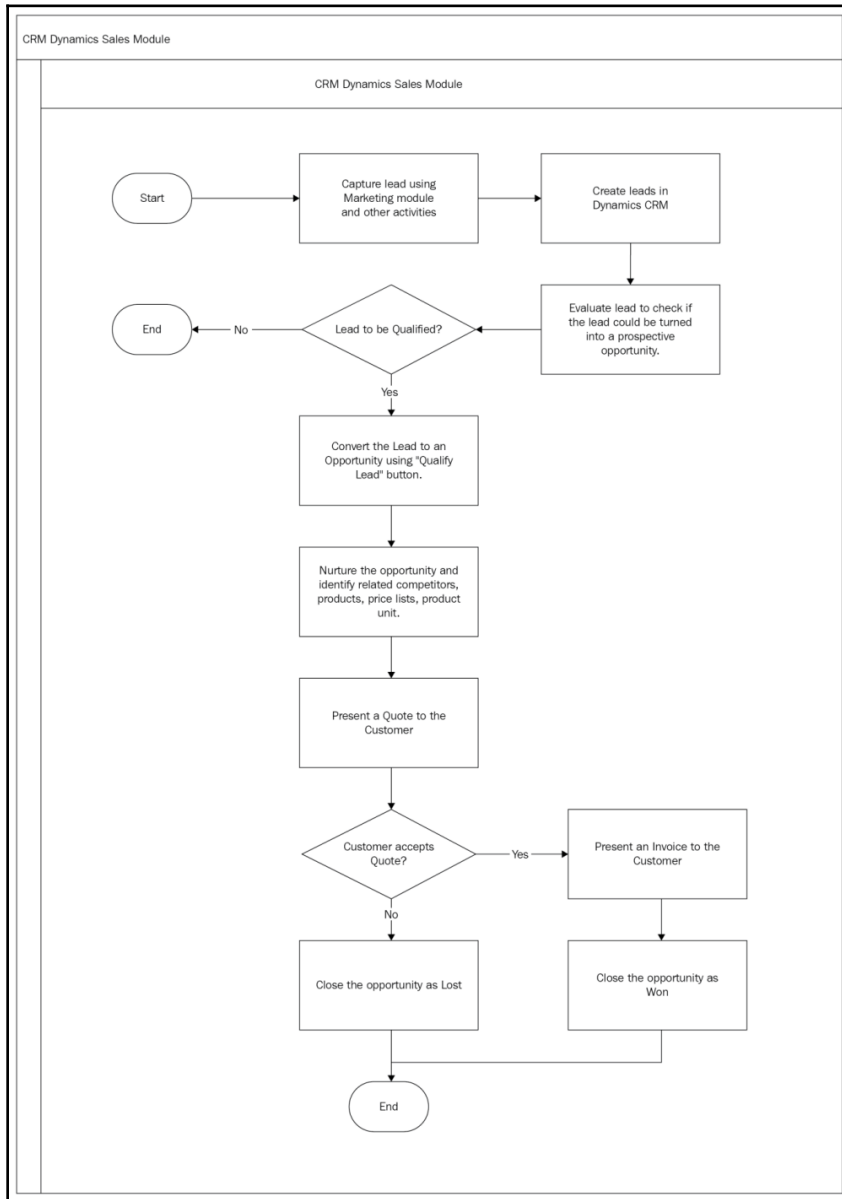
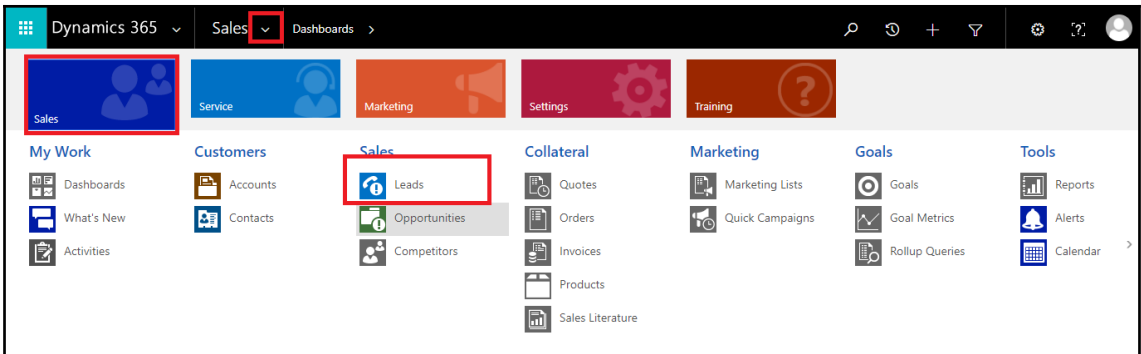
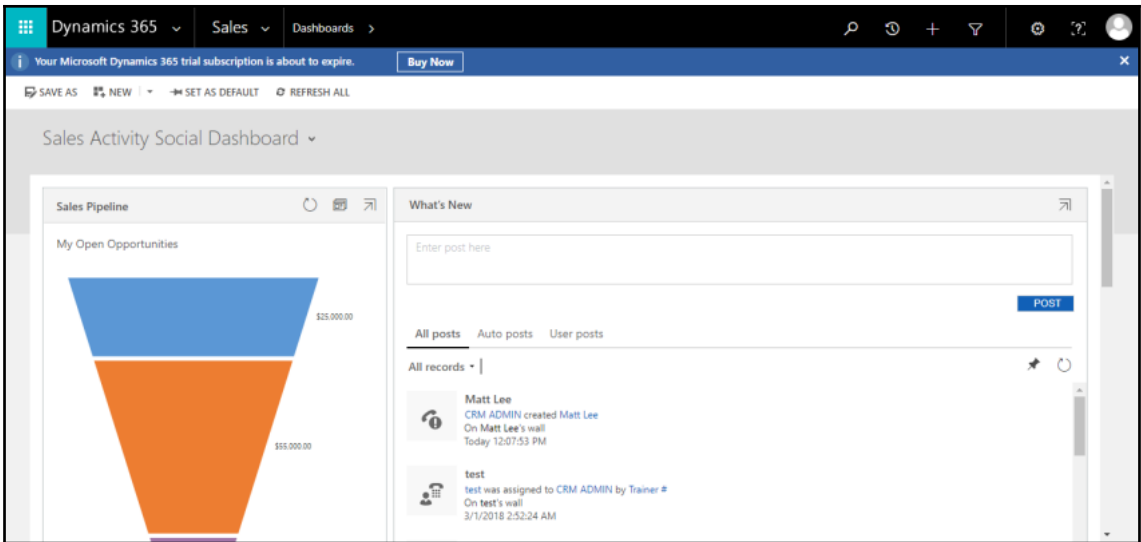


Chapter 1: Working with Sales





Dynamics 365 Sales Leads > New Lead

LEAD: New Lead

Lead Source: Rating: Warm Status: New Owner: CRM ADMIN

Qualify (Active) → Develop → Propose → Close

Existing Contact? [click to enter](#) Estimated Budget [click to enter](#) Capture Summary [click to enter](#)
 Existing Account? [click to enter](#) Purchase Process [click to enter](#)
 Purchase Timeframe [click to enter](#) Identify Decision Maker [mark complete](#)

Lead to Opportunity Sales Process Next Stage

Summary

CONTACT

*Topic
 *Name
 Job Title
 Business Phone

POSTS

Enter post here

POST

STAKEHOLDERS

Name ↑ Role

To enable this content, create the record.

Dynamics 365 Sales Leads > Matt Lee

LEAD: Matt Lee

Lead Source: Rating: Warm Status: New Owner: CRM ADMIN

Qualify (Active for 3 hours) → Develop → Propose → Close

Existing Contact? [click to enter](#) Estimated Budget [click to enter](#) Capture Summary [click to enter](#)
 Existing Account? [click to enter](#) Purchase Process [click to enter](#)
 Purchase Timeframe [click to enter](#) Identify Decision Maker [mark complete](#)

Lead to Opportunity Sales Process (Active for 3 hours) Next Stage

Summary

CONTACT

*Topic Company x interested in products
 *Name Matt Lee
 Job Title
 Business Phone

POSTS

Enter post here

POST

STAKEHOLDERS

Name ↑ Role

No stakeholders found.

LEAD: Matt Lee

Lead Source: Rating: Warm Status: New Owner: CRM ADMIN

Qualify (Active for 3 hours) → Develop → Propose → Close

Existing Contact? [click to enter](#) Estimated Budget [click to enter](#) Capture Summary [click to enter](#)
 Existing Account? [click to enter](#) Purchase Process [click to enter](#)
 Purchase Timeframe [click to enter](#) Identify Decision Maker [mark complete](#)

Lead to Opportunity Sales Process (Active for 3 hours) Next Stage

Navigation bar: [Navigate to other application](#) | **QUALIFY** | PROCESS | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | EMAIL A LINK

LEAD
 Matt Lee

Lead Source: Rating: Warm Status: New Owner: CRM ADMIN

Process flow: **Qualify (Active for 3 hours)** → Develop → Propose → Close

Existing Contact?	click to enter	Estimated Budget	click to enter	Capture Summary	click to enter
Existing Account?	click to enter	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

Lead to Opportunity Sales Process (Active for 3 hours) **Next Stage**

Dynamics 365 | Sales | Opportunities > Company x intereste... >

Navigation bar: NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTU... | FORM | PROCESS | ASSIGN | EMAIL A LINK | DELETE

OPPORTUNITY
 Company x interested in Products A

Est. Close Date: Est. Revenue: Status: In Progress Owner: CRM ADMIN

Process flow: **Qualify** → **Develop (Active for 1 minute)** → Propose → Close

Customer Need	click to enter	Identify Competitors	mark complete
Proposed Solution	click to enter		
Identify Stakeholders	mark complete		

Lead to Opportunity Sales Process (Active for 3 hours) **Next Stage**

Summary

*Topic	Company x interested in Products A
Contact	Matt Lee
Account	.....
Purchase Timeframe	.....
*Currency	US Dollar

POSTS | ACTIVITIES | NOTES

STAKEHOLDERS

Name	Role
Matt Lee	Stakeholder

POST

All posts | Auto posts | User posts

LEAD
 Matt Lee

Lead Source: Rating: Warm Status: Qualified Owner: CRM ADMIN

Process flow: **Qualify** → **Develop (Active for 2 minutes)** → Propose → Close

Existing Contact?	Matt Lee	Estimated Budget	click to enter	Capture Summary	click to enter
Existing Account?	click to enter	Purchase Process	click to enter		
Purchase Timeframe	click to enter	Identify Decision Maker	mark complete		

Lead to Opportunity Sales Process (Active for 3 hours) **Set Active**

Summary

*Topic	Company x interested in products
*Name	Matt Lee
Job Title	.....
Business Phone	.....

POSTS | ACTIVITIES | NOTES

STAKEHOLDERS

Name	Role
Matt Lee	Stakeholder

POST

All posts | Auto posts | User posts

OPPORTUNITY
Company x interested in Products A

Est. Close Date: 4/25/2018 | Est. Revenue: \$5,000.00 | Status: In Progress | Owner: CRM ADMIN

Process Flow: Qualify (Completed) → Develop (Active for 3 minutes) → Propose → Close

Customer Need: click to enter
Proposed Solution: click to enter
Identify Stakeholders: mark complete

Identify Competitors: mark complete

Lead to Opportunity Sales Process (Active for 3 hours) | Next Stage

OPPORTUNITY
Company x interested in Products A

Est. Close Date: 4/25/2018 | Est. Revenue: \$5,000.00

Process Flow: Qualify (Completed) → Develop (Active for 3 minutes) → Propose

Customer Need: Company needs a
Proposed Solution: click to enter
Identify Stakeholders: completed

Identify Competitors: mark complete

Lead to Opportunity Sales

Dynamics 365 | Sales | Opportunities > Company x intereste... >

OPPORTUNITY
Company x interested in Products A

Est. Close Date: 4/25/2018 | Est. Revenue: \$5,000.00 | Status: In Progress | Owner: CRM ADMIN

Process Flow: Qualify (Completed) → Develop (Active for 3 minutes) → Propose → Close

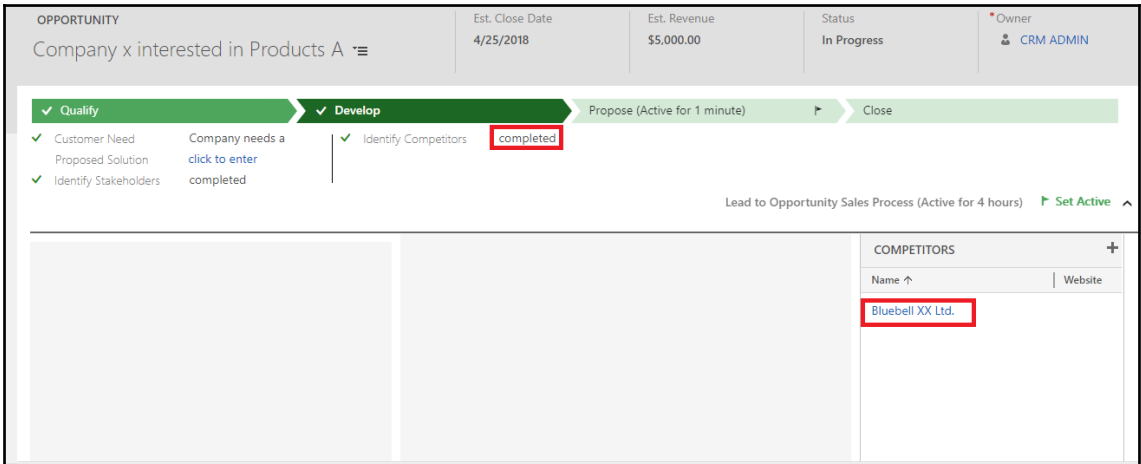
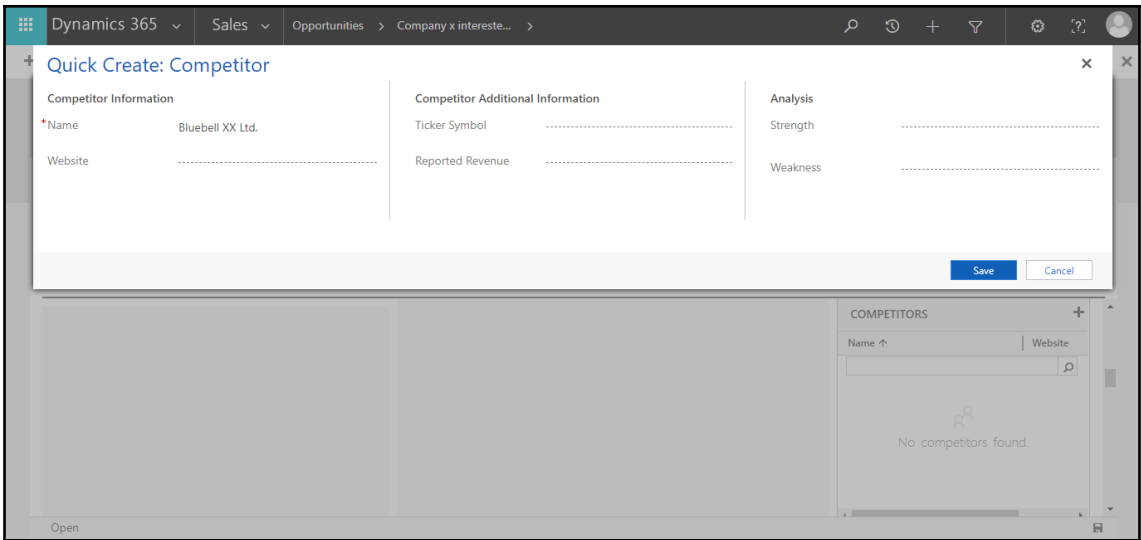
Customer Need: Company needs a
Proposed Solution: click to enter
Identify Stakeholders: completed

Identify Competitors: mark complete

Lead to Opportunity Sales Process (Active for 3 hours) | Next Stage

COMPETITORS

Name ↑	Website
No competitors found.	



