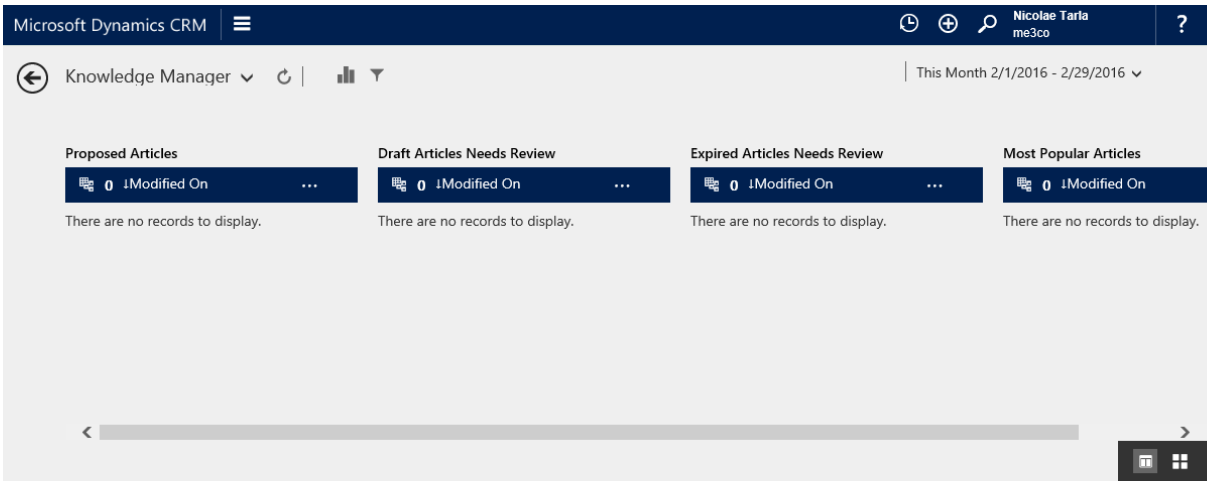

TIMELINE
Details collected
State Open
Created By Nicolae Tarla . Today
...
Information request
Show Preview
Created By Nicolae Tarla . Today
...
Inportant details
the following things have been done to try to rectify the issue:
1. do this
2. do that
3. ...
Note By Nicolae Tarla . Today
Do this, do that.
Priority Normal
State Open
Created By Nicolae Tarla . Today
...

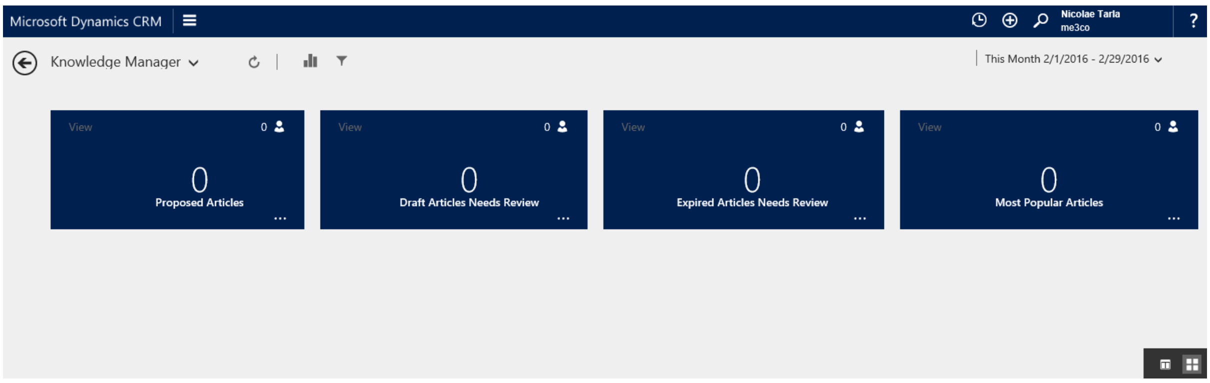

RELATED
RECENT CASES
STATUS
CASE TITLE
No Case records found
ENTITLEMENTS
ENTITLEMENT NAME
REMAINING TERMS
No Entitlement records found

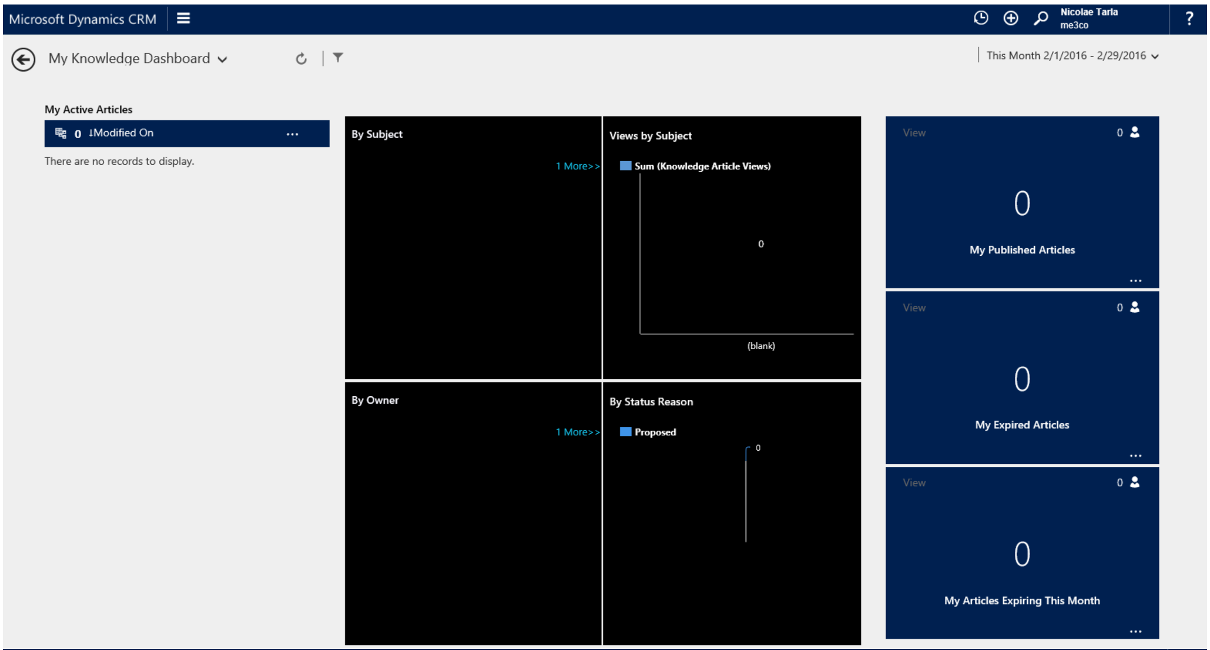


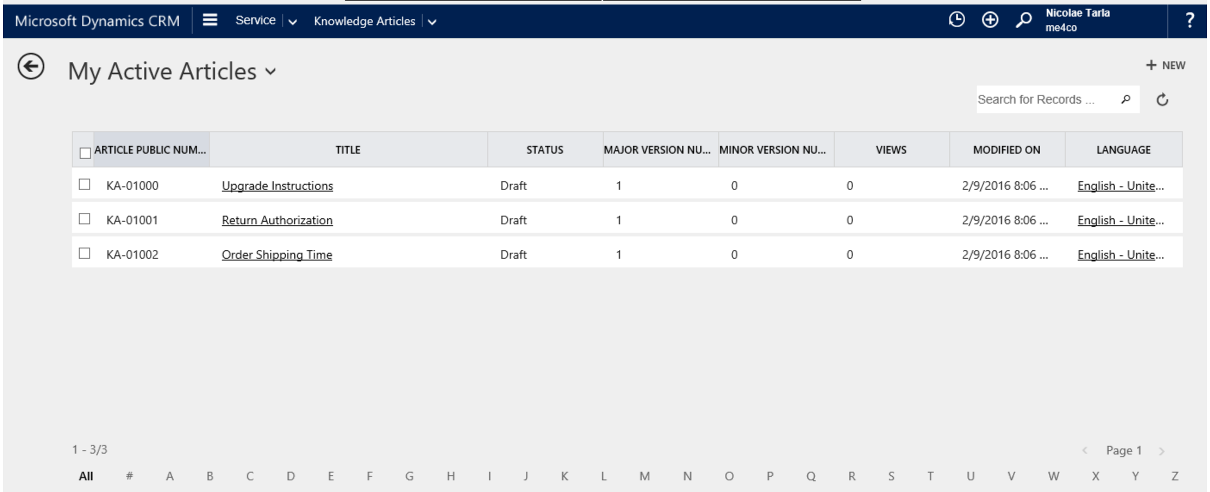

Microsoft Dynamics CRM
Service
Contacts
Jim Glynn (sample)
Service
Voice of the Customer
Help Center
My Work
Dashboards
Activities
Customers
Accounts
Contacts
Social Profiles
Service
Cases
Queues

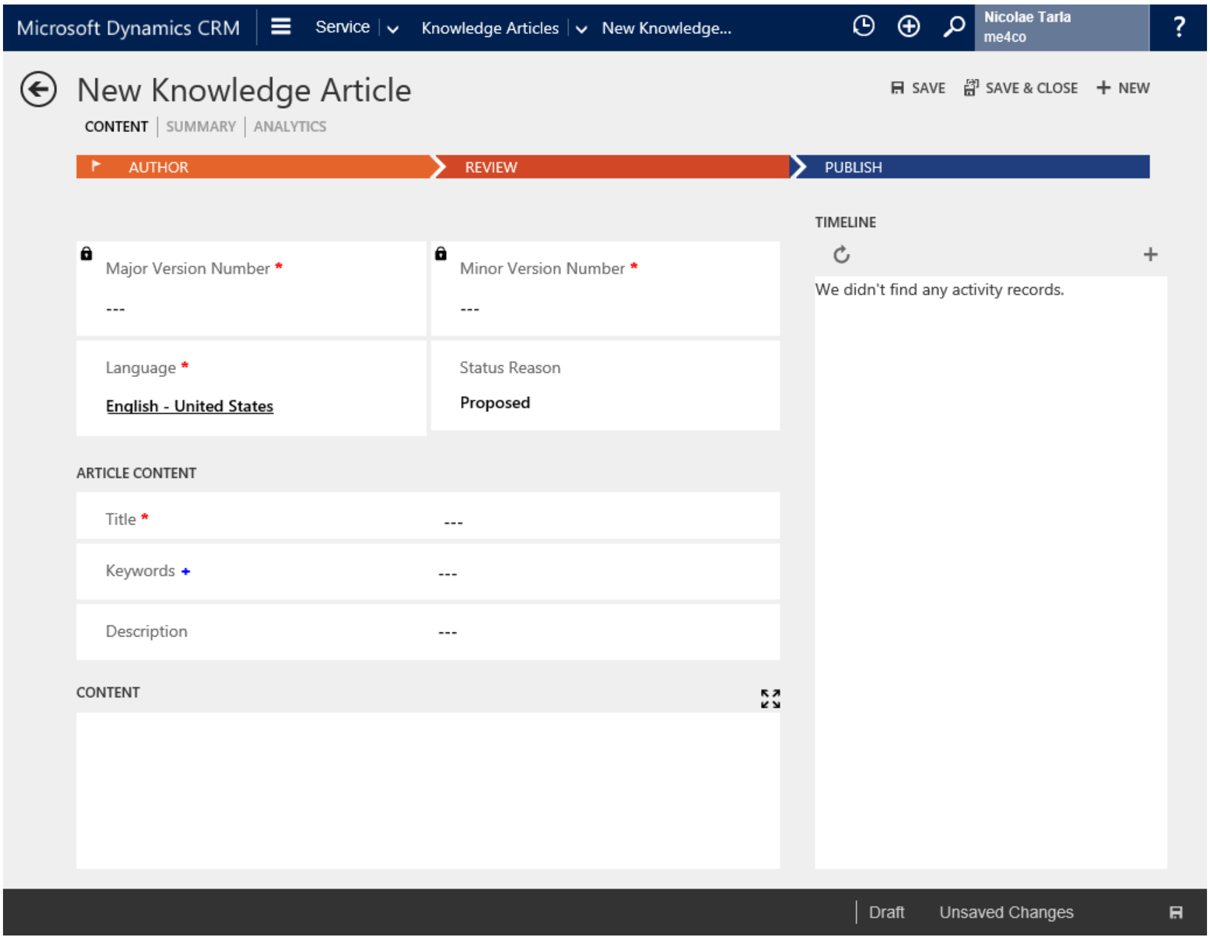

Microsoft Dynamics CRM
ACTIVITIES
My Activities
ACTIVITY TYPE	SUBJECT	REGARDING	PRIORITY	START DATE	DUE DATE
Task	Schedule an appointment with customer (sample)	Maintenance required (sample)	High	4/20/2016 6:00 AM	4/20/2016 6:00 AM
Task	Evaluation Plan agreed upon (sample)	---	Normal	4/21/2016 6:00 AM	4/21/2016 6:00 AM
Phone Call	Likes some of our new products (sample)	---	High	4/21/2016 8:00 AM	4/21/2016 8:00 AM
Phone Call	availability of Product catalogs (sample)	---	High	4/23/2016 6:00 AM	4/23/2016 6:00 AM
Phone Call	Call the customer with relevant information (sample)	Average order shipment time (sample)	High	4/23/2016 6:00 AM	4/23/2016 6:00 AM
Phone Call	Call back to understand the problem (sample)	Complete overhaul required (sample)	High	4/23/2016 6:00 AM	4/23/2016 6:00 AM
Task	Ask Regional Manager to Call Back (sample)	Maintenance time information required (sample)	High	4/23/2016 10:00 PM	4/23/2016 10:00 PM
Phone Call	Call back to understand the request (sample)	Product feature information required (sample)	High	4/24/2016 6:00 AM	4/24/2016 6:00 AM
Phone Call	Call back to understand the problem (sample)	Missing parts (sample)	Low	4/24/2016 6:00 AM	4/24/2016 6:00 AM
Task	Escalate to the delivery team (sample)	Defective item delivered (sample)	High	4/24/2016 8:00 AM	4/24/2016 8:00 AM
Phone Call	Very likely will order from us (sample)	---	High	4/24/2016 10:00 AM	4/24/2016 10:00 AM


Microsoft Dynamics CRM
Nicolae Tarla
me3co
Knowledge Manager
This Month 2/1/2016 - 2/29/2016
Proposed Articles
0 ↓Modified On
There are no records to display.
Draft Articles Needs Review
0 ↓Modified On
There are no records to display.
Expired Articles Needs Review
0 ↓Modified On
There are no records to display.
Most Popular Articles
0 ↓Modified On
There are no records to display.


Microsoft Dynamics CRM
Nicolae Tarla
me3co
Knowledge Manager
This Month 2/1/2016 - 2/29/2016
View
0
0
Proposed Articles
View
0
0
Draft Articles Needs Review
View
0
0
Expired Articles Needs Review
View
0
0
Most Popular Articles


Microsoft Dynamics CRM
Nicolae Tarla
me3co
My Knowledge Dashboard
This Month 2/1/2016 - 2/29/2016
My Active Articles
0 ↓Modified On
There are no records to display.
By Subject
1 More>>
Views by Subject
Sum (Knowledge Article Views)
0
(blank)
By Owner
1 More>>
By Status Reason
Proposed
0
View
0
0
My Published Articles
View
0
0
My Expired Articles
View
0
0
My Articles Expiring This Month


Microsoft Dynamics CRM
Service
Knowledge Articles
Nicolae Tarla
me4co
My Active Articles
NEW
Search for Records ...
ARTICLE PUBLIC NUM...
TITLE
STATUS
MAJOR VERSION NU...
MINOR VERSION NU...
VIEWS
MODIFIED ON
LANGUAGE
KA-01000 Upgrade Instructions Draft 1 0 0 2/9/2016 8:06 ... English - Unite...
KA-01001 Return Authorization Draft 1 0 0 2/9/2016 8:06 ... English - Unite...
KA-01002 Order Shipping Time Draft 1 0 0 2/9/2016 8:06 ... English - Unite...
1 - 3/3
Page 1
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z


Microsoft Dynamics CRM
Service
Knowledge Articles
New Knowledge...
Nicolae Tarla
me4co
?
New Knowledge Article
SAVE
SAVE & CLOSE
NEW
CONTENT
SUMMARY
ANALYTICS
AUTHOR
REVIEW
PUBLISH
Major Version Number *

Minor Version Number *

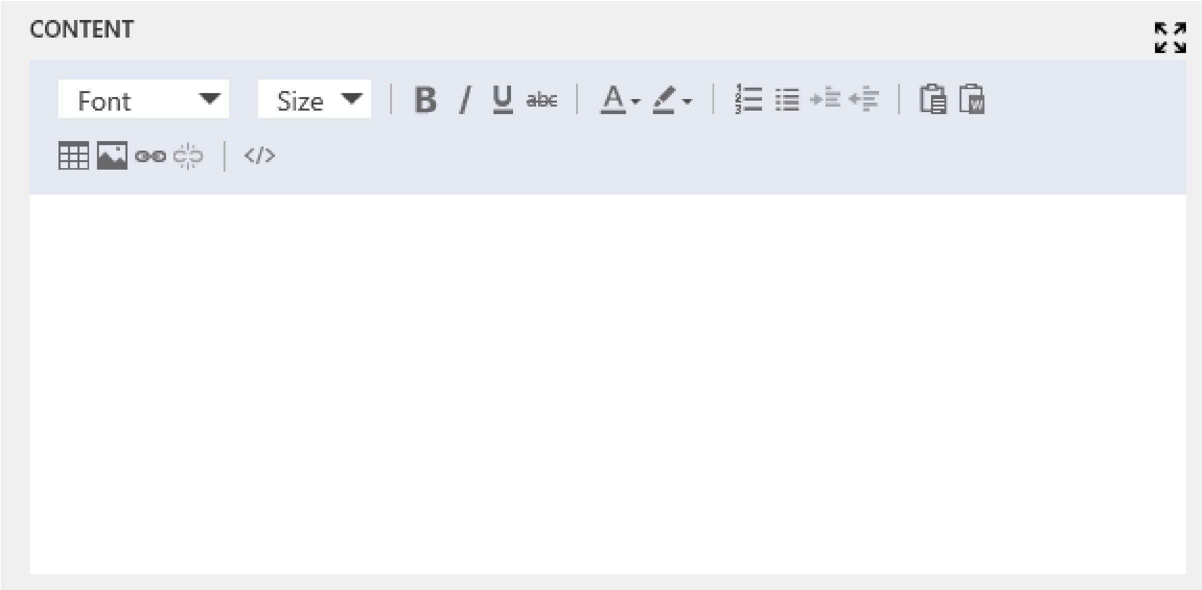
Language *
English - United States
Status Reason
Proposed
TIMELINE
We didn't find any activity records.
ARTICLE CONTENT
Title *

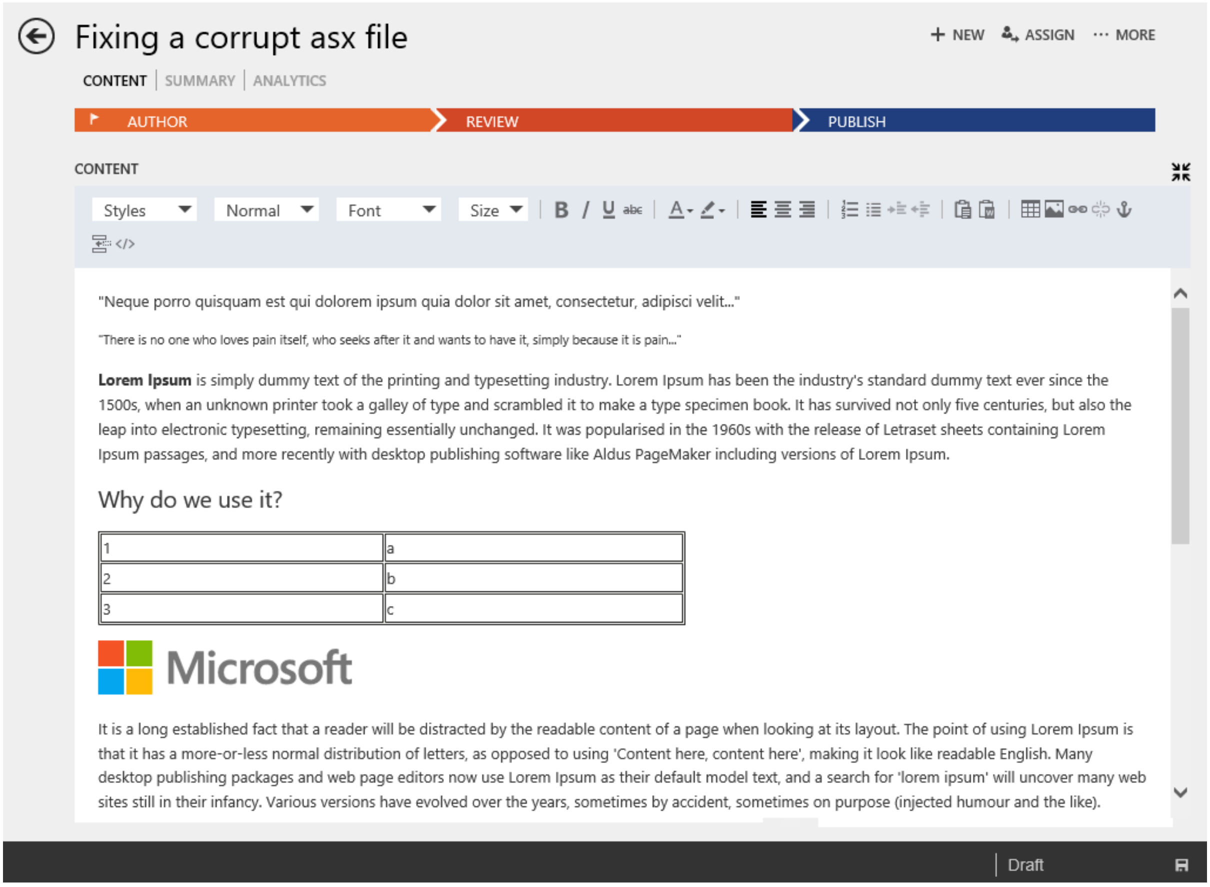
Keywords +

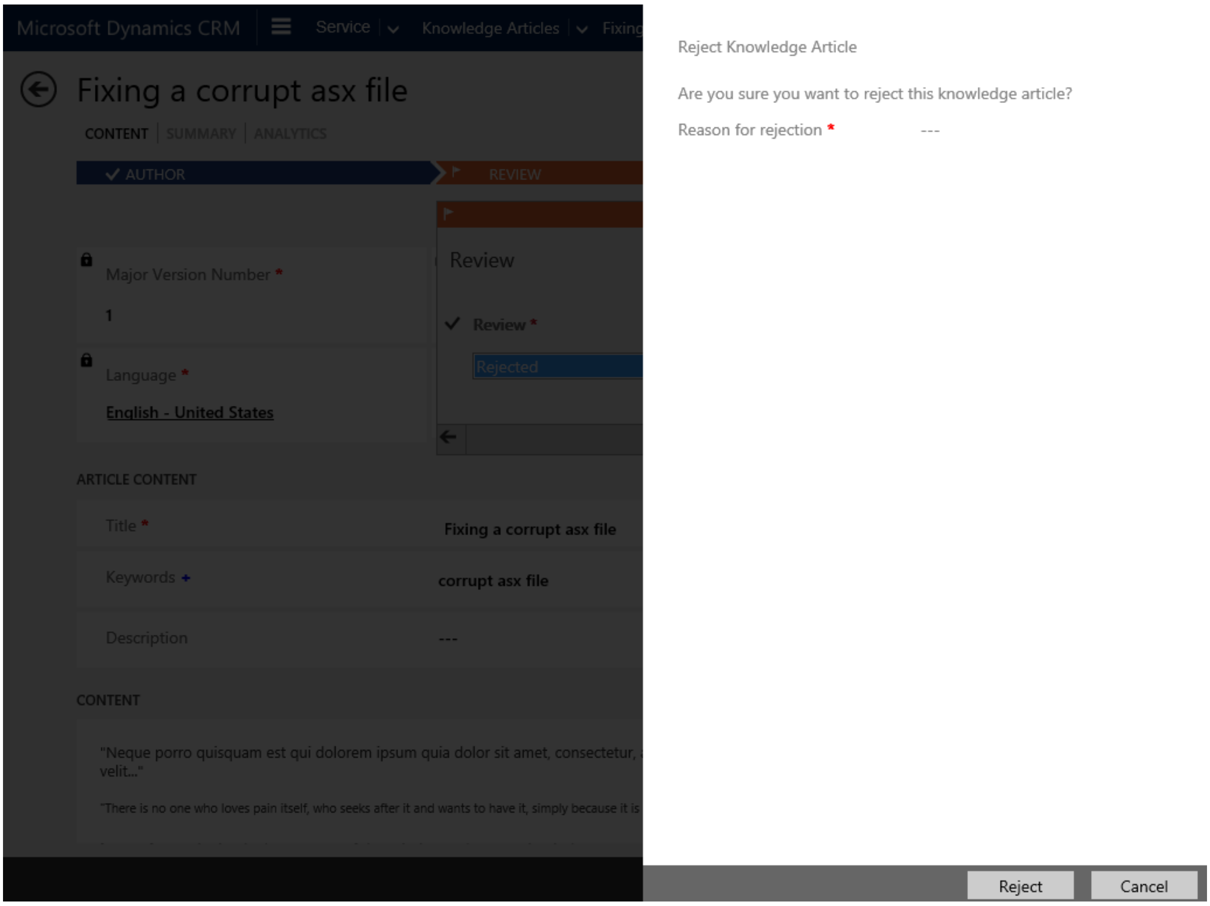
Description

CONTENT
Draft
Unsaved Changes


New Knowledge Article
SAVE
CONTENT
SUMMARY
ANALYTICS
AUTHOR
REVIEW
PUBLISH
ANALYTICS
Unsaved changes on form
Would you like to save your changes?
Save
Discard changes