OPPORTUNITY

Company x interested in Products A

Est. Close Date: 4/25/2018 | Est. Revenue: \$5,000.00 | Status: In Progress | Owner: CRM ADMIN

✓ Qualify → ✓ Develop → Propose (Active for 1 minute) → Close

Identify Sales Team [mark complete](#)
 Develop Proposal [mark complete](#)
 Complete Internal Rev... [mark complete](#)

Present Proposal [mark complete](#)

Lead to Opportunity Sales Process (Active for 4 hours) | [Next Stage](#)

COMPETITORS

Name ↑	Website
Bluebell XX Ltd.	

CLOSE AS LOST RECALCULATE OPPORTU... FORM PROCESS ASSIGN EMAIL A LINK DELETE ...

Company x interested in Products A

Develop → Close

mark complete
completed
mark complete

Present Proposal

Lead to Opportunity Sales Process (Active for 4 hours)

COMPETITORS

Name ↑
Bluebell XX Ltd.

Close Opportunity

Provide the following information about why this opportunity is being closed.

Status Reason *

Actual Revenue *

Close Date *

Competitor

Description

OPPORTUNITY
Company x interested in Products A

Est. Close Date: 4/25/2018 | Est. Revenue: \$5,000.00 | Status: Canceled | Owner: CRM ADMIN

Process Flow: Qualify → Develop → Propose (Active for 13 minutes) → Close

- Identify Sales Team: mark complete
- Develop Proposal: completed
- Complete Internal Rev...: mark complete
- Present Proposal: mark complete

Lead to Opportunity Sales Process (Active for 4 hours) | Next Stage

COMPETITORS

Name	Website
Bluebell XX Ltd.	

Lost | Read only

Dynamics 365 | Sales | Opportunities > Company x interest...

Navigation: Sales, Service, Marketing, Settings, Training

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 (highlighted): Goals, Goal Metrics, Rollup Queries

Tools: Reports, Alerts, Calendar

Dynamics 365 | Sales | Goal Metrics

Actions: NEW, EDIT, ACTIVATE, DEACTIVATE, DELETE, EMAIL A LINK, RUN WORKFLOW, START DIALOG, FLOWS

All Metrics

Search for records

Name	Status	Metric Type	Amount Data Type	Modified On
No. of Product Units	Active	Amount	Decimal	2/20/2018 2:24 PM
Revenue	Active	Amount	Money	2/20/2018 2:24 PM
No. of Cases	Active	Count		2/20/2018 2:24 PM

Charts

FILE GOAL METRIC CUSTOMIZE LIST TOOLS ROLLUP FIELDS

Save Save & Close Deactivate Save Copy a Link Email a Link Follow Unfollow Run Workflow Start Dialog Flows Word Templates Run Report

Goal Metric : Information

- General
- Rollup Fields
- Description

Related

- Common
 - Audit History
- Process Sessions
 - Background Processes
 - Real-time Processes

Goal Metric Revenue

General

Step1 : Define the metric

Name * Revenue

Metric Type * Count Amount

Amount Data Type * Money

Track Stretch Target

Rollup Fields

Step2 : Define the rollup fields for this metric to track the target's actual and in-progress values

<input type="checkbox"/>	Rollup Field	Source Record Type	Source Field	Source Record Type St...	Source
	Actual (Money)	Opportunity	Actual Revenue	Won	
	In-progress (Money)	Opportunity	Est. Revenue	Open	

Status Active

Goal Metric : Information

- General
- Rollup Fields
- Description

Related

- Common
 - Audit History
- Process Sessions
 - Background Processes
 - Real-time Processes

Goal Metric Revenue

General

Step1 : Define the metric

Name * Revenue

Metric Type * Count Amount

Amount Data Type * Money

Track Stretch Target

Rollup Fields

Step2 : Define the rollup fields for this metric to track the target's actual and in-progress values

<input checked="" type="checkbox"/>	Rollup Field	Source Record Type	Source Field	Source Record Type State...	Source Record Type Statu...	Date Field
	Actual (Money)	Opportunity	Actual Revenue	Won		Actual Close Date
	In-progress (Money)	Opportunity	Est. Revenue	Open		Est. Close Date

1 - 2 of 2 (0 selected)

Page 1

Dynamics 365 Sales Goals

NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

All Goals Search for records

Name	Goal Owner	Target	Percentage Achieved	Actual	In-Progress	Status Reason	Fiscal Period
Goal for Q1(Sample)	CRM ADMIN	\$300,000.00	0	\$0.00	\$0.00	Open	Quarter 1
Goal for Q2(Sample)	CRM ADMIN	\$350,000.00	0	\$0.00	\$0.00	Open	Quarter 2
Goal for Q3(Sample)	CRM ADMIN	\$325,000.00	0	\$0.00	\$0.00	Open	Quarter 3
Goal for Q4(Sample)	CRM ADMIN	\$375,000.00	0	\$0.00	\$0.00	Open	Quarter 4

Goal New Goal

Goals

General

Name * sdfsdf

Parent Goal

Goal Metric * Revenue

Goal Owner *

Manager *

Time Period

Goal Period Type Custom Period Fiscal Period

Fiscal Period * Quarter 4 Fiscal Year * FY2016

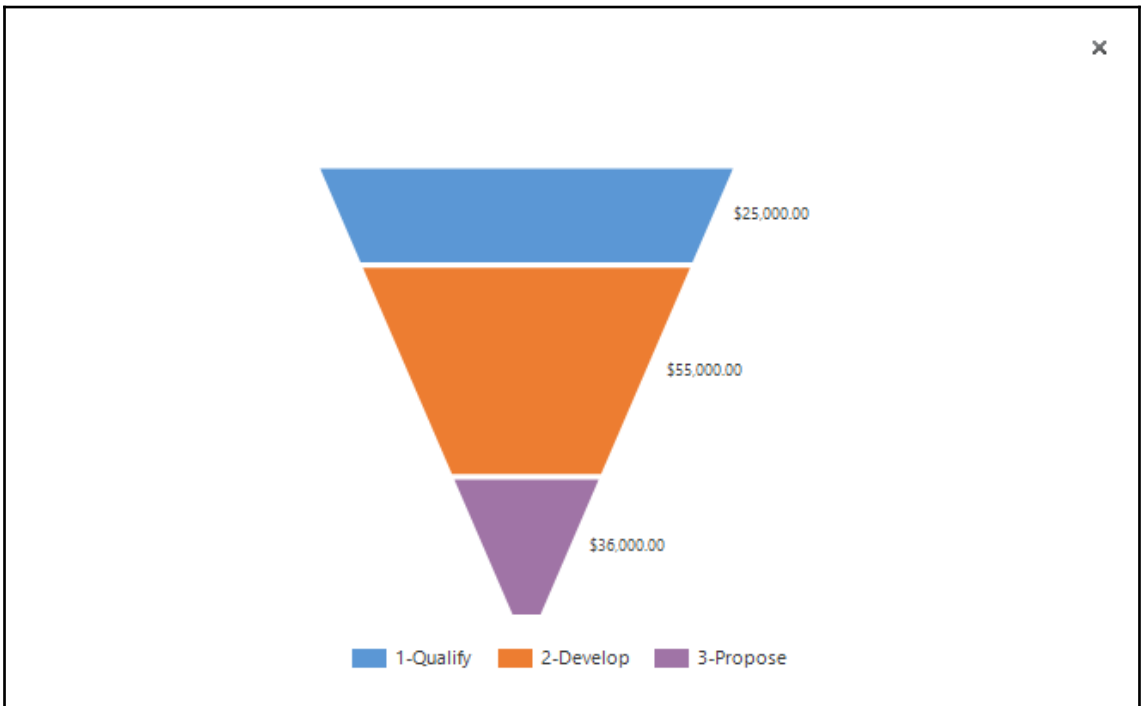
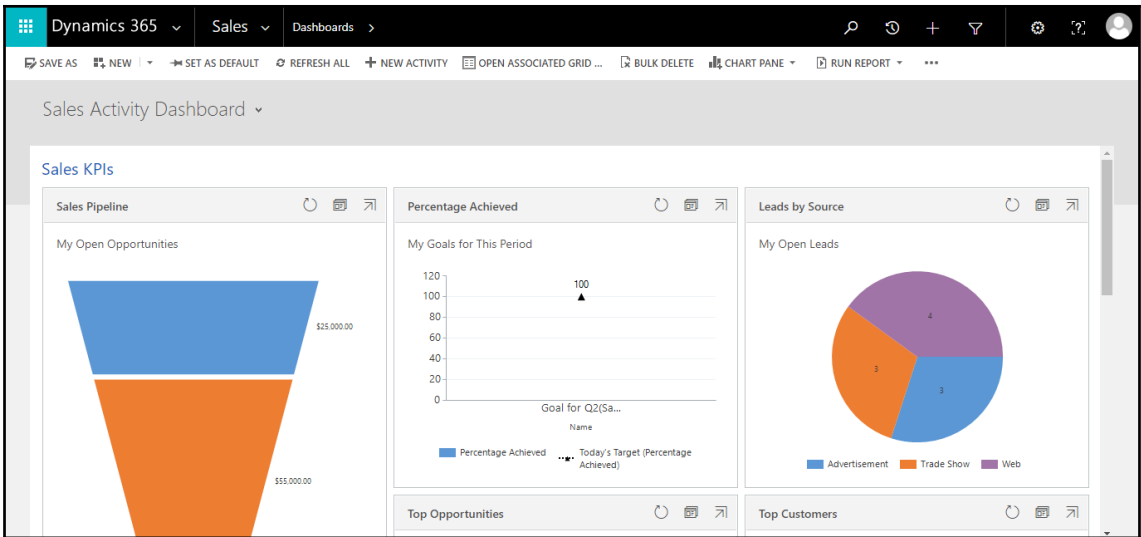
From 10/1/2016 To 12/31/2016

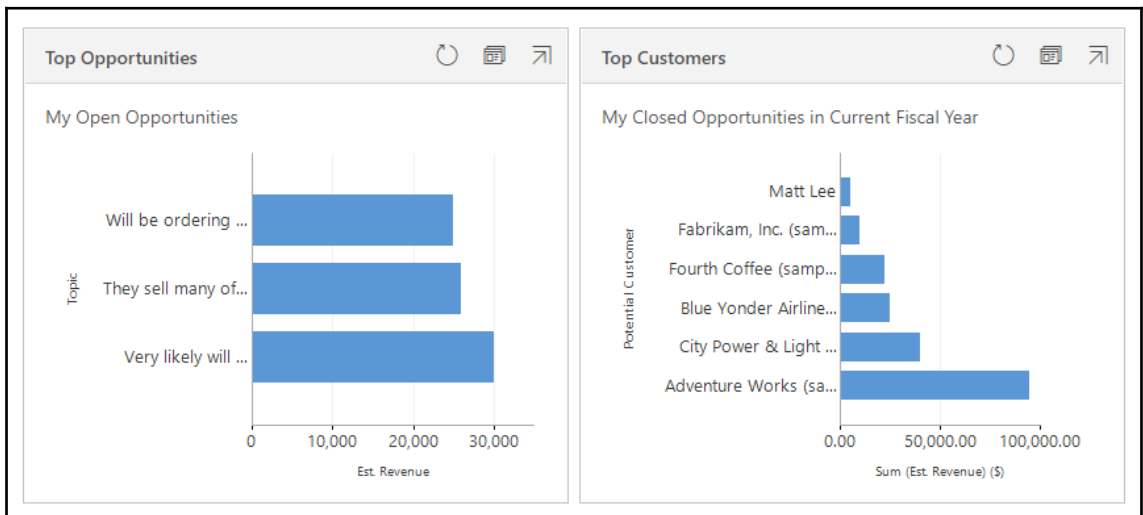
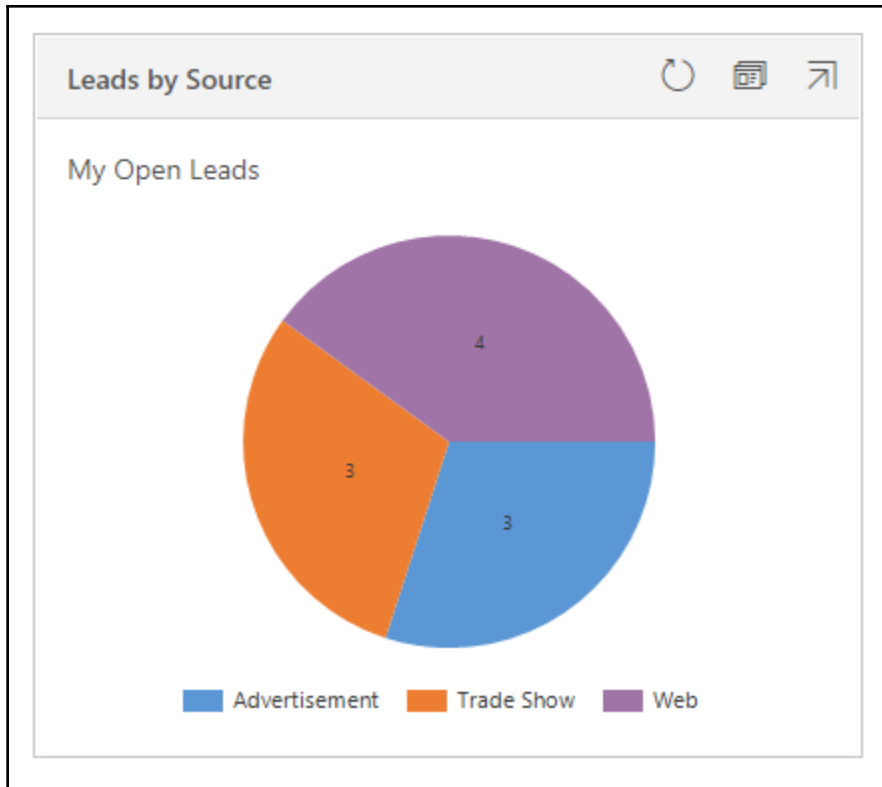
Targets

Target (Money) €0.00

Child Goals

Name	Goal Owner	Target	Percentage Achieved	Actual	In-Progress	Status Reason	Fiscal Period
------	------------	--------	---------------------	--------	-------------	---------------	---------------





Activities

My Activities ▾

Search for records 🔍

Activity Type	Subject	Regarding	Priority	Start Date	Due Date ↑
Task	Proposal Issue, Decision Due		High		
Task	Check sales literature for recent price list		Normal		
Phone Call	Very likely will order from us		High		
Campaign Resp...	Phone Call for new product	test	Normal		
Appointment	ssdsd	Abraham ...	Normal	10/24/2016 11:30 AM	10/24/2016 12:00 PM
Phone Call	Phone Call for new product	Sample Ca...	Normal	12/31/2016 12:00 AM	12/31/2016 12:00 AM
Phone Call	Phone Call for new product	Sample Ca...	Normal	12/31/2016 12:00 AM	12/31/2016 12:00 AM

1 - 7 of 8

Page 1 ▶

Sales Dashboard ▾

1 - 8 of 19

Page 1 ▶

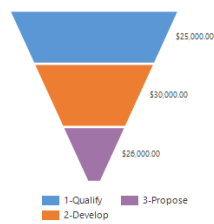
My Active Accounts ▾

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

Sales Pipeline

My Open Opportunities

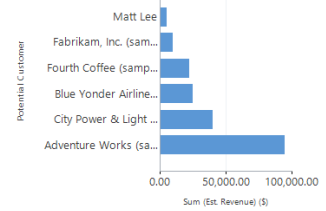


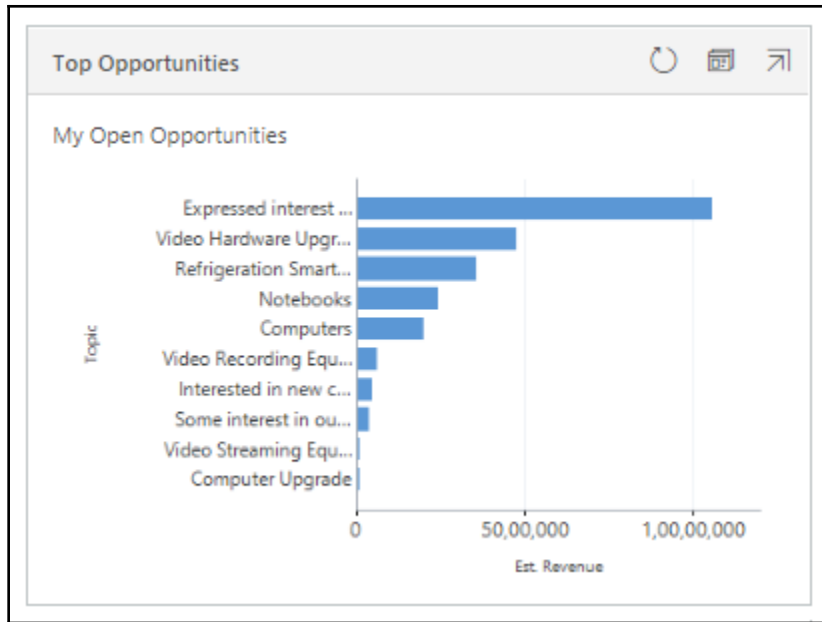
1 - 8 of 10

Page 1 ▶

Top Customers

My Closed Opportunities in Current Fiscal Year





My Active Accounts ▾	
Search for records <input type="text"/>	
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

First Name	Last Name	Company	Email	Address 1: City	Address1: Region
Martin	Arthur	Litware	MartinArthur.Litware.com	New York	USA
James	Conolly	Adventure Works	JamesConolly.Adventure Works.com	London	UK
Mahesh	Kumar	Northwind Traders	MaheshKumar.Northwind Traders.com	Mumbai	India

Sales ▾ Contacts >

Sales

Settings

Training

My Work

- Dashboards
- What's New
- Activities

Customers

- Accounts
- Contacts**

Sales

- Leads
- Opportunities
- Competitors

Go to your list of Contacts.

+ NEW DELETE ▾ EMAIL A LINK ▾ RUN REPORT ▾ EXCEL TEMPLATES ▾ EXPORT TO EXCEL ▾ IMPORT DATA ▾ CHART PANE ▾

→ Active Contacts ▾

Upload Data File

 Help

Select a data file to import into Microsoft Dynamics 365.

Data file name:

No file chosen

Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip



Drag your file here

Next

Cancel

Review File Upload Summary



The following data will be imported into Microsoft Dynamics 365.

1 file uploaded.

File Name	Size
Contacts.csv	1 KB

▶ Delimiter Settings

Back

Next

Cancel

▶ Delimiter Settings

Select the field and data delimiters. If there is more than one file, these delimiters will be applied to all files that you want to import.

Field delimiter:	Comma (,)	▼
Data delimiter:	Quotation mark (")	▼
<input checked="" type="checkbox"/>	First row contains column headings	

Select Data Map



Before your data can be imported, it must be mapped to the data in Microsoft Dynamics 365. You can let the system map your data automatically, or you can select a data map to specify how your data will be imported.

System Data Maps

- Default (Automatic Mapping)
For Generic Contact and Account Data



Data Maps for Salesforce.com

- For Contact and Account Report Export
- For Full Data Export
- For Report Export

Data Maps for Microsoft Outlook Business Contact Manager

- For BCM 2010

Source Data Files	Microsoft Dynamics 365 Record Types
✓ Contacts	Contact

Dynamics 365 Record Types	Source Fields	Dynamics 365 Record Types
 Contact	Required Fields Last Name	Show All
	Optional Fields Address 1: City Address 1: Region Company	Last Name Address 1: City Address 1: Country/Region  Company Name (Lookup)
	Lookup reference for field Company	
	Related Record Type: Referred Field:	
	<input checked="" type="checkbox"/> Account	Account Name
	<input type="checkbox"/> Contact	Full Name
	OK Cancel	

✓ All the record types with fields have been successfully mapped.

Dynamics 365 Record Types	Source Fields	Dynamics 365 Fields
✓ Contact	Required Fields	
	Last Name	Last Name
	Optional Fields	
	Address 1: City	Address 1: City
	Address1: Region	Address 1: Country/Region
	Company	Company Name (Lookup)
	Email	Email
	First Name	First Name

Back

Next

Cancel

Review Settings and Import Data



Review the default settings, make the necessary changes, and submit the data for import.

Allow Duplicates

No

Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics 365.

Select Owner for Imported Records

 Deepesh Somani 

This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

Data Map Name (optional)

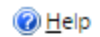
Save this data map for future imports.

Back

Submit

Cancel

Data Submitted for Import



Your data has been submitted for import.

To check the status of the import, go to [Settings > Data Management > Imports](#)

My Imports

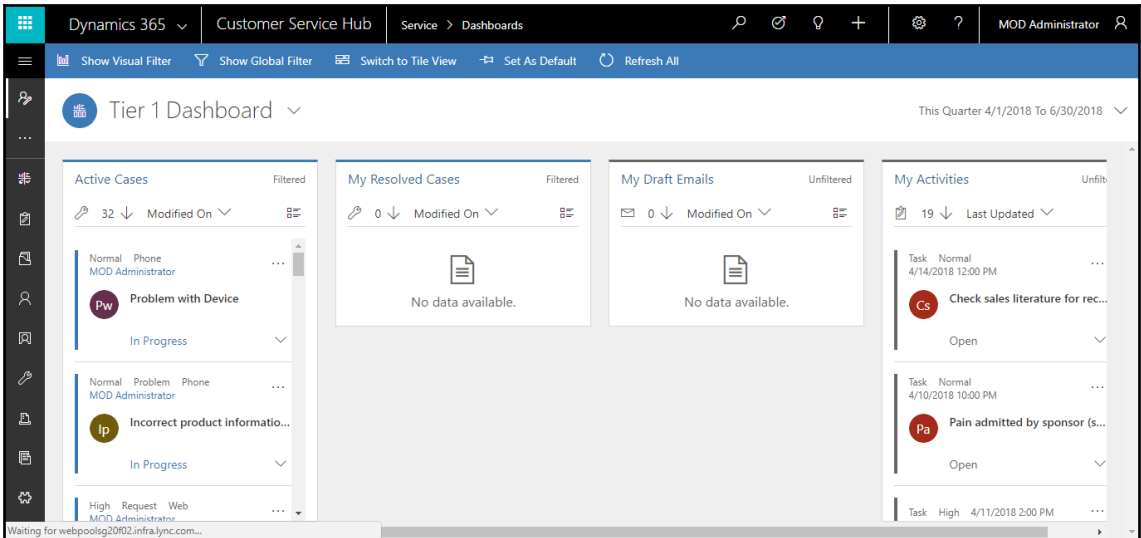
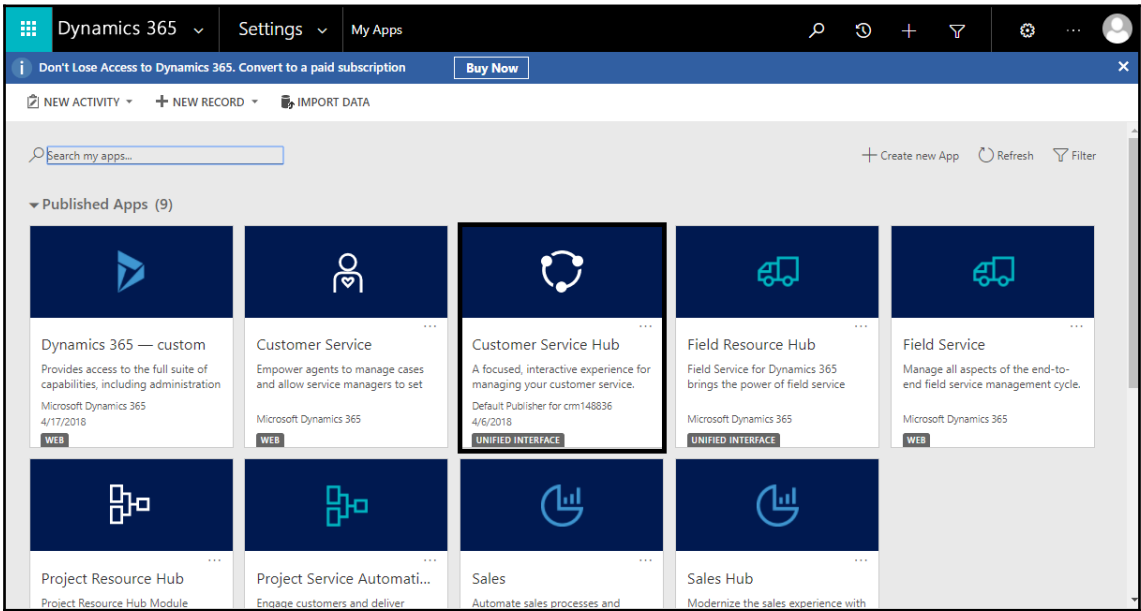
Import Name	Status Reason	Successes	Partial Failures	Errors	Total Proc...	Created On	Created By
Contacts.csv	Completed	3	0	0	3	11/29/2016 7:36...	Deepesh Somani

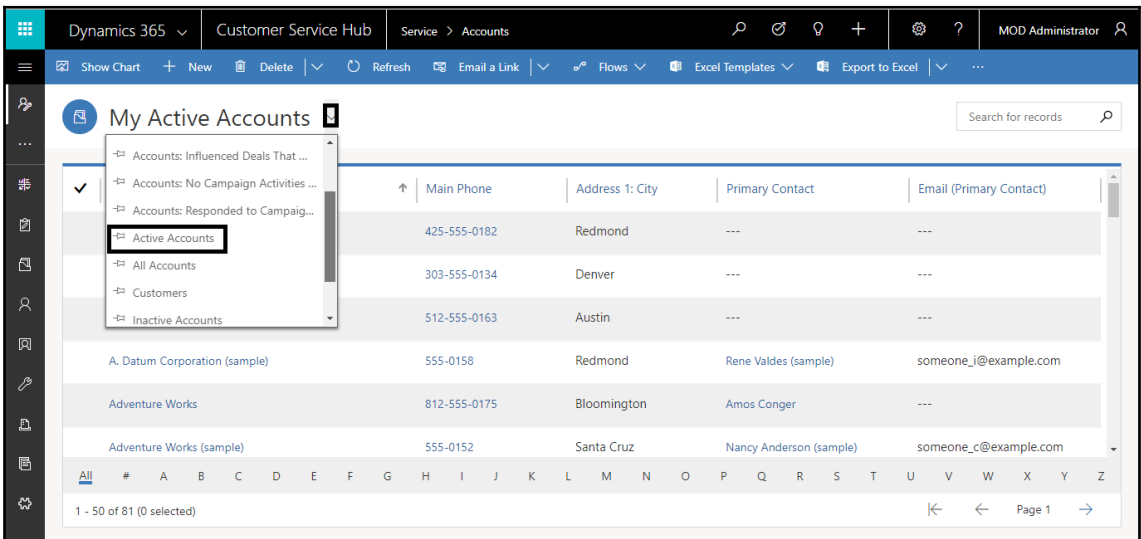
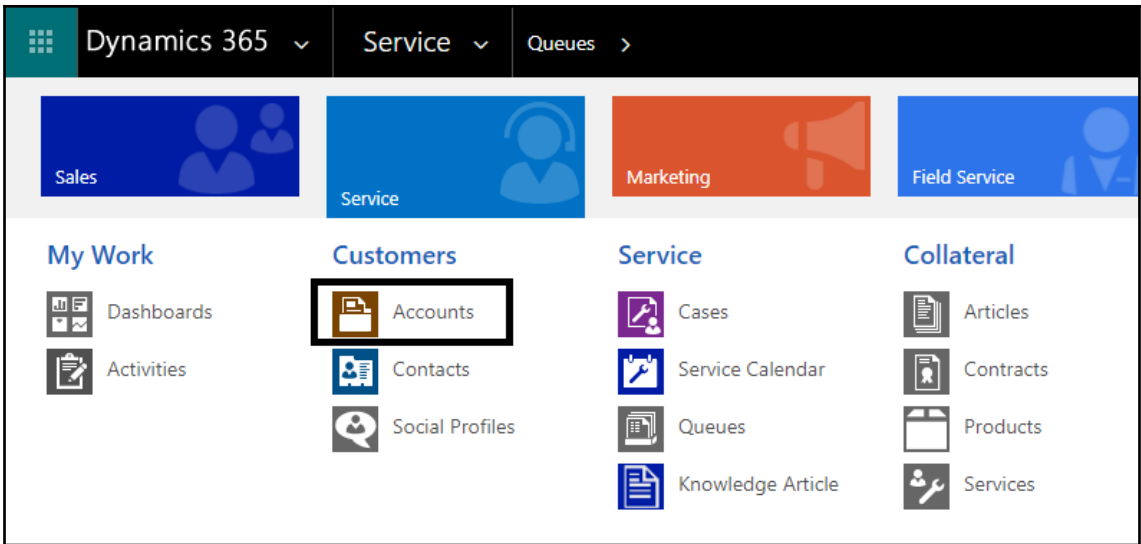
Active Contacts