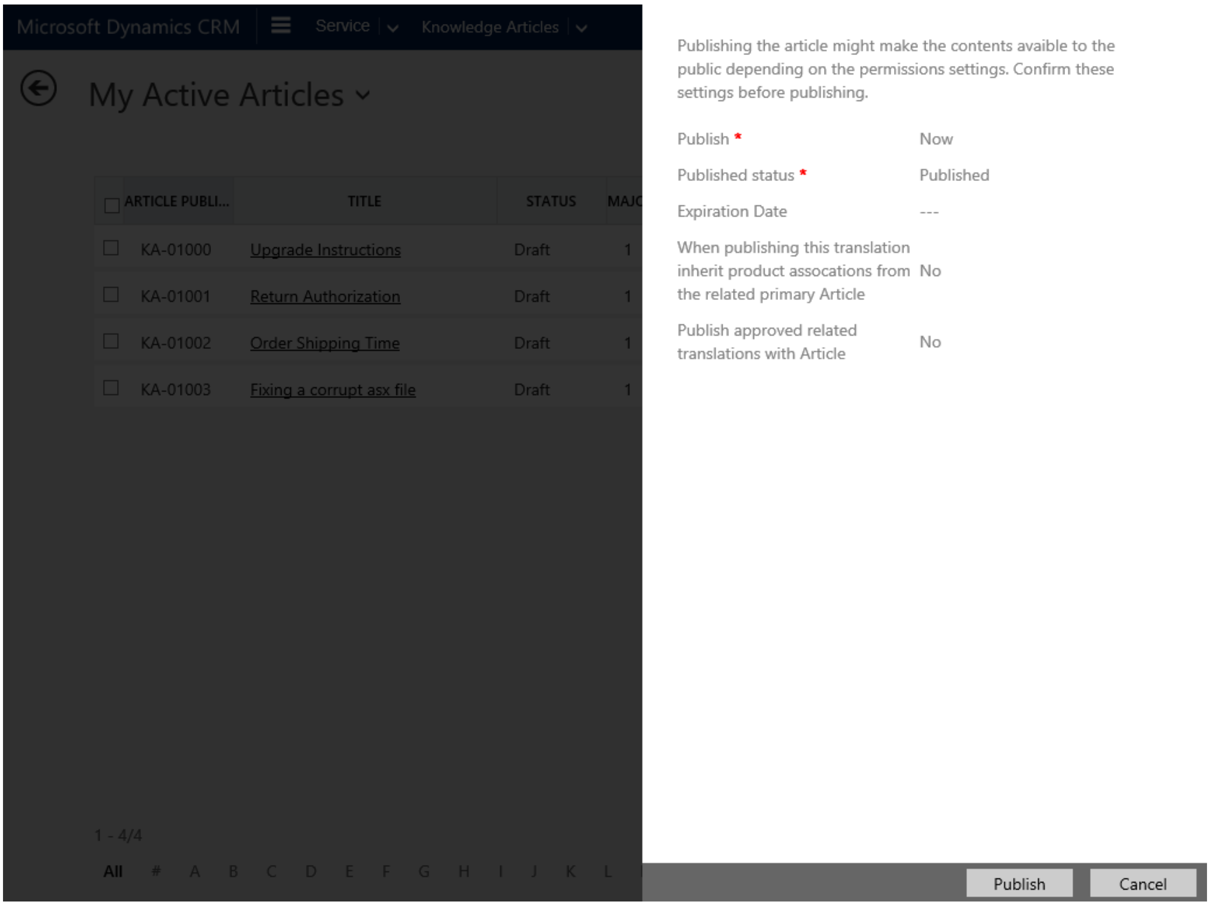

CONTENT
Font
Size


Fixing a corrupt asx file
+ NEW
ASSIGN
··· MORE
CONTENT
SUMMARY
ANALYTICS
AUTHOR
REVIEW
PUBLISH
CONTENT
Styles
Normal
Font
Size
"Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit..."
"There is no one who loves pain itself, who seeks after it and wants to have it, simply because it is pain..."
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.
Why do we use it?
1
a
2
b
3
c
Microsoft
It is a long established fact that a reader will be distracted by the readable content of a page when looking at its layout. The point of using Lorem Ipsum is that it has a more-or-less normal distribution of letters, as opposed to using 'Content here, content here', making it look like readable English. Many desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search for 'lorem ipsum' will uncover many web sites still in their infancy. Various versions have evolved over the years, sometimes by accident, sometimes on purpose (injected humour and the like).
Draft

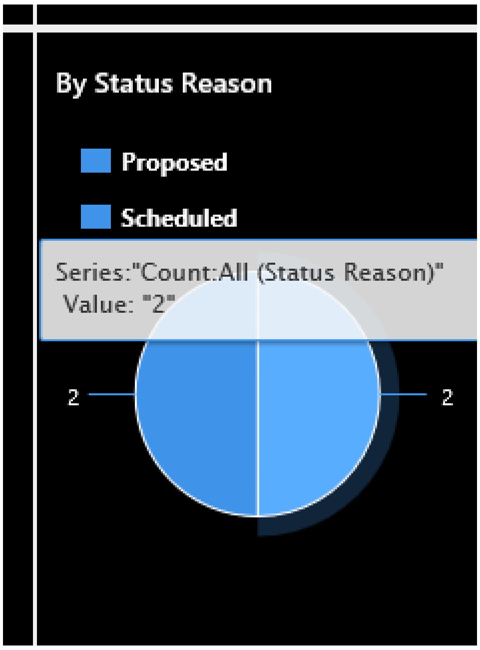

Microsoft Dynamics CRM
Service
Knowledge Articles
Fixing a corrupt asx file
CONTENT
SUMMARY
ANALYTICS
AUTHOR
REVIEW
Review
Review *
Rejected
Major Version Number *
1
Language *
English - United States
ARTICLE CONTENT
Title *
Fixing a corrupt asx file
Keywords
corrupt asx file
Description

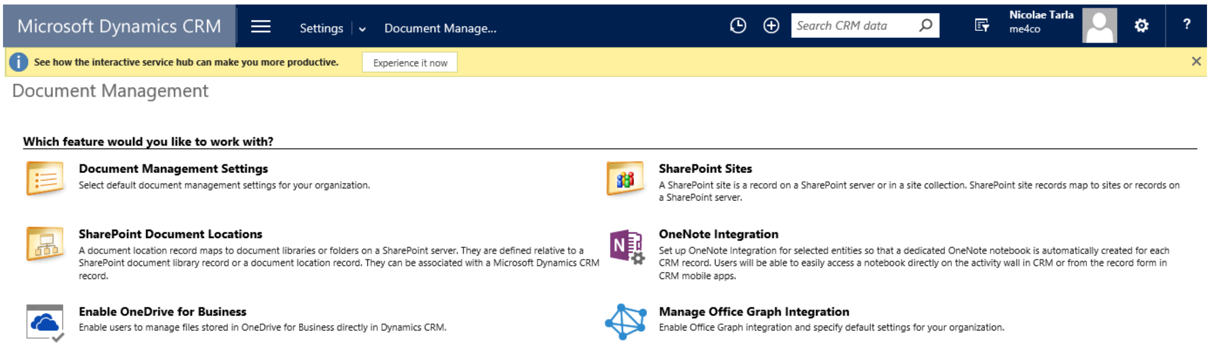
CONTENT
"Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur,
velit..."
"There is no one who loves pain itself, who seeks after it and wants to have it, simply because it is
Reject Knowledge Article
Are you sure you want to reject this knowledge article?
Reason for rejection *

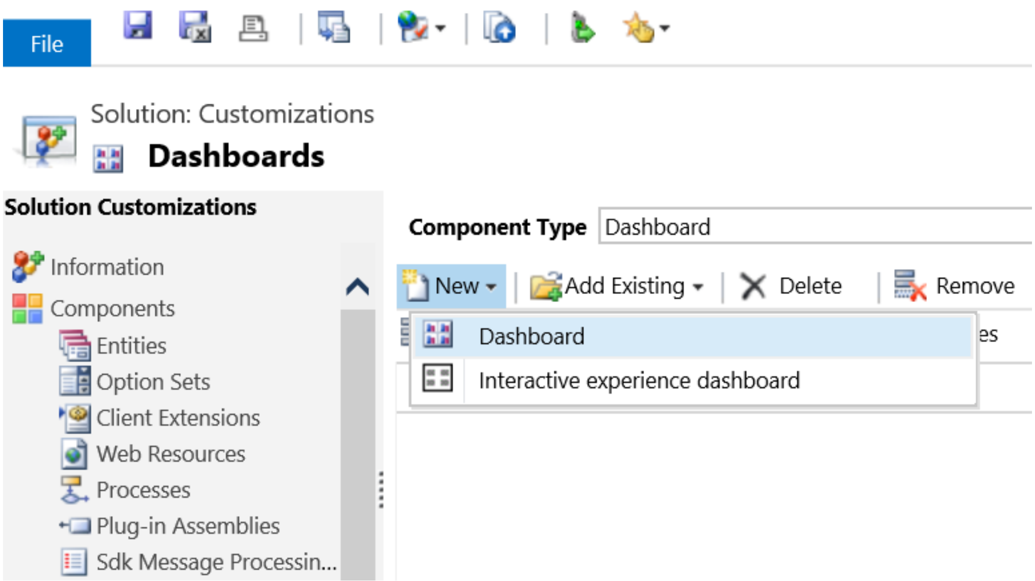
Reject
Cancel

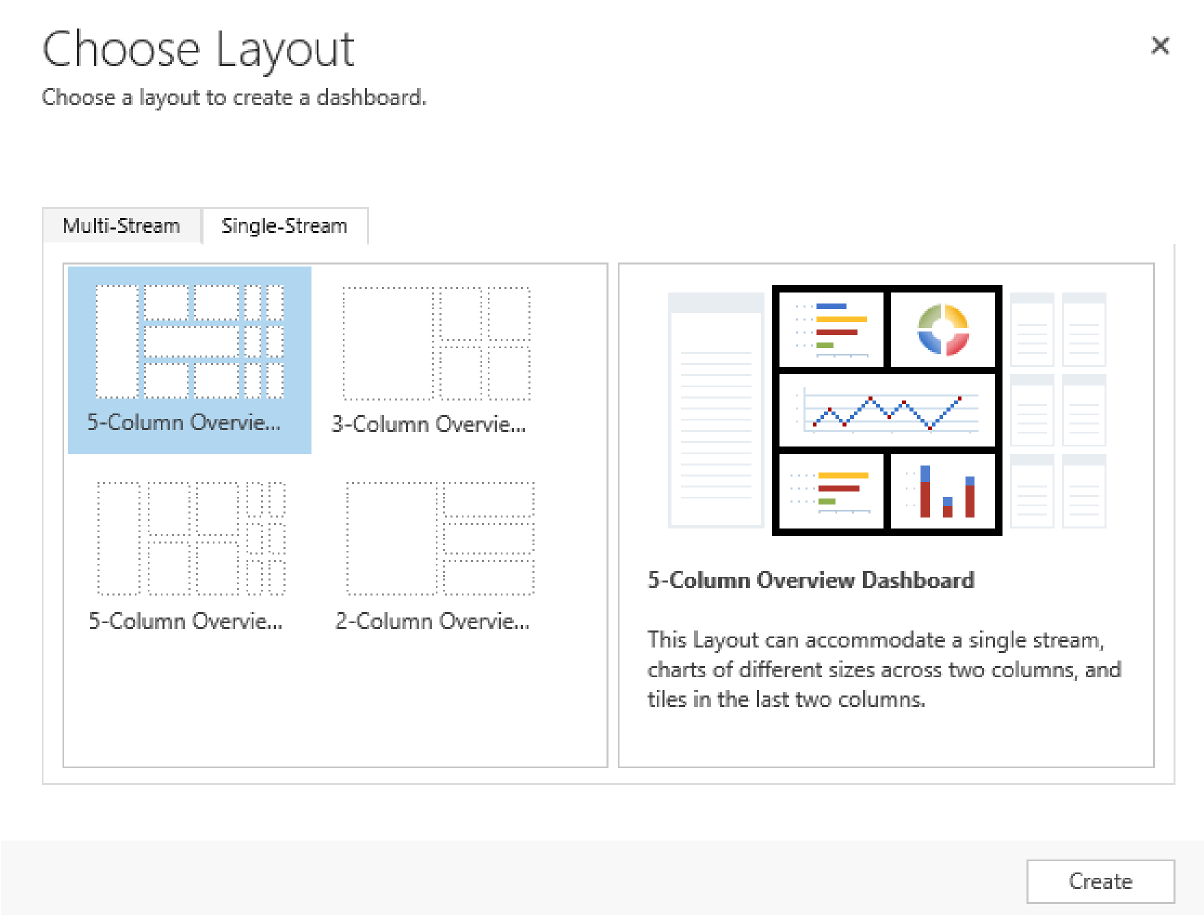

Microsoft Dynamics CRM
Service
Knowledge Articles
My Active Articles
ARTICLE PUBLI...
TITLE
STATUS
KA-01000
Upgrade Instructions
Draft
1
KA-01001
Return Authorization
Draft
1
KA-01002
Order Shipping Time
Draft
1
KA-01003
Fixing a corrupt asx file
Draft
1
1 - 4/4
All # A B C D E F G H I J K L
Publishing the article might make the contents avaible to the public depending on the permissions settings. Confirm these settings before publishing.
Publish *
Now
Published status *
Published
Expiration Date

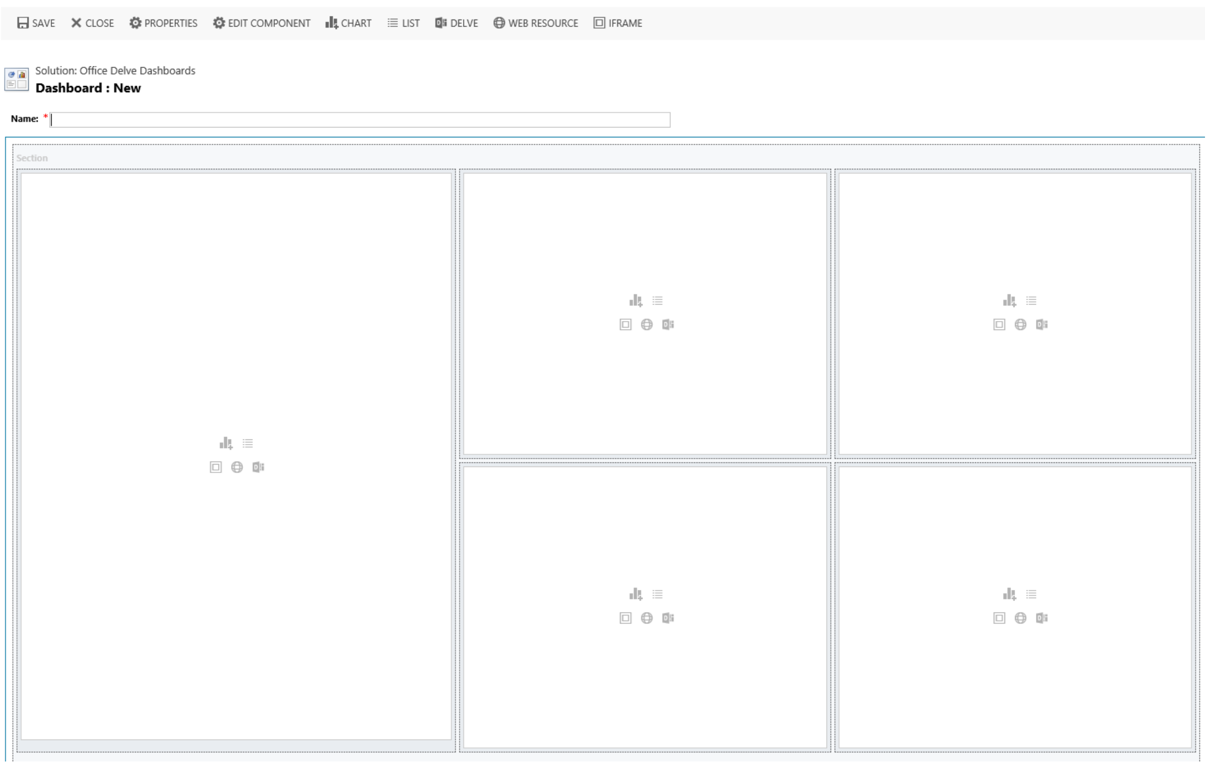
When publishing this translation inherit product assocations from the related primary Article
No
Publish approved related translations with Article
No
Publish
Cancel

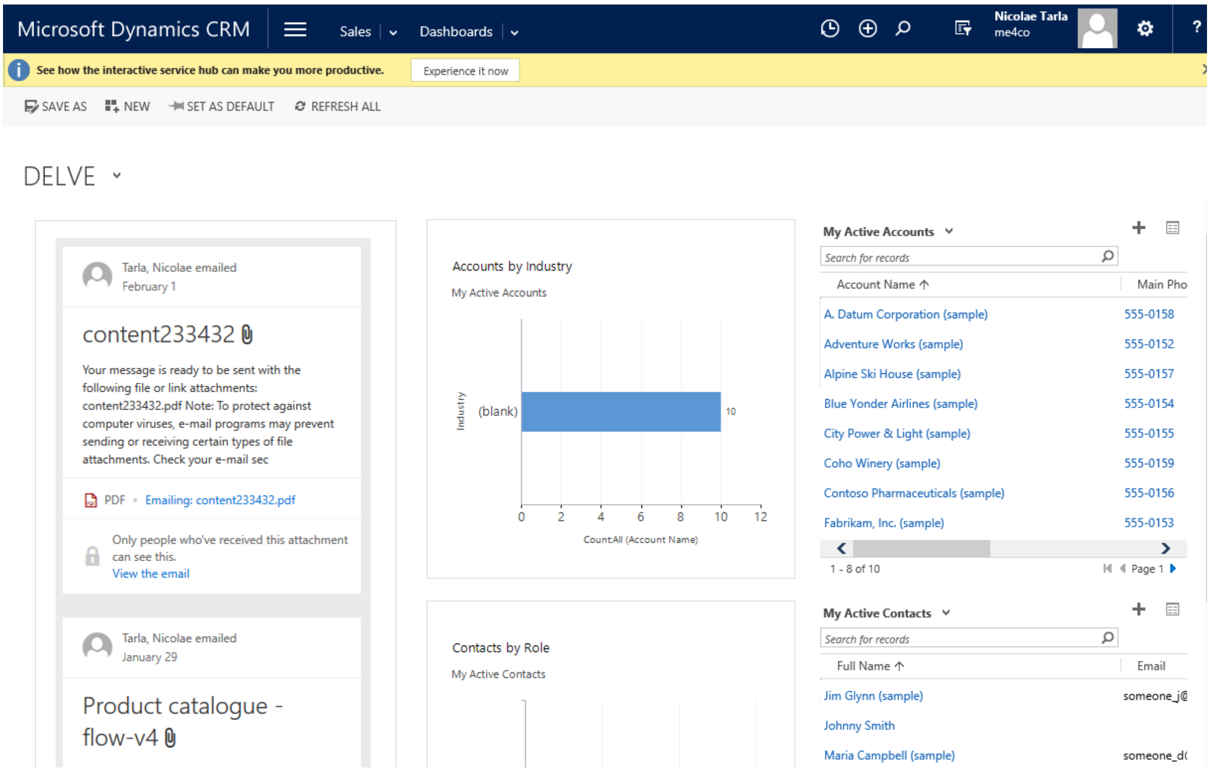

By Status Reason
Proposed
Scheduled
Series:"Count:All (Status Reason)"
Value: "2"
2
2

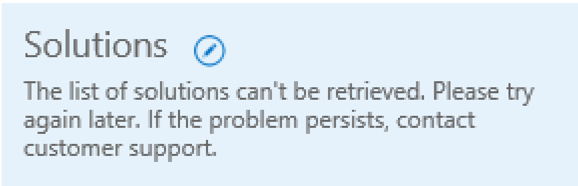

Microsoft Dynamics CRM
Settings
Document Manage...
Search CRM data
Nicolae Tarla
me4co
See how the interactive service hub can make you more productive.
Experience it now
Document Management
Which feature would you like to work with?
Document Management Settings
Select default document management settings for your organization.
SharePoint Sites
A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.
SharePoint Document Locations
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics CRM record.
OneNote Integration
Set up OneNote Integration for selected entities so that a dedicated OneNote notebook is automatically created for each CRM record. Users will be able to easily access a notebook directly on the activity wall in CRM or from the record form in CRM mobile apps.
Enable OneDrive for Business
Enable users to manage files stored in OneDrive for Business directly in Dynamics CRM.
Manage Office Graph Integration
Enable Office Graph integration and specify default settings for your organization.