Search for records

Full Name	Email	Company Name	Business Phone	Owner	Address 1: City	Address 1: Country/Region...
James Conolly	JamesConolly.Adventure ...	Adventure Works		Deepesh Somani	London	South Africa
Mahesh Kumar	MaheshKumar.Northwind ...	Northwind Traders		Deepesh Somani	Mumbai	US
Martin Arthur	MartinArthur.Litware.com	Litware		Deepesh Somani	New York	USA

Chapter 2: Working with Service





Dynamics 365 | Customer Service Hub | Service > Accounts | MOD Administrator

My Active Accounts

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A Datum Corporation	425-555-0182	Redmond	---	---
A Datum Fabrication	303-555-0134	Denver	---	---
A Datum Integration	512-555-0163	Austin	---	---
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
Adventure Works	812-555-0175	Bloomington	Amos Conger	---
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com

1 - 50 of 81 (0 selected) | Page 1

Dynamics 365 | Customer Service Hub | Service > Accounts > A Datum Corporation | MOD Administrator

ACCOUNT: A Datum Corporation

Annual Revenue: --- | Number of Employees: 50

Summary | Details | Related

ACCOUNT INFORMATION

Account Name: A Datum Corporation

Phone: 425-555-0182

Fax: ---

Website: ---

Primary Contact: ---

Parent Account: Active

TIMELINE

Timeline

Enter a note...


LAST WEEK

- Phone Call from A Datum Corporation - Tuesday, April 10, 2018 8:01 AM
- Problem with Device: There is a problem with the device. Requires dispatch of a technician.

RELATED CONTACTS


No data available.

TIMELINE

Timeline + 

Enter a note...

LAST WEEK


 Auto-post on **Problem with Device's** wall - Tuesday, April 10, 2018 8:01 AM

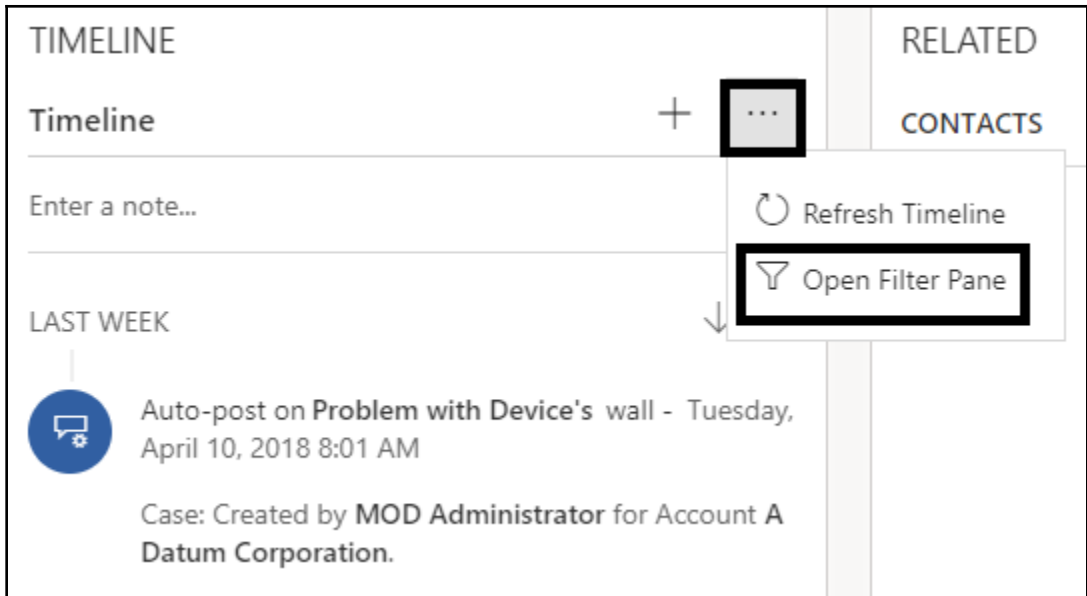
Case: Created by **MOD Administrator** for Account **A Datum Corporation**.

RELATED

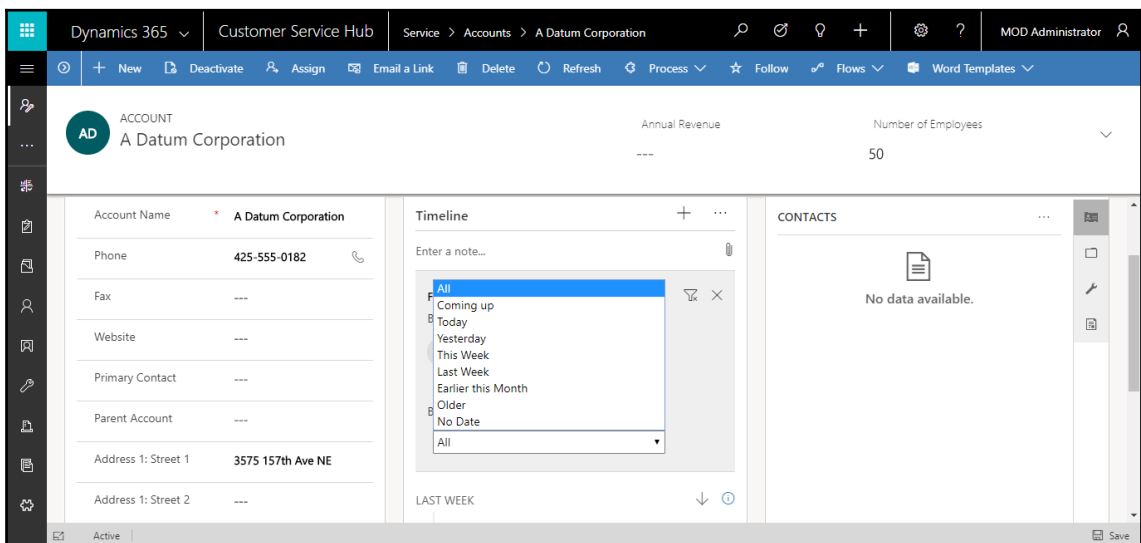
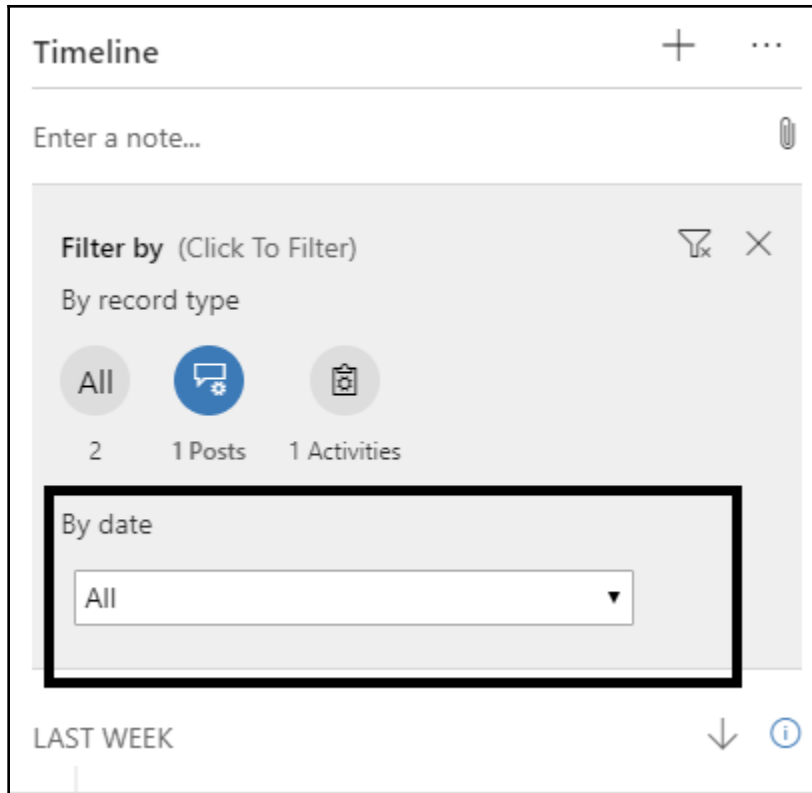
CONTACTS

Refresh Timeline

 Open Filter Pane



The screenshot shows a user interface for a timeline. At the top left, the word "TIMELINE" is displayed. Below it, the word "Timeline" is followed by a plus sign and a square icon containing three dots, which is highlighted with a black box. To the right of this icon is a vertical sidebar with the words "RELATED" and "CONTACTS". Below the "Timeline" header is a text input field with the placeholder "Enter a note...". Underneath the input field is a section titled "LAST WEEK" with a downward arrow. A post is visible, starting with a blue circular icon containing a speech bubble and a gear. The post text reads: "Auto-post on **Problem with Device's** wall - Tuesday, April 10, 2018 8:01 AM" followed by "Case: Created by **MOD Administrator** for Account **A Datum Corporation**." A context menu is open over the three-dot icon, containing two options: "Refresh Timeline" with a circular arrow icon, and "Open Filter Pane" with a funnel icon. The "Open Filter Pane" option is highlighted with a black box.



By activity type
By date

All ▼

All ▼

LAST WEEK ↓ ⓘ

AD

Phone Call from A Datum Corporation - Tuesday, April 10, 2018 8:01 AM

Problem with Device
There is a problem with the device. Requires dispatch of a technician.

👤 Assign
🗑️ Delete
⋮


The screenshot shows the Dynamics 365 interface for the 'Customer Service Hub'. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and the breadcrumb 'Service > Accounts > A Datum Corporation'. The user is identified as 'MOD Administrator'.

The main content area displays account information for 'A Datum Corporation' with an annual revenue of '---' and 50 employees. Below this, there are three panels:

- ACCOUNT INFORMATION:** Lists fields such as Account Name (A Datum Corporation), Phone (425-555-0182), Fax, Website, and Primary Contact.
- TIMELINE:** Shows a 'LAST WEEK' section with a single activity: 'Phone Call from A Datum Corporation - Tuesday, April 10, 2018 8:01 AM' with the subject 'Problem with Device' and description 'There is a problem with the device. Requires dispatch of a technician.'.
- RELATED CONTACTS:** Displays 'No data available.'

RELATED

CONTACTS

 Nancy Anderson (sample)
someone_c@example.com

... [More options]

[Add contact] [Refresh] [Edit] [Print]

Dynamics 365 | Customer Service Hub | Service > Cases | MOD Administrator

Show Chart | New Case | Delete | Refresh | Email a Link | Flows | Excel Templates | Export to Excel

My Active Cases

Case Title	Case Number	Priority	Origin	Customer	Status Reason	Created On
Average order shipment time (sample)	CAS-01000-M8V8...	Normal	Web	Litware, Inc. (sample)	In Progress	4/8/2018 4:00 PM
Complete overhaul required (sample)	CAS-01001-V0N7F7	High	Web	Paul Cannon (sample)	In Progress	4/8/2018 10:00 AM
Contact information requested (sample)	CAS-01002-G2B6G3	Normal	Phone	Alpine Ski House (sa...	In Progress	4/6/2018 9:00 AM
Contact information required (sample)	CAS-01003-Z1Q7K7	Normal	Phone	Blue Yonder Airlines ...	In Progress	4/9/2018 12:00 AM
Damaged during shipment (sample)	CAS-01004-K5W3L1	Low	Email	Yvonne McKay (sam...	In Progress	4/3/2018 10:00 AM
Defective item delivered (sample)	CAS-01005-V2R4B6	Low	Phone	City Power & Light (...)	In Progress	3/30/2018 10:00 AM

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

1 - 33 of 33 (0 selected)

Dynamics 365 | Customer Service Hub | Cases > Average order shipment time (sample) | MOD Administrator

Save & Route | New | Create Child Case | Resolve Case | Cancel Case | Add to Queue | Assign | Do Not Decrement En...

Open Record Set

CASE: Average order shipment time (samp... | Priority: Normal | Created On: 08-04-2018 16:00

Phone to Case Process: Active for 7 days | Identify | Research (7 D) | Resolve

Summary | Details | Case Relationships | SLA | Related

GENERAL INFORMATION: Account: Litware, Inc. (sample) | Litware, Inc. (sample) | someone2@example.com | 555-0151

TIMELINE: Timeline | Enter a note... | LAST WEEK | Auto-post on Average order shipment time (sample)'s wall - Tuesday, April 10, 2018 5:26 AM

RELATED: RECENT CASES | Product damaged (sample) Active | Average order shipment time (sample)

RELATED

Knowledge Base Search

Average order shipment time (sample) X

5 Results found

Sort by Relevance

Order Shipping Time
 We value customer service above all else, so we provide multiple options for shipping. Customers can expect fast and easy shipping

Link | Email

Last modified 4/10/2018 0 0

Microsoft Dynamics 365

Go to home page.

CASE Average order shipment time (samp... Priority Normal Created On 08-04-2018 16:00

Phone to Case Process Active for 7 days Identify Research (7 D) Resolve

Summary **Details** Case Relationships SLA Related

CASE DETAILS		ADDITIONAL DETAILS		SOCIAL DETAILS	
Case Title	Average order shipment ti...	Type	Question	Social Profile	---
ID	CAS-01000-M8V8M0	Parent Case	---	Received As	---
Customer	Litware, Inc. (sample)	Is Escalated	No	Influence Score	---
Subject	Information	Escalated On	dd-mm-yyyy --:--	Sentiment Value	---

CASE Average order shipment time (samp... Priority Normal Created On 08-04-2018 16:00

Phone to Case Process Active for 7 days Identify Research (7 D) Resolve

Summary Details **Case Relationships** SLA Related

Merged Cases	Child Cases	Associated Knowledge Records
No data available.	No data available.	No data available.

CASE Average order shipment time (samp... Priority Normal Created On 08-04-2018 16:00

Phone to Case Process Active for 7 days Identify Research (7 D) Resolve

Summary Details Case Relationships **SLA** Related

SLA KPI INSTANCES

✓	Name	↑ Status	Failure Time	Warning Time	Succeeded On
No data available.					

CASE Average order shipment time (samp... Priority Normal Created On 08-04-2018 16:00

Phone to Case Process Active for 7 days Identify Research (1 Min) Resolve

Summary Details Case Relationships SLA Related

GENERAL INFORMATION TIMELINE

Account

Active for 1 minute

Assign to Others MOD Administ

Next Stage

Save & Route New Create Child Case Resolve Case Cancel Case Add to Queue Assign Do Not Decrement En...

Dynamics 365 Service Queues

Sales Service Marketing Field Service Internet of Things Settings Project Service

My Work Customers Service Collateral Goals Tools Business proce

- Dashboards Accounts Cases Articles Goals Reports Phone To Ca
- Activities Contacts Service Calendar Contracts Goal Metrics Alerts New Process
- Social Profiles Queues Knowledge Article Products Rollup Queries Calendar Expired Proc
- Knowledge Article Services Translation P

ACCOUNT ▾
Alpine Ski House (sample) ≡

Annual Revenue
\$90,000.00

Number of Employees
4,800

Owner
MOD Administrator

Summary

ACCOUNT INFORMATION

*Account Name Alpine Ski House (sample)

Phone **555-0157**

Fax

Website **http://www.alpineskihouse.com/**

Parent Account

Ticker Symbol

Relationship Type

POSTS
ASSISTANT
ACTIVITIES
NOTES

Enter post here

POST

All posts
Auto posts
User posts

Delivery never arrived (sample)
 Case: Created by MOD Administrator for Account Alpine Ski House (sample).
 On Delivery never arrived (sample)'s wall
 4/10/2018 5:26:15 AM

Contact information requested (sample)
 Case: Created by MOD Administrator for Account Alpine Ski House (sample).
 On Contact information requested (sample)'s wall

Primary Contact
Paul Cannon (sample)

Email **someone_h@example.**

Business **555-0107**

CONTACTS +

Full Name ↑	Email
Patrick Sands (sample)	someone_k@exampl...
Paul Cannon (sample)	someone_h@exampl...

Dynamics 365 ▾
Service ▾
Accounts > Alpine Ski House (sa... ▾

Common

- Activities
- Social Profiles
- Contacts
- Connections
- Documents
- Audit History

- IoT Devices
- Entitlements
- Actuals
- Resource Preferences
- Opportunity Lines
- Quotes

Project Service

- Quote Lines
- Orders

- Opportunities
- Invoices
- Cases
- Contracts
- Marketing Li

ACCOUNT ▾
Alpine Ski House (sample) ≡

Annual Revenue
\$90,000.00

Number of Employees
4,800

Owner
MOD Administrator

Open Activity Associated View ▾

Filter on: Last 30 days Include: Related "Regarding" Records ▾

ADD NEW ACTIVITY ▾
ADD EXISTING ACTIVITY
BULK DELETE
CHART PANE ▾
RUN REPORT ▾
EXCEL TEMPLATES ▾
EXPORT ACTIVITIES ▾
TRACK EMAILS BY FOLDER

Subject ↑	Activity Type	Activity Status	Priority	Due Date	Created By	Regarding
<p>No Activities found for this Account. Select Add (+).</p>						

0 - 0 of 0 | 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 | Page 1

ACCOUNT Alpine Ski House (sample) Annual Revenue \$90,000.00 Number of Employees 4,800 Owner MOD Administrator

Open Activity Associated View Search for records

Filter on: Last 30 days Include: Related "Regarding" Records

ADD NEW ACTIVITY ADD EXISTING ACTIVITY BULK DELETE CHART PANE RUN REPORT EXCEL TEMPLATES EXPORT ACTIVITIES TRACK EMAILS BY FOLDER

Task Fax Phone Call Email Letter Appointment Service Activity Campaign Response Recurring Appointment Approval

Activity Type Activity Status Priority Due Date Created By Regarding

No Activities found for this Account. Select Add (+).

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 Page 1

SAVE MARK COMPLETE SAVE & CLOSE FORM FLOWS

PHONE CALL

New Phone Call

Priority Normal Due 4/19/2018 8:00 AM Status Open Owner MOD Administrator

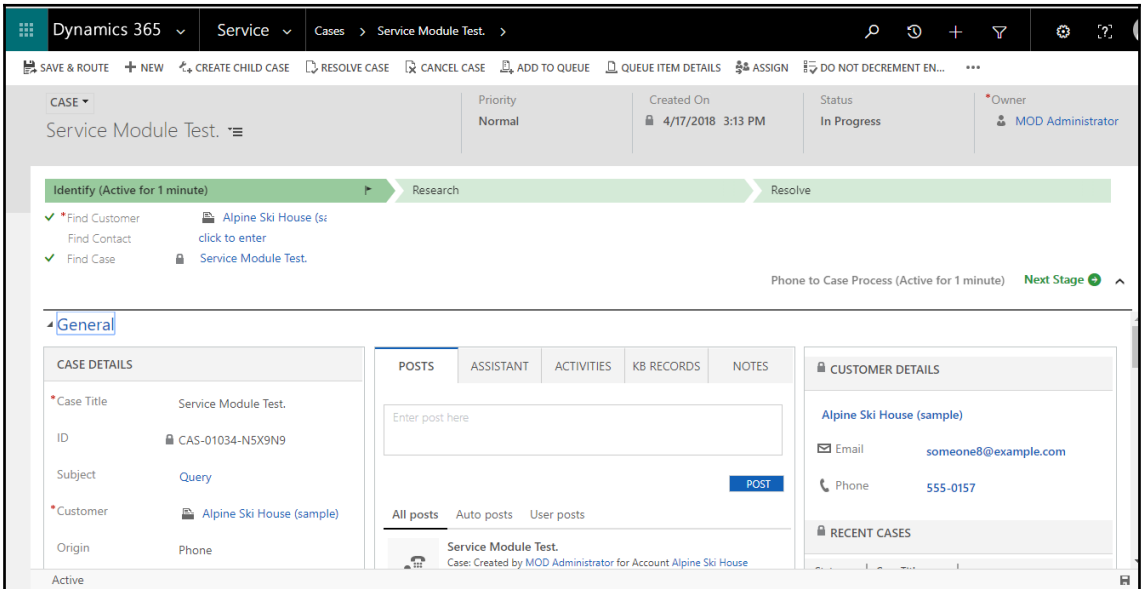
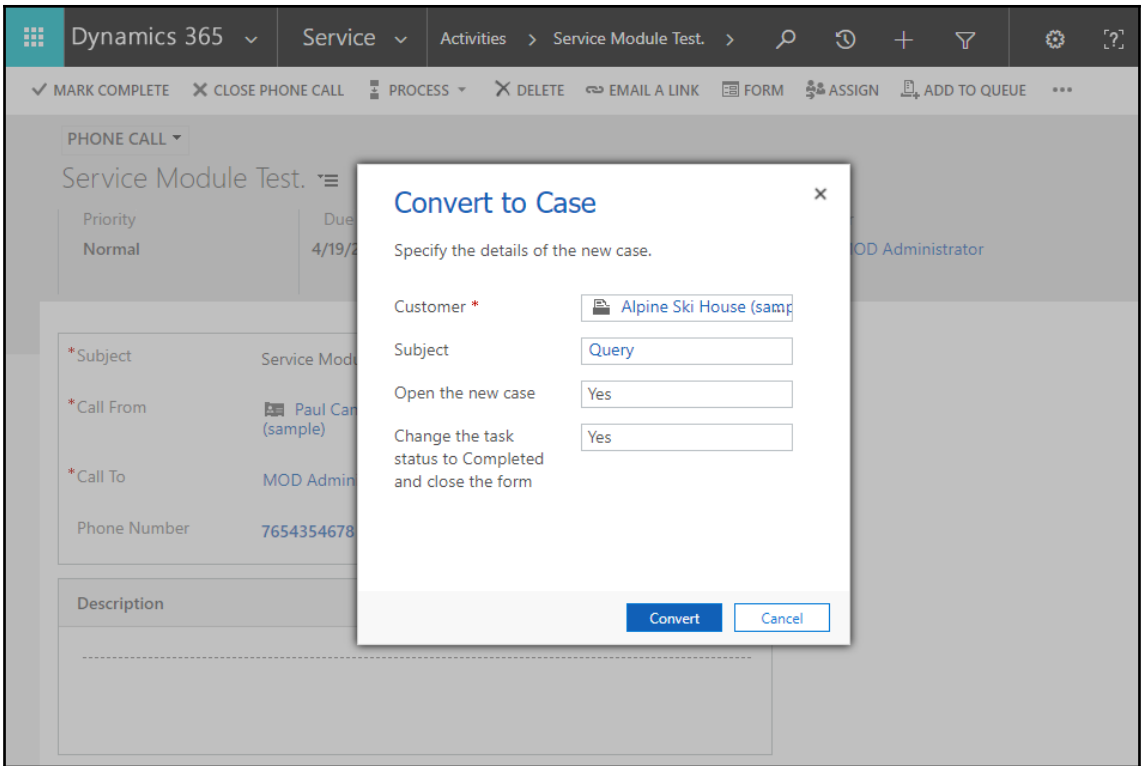
*Subject Service Module Test.

*Call From Paul Cannon (sample)

*Call To MOD Administrator

Phone Number 7654354678 Direction Incoming

Description



CASE ▾ Service Module Test. ☰

Priority Normal Created On 4/17/2018 3:13 PM Status In Progress Owner MOD Administrator

Identify → Research (Active for 1 minute) → Resolve

Similar Cases Find
 ✓ Assign to Others MOD Administrator

Phone to Case Process (Active for 7 minutes) Next Stage

*Customer	Alpine Ski House (sample)	All posts	Auto posts	User posts	RECENT CASES <table border="1"> <thead> <tr> <th>Status</th> <th>Case Title</th> </tr> </thead> <tbody> <tr> <td>Active</td> <td>Service Modu...</td> </tr> <tr> <td>Active</td> <td>Need help (sa...</td> </tr> <tr> <td>Active</td> <td>Delivery neve...</td> </tr> <tr> <td>Active</td> <td>Complete ove...</td> </tr> <tr> <td>Active</td> <td>Contact infor...</td> </tr> </tbody> </table>	Status	Case Title	Active	Service Modu...	Active	Need help (sa...	Active	Delivery neve...	Active	Complete ove...	Active	Contact infor...
Status	Case Title																
Active	Service Modu...																
Active	Need help (sa...																
Active	Delivery neve...																
Active	Complete ove...																
Active	Contact infor...																
Origin	Phone	Service Module Test. Case: Created by MOD Administrator for Account Alpine Ski House (sample). On Service Module Test's wall Today 3:13:34 PM															
Contact																
Entitlement																
Product																

DESCRIPTION

SAVE & ROUTE + NEW CREATE CHILD CASE **RESOLVE CASE** CANCEL CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN DO NOT DECREMENT EN... ✕

CASE ▾ Service Module Test. ☰

Priority Normal Created On 4/17/2018 3:13 PM Status In Progress Owner MOD Administrator

Identify → Research (Active for 1 minute) → Resolve

Resolve Case ✕

Resolution Type *

Resolution *

Total Time

Billable Time *

Remarks

CASE ▾
Service Module Test. ☰

Priority
Normal

Created On
4/17/2018 3:13 PM

Status
Problem Solved

*Owner
MOD Administrator

Identify

Research (Active)

Resolve

Similar Cases

Find

✓ *Assign to Others

MOD Administrator

Phone to Case Process (Aborted after 7 minutes) Next Stage ⌵

General

CASE DETAILS

*Case Title Service Module Test.

ID CAS-01034-N5X9N9

Subject Query

*Customer Alpine Ski House (sample)

Origin Phone

POSTS ASSISTANT ACTIVITIES KB RECORDS NOTES

Enter post here

All posts Auto posts User posts

Service Module Test.