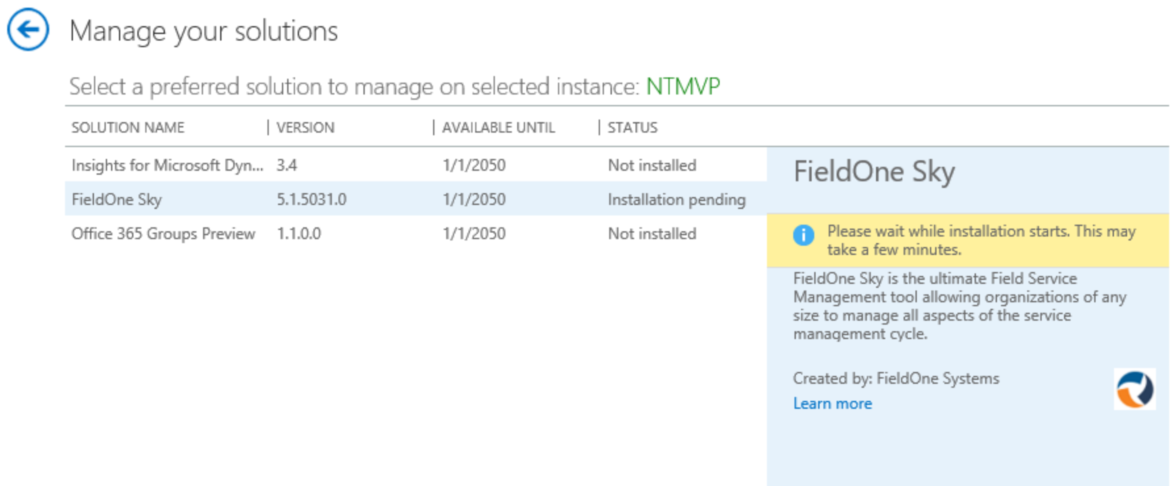

File
Solution: Customizations
Dashboards
Solution Customizations
Information
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processin...
Component Type
Dashboard
New
Add Existing
Delete
Remove
Dashboard
Interactive experience dashboard

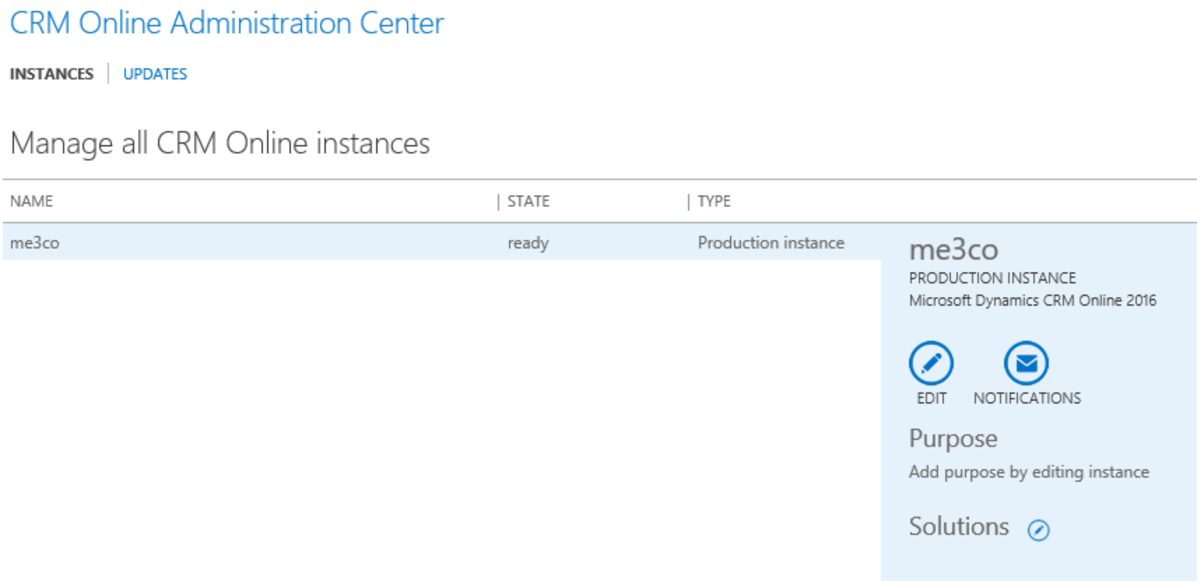

Choose Layout
Choose a layout to create a dashboard.
Multi-Stream
Single-Stream
5-Column Overvie...
3-Column Overvie...
5-Column Overvie...
2-Column Overvie...
5-Column Overview Dashboard
This Layout can accommodate a single stream, charts of different sizes across two columns, and tiles in the last two columns.
Create

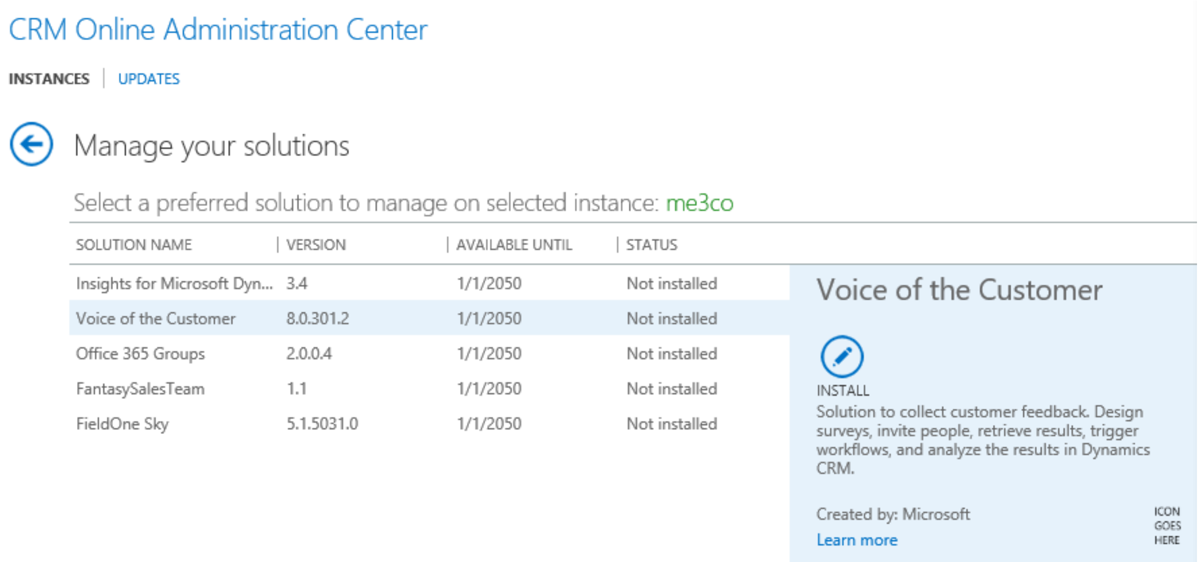

SAVE
CLOSE
PROPERTIES
EDIT COMPONENT
CHART
LIST
DELVE
WEB RESOURCE
IFRAME
Solution: Office Delve Dashboards
Dashboard : New
Name:
Section

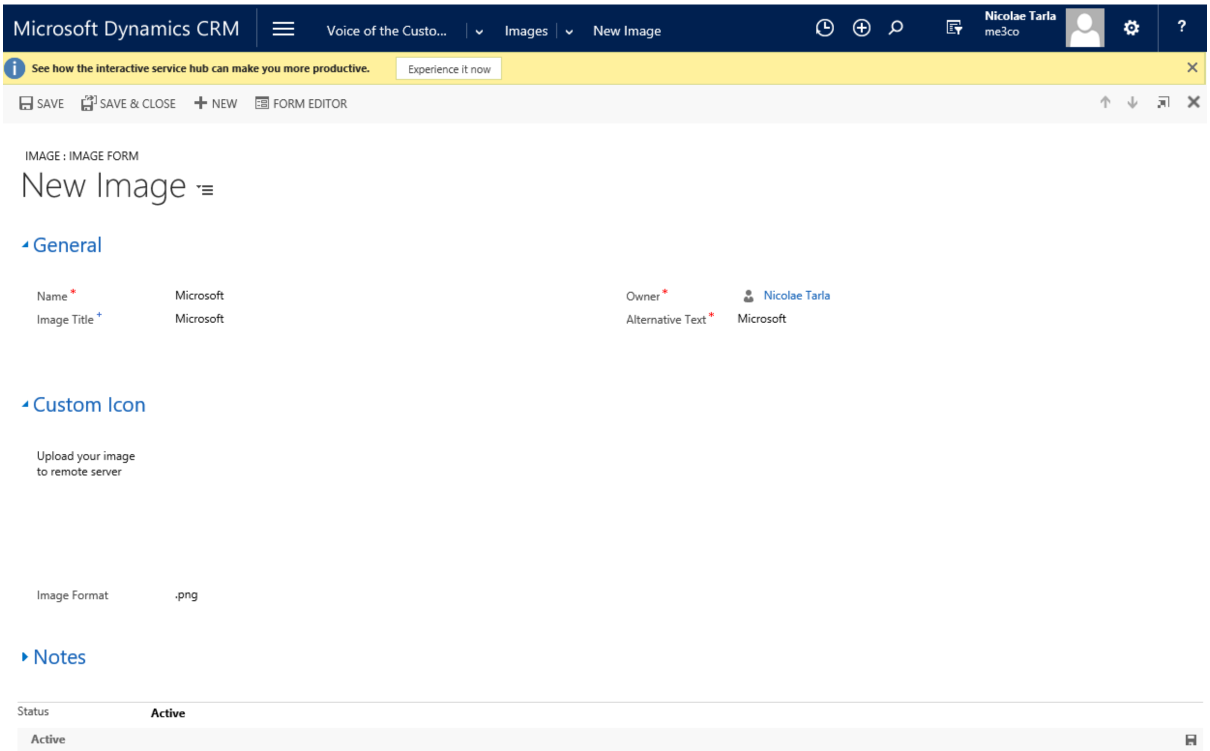

Microsoft Dynamics CRM
Sales
Dashboards
Nicolae Tarla
me4co
See how the interactive service hub can make you more productive.
Experience it now
SAVE AS
NEW
SET AS DEFAULT
REFRESH ALL
DELVE
Tarla, Nicolae emailed
February 1
content233432
Your message is ready to be sent with the following file or link attachments: content233432.pdf Note: To protect against computer viruses, e-mail programs may prevent sending or receiving certain types of file attachments. Check your e-mail sec
PDF
Emailing: content233432.pdf
Only people who've received this attachment can see this.
View the email
Tarla, Nicolae emailed
January 29
Product catalogue - flow-v4
Accounts by Industry
My Active Accounts
Industry
(blank)
10
0 2 4 6 8 10 12
CountAll (Account Name)
Contacts by Role
My Active Contacts
My Active Accounts
Search for records
Account Name
Main Pho
A. Datum Corporation (sample) 555-0158
Adventure Works (sample) 555-0152
Alpine Ski House (sample) 555-0157
Blue Yonder Airlines (sample) 555-0154
City Power & Light (sample) 555-0155
Coho Winery (sample) 555-0159
Contoso Pharmaceuticals (sample) 555-0156
Fabrikam, Inc. (sample) 555-0153
1 - 8 of 10
Page 1
My Active Contacts
Search for records
Full Name
Email
Jim Glynn (sample) someone_j@
Johnny Smith
Maria Campbell (sample) someone_d

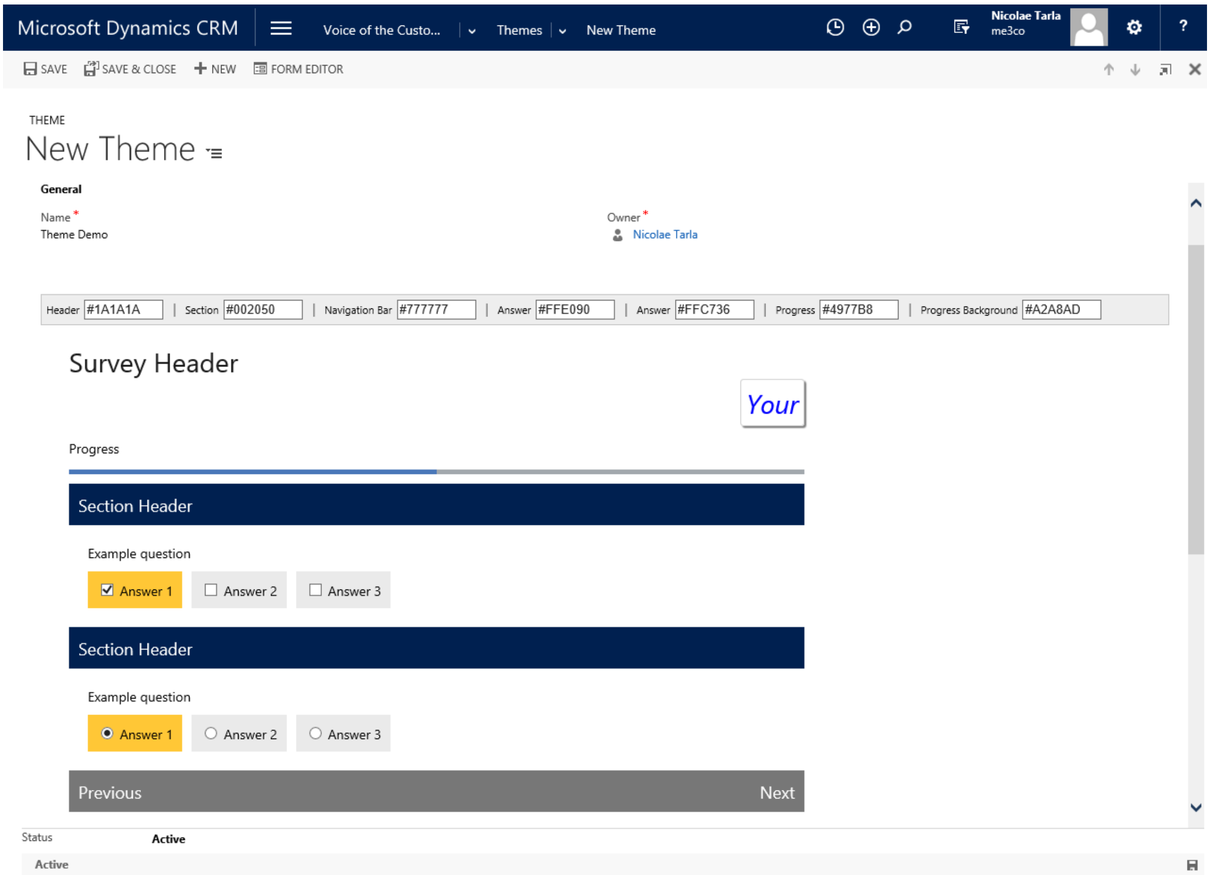

Solutions
The list of solutions can't be retrieved. Please try again later. If the problem persists, contact customer support.


Manage your solutions
Select a preferred solution to manage on selected instance: NTMVP
SOLUTION NAME | VERSION | AVAILABLE UNTIL | STATUS
Insights for Microsoft Dyn... 3.4 1/1/2050 Not installed
FieldOne Sky 5.1.5031.0 1/1/2050 Installation pending
Office 365 Groups Preview 1.1.0.0 1/1/2050 Not installed
FieldOne Sky
Please wait while installation starts. This may take a few minutes.
FieldOne Sky is the ultimate Field Service Management tool allowing organizations of any size to manage all aspects of the service management cycle.
Created by: FieldOne Systems
Learn more

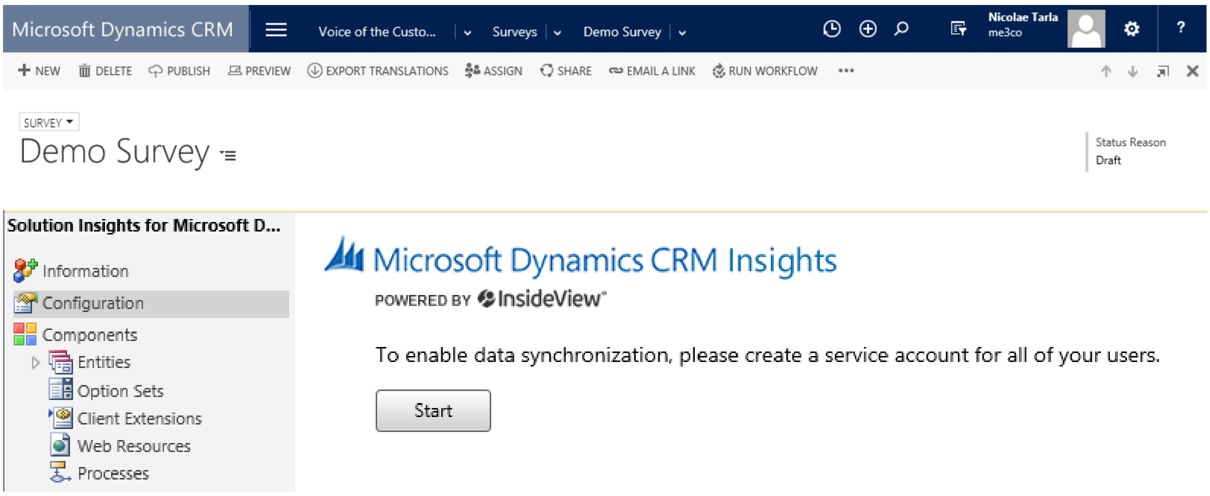

CRM Online Administration Center
INSTANCES
UPDATES
Manage all CRM Online instances
NAME
STATE
TYPE
me3co
ready
Production instance
me3co
PRODUCTION INSTANCE
Microsoft Dynamics CRM Online 2016
EDIT
NOTIFICATIONS
Purpose
Add purpose by editing instance
Solutions

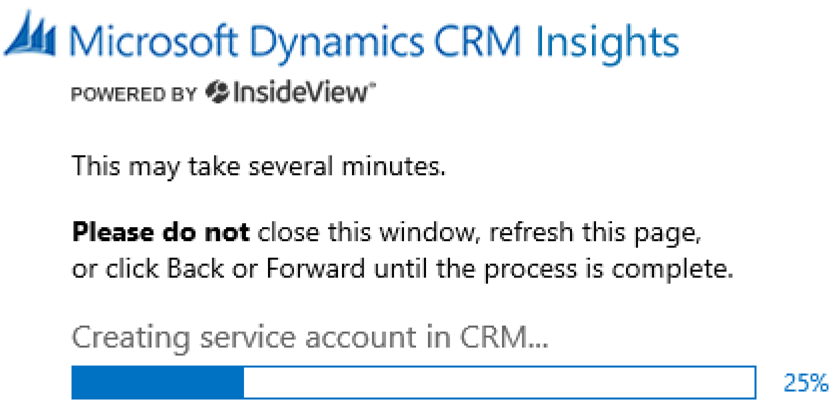

CRM Online Administration Center
INSTANCES
UPDATES
Manage your solutions
Select a preferred solution to manage on selected instance: me3co
SOLUTION NAME
VERSION
AVAILABLE UNTIL
STATUS
Insights for Microsoft Dyn... 3.4 1/1/2050 Not installed
Voice of the Customer 8.0.301.2 1/1/2050 Not installed
Office 365 Groups 2.0.0.4 1/1/2050 Not installed
FantasySalesTeam 1.1 1/1/2050 Not installed
FieldOne Sky 5.1.5031.0 1/1/2050 Not installed
Voice of the Customer
INSTALL
Solution to collect customer feedback. Design surveys, invite people, retrieve results, trigger workflows, and analyze the results in Dynamics CRM.
Created by: Microsoft
Learn more
ICON GOES HERE


Microsoft Dynamics CRM
Voice of the Custo...
Images
New Image
Nicolae Tarla
me3co
See how the interactive service hub can make you more productive.
Experience it now
SAVE
SAVE & CLOSE
NEW
FORM EDITOR
IMAGE : IMAGE FORM
New Image
General
Name
Microsoft
Image Title
Microsoft
Owner
Nicolae Tarla
Alternative Text
Microsoft
Custom Icon
Upload your image to remote server
Image Format
.png
Notes
Status
Active
Active


Microsoft Dynamics CRM
Voice of the Custo...
Themes
New Theme
Nicolae Tarla
me3co
SAVE
SAVE & CLOSE
NEW
FORM EDITOR
THEME
New Theme
General
Name
Theme Demo
Owner
Nicolae Tarla
Header #1A1A1A
Section #002050
Navigation Bar #777777
Answer #FFE090
Answer #FFC736
Progress #4977B8
Progress Background #A2A8AD
Survey Header
Your
Progress
Section Header
Example question
Answer 1
Answer 2
Answer 3
Section Header
Example question
Answer 1
Answer 2
Answer 3
Previous
Next
Status
Active
Active


Survey Runtime
APPEARANCE
Theme
Theme Demo
Logo
Microsoft
Show Progress Bar
Yes
Show Page Numbers
No
Header Text (shown on every page -
This is a header
Runtime Title
Title
Survey Already Taken Text Block
Only one response is allowed per respondent.
Survey Complete Text
Thank you.
Survey Complete Link URL
--
FOOTER LINK TEXTS
Redirect Text
--
Custom Footer Text
--
Privacy Policy Text
--
Survey Email Text
--
Show Technical Help
No
Redirect URL
--
Custom Footer URL
--
Privacy Policy URL
--
Survey Email
--
NAVIGATION
Next Text
Next
Previous Text
Previous
Submit Text
Submit
Invitations and Actions
INVITATIONS
Invitation Link Text
Demo Survey
Email Snippet
--
Anonymous Link
--
Run in IFrame
RESPONSES
Create Lead For Anonymous Responses
No
Create Alert Task
No
Alert Lower Target
--
Calculate Score
Yes
Automatically Send Email Response
No
UNSUBSCRIBE
Unsubscribe respondent when response receive
No

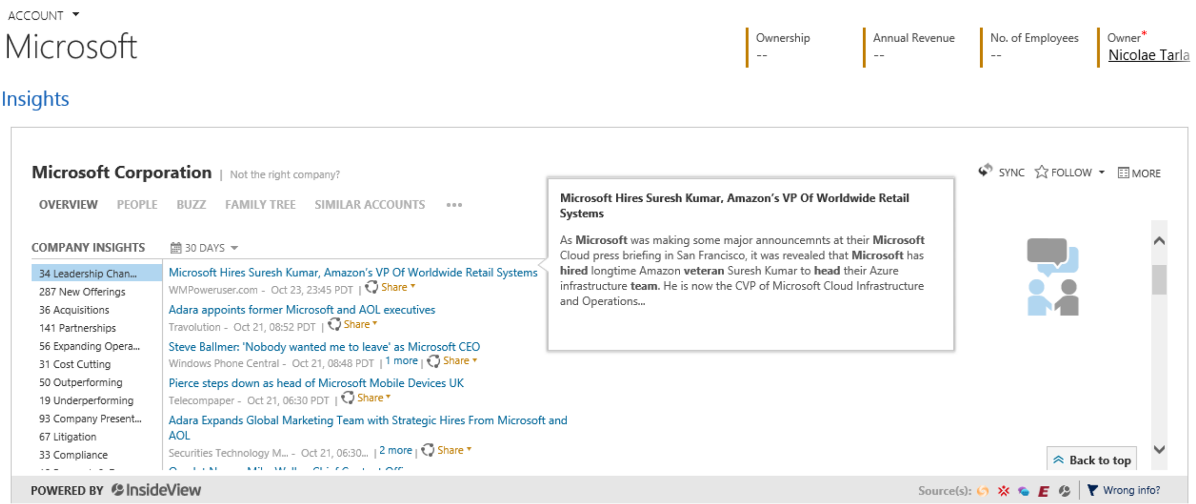

Microsoft Dynamics CRM
Voice of the Custo...
Surveys
Demo Survey
Nicolae Tarla
me3co
NEW
DELETE
PUBLISH
PREVIEW
EXPORT TRANSLATIONS
ASSIGN
SHARE
EMAIL A LINK
RUN WORKFLOW
SURVEY
Demo Survey
Status Reason
Draft
Solution Insights for Microsoft D...
Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Microsoft Dynamics CRM Insights
POWERED BY InsideView
To enable data synchronization, please create a service account for all of your users.
Start

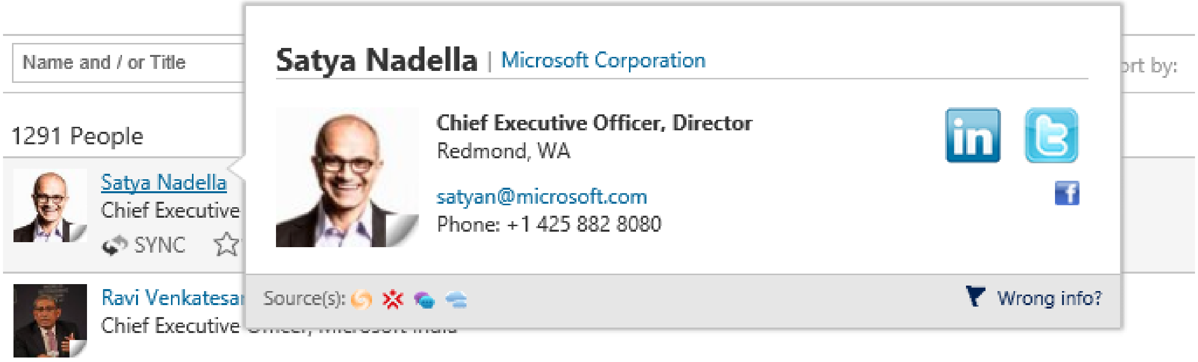

Microsoft Dynamics CRM Insights
POWERED BY InsideView
This may take several minutes.
Please do not close this window, refresh this page,
or click Back or Forward until the process is complete.
Creating service account in CRM...
25%

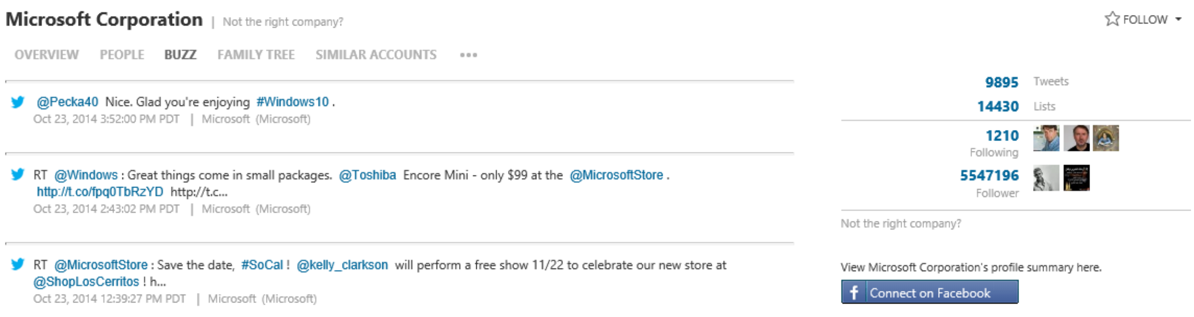
Microsoft Dynamics CRM Insights

POWERED BY InsideView

Data synchronization has been enabled for Insights.







MICROSOFT @Microsoft

The official Twitter page for Microsoft consume...
Redmond, WA
http://t.co/ilrGzB9fzr
Follow

9895 Tweets
14430 Lists

1210 Following
5547196 Follower

Microsoft Corporation | Not the right company?