Case: Created by MOD Administrator for Account Alpine Ski House

CUSTOMER DETAILS

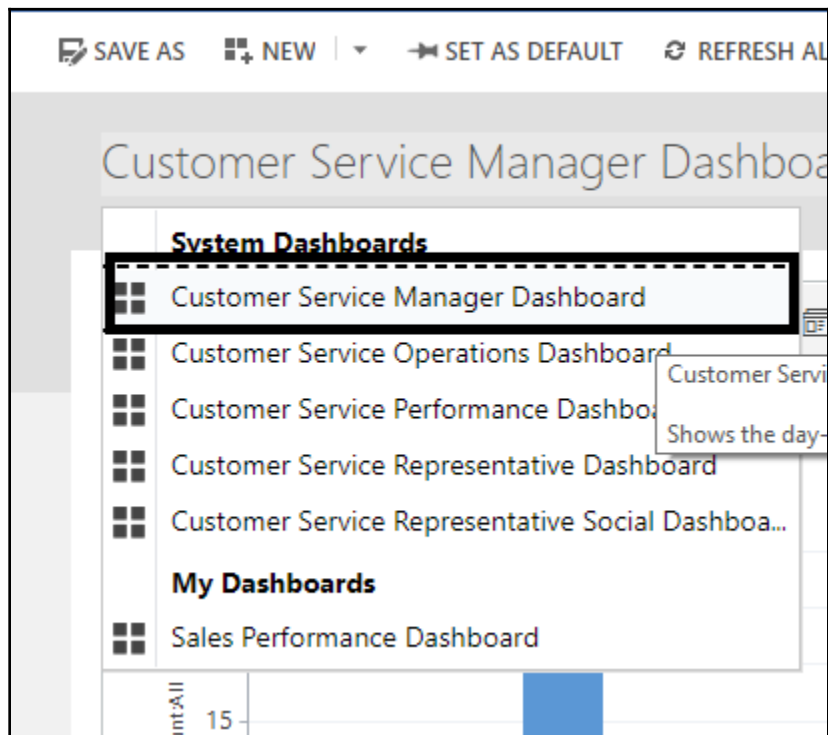
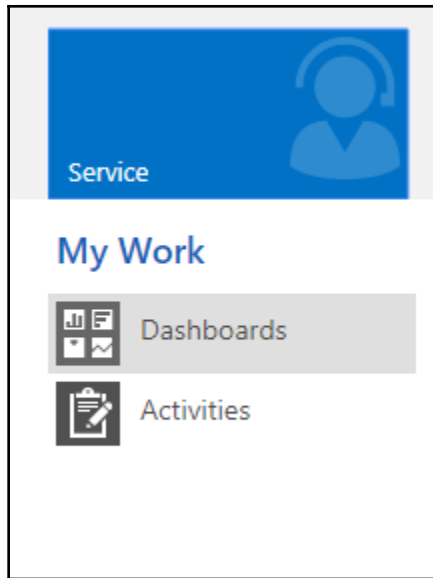
Alpine Ski House (sample)

Email someone@example.com

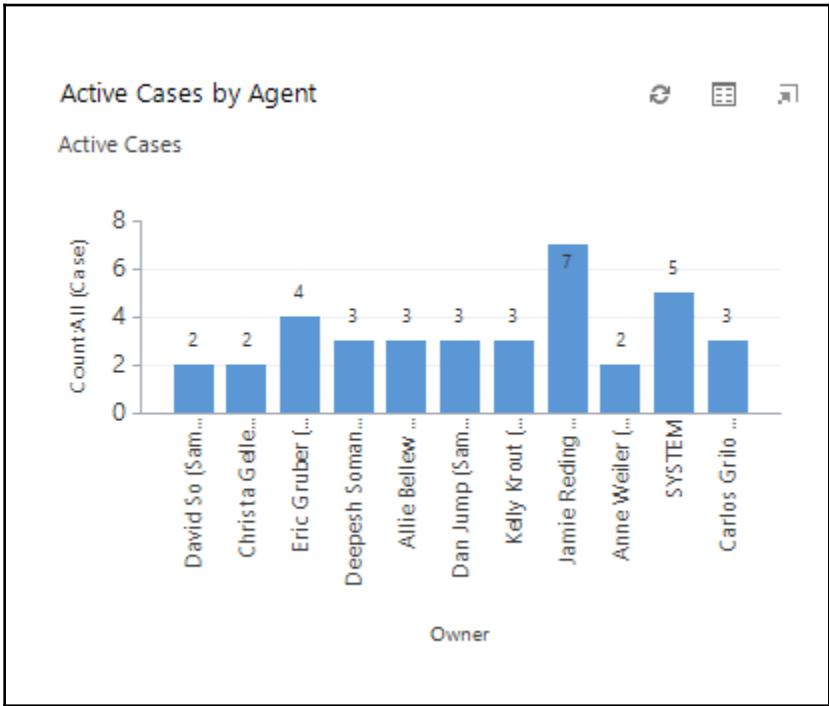
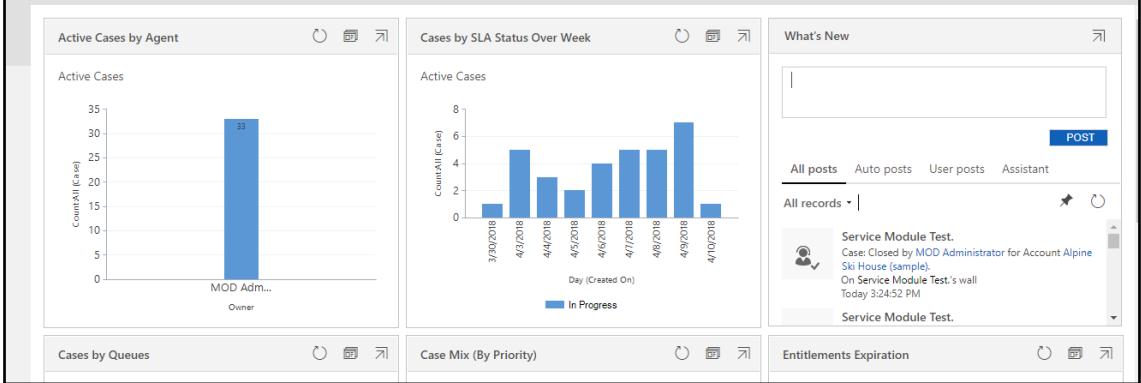
Phone 555-0157

RECENT CASES

Resolved
Read only

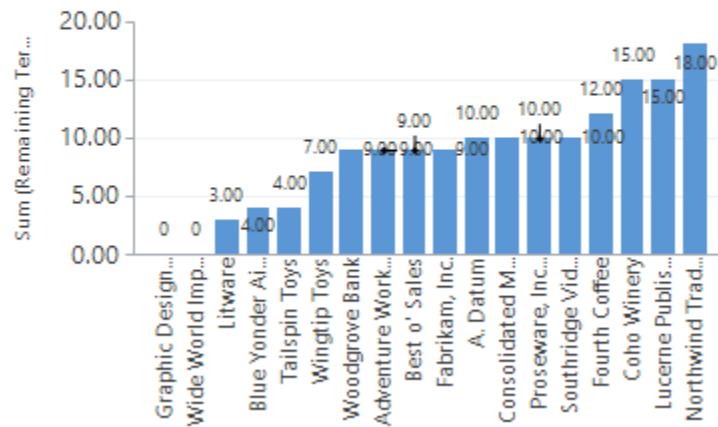


Customer Service Manager Dashboard ▾



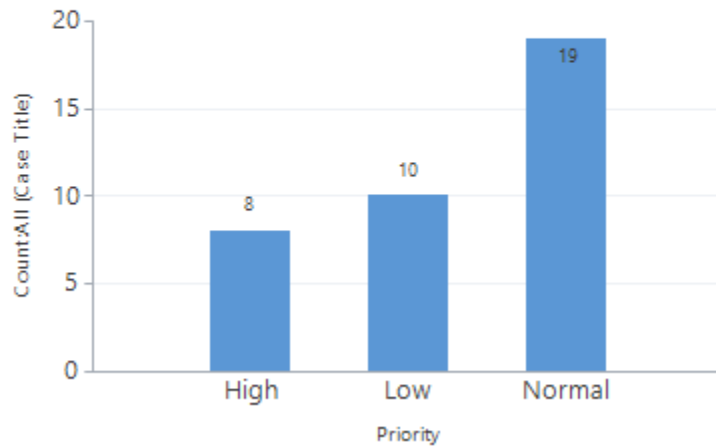
Entitlements Expiration

All Entitlements



Case Mix (By Priority)

Active Cases



Chapter 3: Working with Marketing

The screenshot displays a marketing list interface for 'Current Customers'. At the top, there is a navigation bar with icons for NEW, DEACTIVATE, DELETE, MANAGE MEMBERS, PROCESS, ASSIGN, SHARE, EMAIL A LINK, and RUN WORKFLOW. Below the navigation bar, the title 'MARKETING LIST' is followed by 'Current Customers'. To the right of the title are three filters: 'Locked' (No), 'Last Used on (Date)' (--), and 'Owner' (SYSTEM). A 'Summary' section is expanded, showing three columns: Information, Members, and Campaigns.

Information

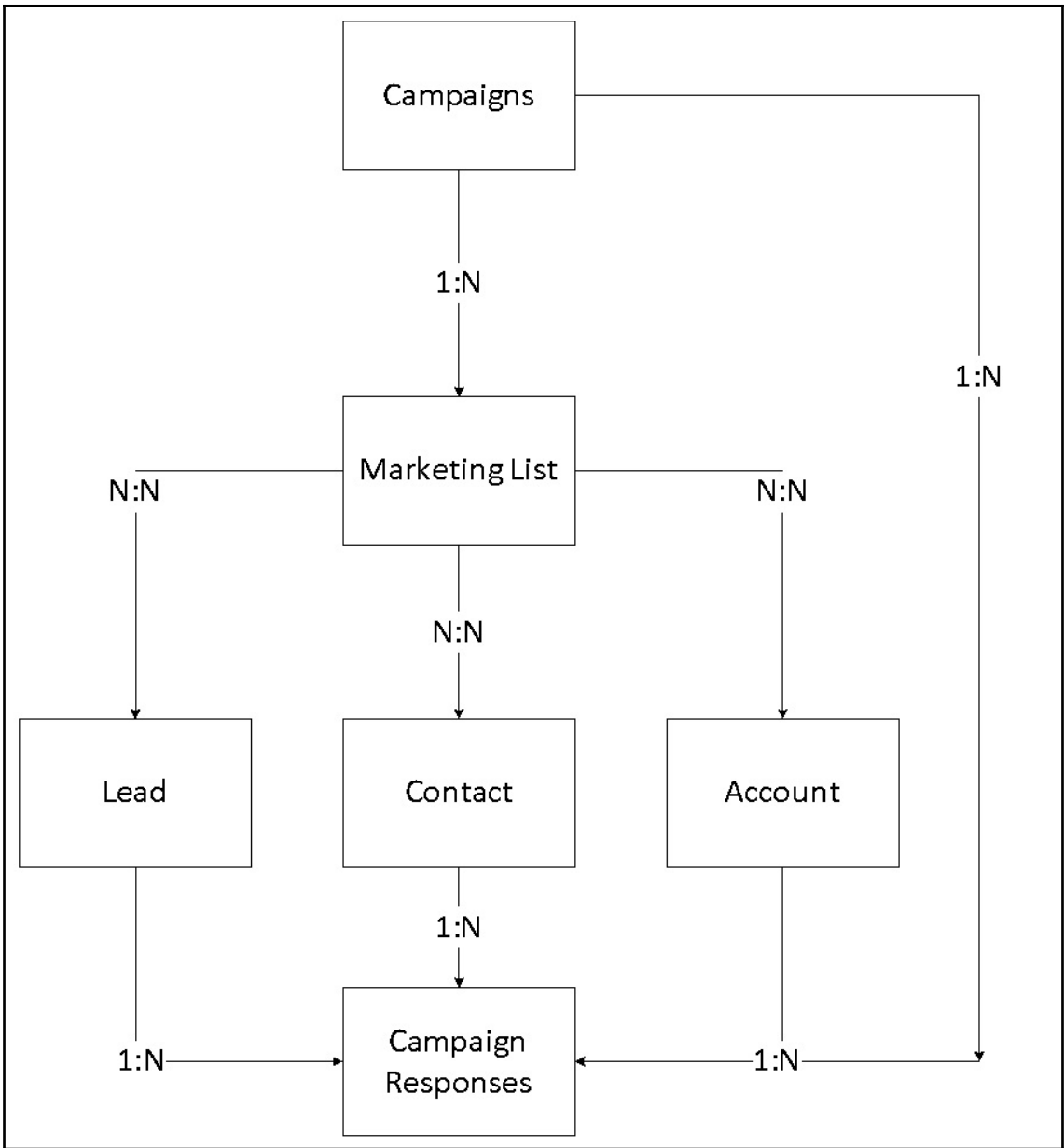
Name *	Current Customers
List Type *	Static
Purpose	--
Targeted At *	Contact
Source	Customer List
Currency	--
Modified On	7/24/2017 2:27 AM
Cost	--
Last Used On	--

Members

Full Name ↑	Business Ph
Allison Brown	1-555-555-55
Allison Dickson	
Amie Gonzales	
Brian LaMee	555-0135
Bruno Torres	407-967-2218

Campaigns

No Campaign records found.



MARKETING LIST

New Marketing List

Locked: No

Last Used on (Date):

Owner: crm admin

Summary

Information

- *Name: [Red X]
- *List Type: Static
- Purpose:
- *Targeted At: Account, Contact, Lead (Selected: Account)
- Source:
- Currency: रुपया
- Modified On:

Members

Campaigns

Name ↑ | Campa

To enable this content, create the record.

Quick Campaigns

Active

MARKETING LIST

Static Marketing List

Locked: No

Last Used on (Date):

Owner: crm admin

Summary

Information

- *Name: Static Marketing List
- *List Type: Static
- Purpose:
- *Targeted At: Contact
- Source:
- Currency: रुपया
- Modified On: 26-04-2018 11:59

Members

Full Name ↑ | Business Phone

No Contacts found for this Marketing List. Select Add (+).

Campaigns

Name ↑ | Campa

No Campaigns found for this Marketing List. Select Add (+).

Quick Campaigns

Active

Manage Members



Choose how you want to find customers, and then add or remove these as members to the marketing list.

How do you want to find members?



Add using Lookup

Find members to add to marketing list.



Add using Advanced Find

Find members to add based on search criteria.



Remove using Advanced Find

Find members to remove based on search criteria.

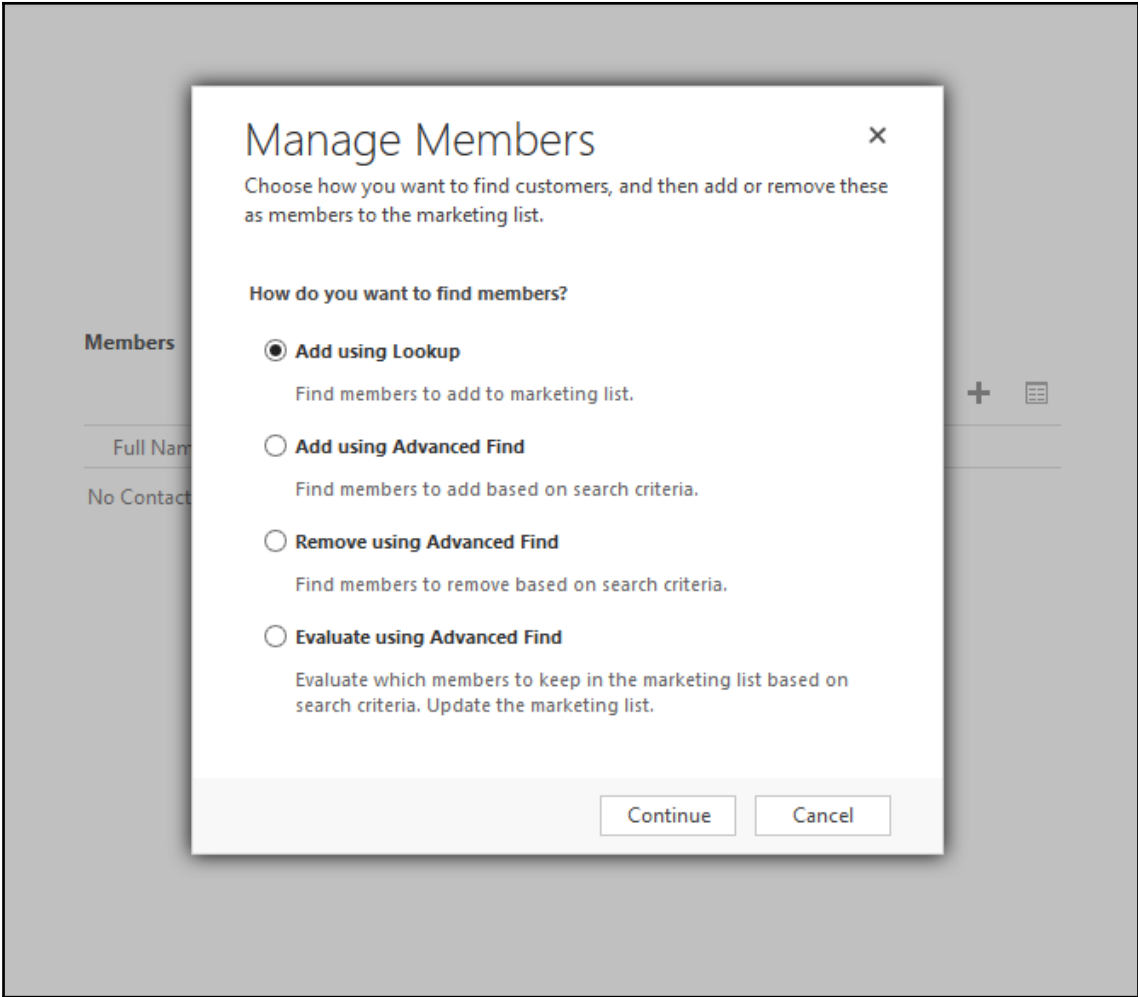


Evaluate using Advanced Find

Evaluate which members to keep in the marketing list based on search criteria. Update the marketing list.

Continue

Cancel



Look Up Records ✕

Enter your search criteria.

Look for Show Only My Records

Look in

Search 🔍

<input type="checkbox"/>	Full Name ↑	Email ↻
<input checked="" type="checkbox"/>	Jim Glynn (sample)	someone_j@exan
<input type="checkbox"/>	Maria Campbell (sample)	someone_d@exar
<input type="checkbox"/>	Nancy Anderson (sample)	someone_c@exar

1 - 13 of 13 (1 selected) ⏪ ⏩ Page 1

Selected records:

Jim Glynn (sample)

MARKETING LIST
Static marketing list

Summary

Information

Name* Static marketing list
List Type* Static
Purpose --
Targeted At* Contact
Source --
Currency Euro
Modified On 11/20/2016 3:34 PM
Cost --
Last Used On --
Locked No
Owner* [Redacted]
Description --

Look Up Records

Enter your search criteria.

Look for Contact Show Only My Records

Look in Contacts Lookup View

Search Search for records

Full Name	Email
Abraham McCormick	someone29@contoso.com
Adrian Dumitrascu	Adrian@adventure-works.c
Adrienne McMillan	

1 - 50 of 201 (1 selected) Page 1

Selected records:

Abraham McCormick

Select Remove

New Add Cancel

Locked No

Campaigns

Name

No Campaign records found.

Quick Campaigns

Subject

MARKETING LIST
Static Marketing List

Summary

Information

Name* Static Marketing List
List Type* Static
Purpose
Targeted At* Contact
Source
Currency रुपया
Modified On 26-04-2018 11:59

Members

Full Name	Business Phone
Jim Glynn (sample)	555-0109

Campaigns

No Campaigns found for this Marketing List. Select Add (+).

Quick Campaigns

Active

NEW DEACTIVATE DELETE MANAGE MEMBERS PROCESS ASSIGN SHARE EMAIL A LINK RUN WORKFLOW

Locked No

Last Used on (Date)

Owner* crm admin

Static marketing list

Locked
No

Last Used on (Date)
...

Summary

Information

Name *	Static marketing list
List Type *	Static
Purpose	--
Targeted At *	Contact
Source	--
Currency	Euro
Modified On	11/20/2016 3:34 PM
Cost	--
Last Used On	--
Locked	No
Owner *	
Description	--

Members

Full Name ↑	Business Phone
Abraham McCormick	

Campaigns

Name ↑
No Campaign records found.

Quick Campaigns

Subject	Activ
No Quick Campaign records found.	

Dynamic Marketing list

Locked
No

Last Used on (Date)
...

Summary

Information

Name *	Dynamic Marketing list
List Type *	Dynamic
Purpose	--
Targeted At *	Contact
Source	--
Currency	Euro
Modified On	11/20/2016 3:58 PM
Cost	--
Last Used On	--
Locked	No
Owner *	
Description	--

Members

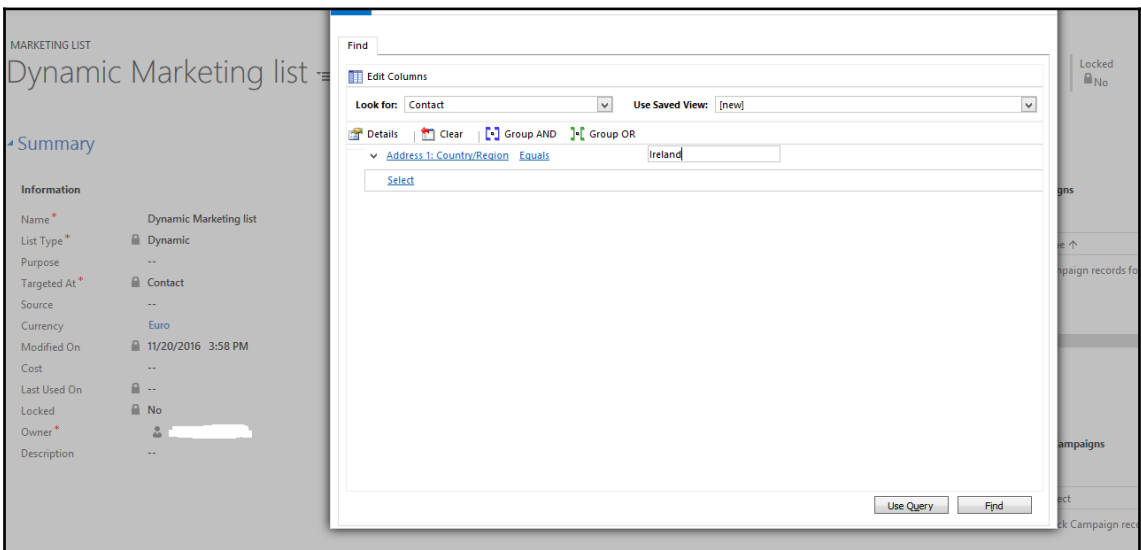
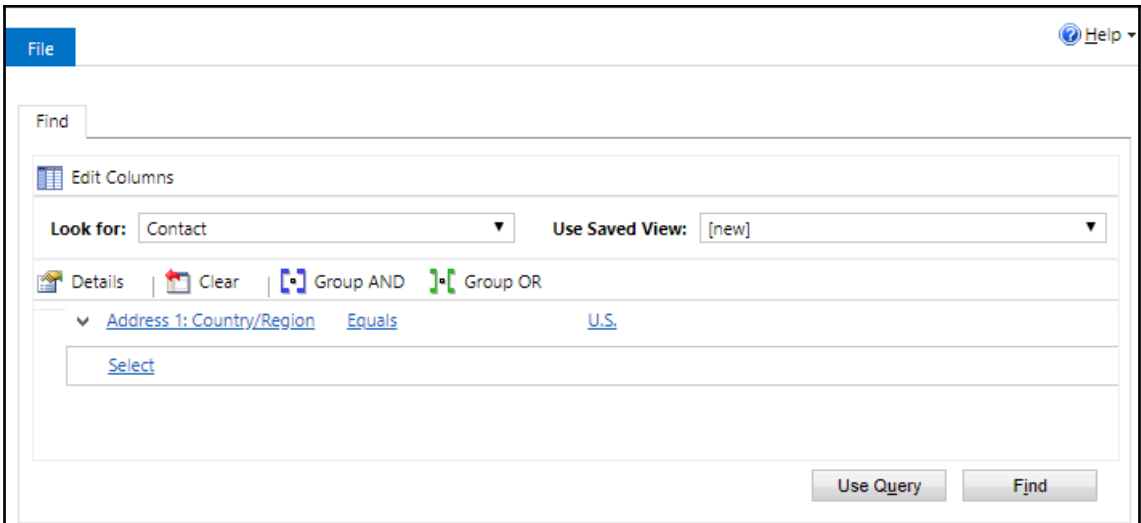
Full Name ↑	Business Phone
No Contact records found.	

Campaigns

Name ↑
No Campaign records found.

Quick Campaigns

Subject	Activ
No Quick Campaign records found.	



SAVE SAVE & CLOSE + NEW FLOWS FORM EDITOR

CAMPAIGN
New Campaign

Template: No | Estimated Revenue: ----- | Status Details: Proposed | Owner: **crm admin**

Summary

CAMPAIGN	ASSISTANT	ACTIVITIES	NOTES	MARKETING LISTS
<p>*Name ✖ -----</p> <p>Campaign Code -----</p> <p>*Currency रुपया</p> <p>Campaign Type Advertisement</p> <p>Expected Response% -----</p>	<p>There are currently no actions waiting to be completed.</p>			<p>Name ↑ | Members Cou... |</p> <p>To enable this content, create the record.</p>
<p>SCHEDULES</p> <p>Proposed Start -----</p> <p>Active</p>				<p>LEADS</p> <p>Name ↑ | Owner | Status |</p>

CAMPAIGN
New Campaign

Template: No | Estimated Revenue: -- | Status Details: Proposed

Summary

CAMPAIGN	ACTIVITIES	NOTES	MARKETING LISTS
<p>Name* ✖ --</p> <p>Campaign Code --</p> <p>Currency* Euro</p> <p>Campaign Type Advertisement</p> <p>Expected Response% --</p>	<p>All - | Add Phone Call | Add Task | ...</p> <hr/> <p>We didn't find any activity records.</p>		<p>Name ↑ | Members Cou... |</p> <p>To enable this content, create the record.</p>
<p>SCHEDULES</p> <p>Proposed Start --</p> <p>Proposed End --</p> <p>Actual Start --</p> <p>Actual End --</p>			<p>LEADS</p> <p>Name ↑ | Owner | Status |</p> <p>To enable this content, create the record.</p>

OFFER

CAMPAIGN ACTIVITIES
Subject ↑ | Channel |

To enable this content, create the record.

Details

FINANCIALS | **DESCRIPTION**

OFFER

--

CAMPAIGN ACTIVITIES
Subject ↑ | Channel |

To enable this content, create the record.

Details

FINANCIALS		DESCRIPTION	
Activity Cost	.....	Allocated Budget	.....
Misc. Cost	.....	Total Cost	.....
ADMINISTRATION			
* Owner	crm admin	Created On	.....
Modified By	.....	Modified On	.....
RESPONSES			
Active			

Details

FINANCIALS		DESCRIPTION	
Activity Cost	--	Allocated Budget	--
Misc. Cost	--	Total Cost	--
ADMINISTRATION			
Owner*	Simaranjit Bhalla	Created On	--
Modified By	--	Modified On	--
RESPONSES			
Subject ↑	Received On	Response Cod...	Priority
To enable this content, create the record.			

Look Up Records

Enter your search criteria.

Look for: Show Only My Records

Look in:

Search:

<input type="checkbox"/>	Name ↑	Email
<input type="checkbox"/>	Counts Vong (sample)	someone9@exar
<input type="checkbox"/>	Debra Garcia (sample)	someone10@exa
<input type="checkbox"/>	Ivan Komashinsky (sample)	someone6@exar

1 - 10 of 10 (0 selected) Page 1

Selected records:

LEADS

Name ↑	Owner	Status
No Leads found for this Campaign. Select Add (+)		

SAVE SAVE & CLOSE FLOWS FORM EDITOR

CAMPAIGN ACTIVITY

New Campaign Activity

Priority: Normal Status Details: Proposed Owner: crm admin

Campaign Activity

SUMMARY		MARKETING LISTS					
* Subject		<table border="1"> <thead> <tr> <th>Name ↑</th> <th>Marketing List Member Type</th> </tr> </thead> <tbody> <tr> <td colspan="2" style="text-align: center;">To enable this content, create the record.</td> </tr> </tbody> </table>		Name ↑	Marketing List Member Type	To enable this content, create the record.	
Name ↑	Marketing List Member Type						
To enable this content, create the record.							
* Used in Campaign	Demo Campaign						
Type	Research						
Channel							
Outsource Vendors							
Description							
Scheduled Start	Open						

LINK

Status Details: Proposed Owner: crm admin

CAMPAIGN ACTIVITIES

Subject ↑	Channel
No Campaign Activities found for this Campaign. Select Add (+).	

DESCRIPTION


DELETE DISTRIBUTE CAMPAIGN ... CLOSE CAMPAIGN ACTIVI... PROCESS TO CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN EMAIL A LINK ...


CAMPAIGN ACTIVITY
 Sample Campaign Activity ☰

Priority: Normal | Status Details: Proposed | Owner: crm_admin

Campaign Activity

SUMMARY	
Subject	Sample Campaign Activity
Used in Campaign	🔒 Demo Campaign
Type	Research
Channel	Phone
Outsource Vendors	.....
Description	.....
Scheduled Start	.....
Scheduled End	.....
Actual Start	🔒

MARKETING LISTS	
+ ☰	
Name ↑	Marketing List Member Type
 No Marketing Lists found for this Campaign Activity. Select Add (+).	
← →	

ASSISTANT	ACTIVITIES	NOTES
 There are currently no actions waiting to be completed.		

Open 🔍

SHARE EMAIL A LINK

Estimated Revenue
₹0.00

Status Details
Proposed
Ready To Launch
Launched
Completed
Canceled
Suspended

*Owner
crm admin

NOTES

MARKETING LISTS

Name ↑	Members Cou...
Dynamic Marketing L...	
Static Marketing List	1

Dynamics 365 Marketing Campaigns Sample Campaign A...