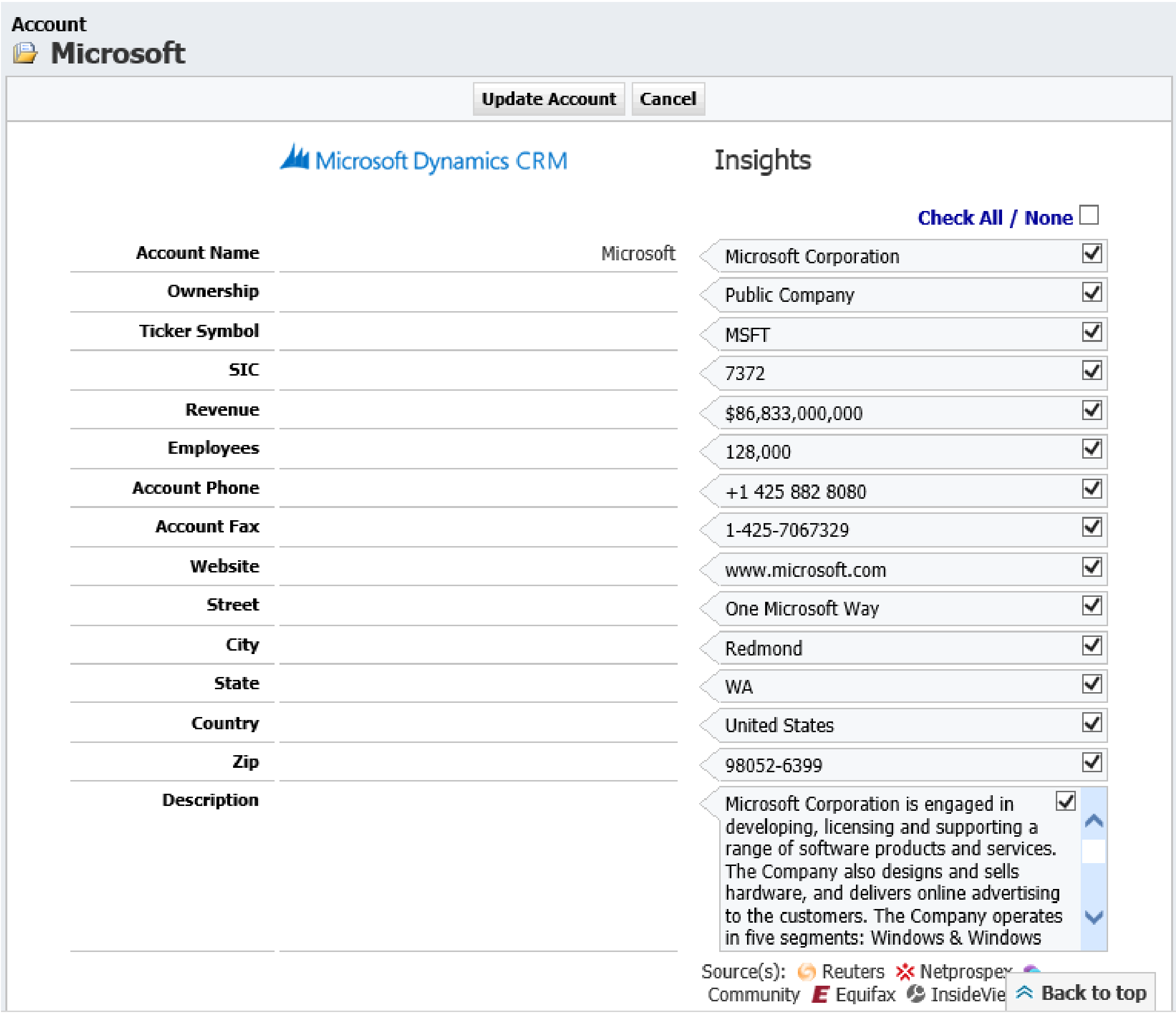
OVERVIEW PEOPLE BUZZ FAMILY TREE **SIMILAR ACCOUNTS** •••

All News
Jobs
Financials
Industry Profile

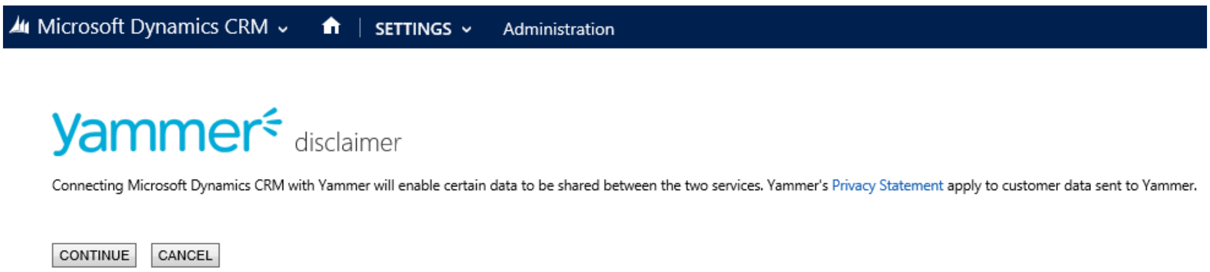
Adobe Systems Incorporated
Public Company (NASD:ADBE)
Primary Industry: Computer Software
$4,115.4M
ees: 11,847
Description: Adobe Systems Incorporated (Adobe) is a diversified software c

Amazon.com, Inc.
Public Company (NASD:AMZN)
Primary Industry: Retail - Internet & Catalog Order
Revenue: $81,760.0M
# of Employees: 117,300
Description: Amazon.com, Inc. (Amazon.com) serves consumers through its retail | more

Microsoft Corporation | Not the right company?
SYNC FOLLOW MORE
OVERVIEW PEOPLE BUZZ FAMILY TREE SIMILAR ACCOUNTS •••


Account
Microsoft
Update Account
Cancel
Microsoft Dynamics CRM
Insights
Check All / None
Account Name
Microsoft
Microsoft Corporation
Ownership
Public Company
Ticker Symbol
MSFT
SIC
7372
Revenue
$86,833,000,000
Employees
128,000
Account Phone
+1 425 882 8080
Account Fax
1-425-7067329
Website
www.microsoft.com
Street
One Microsoft Way
City
Redmond
State
WA
Country
United States
Zip
98052-6399
Description
Microsoft Corporation is engaged in developing, licensing and supporting a range of software products and services. The Company also designs and sells hardware, and delivers online advertising to the customers. The Company operates in five segments: Windows & Windows
Source(s): Reuters Netprospex Community Equifax InsideVie
Back to top


Yammer Configuration
Connect Microsoft Dynamics CRM to your enterprise Yammer network


Microsoft Dynamics CRM
SETTINGS
Administration
yammer
disclaimer
Connecting Microsoft Dynamics CRM with Yammer will enable certain data to be shared between the two services. Yammer's Privacy Statement apply to customer data sent to Yammer.
CONTINUE
CANCEL

yammer configuration

Connect Microsoft Dynamics CRM to your enterprise Yammer network.

With Yammer, you can collaborate securely with colleagues whenever and wherever they're connected. Learn more

Note: Currently, Yammer is available only in English. You may prefer to delay Yammer installation until a future update that supports additional languages becomes available. To find out about any future updates, subscribe to the Microsoft Dynamics CRM blog.

Note: You will need administrative permissions on the Yammer network to complete this step. Need permissions? Visit Yammer.

Note: This will replace Activity Feeds with Yammer, and you can't revert back to Activity Feeds. You can access your Activity Feeds user messages programmatically by using the Microsoft Dynamics CRM SDK.

1. Authorize Microsoft Dynamics CRM OnPremise to connect to Yammer

   Yammer Network:

2. Select a Yammer Group ID to control conversation access (optional step).

   Yammer Group ID: (Select)

3. Set the level of security for Yammer activity stream messages

   - Public
   - Private

yammer
The Enterprise Social Network

Log in with your Yammer account

The application Dynamics CRM would like to log you in using your Yammer account.

Email Address

Password

Forgot password?

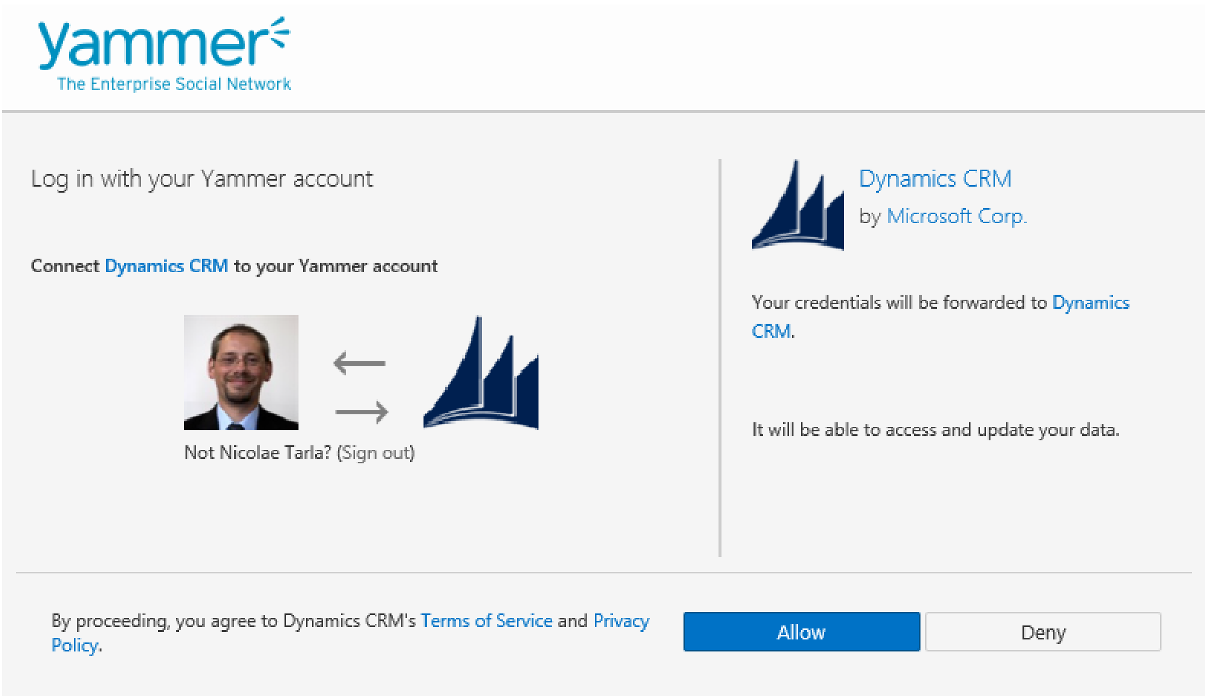
☑ Remember me

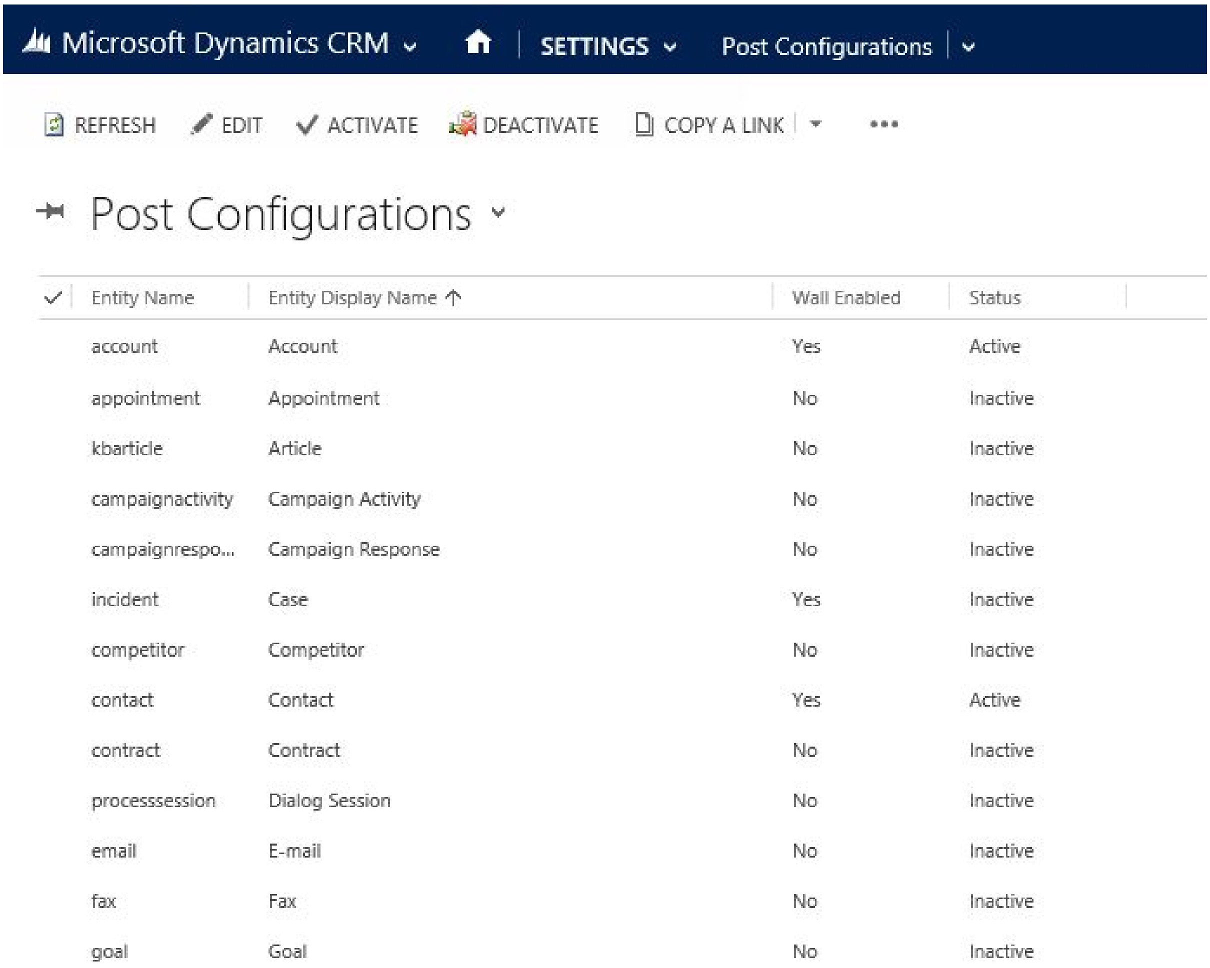
Log In

Dynamics CRM by Microsoft Corp.

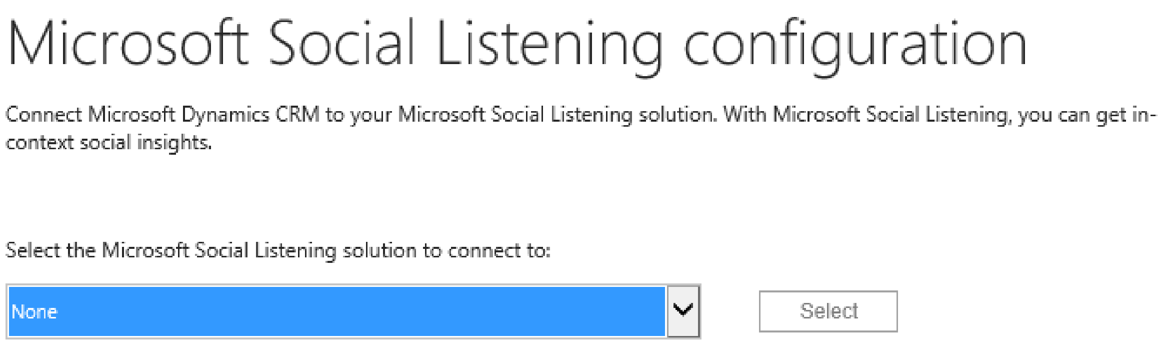
It will be able to access and update your data

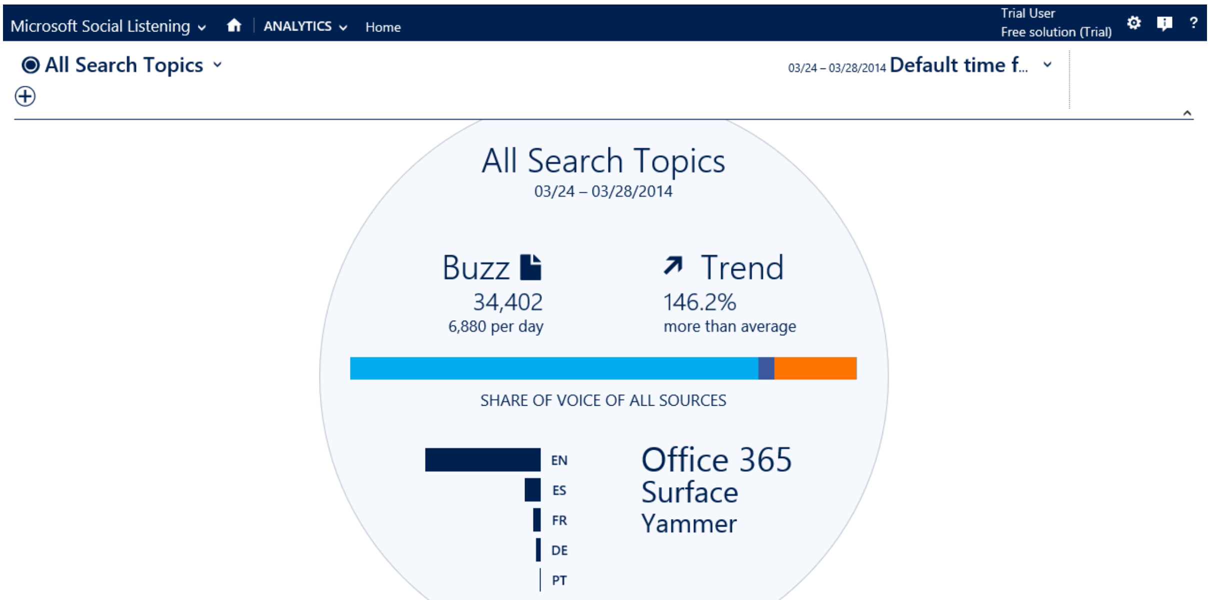

Yammer Administrative Permissions Required
You need administrative permissions on your Yammer network to do this.
Contact your verified Yammer administrator.
Try Again
Close

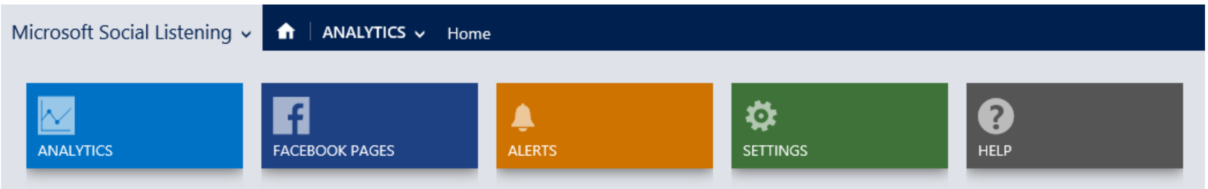

yammer
The Enterprise Social Network
Log in with your Yammer account
Connect Dynamics CRM to your Yammer account
Not Nicolae Tarla? (Sign out)
Dynamics CRM
by Microsoft Corp.
Your credentials will be forwarded to Dynamics CRM.
It will be able to access and update your data.
By proceeding, you agree to Dynamics CRM's Terms of Service and Privacy Policy.
Allow
Deny

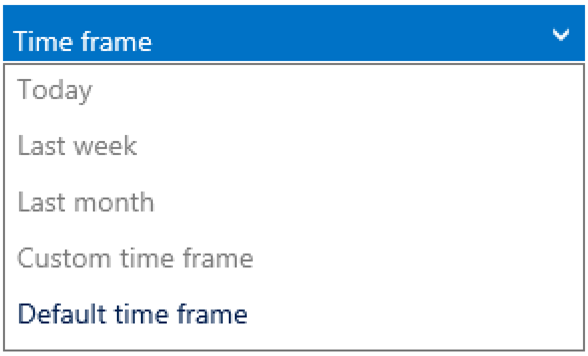

Microsoft Dynamics CRM
SETTINGS
Post Configurations
REFRESH
EDIT
ACTIVATE
DEACTIVATE
COPY A LINK
Post Configurations
Entity Name
Entity Display Name
Wall Enabled
Status
account Account Yes Active
appointment Appointment No Inactive
kbarticle Article No Inactive
campaignactivity Campaign Activity No Inactive
campaignrespo... Campaign Response No Inactive
incident Case Yes Inactive
competitor Competitor No Inactive
contact Contact Yes Active
contract Contract No Inactive
processsession Dialog Session No Inactive
email E-mail No Inactive
fax Fax No Inactive
goal Goal No Inactive


Microsoft Social Listening Configuration
Connect Microsoft Dynamics CRM to Microsoft Social Listening for Social Insights


Microsoft Social Listening configuration
Connect Microsoft Dynamics CRM to your Microsoft Social Listening solution. With Microsoft Social Listening, you can get in-context social insights.
Select the Microsoft Social Listening solution to connect to:
None
Select


Microsoft Social Listening
ANALYTICS
Home
Trial User
Free solution (Trial)
All Search Topics
03/24 – 03/28/2014 Default time f...
All Search Topics
03/24 – 03/28/2014
Buzz
34,402
6,880 per day
Trend
146.2%
more than average
SHARE OF VOICE OF ALL SOURCES
EN
ES
FR
DE
PT
Office 365
Surface
Yammer


Microsoft Social Listening
ANALYTICS
Home
ANALYTICS
FACEBOOK PAGES
ALERTS
SETTINGS
HELP


Time frame
Today
Last week
Last month
Custom time frame
Default time frame

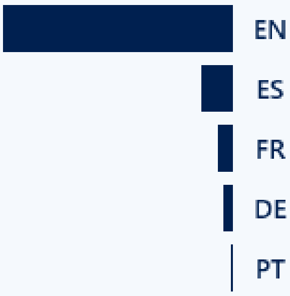
All Search Topics

03/24 – 03/28/2014

Buzz
34,402
6,880 per day

Trend
146.2%
more than average

SHARE OF VOICE OF ALL SOURCES



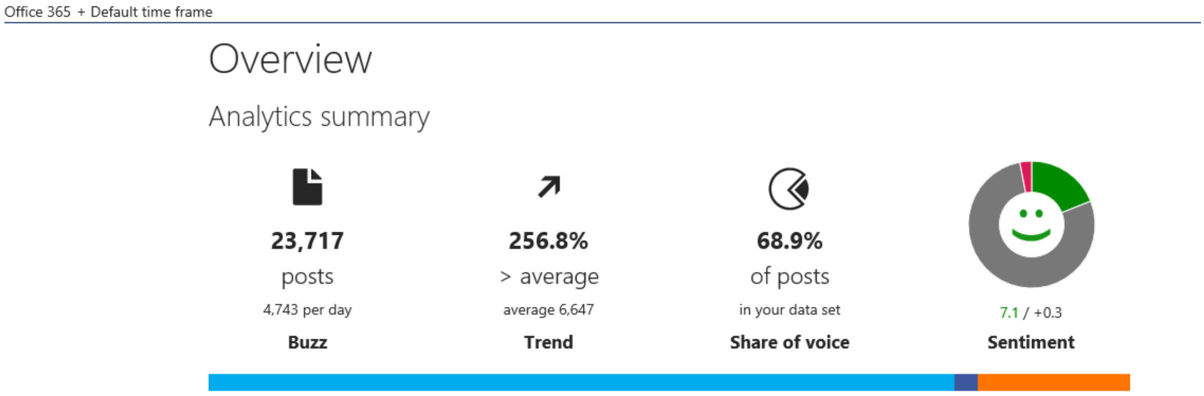
Office 365
Surface
Yammer

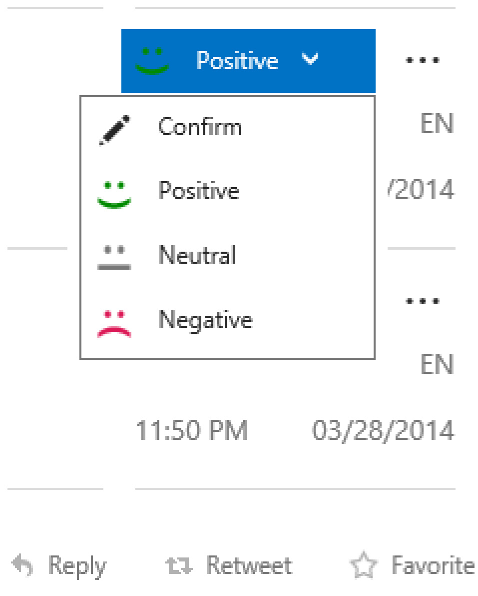
Office 365

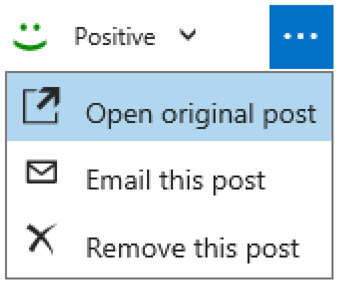
23,717 posts, 68.9% of all posts

256.8%

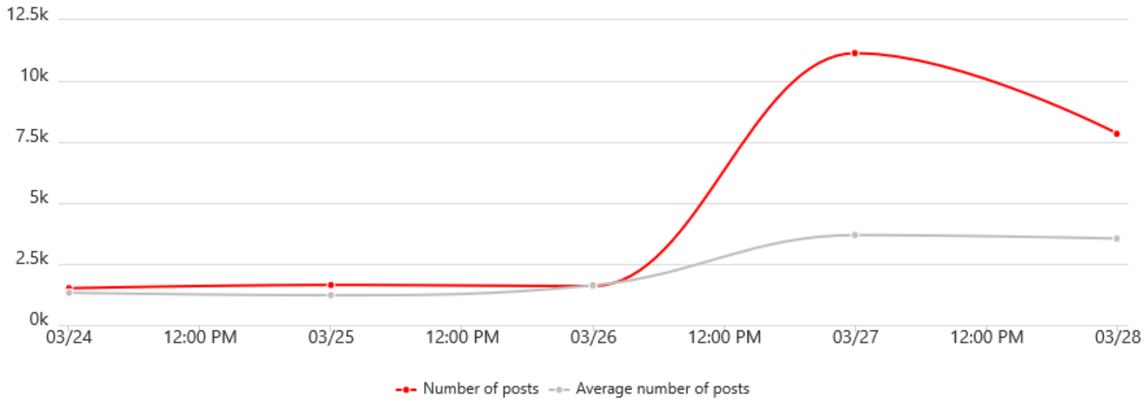
Office 365
Surface
Yammer


Office 365 + Default time frame
Overview
Analytics summary
23,717
posts
4,743 per day
Buzz
256.8%
> average
average 6,647
Trend
68.9%
of posts
in your data set
Share of voice
7.1 / +0.3
Sentiment


Positive
Confirm
Positive
Neutral
Negative
EN
/2014
EN
11:50 PM
03/28/2014
Reply
Retweet
Favorite


Positive
Open original post
Email this post
Remove this post

Volume history Number of posts in your time frame



Sources summary

Twitter
19,202 Posts
81 %

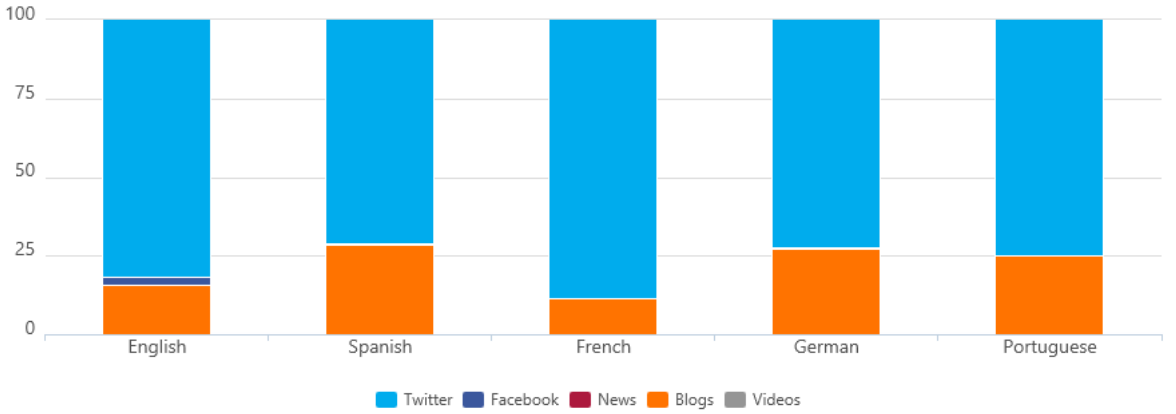
Facebook
580 Posts
2.4 %

News
0 Posts
0 %

Blogs
3,920 Posts
16.5 %

Videos
15 Posts
< 1 %

Sources share of voice by language In percentage per language



Authors

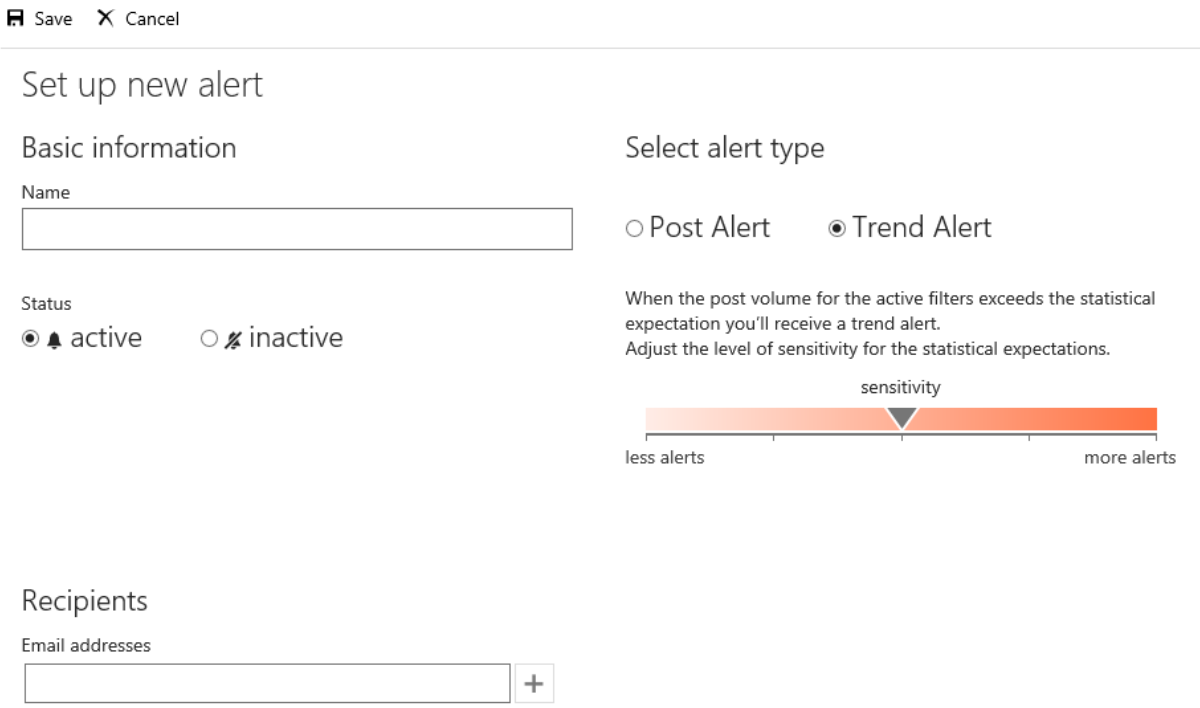
Top 5 authors

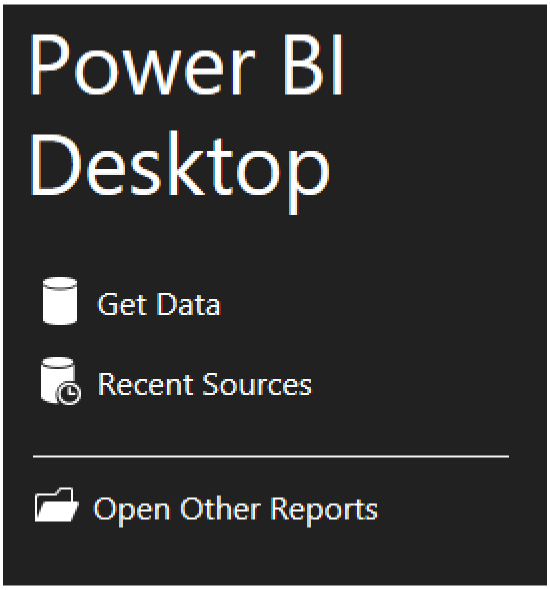
				→
burakmentes		178	< 1%	↗
QuiteCloudy (Scott Cameron)	Olathe, Kansas,...	137	< 1%	↗
Vorsite (Vorsite)	Seattle, Washin...	113	< 1%	↗
Bob Gourley		108	< 1%	↗
myfreshreviews		102	< 1%	↗

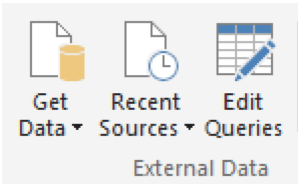
Top 5 authors by sources

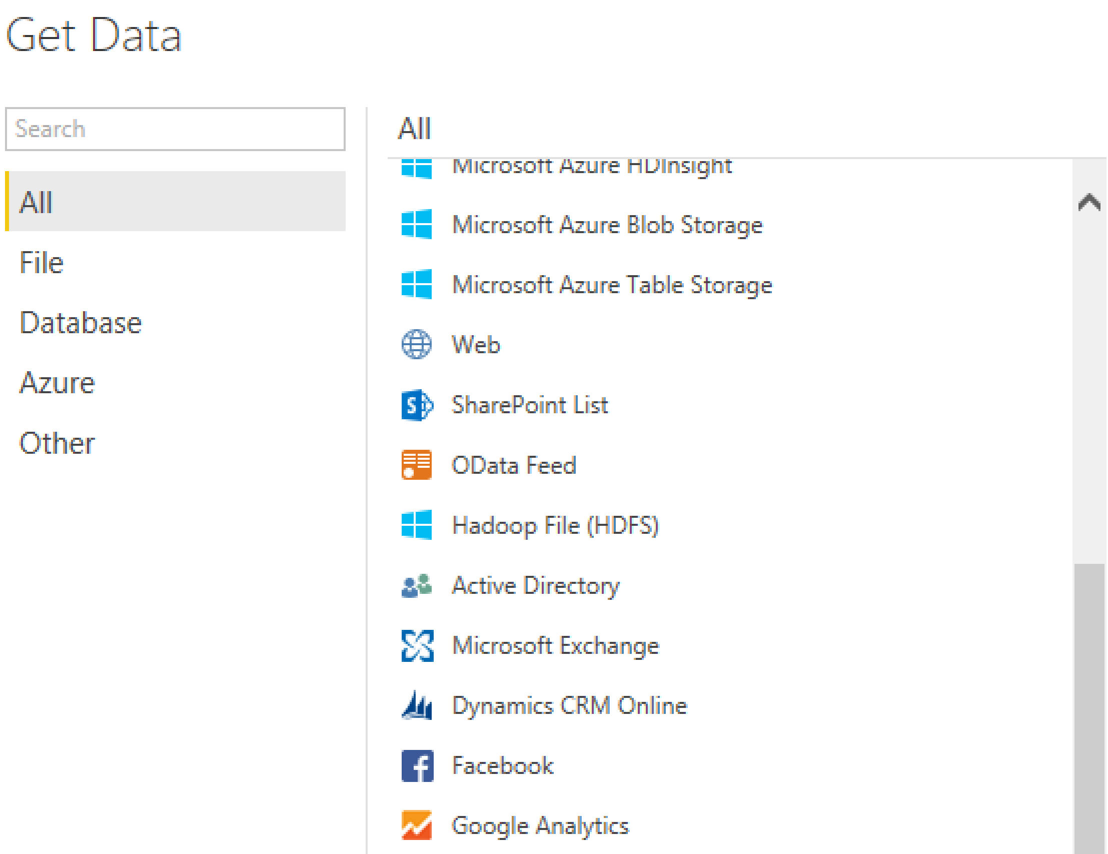
Twitter 12,760 authors found

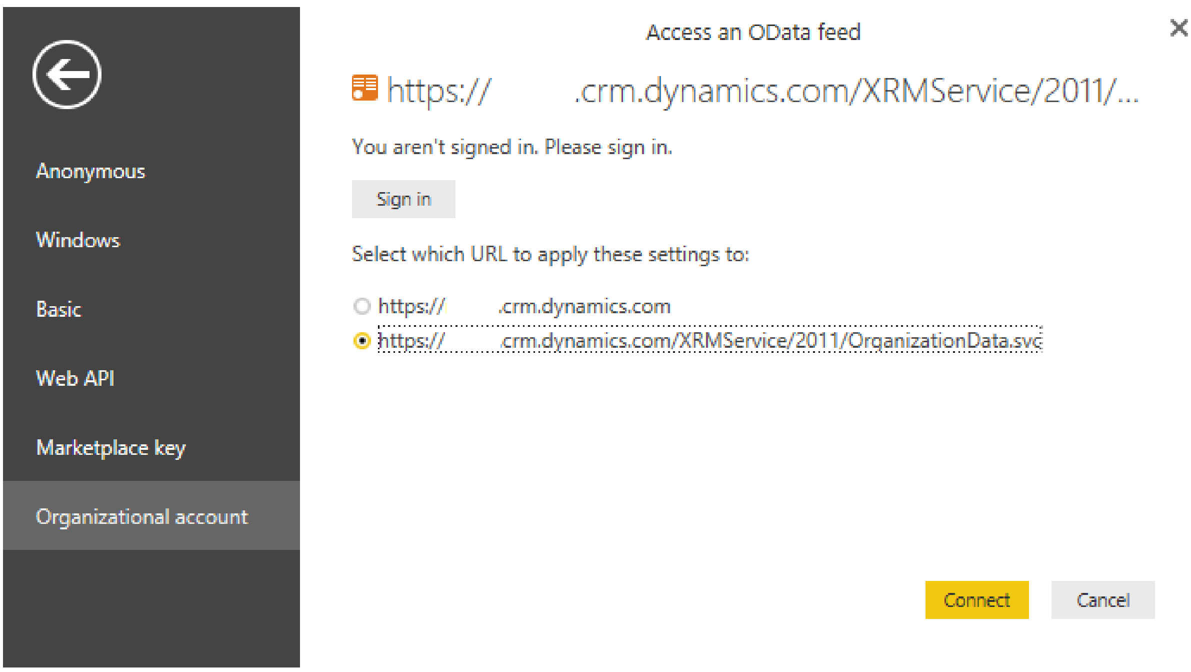
		SoV	→
QuiteCloudy (Scott Cameron)	137	< 1%	↗
Vorsite (Vorsite)	113	< 1%	↗
CloudSolutions (Cloud Soluti...	78	< 1%	↗
whymicrosoft (Why Microsoft)	53	< 1%	→
Office (Office)	50	< 1%	↗


Save
Cancel
Set up new alert
Basic information
Name
Status
active
inactive
Select alert type
Post Alert
Trend Alert
When the post volume for the active filters exceeds the statistical expectation you'll receive a trend alert.
Adjust the level of sensitivity for the statistical expectations.
sensitivity
less alerts
more alerts
Recipients
Email addresses

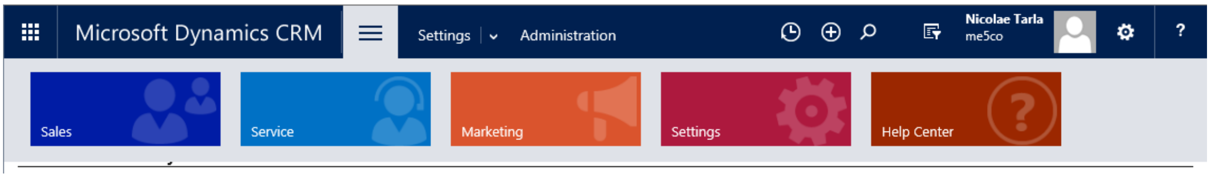

Power BI Desktop
Get Data
Recent Sources
Open Other Reports

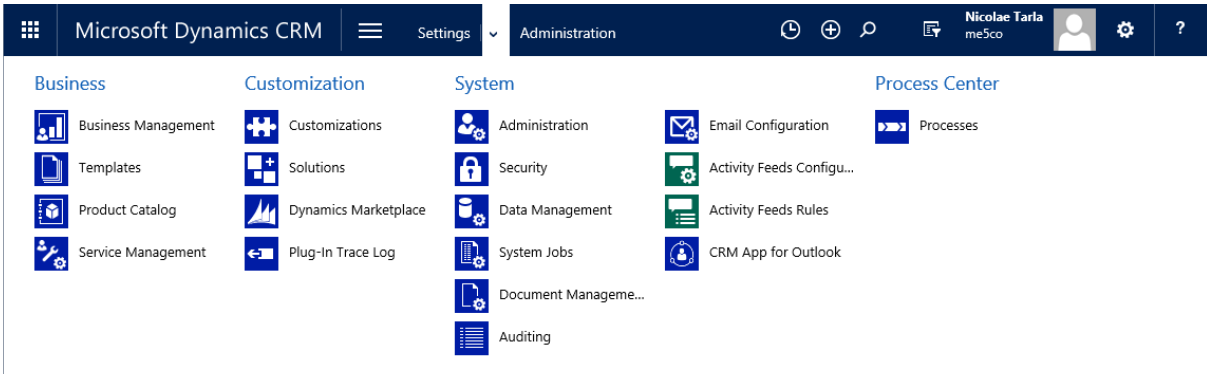

Get Data
Recent Sources
Edit Queries
External Data

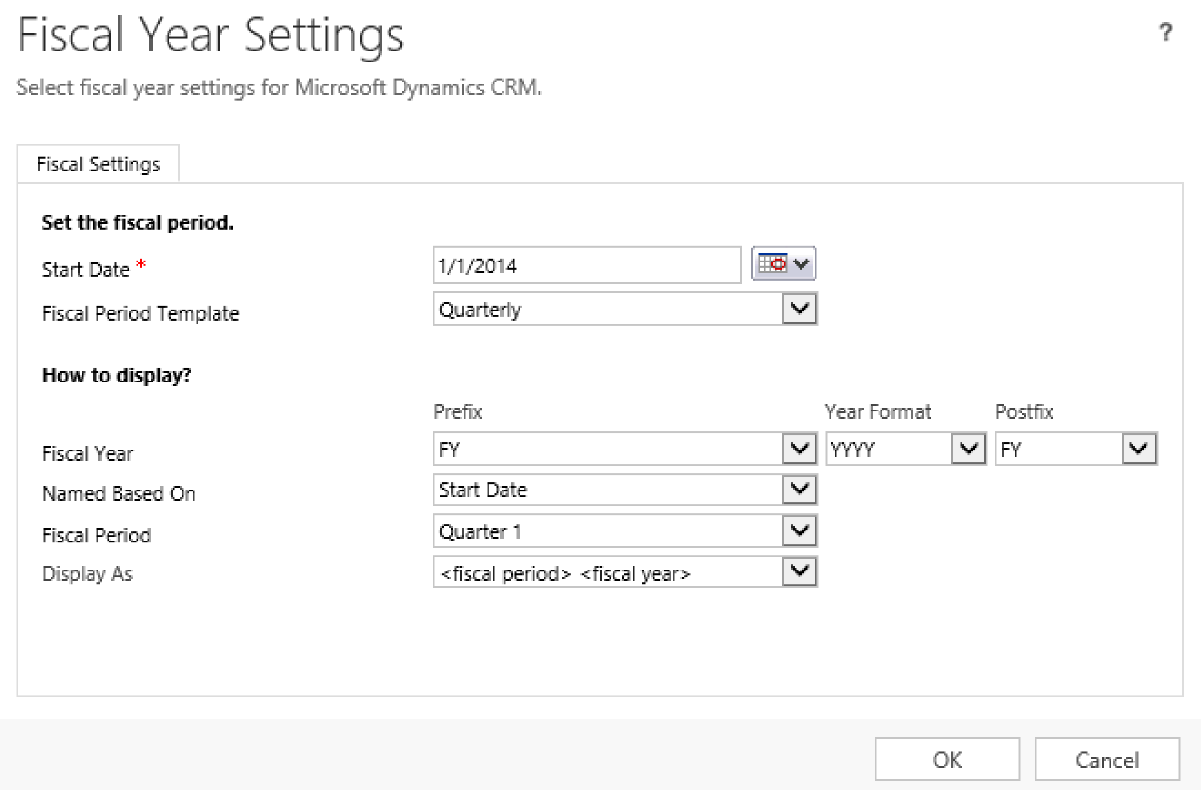

Get Data
Search
All
File
Database
Azure
Other
All
Microsoft Azure HDInsight
Microsoft Azure Blob Storage
Microsoft Azure Table Storage
Web
SharePoint List
OData Feed
Hadoop File (HDFS)
Active Directory
Microsoft Exchange
Dynamics CRM Online
Facebook
Google Analytics

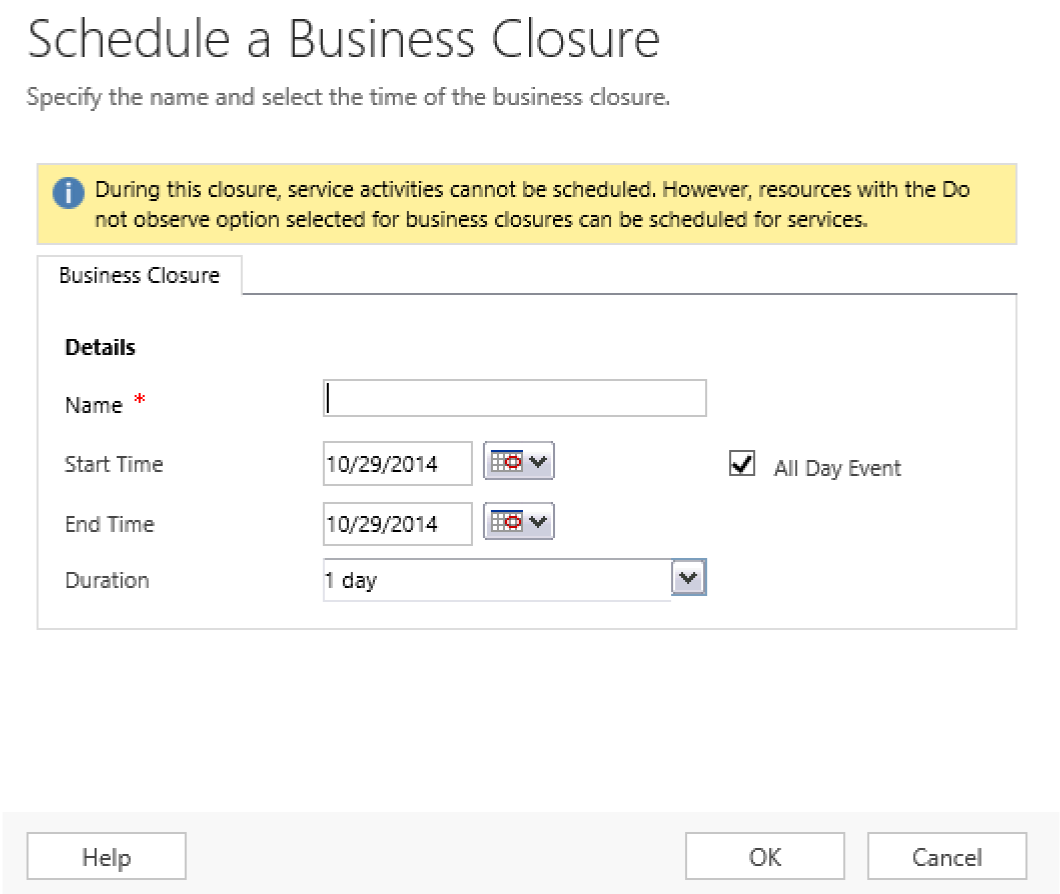

Anonymous
Windows
Basic
Web API
Marketplace key
Organizational account
Access an OData feed
https:// .crm.dynamics.com/XRMService/2011/...
You aren't signed in. Please sign in.
Sign in
Select which URL to apply these settings to:
https:// .crm.dynamics.com
https:// .crm.dynamics.com/XRMService/2011/OrganizationData.svc
Connect
Cancel

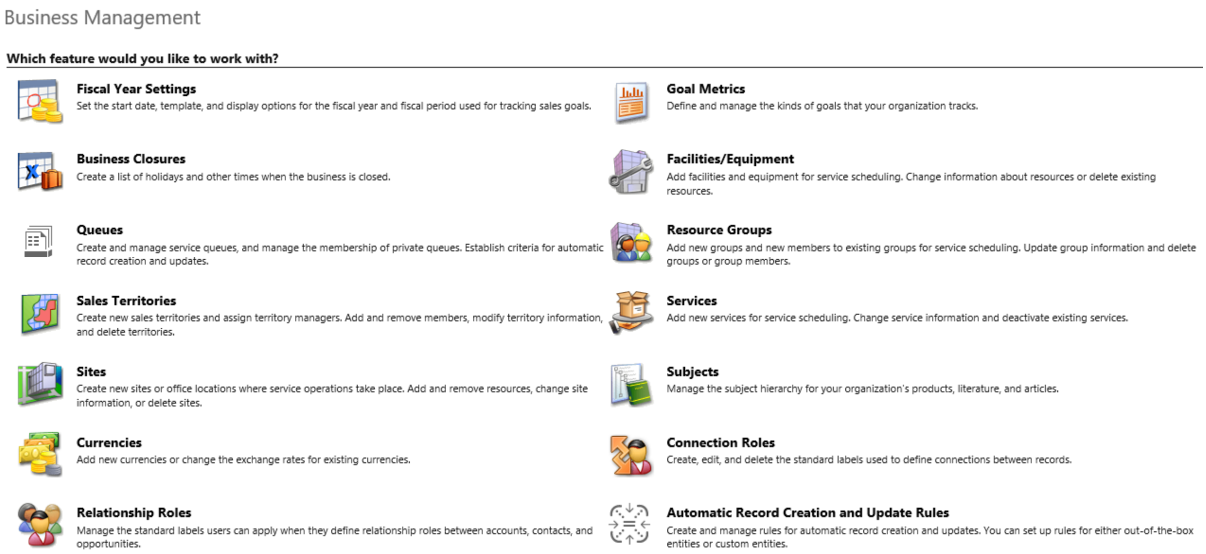
Chapter 6: Dynamics CRM Administration

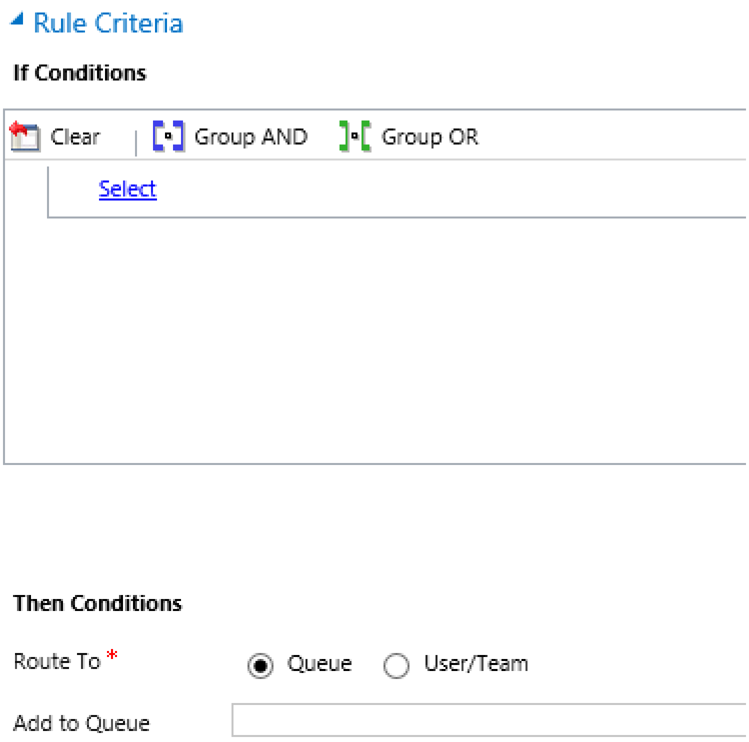


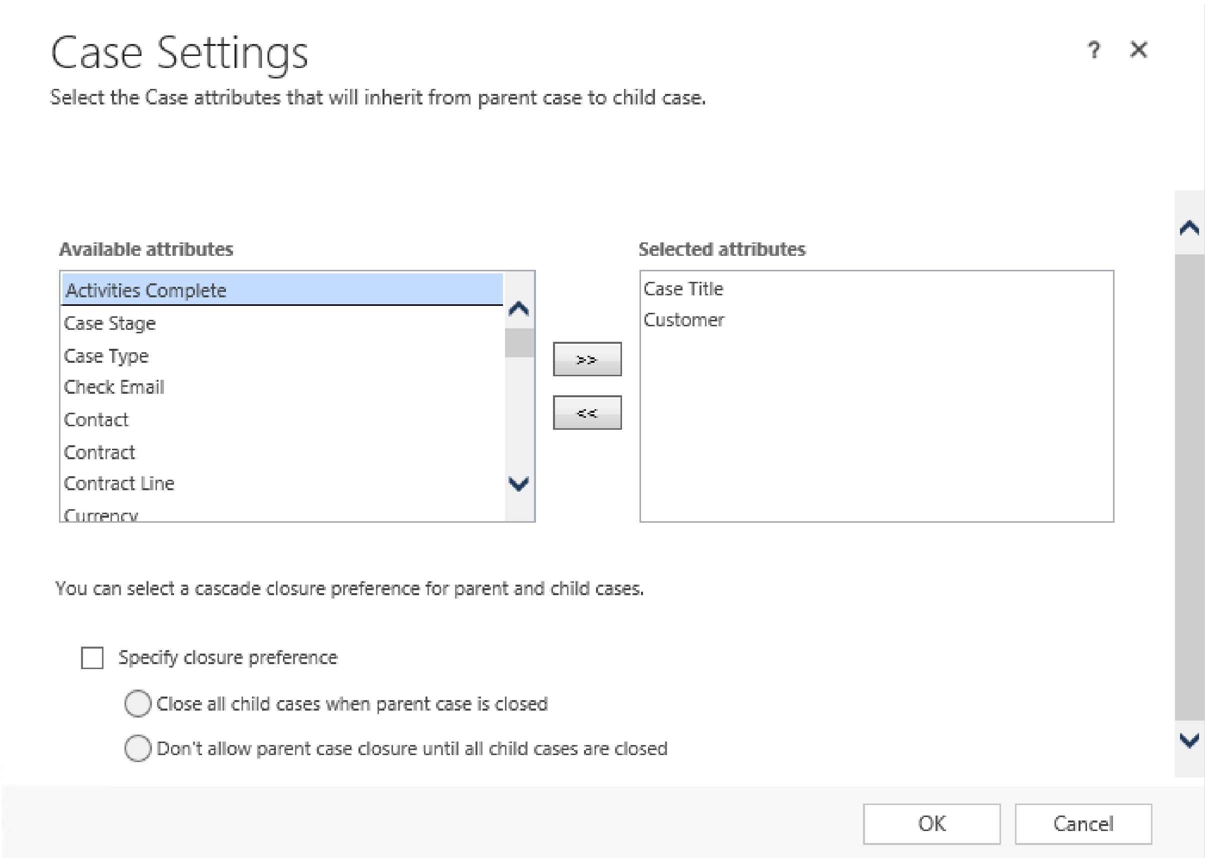





Schedule a Business Closure
Specify the name and select the time of the business closure.
During this closure, service activities cannot be scheduled. However, resources with the Do not observe option selected for business closures can be scheduled for services.
Business Closure
Details
Name *
Start Time
10/29/2014
All Day Event
End Time
10/29/2014
Duration
1 day
Help
OK
Cancel


Business Management
Which feature would you like to work with?
Fiscal Year Settings
Set the start date, template, and display options for the fiscal year and fiscal period used for tracking sales goals.
Goal Metrics
Define and manage the kinds of goals that your organization tracks.
Business Closures
Create a list of holidays and other times when the business is closed.
Facilities/Equipment
Add facilities and equipment for service scheduling. Change information about resources or delete existing resources.
Queues
Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.
Resource Groups
Add new groups and new members to existing groups for service scheduling. Update group information and delete groups or group members.
Sales Territories
Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.
Services
Add new services for service scheduling. Change service information and deactivate existing services.
Sites
Create new sites or office locations where service operations take place. Add and remove resources, change site information, or delete sites.
Subjects
Manage the subject hierarchy for your organization's products, literature, and articles.
Currencies
Add new currencies or change the exchange rates for existing currencies.
Connection Roles
Create, edit, and delete the standard labels used to define connections between records.
Relationship Roles
Manage the standard labels users can apply when they define relationship roles between accounts, contacts, and opportunities.
Automatic Record Creation and Update Rules
Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or custom entities.


Rule Criteria
If Conditions
Clear
Group AND
Group OR
Select
Then Conditions
Route To *
Queue
User/Team
Add to Queue


Case Settings
Select the Case attributes that will inherit from parent case to child case.
Available attributes
Activities Complete
Case Stage
Case Type
Check Email
Contact
Contract
Contract Line
Selected attributes
Case Title
Customer
>>
<<
You can select a cascade closure preference for parent and child cases.
Specify closure preference
Close all child cases when parent case is closed
Don't allow parent case closure until all child cases are closed
OK
Cancel

Case Settings with Record Creation and Update Rules

Queues
Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.

Parent and Child case settings
Specify the information to be inherited from a parent case to child cases. Define case closure cascade settings between parent and child cases.

Routing Rule Sets
Create or delete case routing rules. Change existing rule information, such as conditions, order, and actions.

Automatic Record Creation and Update Rules
Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or custom entities.

Subjects
Create and manage information in a subject tree. This helps to categorize an organization's cases to identify frequent requests and problem areas.

ENTITLEMENT TERMS

Allocation Type *	Number of cases
Decrease Remaining On *	Case Resolution
Total Terms	--
Remaining Terms	--

Service Terms

Service Level Agreements
Create and manage service level agreements (SLAs), and associate them to a customer service schedule. Define failure and warning violation time, and the actions associated with SLAs.

Entitlements
Create and manage entitlements, and associate them with a customer. Define and manage entitlement terms of service for multiple channels.

Holiday Schedule
Create and manage a list of holidays for the customer service schedule. Associating the holiday schedule with a service schedule determines SLA time calculations.

Service Configuration Settings
Set system-level service settings for your organization.

Customer Service Schedule
Create and manage customer service schedules for the organization.

Knowledge Base Management

Embedded Knowledge Search
Configure the knowledge search control to use the CRM knowledge base or Parature. Add the control to additional record types in CRM.

Knowledge Base Management Settings

Help

Record Types

Select the record types that you want to turn on knowledge base (KB) management for.

☐	Entities
☐	Account
☐	Campaign
☑	Case
☐	Competitor
☐	Contact
☐	Contract
☐	Contract Line
☐	Entitlement
☐	External Party

Knowledge Source

Dynamics CRM supports the use of the CRM Knowledge base as well as the Parature Knowledgebase. Select the knowledge solution that your organization is using.

Knowledge Solution: Dynamics CRM

Support Portal Connection

External links for KB articles are created in the URL format specified below. Insert "{kbnum}" as a placeholder in the URL format. It will be replaced by an actual KB article number, for example http://support.microsoft.com/kb/{kbnum}

Portal: ☐ Use an external portal

If "Use an external portal" isn't selected, when an email is sent to customers, the article contents will be inserted as the email body, instead of a link to the article.

URL Format:* *http://support.microsoft.com/kb/{kbnum}*

Next Cancel

Templates

Entitlement Templates
Create and manage templates for creating entitlements.

Email Templates
Create and manage templates for email messages.

Article Templates
Create and manage templates for articles in the knowledge base.

Contract Templates
Create and manage templates for contracts.

ENTITLEMENT TEMPLATE

Product X-13 Entitlement

INFORMATION

Entitlement Template Name *	Product X-13 E
Start Date	--
End Date	--
Restrict based on entitlement terms	No
SLA	--
Description	--

ENTITLEMENT TERMS

Allocation Type	Number of cases
Decrease Remaining	Case Resolution
Total Terms	--

Entitlement Channels +

Name ↑	Total Ter

No Entitlement Template Channel records found.

Products +

Search for records

Name ↑	Product ID

No Product records found.

Service Scheduling

Business Closure
Create a list of holidays and other times when the business is closed.

Services
Add new services for service scheduling. Change service information and deactivate existing services.

Facilities/Equipment
Add facilities and equipment for service scheduling. Change information about resources or delete existing resources.

Resource Groups
Add new groups and new members to existing groups for service scheduling. Update group information and delete groups or group members.

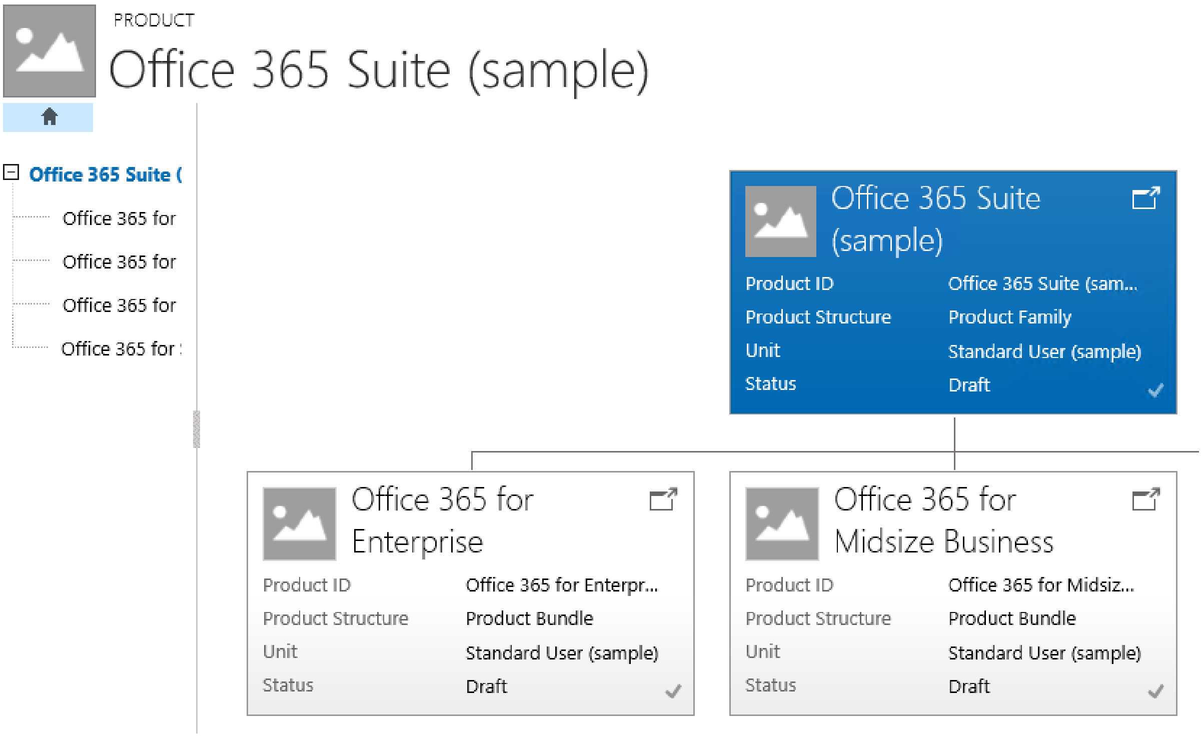
Sites
Create new sites or office locations where service operations take place. Add and remove resources, change site information, or delete sites.

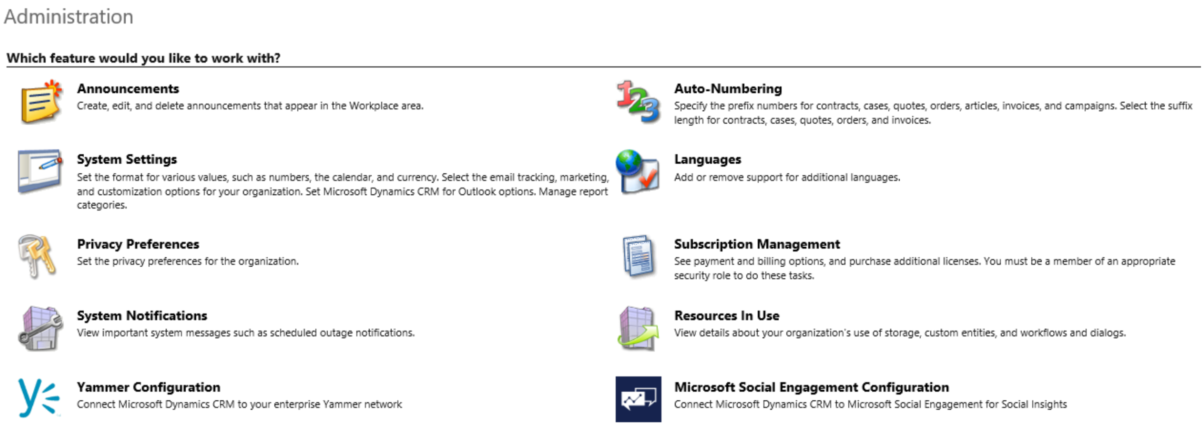
Families & Products
A product is an item in the product catalog that you want to sell to your customers. In this section, you manage products, set up product family hierarchies, create product bundles, and manage properties of product records. You can publish, revise, or retire product records, and also reclassify them to move them to other areas of the product catalog.

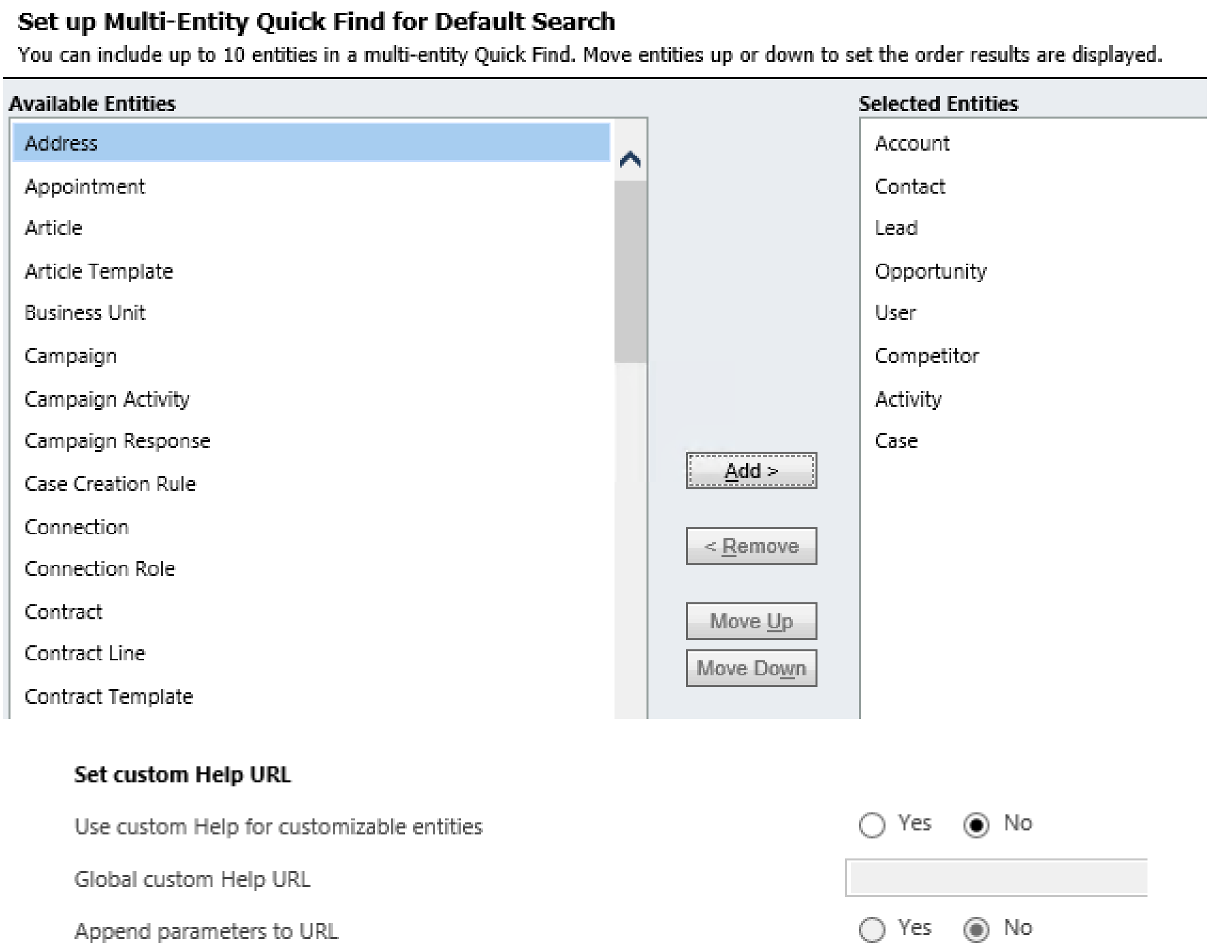
Price Lists
A price list specifies what prices can be charged for each unit in the unit group of a product. In this section, you create, manage, and delete price list line items and price lists in the product catalog. You associate and disassociate products with price lists. You also specify various pricing options in the price list line items, such as the quantity selling option, the pricing method, and the rounding options.

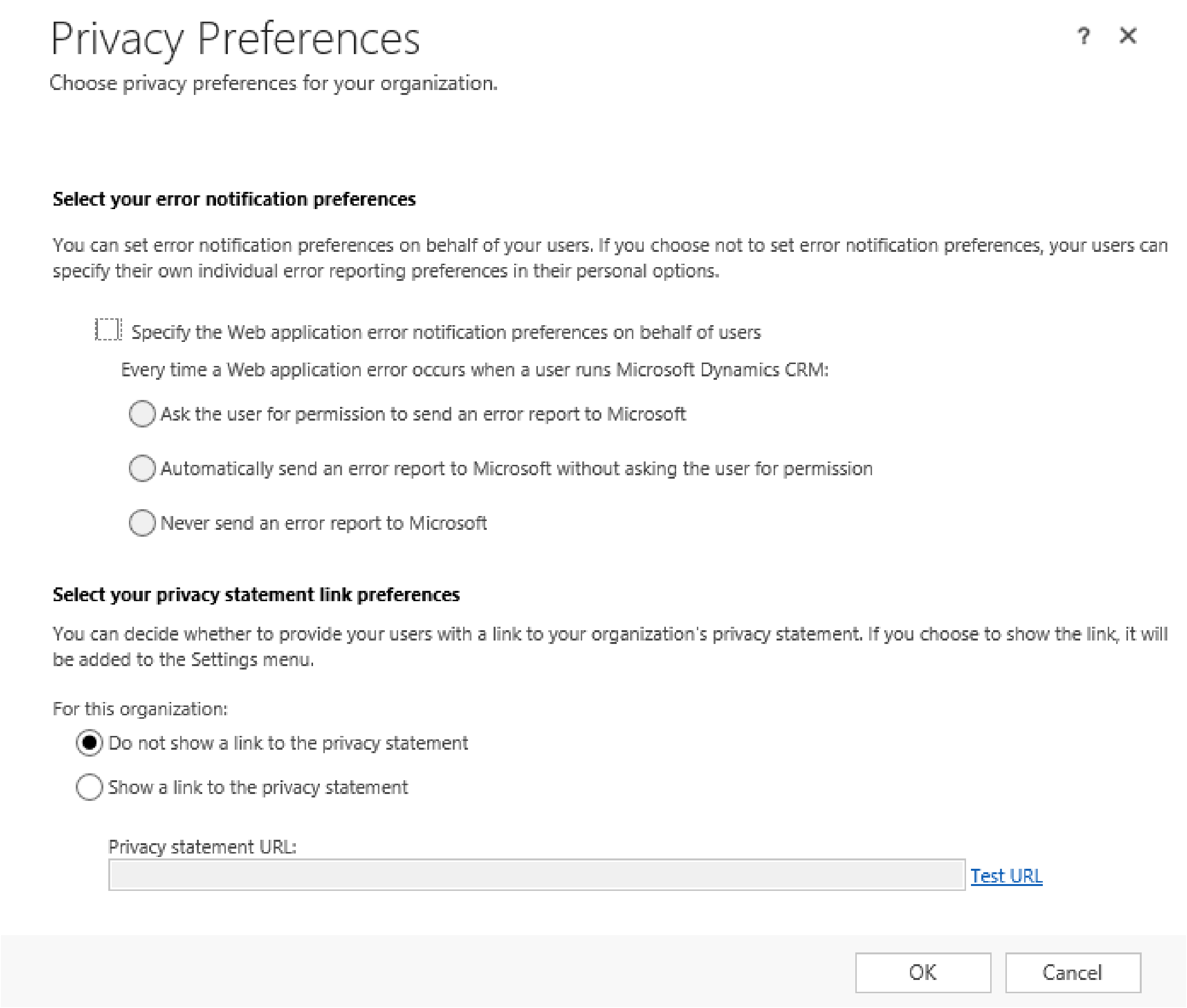
Discount Lists
A discount list contains the specific discounts that can be applied to a product, based on volume purchased. In this section, you create, manage, and delete discount lists in the product catalog.

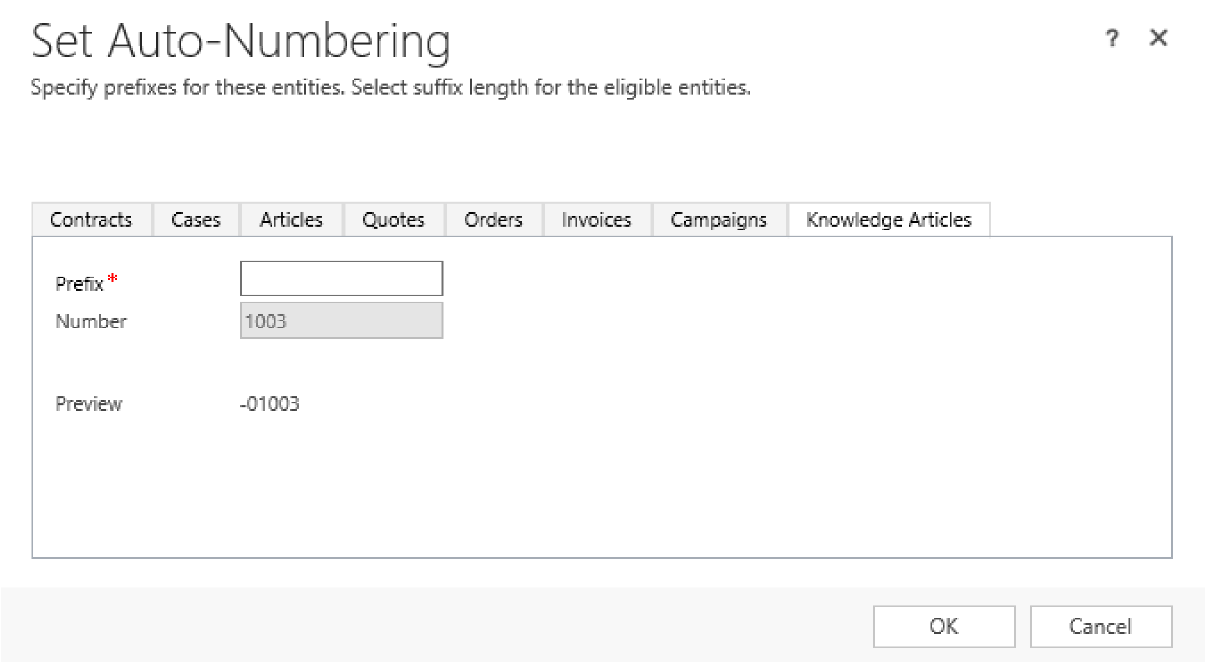
Unit Groups
A unit group contains the base unit a product is available in, such as a liter, and then lists all the different increments that this base unit is packaged for sale. For example, if the base unit is a two-liter bottle, then that product could be sold individually as a two-liter bottle or in a case containing 6 two-liter bottles. In this section, you create, manage, and delete units and unit groups in the product catalog.


PRODUCT
Office 365 Suite (sample)
Office 365 Suite (
Office 365 for
Office 365 for
Office 365 for
Office 365 for
Office 365 Suite (sample)
Product ID
Office 365 Suite (sam...
Product Structure
Product Family
Unit
Standard User (sample)
Status
Draft
Office 365 for Enterprise
Product ID
Office 365 for Enterpr...
Product Structure
Product Bundle
Unit
Standard User (sample)
Status
Draft
Office 365 for Midsize Business
Product ID
Office 365 for Midsiz...
Product Structure
Product Bundle
Unit
Standard User (sample)
Status
Draft


Administration
Which feature would you like to work with?
Announcements
Create, edit, and delete announcements that appear in the Workplace area.
Auto-Numbering
Specify the prefix numbers for contracts, cases, quotes, orders, articles, invoices, and campaigns. Select the suffix length for contracts, cases, quotes, orders, and invoices.
System Settings
Set the format for various values, such as numbers, the calendar, and currency. Select the email tracking, marketing, and customization options for your organization. Set Microsoft Dynamics CRM for Outlook options. Manage report categories.
Languages
Add or remove support for additional languages.
Privacy Preferences
Set the privacy preferences for the organization.
Subscription Management
See payment and billing options, and purchase additional licenses. You must be a member of an appropriate security role to do these tasks.
System Notifications
View important system messages such as scheduled outage notifications.
Resources In Use
View details about your organization's use of storage, custom entities, and workflows and dialogs.
Yammer Configuration
Connect Microsoft Dynamics CRM to your enterprise Yammer network
Microsoft Social Engagement Configuration
Connect Microsoft Dynamics CRM to Microsoft Social Engagement for Social Insights


Set up Multi-Entity Quick Find for Default Search
You can include up to 10 entities in a multi-entity Quick Find. Move entities up or down to set the order results are displayed.
Available Entities
Address
Appointment
Article
Article Template
Business Unit
Campaign
Campaign Activity
Campaign Response
Case Creation Rule
Connection
Connection Role
Contract
Contract Line
Contract Template
Add >
< Remove
Move Up
Move Down
Selected Entities
Account
Contact
Lead
Opportunity
User
Competitor
Activity
Case
Set custom Help URL
Use custom Help for customizable entities
Yes
No
Global custom Help URL
Append parameters to URL
Yes
No


Privacy Preferences
Choose privacy preferences for your organization.
Select your error notification preferences
You can set error notification preferences on behalf of your users. If you choose not to set error notification preferences, your users can specify their own individual error reporting preferences in their personal options.
Specify the Web application error notification preferences on behalf of users
Every time a Web application error occurs when a user runs Microsoft Dynamics CRM:
Ask the user for permission to send an error report to Microsoft
Automatically send an error report to Microsoft without asking the user for permission
Never send an error report to Microsoft
Select your privacy statement link preferences
You can decide whether to provide your users with a link to your organization's privacy statement. If you choose to show the link, it will be added to the Settings menu.
For this organization:
Do not show a link to the privacy statement
Show a link to the privacy statement
Privacy statement URL:
Test URL
OK
Cancel


Set Auto-Numbering
Specify prefixes for these entities. Select suffix length for the eligible entities.
Contracts
Cases
Articles
Quotes
Orders
Invoices
Campaigns
Knowledge Articles
Prefix *
Number
1003
Preview
-01003
OK
Cancel

Resources In Use

CRM Organization Name: **me5co**

CRM Organization URL Name: **me5co**

Storage:	1.60% used (0.08 of 5.00 GB)
Custom Entities:	1% used (5 of 300)

To view the number of user licenses in use, visit the Licenses Page. You must be a member of an appropriate security role to do these tasks.

To purchase more user licenses or storage, visit the Subscription Management page. You must be a member of an appropriate security role to do these tasks

Security

Which feature would you like to work with?

Users
Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.

Teams
Add new teams and new members to existing teams. Modify the team description and delete members from teams.

Security Roles
Create new security roles. Manage and delete existing security roles for your organization.

Business Units
Add new business units. Edit and deactivate existing business units. Change the parent business unit.

Field Security Profiles
Manage user and team permissions to read, create, or write information in secured fields.

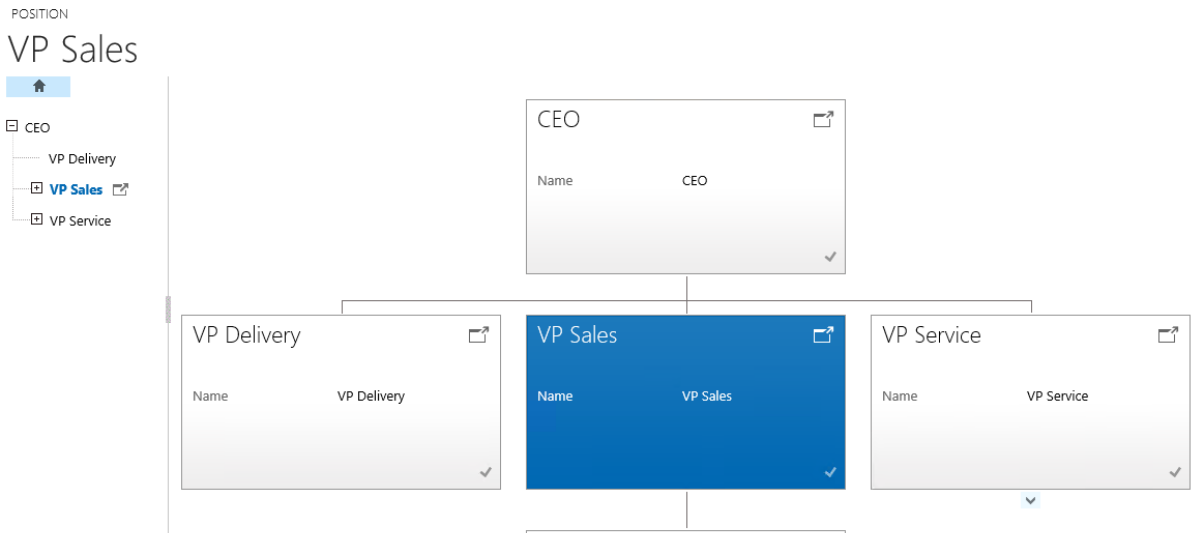
Hierarchy Security
Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.

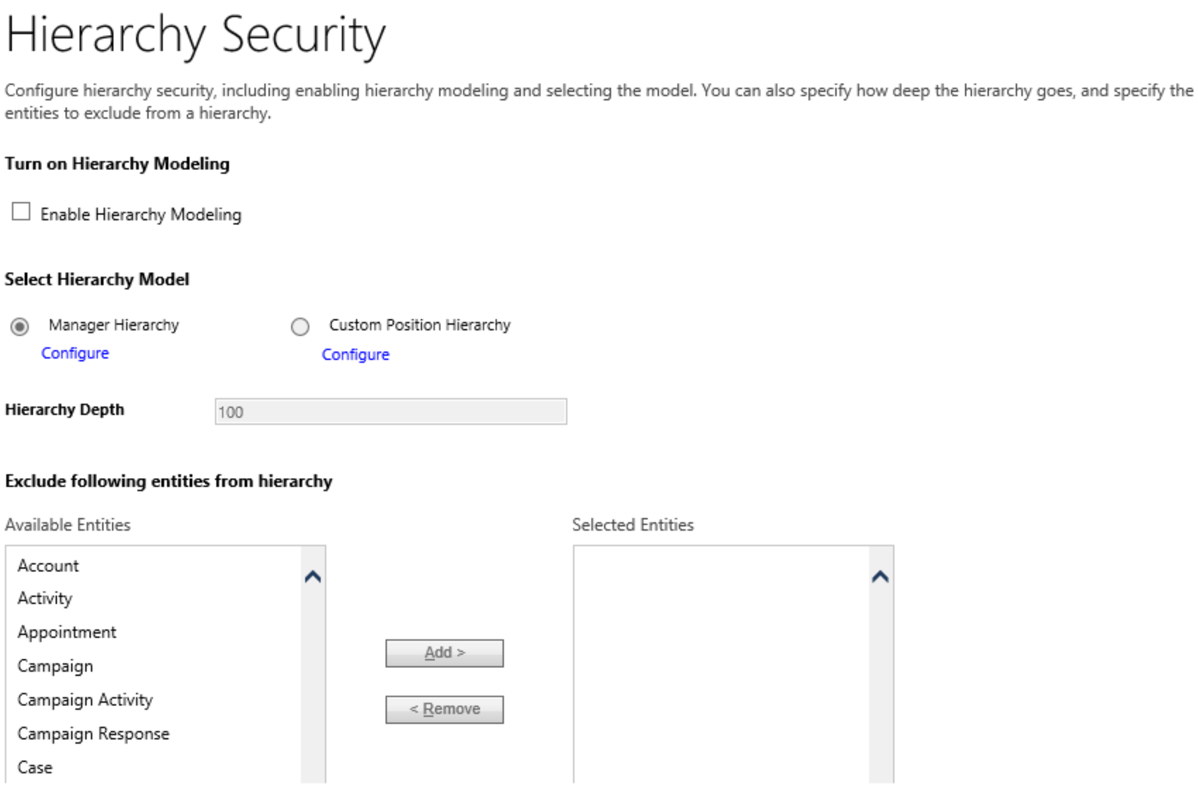
Positions
Add new Position. Modify the Position description.

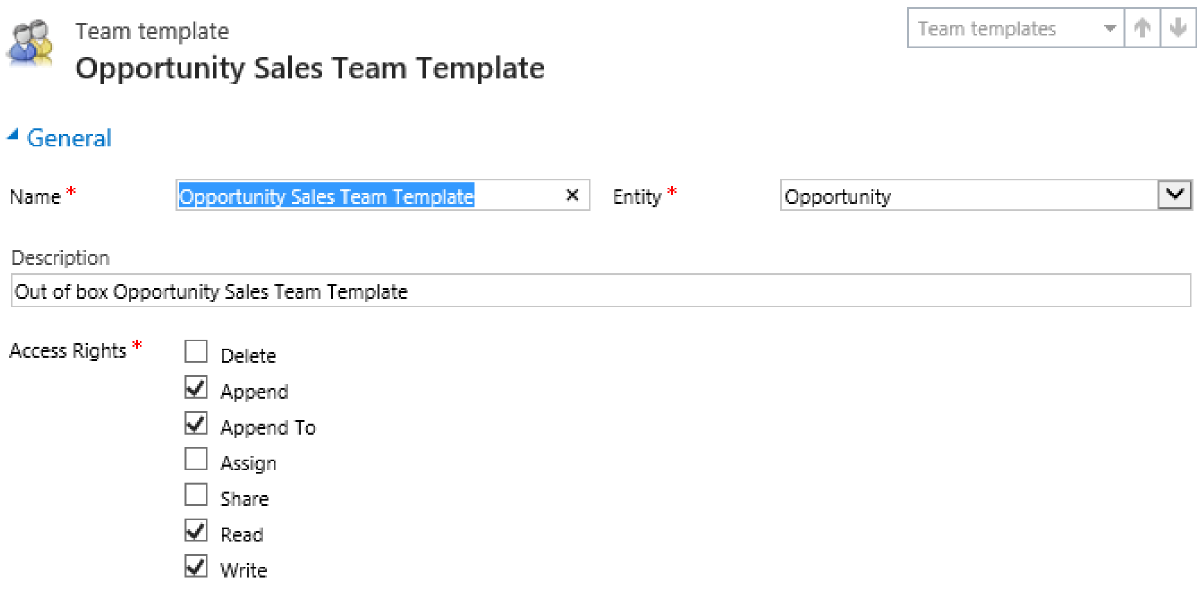
Access Team Templates
Add new team templates. Modify the team template description.

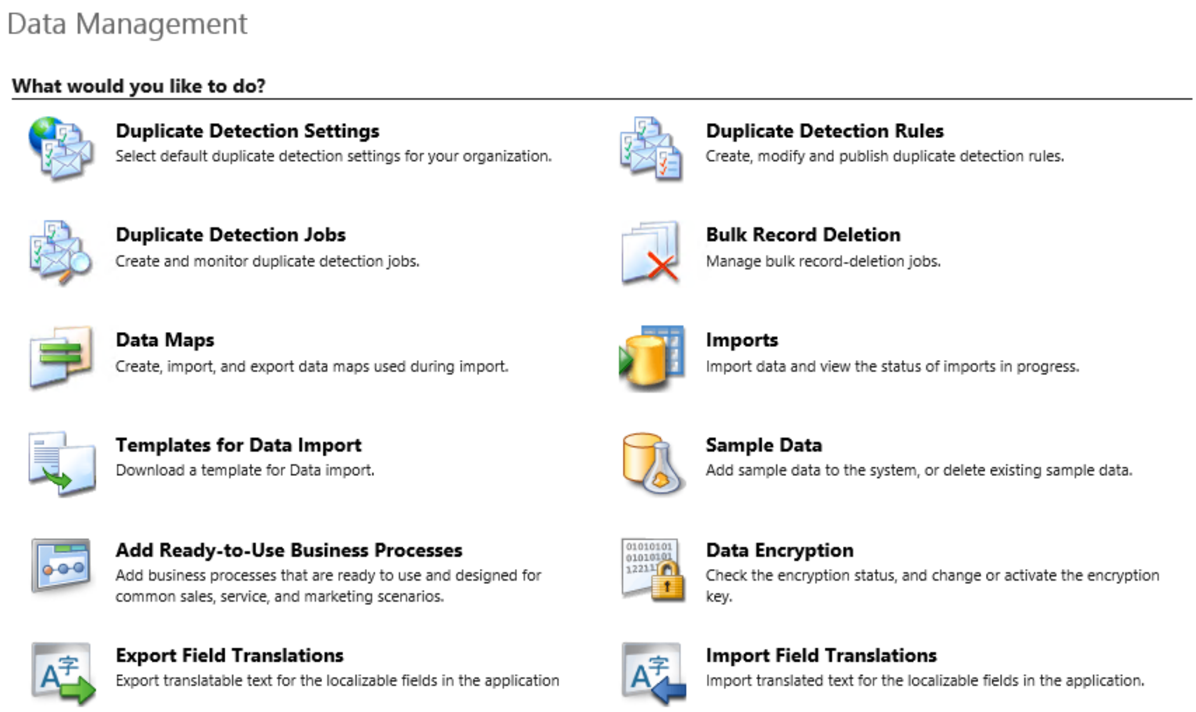
Active Positions

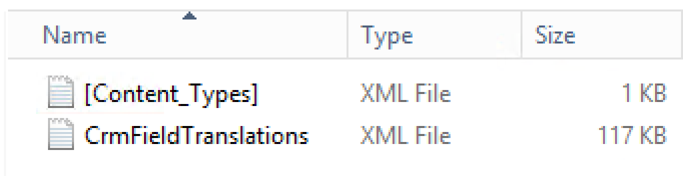
Name	Parent Position
CEO	
VP Sales	CEO
Salesperson	VP Sales
VP Delivery	CEO
VP Service	CEO
Service Respresentative	VP Service

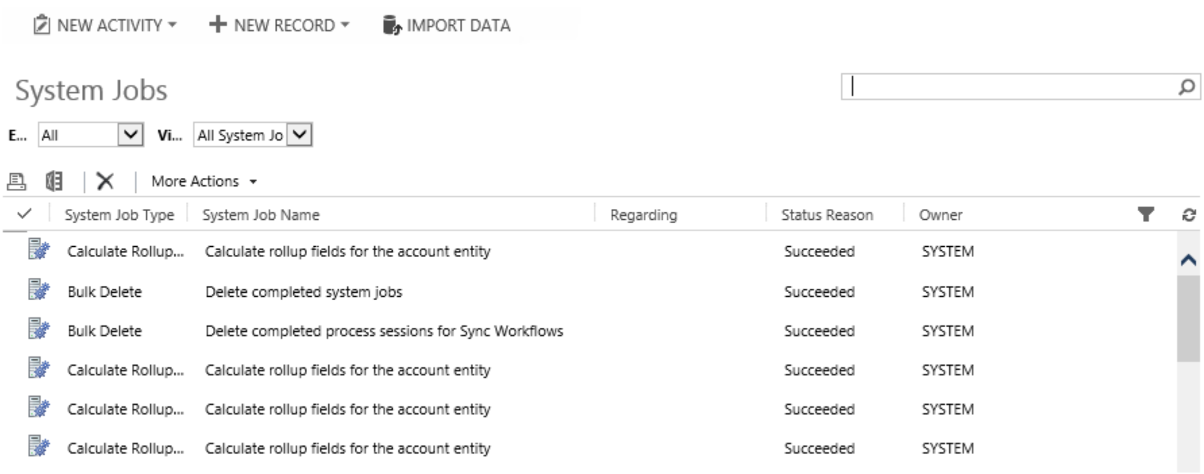

POSITION
VP Sales
CEO
VP Delivery
VP Sales
VP Service
CEO
Name
CEO
VP Delivery
Name
VP Delivery
VP Sales
Name
VP Sales
VP Service
Name
VP Service

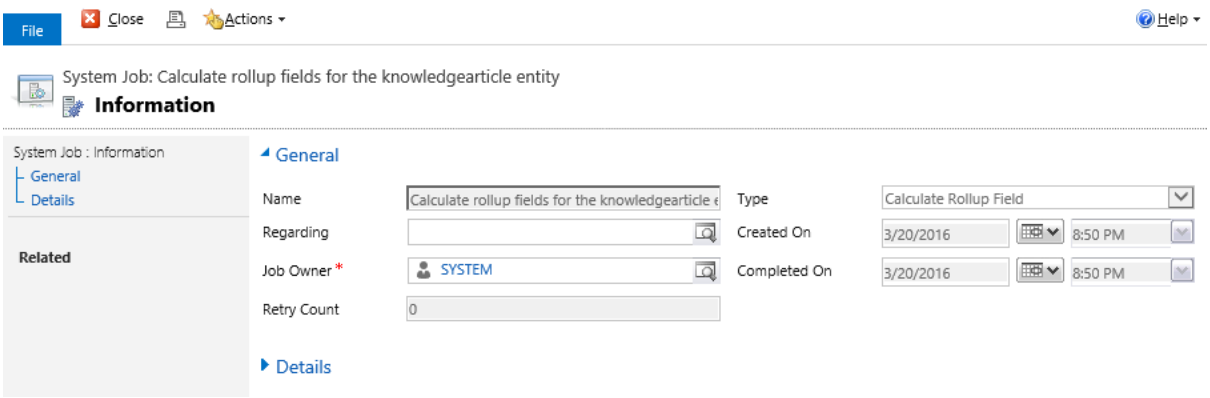

Hierarchy Security
Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.
Turn on Hierarchy Modeling
Enable Hierarchy Modeling
Select Hierarchy Model
Manager Hierarchy
Configure
Custom Position Hierarchy
Configure
Hierarchy Depth
100
Exclude following entities from hierarchy
Available Entities
Account
Activity
Appointment
Campaign
Campaign Activity
Campaign Response
Case
Add >
< Remove
Selected Entities

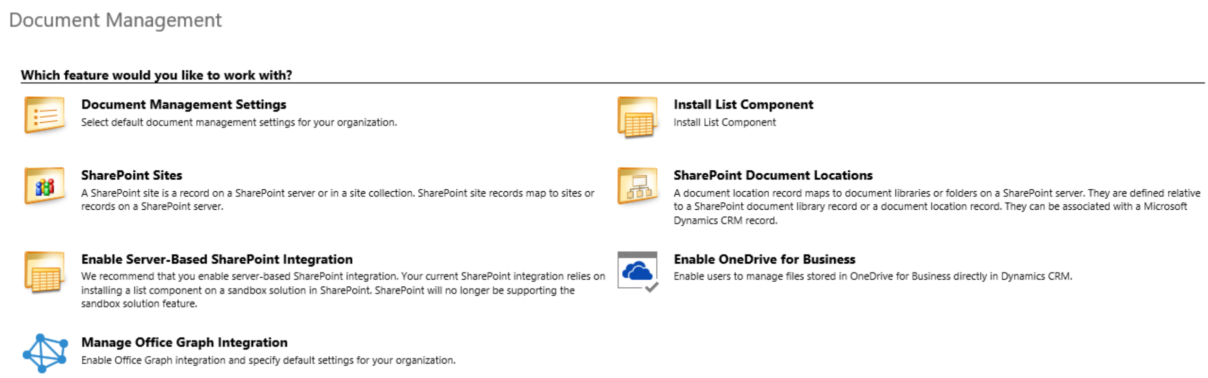

Team template
Opportunity Sales Team Template
Team templates
General
Name *
Opportunity Sales Team Template
Entity *
Opportunity
Description
Out of box Opportunity Sales Team Template
Access Rights *
Delete
Append
Append To
Assign
Share
Read
Write

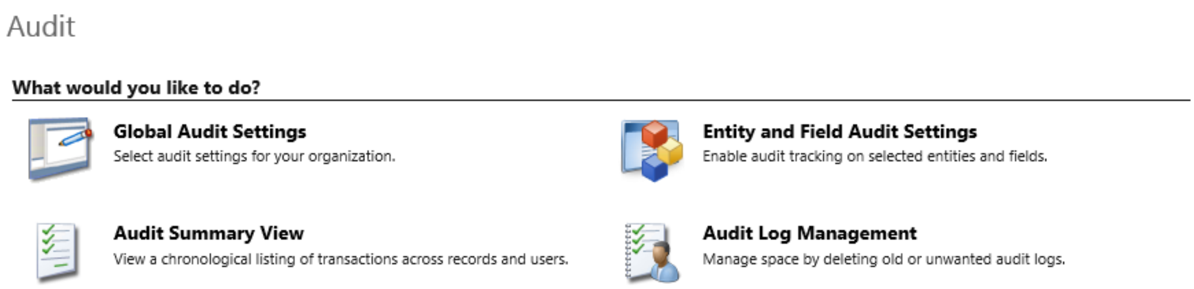

Data Management
What would you like to do?
Duplicate Detection Settings
Select default duplicate detection settings for your organization.
Duplicate Detection Rules
Create, modify and publish duplicate detection rules.
Duplicate Detection Jobs
Create and monitor duplicate detection jobs.
Bulk Record Deletion
Manage bulk record-deletion jobs.
Data Maps
Create, import, and export data maps used during import.
Imports
Import data and view the status of imports in progress.
Templates for Data Import
Download a template for Data import.
Sample Data
Add sample data to the system, or delete existing sample data.
Add Ready-to-Use Business Processes
Add business processes that are ready to use and designed for common sales, service, and marketing scenarios.
Data Encryption
Check the encryption status, and change or activate the encryption key.
Export Field Translations
Export translatable text for the localizable fields in the application
Import Field Translations
Import translated text for the localizable fields in the application.

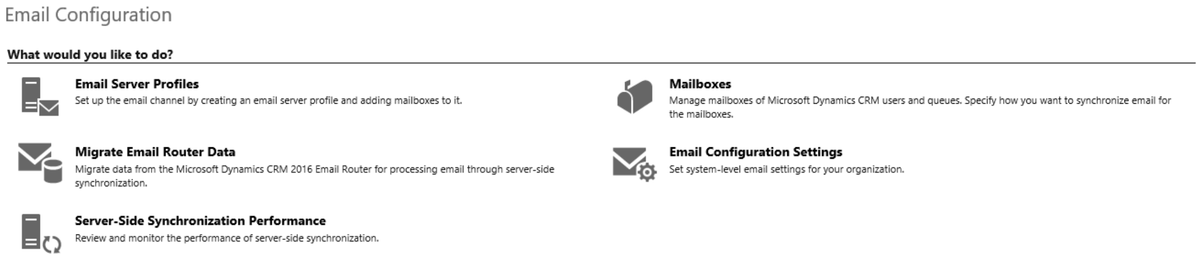

Name
Type
Size
[Content_Types]
XML File
1 KB
CrmFieldTranslations
XML File
117 KB

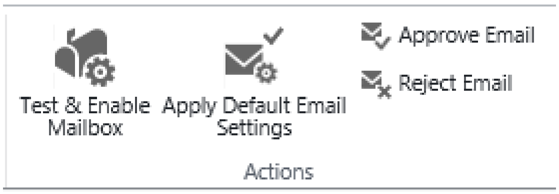

NEW ACTIVITY
NEW RECORD
IMPORT DATA
System Jobs
E... All
Vi... All System Jo
More Actions
System Job Type
System Job Name
Regarding
Status Reason
Owner
Calculate Rollup... Calculate rollup fields for the account entity Succeeded SYSTEM
Bulk Delete Delete completed system jobs Succeeded SYSTEM
Bulk Delete Delete completed process sessions for Sync Workflows Succeeded SYSTEM
Calculate Rollup... Calculate rollup fields for the account entity Succeeded SYSTEM
Calculate Rollup... Calculate rollup fields for the account entity Succeeded SYSTEM
Calculate Rollup... Calculate rollup fields for the account entity Succeeded SYSTEM

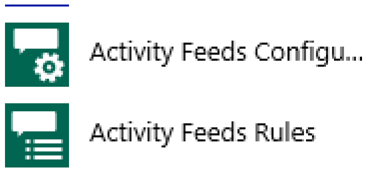

File
Close
Actions
Help
System Job: Calculate rollup fields for the knowledgearticle entity
Information
System Job : Information
General
Details
Related
General
Name
Calculate rollup fields for the knowledgearticle e
Type
Calculate Rollup Field
Regarding
Created On
3/20/2016
8:50 PM
Job Owner *
SYSTEM
Completed On
3/20/2016
8:50 PM
Retry Count
0
Details

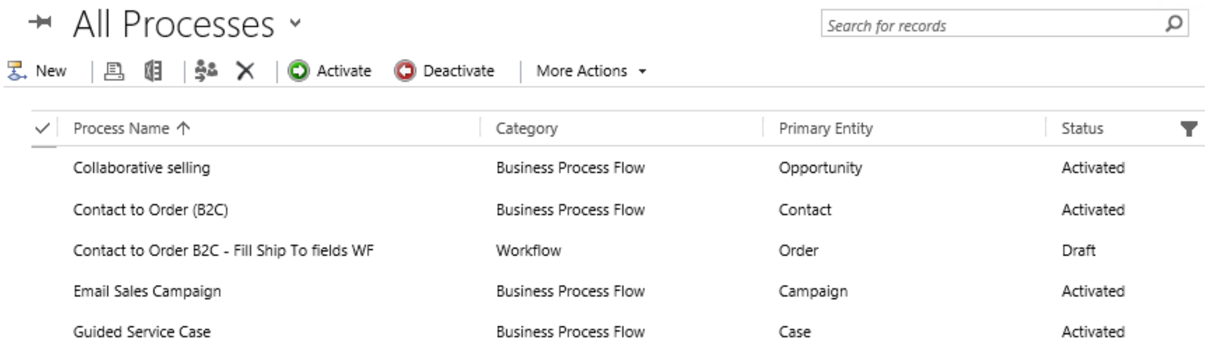

Document Management
Which feature would you like to work with?
Document Management Settings
Select default document management settings for your organization.
Install List Component
Install List Component
SharePoint Sites
A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.
SharePoint Document Locations
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics CRM record.
Enable Server-Based SharePoint Integration
We recommend that you enable server-based SharePoint integration. Your current SharePoint integration relies on installing a list component on a sandbox solution in SharePoint. SharePoint will no longer be supporting the sandbox solution feature.
Enable OneDrive for Business
Enable users to manage files stored in OneDrive for Business directly in Dynamics CRM.
Manage Office Graph Integration
Enable Office Graph integration and specify default settings for your organization.

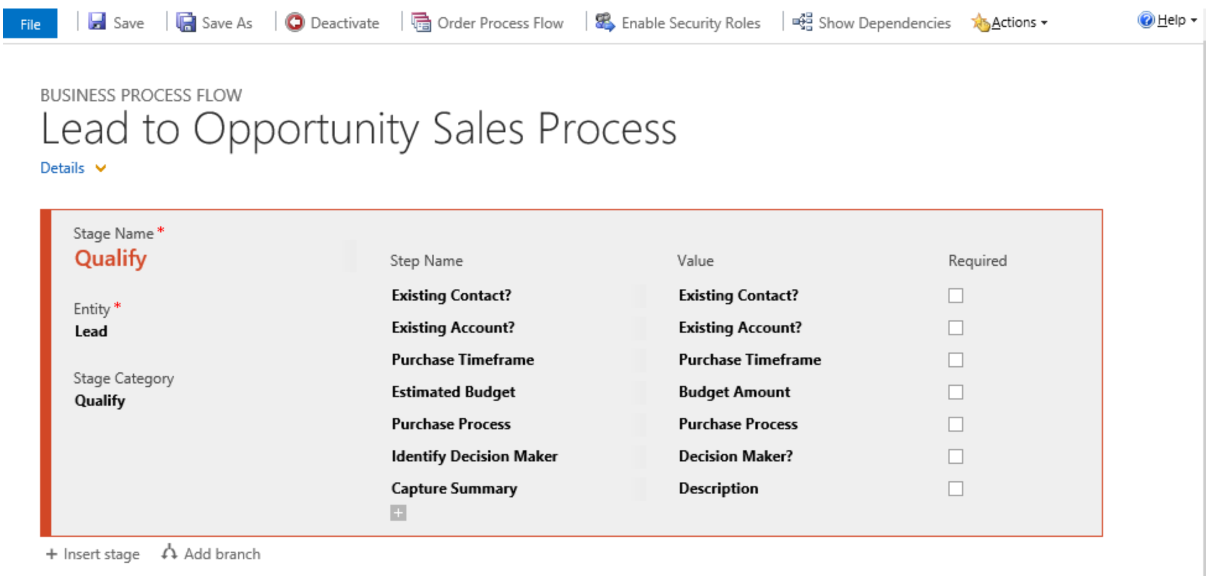

Audit
What would you like to do?
Global Audit Settings
Select audit settings for your organization.
Entity and Field Audit Settings
Enable audit tracking on selected entities and fields.
Audit Summary View
View a chronological listing of transactions across records and users.
Audit Log Management
Manage space by deleting old or unwanted audit logs.

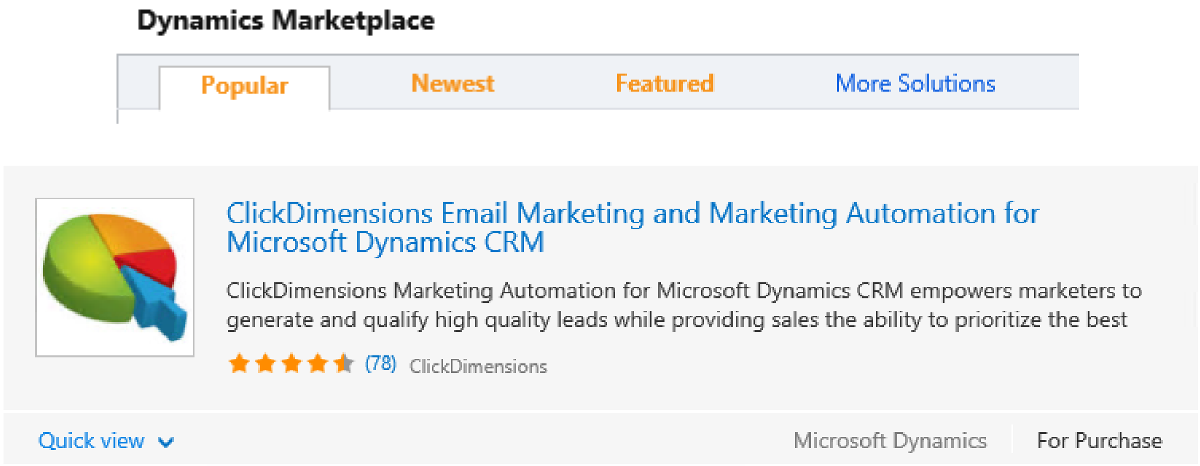

Email Configuration
What would you like to do?
Email Server Profiles
Set up the email channel by creating an email server profile and adding mailboxes to it.
Mailboxes
Manage mailboxes of Microsoft Dynamics CRM users and queues. Specify how you want to synchronize email for the mailboxes.
Migrate Email Router Data
Migrate data from the Microsoft Dynamics CRM 2016 Email Router for processing email through server-side synchronization.
Email Configuration Settings
Set system-level email settings for your organization.
Server-Side Synchronization Performance
Review and monitor the performance of server-side synchronization.

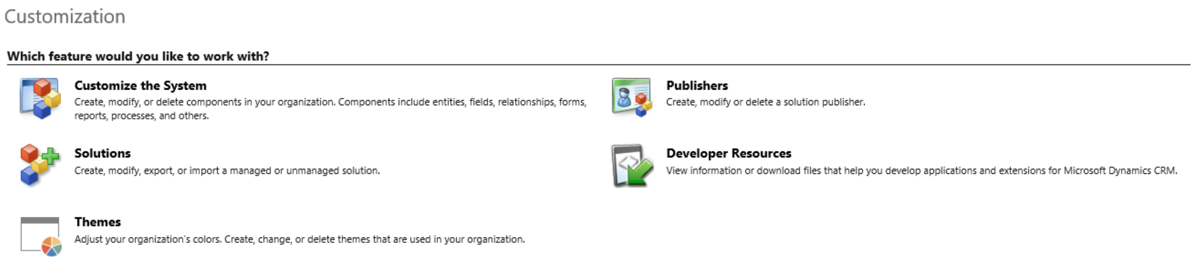

Test & Enable Mailbox
Apply Default Email Settings
Approve Email
Reject Email
Actions


Activity Feeds Configu...
Activity Feeds Rules

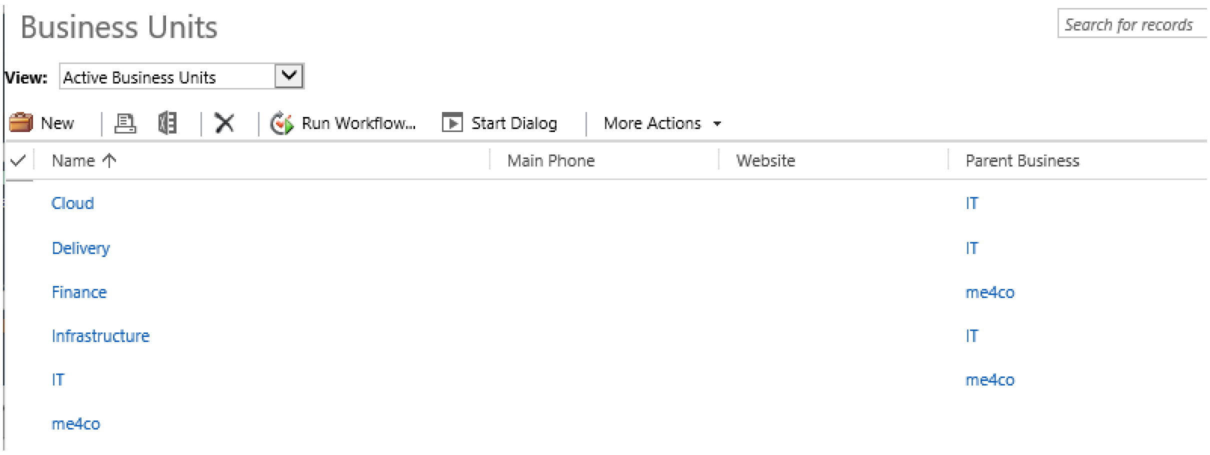

All Processes
Search for records
New
Activate
Deactivate
More Actions
Process Name
Category
Primary Entity
Status
Collaborative selling
Business Process Flow
Opportunity
Activated
Contact to Order (B2C)
Business Process Flow
Contact
Activated
Contact to Order B2C - Fill Ship To fields WF
Workflow
Order
Draft
Email Sales Campaign
Business Process Flow
Campaign
Activated
Guided Service Case
Business Process Flow
Case
Activated


File
Save
Save As
Deactivate
Order Process Flow
Enable Security Roles
Show Dependencies
Actions
Help
BUSINESS PROCESS FLOW
Lead to Opportunity Sales Process
Details
Stage Name *
Qualify
Entity *
Lead
Stage Category
Qualify
Step Name
Value
Required
Existing Contact?
Existing Contact?
Existing Account?
Existing Account?
Purchase Timeframe
Purchase Timeframe
Estimated Budget
Budget Amount
Purchase Process
Purchase Process
Identify Decision Maker
Decision Maker?
Capture Summary
Description
Insert stage
Add branch


Dynamics Marketplace
Popular
Newest
Featured
More Solutions
ClickDimensions Email Marketing and Marketing Automation for Microsoft Dynamics CRM
ClickDimensions Marketing Automation for Microsoft Dynamics CRM empowers marketers to generate and qualify high quality leads while providing sales the ability to prioritize the best
(78) ClickDimensions
Quick view
Microsoft Dynamics
For Purchase


Customization
Which feature would you like to work with?
Customize the System
Create, modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.
Publishers
Create, modify or delete a solution publisher.
Solutions
Create, modify, export, or import a managed or unmanaged solution.
Developer Resources
View information or download files that help you develop applications and extensions for Microsoft Dynamics CRM.
Themes
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.


All Solutions
Search for records
More Actions
Name
Display Name
Version
Installed On
Package Typ...
Publisher
BusinessProcesses
Business Processes
1.0.0.0
11/6/2014
Managed
Microsoft Dynamics


Business Units
Search for records
View: Active Business Units
New
Run Workflow...
Start Dialog
More Actions
Name
Main Phone
Website
Parent Business
Cloud
IT
Delivery
IT
Finance
me4co
Infrastructure
IT
IT
me4co
me4co

File | Save and Close | Actions | Help

Security Role: role1

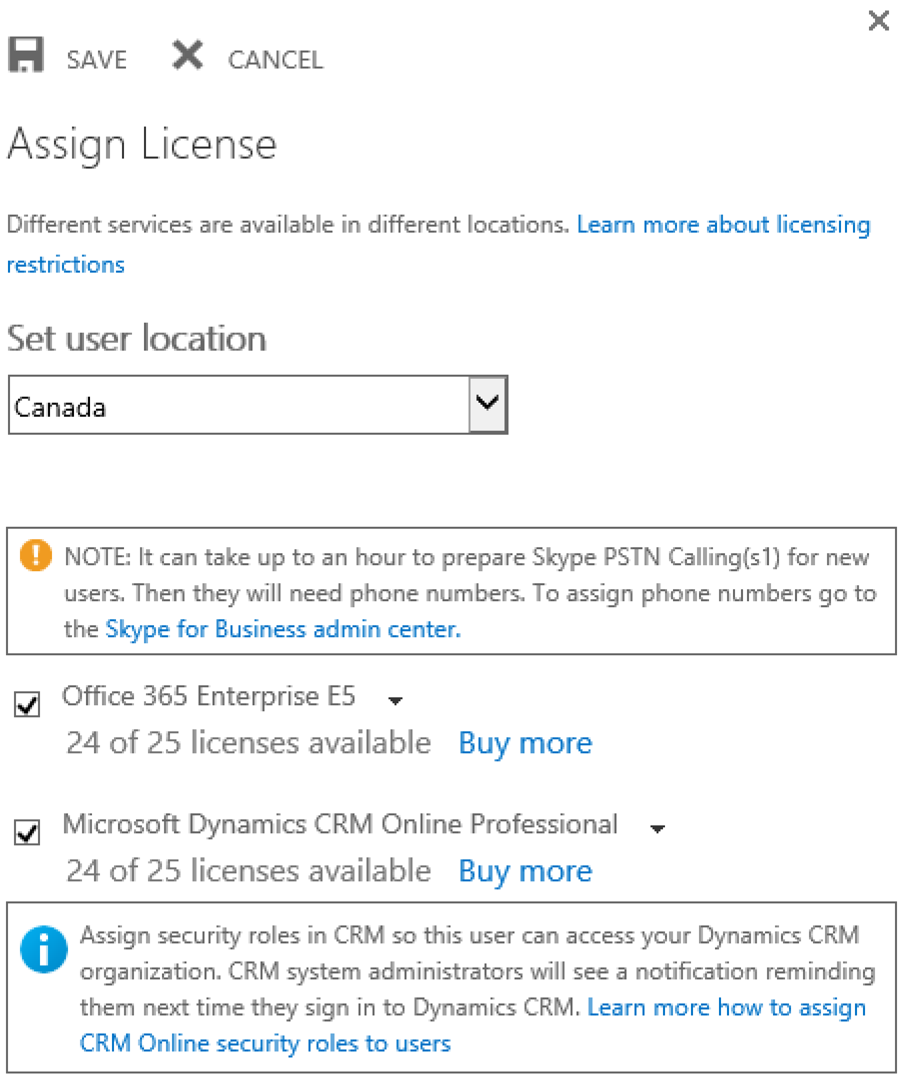
Working on solution: Default Solution

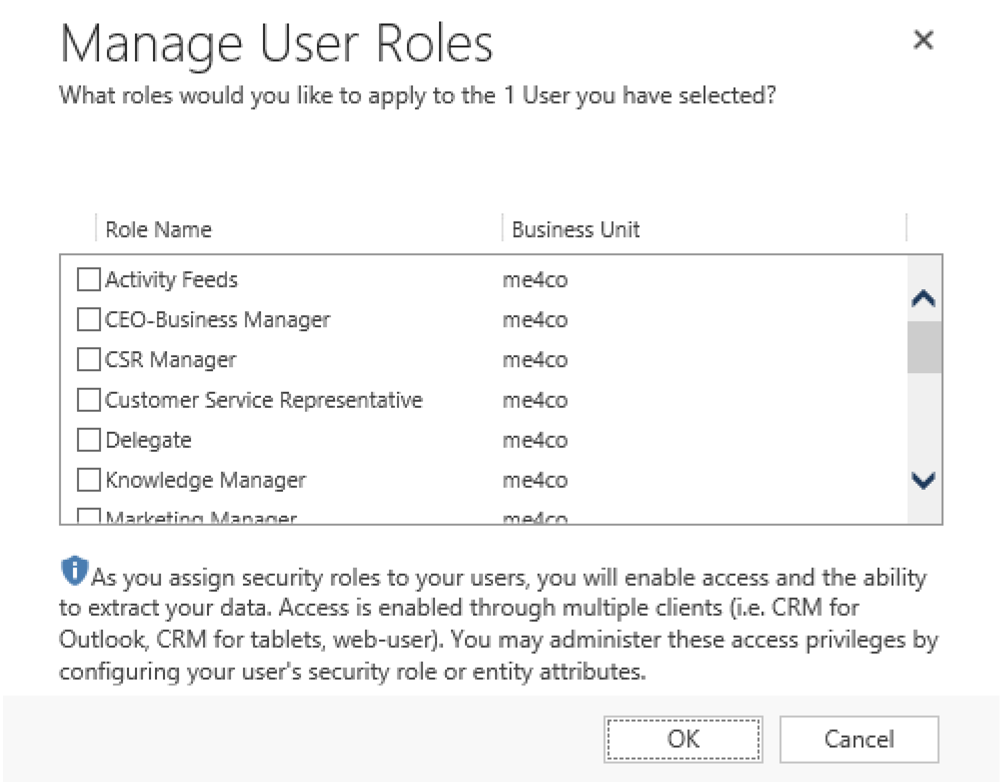
Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Custom Entities

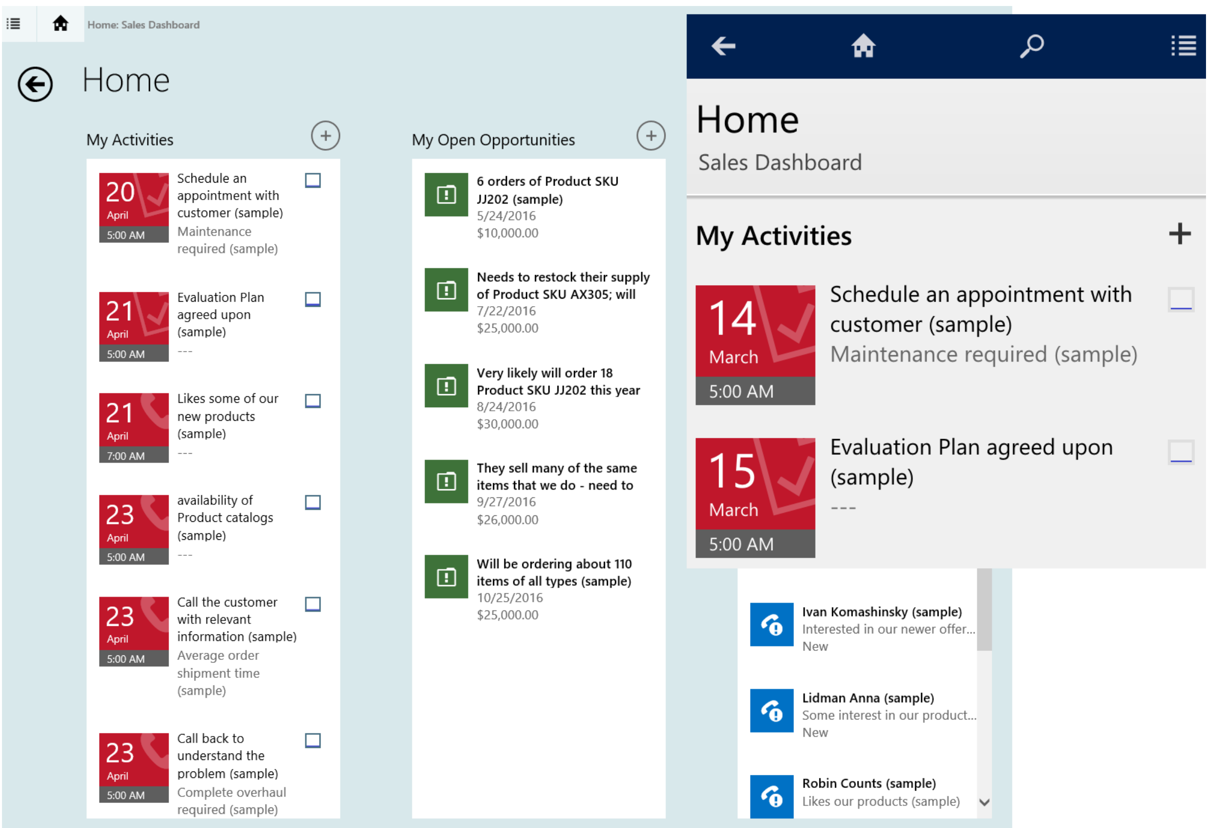
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	○	○	○	○	○	○	○	○
Activity	○	○	○	○	○	○	○	○
Announcement	○	○	○	○		○		
Application File	○	○	○	○				
Connection	○	○	○	○	○	○	○	○
Connection Role	○	○	○	○	○	○		
Contact	○	○	○	○	○	○	○	○
Customer Relationship	○	○	○	○	○	○	○	○
Data Import	○	○	○	○	○	○	○	○
Data Map	○	○	○	○	○	○	○	○
Data Performance Dashboard	○	○	○	○	○	○		
Document Location	○	○	○	○	○	○	○	○
Duplicate Detection Rule	○	○	○	○	○	○	○	○
Email Template	○	○	○	○	○	○	○	○
Follow	○	○		○	○			
Import Source File	○	○	○	○	○	○	○	○
Language	○	○	○	○	○	○		
Lead	○	○	○	○	○	○	○	○
Mail Merge Template	○	○	○	○	○	○	○	○
Mobile Offline Profile	○	○	○	○	○	○	○	○
Note	○	○	○	○	○	○	○	○
Office Graph Document		○						
Opportunity	○	○	○	○	○	○	○	○

Key

○ None Selected | User | Business Unit | Parent: Child Business Units | Organization


SAVE
CANCEL
Assign License
Different services are available in different locations. Learn more about licensing restrictions
Set user location
Canada
NOTE: It can take up to an hour to prepare Skype PSTN Calling(s1) for new users. Then they will need phone numbers. To assign phone numbers go to the Skype for Business admin center.
Office 365 Enterprise E5
24 of 25 licenses available Buy more
Microsoft Dynamics CRM Online Professional
24 of 25 licenses available Buy more
Assign security roles in CRM so this user can access your Dynamics CRM organization. CRM system administrators will see a notification reminding them next time they sign in to Dynamics CRM. Learn more how to assign CRM Online security roles to users


Manage User Roles
What roles would you like to apply to the 1 User you have selected?
Role Name
Business Unit
Activity Feeds me4co
CEO-Business Manager me4co
CSR Manager me4co
Customer Service Representative me4co
Delegate me4co
Knowledge Manager me4co
Marketing Manager me4co
As you assign security roles to your users, you will enable access and the ability to extract your data. Access is enabled through multiple clients (i.e. CRM for Outlook, CRM for tablets, web-user). You may administer these access privileges by configuring your user's security role or entity attributes.
OK
Cancel


Home: Sales Dashboard
Home
My Activities
20 April 5:00 AM Schedule an appointment with customer (sample) Maintenance required (sample)
21 April 5:00 AM Evaluation Plan agreed upon (sample) ---
21 April 7:00 AM Likes some of our new products (sample) ---
23 April 5:00 AM availability of Product catalogs (sample) ---
23 April 5:00 AM Call the customer with relevant information (sample) Average order shipment time (sample)
23 April 5:00 AM Call back to understand the problem (sample) Complete overhaul required (sample)
My Open Opportunities
6 orders of Product SKU JJ202 (sample) 5/24/2016 $10,000.00
Needs to restock their supply of Product SKU AX305; will 7/22/2016 $25,000.00
Very likely will order 18 Product SKU JJ202 this year 8/24/2016 $30,000.00
They sell many of the same items that we do - need to 9/27/2016 $26,000.00
Will be ordering about 110 items of all types (sample) 10/25/2016 $25,000.00
Home
Sales Dashboard
My Activities
14 March 5:00 AM Schedule an appointment with customer (sample) Maintenance required (sample)
15 March 5:00 AM Evaluation Plan agreed upon (sample) ---
Ivan Komashinsky (sample) Interested in our newer offer... New
Lidman Anna (sample) Some interest in our product... New
Robin Counts (sample) Likes our products (sample)