DELETE DISTRIBUTE CAMPAIGN CLOSE CAMPAIGN ACTIVITY PROCESS TO CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN EMAIL A LINK

NAVIGATE TO OTHER APPLICATIONS

CAMPAIGN ACTIVITY

Sample Campaign Activity

Priority: Normal Status Details: Proposed Owner: crm admin

Campaign Activity

SUMMARY

- Subject: Sample Campaign Activity
- Used in Campaign: Demo Campaign
- Type: Research
- Channel: Phone
- Outsource Vendors: -----
- Description: -----
- Scheduled Start: 12-04-2018
- Scheduled End: 12-05-2018

MARKETING LISTS

Name	Marketing List Member Type
Dynamic Marketing List	Contact
Static Marketing List	Contact

ASSISTANT ACTIVITIES NOTES

Today's Insights (Preview)

There are currently no insights. There are currently no actions waiting to be completed.

Dynamics 365 Marketing Campaigns Sample Campaign A...

DELETE DISTRIBUTE CAMPAIGN CLOSE CAMPAIGN ACTIVITY PROCESS TO CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN EMAIL A LINK

NAVIGATE TO OTHER APPLICATIONS

CAMPAIGN ACTIVITY

Sample Campaign Activity

Campaign Activity

SUMMARY

- Subject: Sample Campaign Activity
- Used in Campaign: Demo Campaign
- Type: Research
- Channel: Phone
- Outsource Vendors: -----
- Description: -----
- Scheduled Start: 12-04-2018
- Scheduled End: 12-05-2018

New Phone Calls

Fill out this form to create new phone calls for the members you selected in the marketing list. To add this phone call as a new phone call in each member's record, click Distribute.

Header

Subject: Phone Call for new product

Call From: [lookup]

Call To: [lookup]

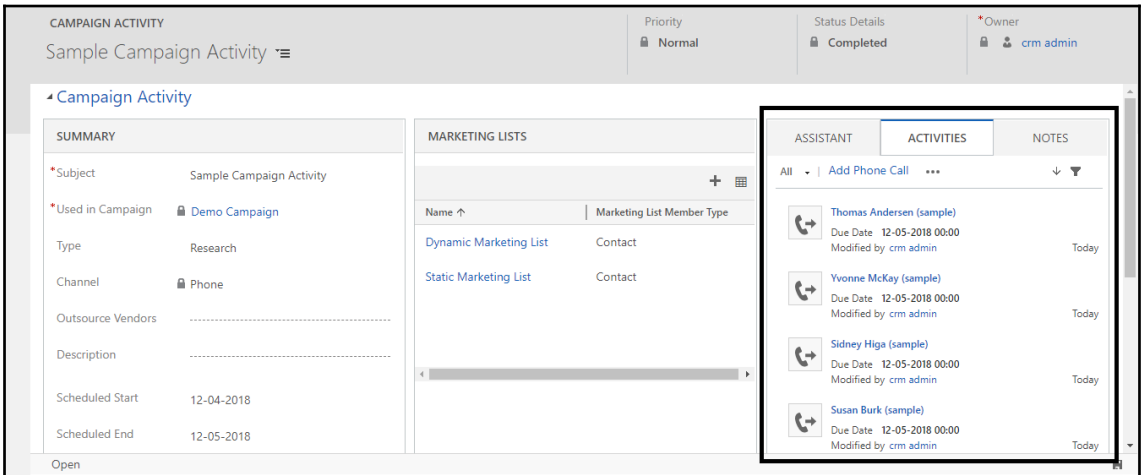
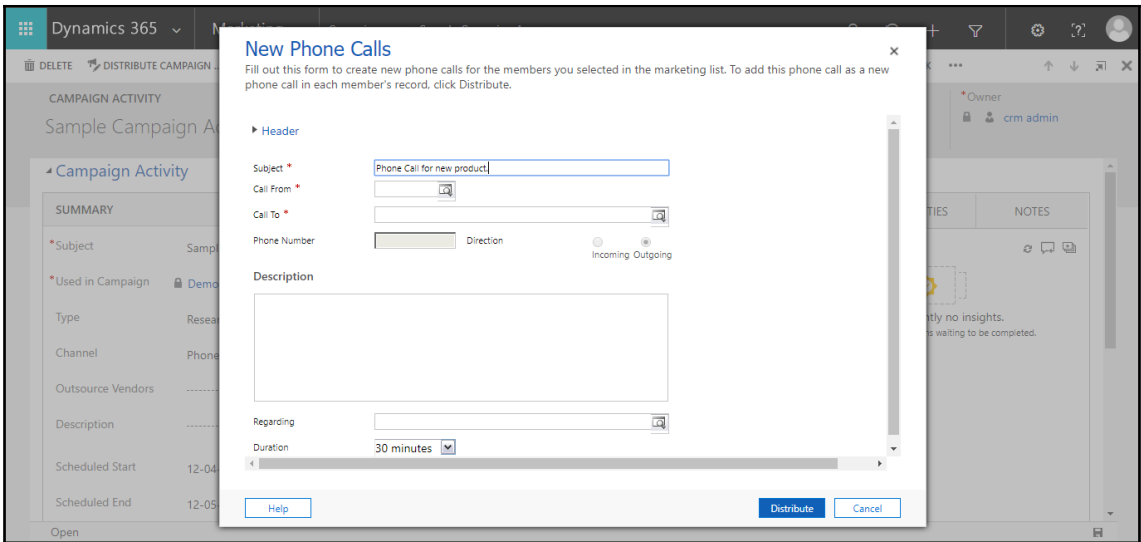
Phone Number: [text] Direction: [radio] Incoming [radio] Outgoing [radio]

Description: [text area]

Regarding: [lookup]

Duration: 30 minutes

Help Distribute Cancel



Dynamics 365 Marketing Activities > Phone Call for new p...

MARK COMPLETE CLOSE PHONE CALL PROCESS DELETE EMAIL A LINK FORM ASSIGN ADD TO QUEUE CONVERT TO

PHONE CALL Phone Call for new product. Priority Normal Due 12-05-2018 00:00 Owner crm admin

- To Opportunity
- To Case
- Promote to Response

*Subject Phone Call for new product.

*Call From crm admin

*Call To Thomas Andersen (sample)

Phone Number 555-0112 Direction Outgoing

Description

Regarding Sample Campaign Activity

Open

Dynamics 365 Marketing Activities > Phone Call for new p...

SAVE SAVE & CLOSE FLOWS FORM EDITOR

CAMPAIGN RESPONSE Phone Call for new product. Related Campaign Demo Campaign Response Code Interested Status Open Owner crm admin

Campaign Response

SUMMARY

*Subject Phone Call for new product.

RECEIVED FROM

Customer Thomas Andersen (sample)

Company Name

Last Name

First Name

Phone

DESCRIPTION

DETAILS

Promotion Code

*Related Campaign Demo Campaign

Response Code Interested

Channel Phone

Open

+ NEW DEACTIVATE DELETE COPY AS CAMPAIGN COPY AS TEMPLATE PROCESS ASSIGN SHARE EMAIL A LINK ...

CAMPAIGN
 Demo Campaign

Template: No Estimated Revenue: ₹0.00 Status Details: Launched Owner: crm admin

Modified By: crm admin Modified On: 26-04-2018 13:16

RESPONSES

Subject ↑	Received On	Response Code	Priority
Phone Call for new p...	26-04-2018	Interested	Normal

Active

+ NEW DEACTIVATE DELETE MANAGE MEMBERS COPY TO STATIC PROCESS ASSIGN SHARE EMAIL A LINK ...

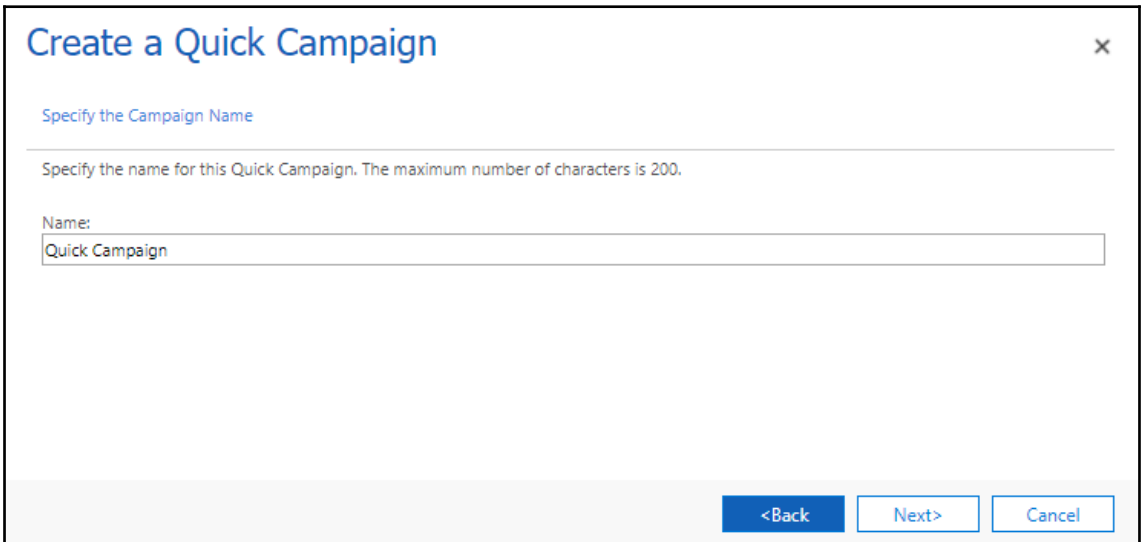
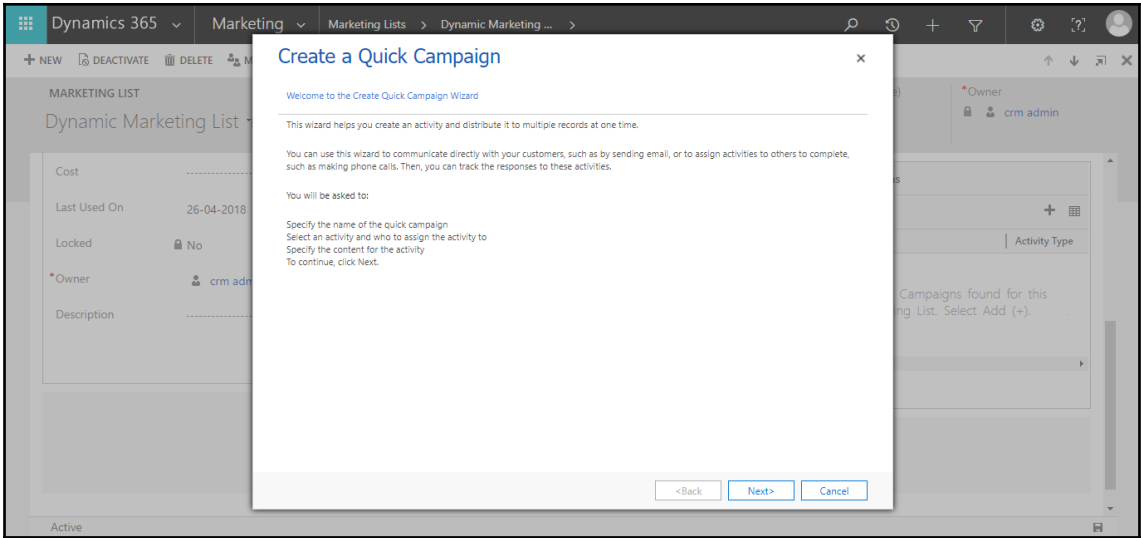
MARKETING LIST
 Dynamic Marketing List

Locked: No Owner: crm admin

Cost	Robert Lyon (sample)	555-0106
Last Used On	Scott Konersmann (sample)	555-0105
Locked	Sidney Higa (sample)	555-0104
Owner	Susan Burk (sample)	555-0111
Description	Susanna Stubberod (sample)	555-0101
	Thomas Andersen (sample)	555-0112
	Yvonne McKay (sample)	555-0100

Run Workflow Start Dialog Flows Word Templates Run Report **Create Quick Campaign** Create Opportunities Mail Merge on List Memb... Form Editor

No quick campaigns found for this Marketing List. Select Add (+).



Create a Quick Campaign



Select the Activity Type and Owners

Activity Type:

- Phone Call
- Appointment
- Letter
- Fax
- Email

Select who will own these new activities.

Assign these activities to:

- Me
- The owners of the records that are included in the quick campaign
- Assign to another user or team
- Add the created activities to a queue

Select whether email activities should be closed.

- Mark email messages to be sent and close corresponding email activities.

<Back

Next>

Cancel


Create a Quick Campaign ×


Specify the Content of the Activity

Specify the details of the quick campaign by filling out the available fields in the activity. When you are done, click Next.

▶ Header


Subject *

Call From * 

Call To * 

Phone Number Direction Incoming Outgoing

Description

Description 

Create a Quick Campaign

Completing the Create Quick Campaign Wizard

You have successfully completed the wizard. Review the information for your campaign. If you want to make changes, click Back.

Name: Quick Campaign
 Activity: Phone Call
 Scope: For Selected Records (1)
 Owner: Me

After you create this quick campaign, it will be located in the Sales and Marketing pane, under Quick Campaigns.

To create the quick campaign and its activities, click Create.

< Back
Create
Cancel

MARKETING LIST

Dynamic Marketing List

Locked: No | Last Used on (Date): 26-04-2018 | Owner: crm admin

Property	Value	Name	Phone Number
Currency	₹	Paul Cannon (sample)	555-0107
Modified On	26-04-2018 12:44	Rene Valdes (sample)	555-0108
Cost	.....	Robert Lyon (sample)	555-0106
Last Used On	26-04-2018	Scott Konersmann (sample)	555-0105
Locked	No	Sidney Higa (sample)	555-0104
Owner	crm admin	Susan Burk (sample)	555-0111
Description	.....	Susanna Stubberod (sample)	555-0101
		Thomas Andersen (sample)	555-0112
		Yvonne McKay (sample)	555-0100

Quick Campaigns

Subject	Activity Type
Quick Campaign	Phone Call

MARKETING LIST

Test List

Locked: No

Last Used on (Date):

Owner: crm admin

Summary

Information		Members		Campaigns	
* Name	Test List	Name	Topic	Name ↑	Campa
* List Type	Dynamic	No Leads found for this Marketing List. Select Add (+).		No Campaigns found for this Marketing List. Select Add (+).	
Purpose					
* Targeted At	Lead				
Source					
Currency	रुपया				
Modified On	26-04-2018 16:28				
Cost		Quick Campaigns			

File

Help

Find

Edit Columns

Look for: Lead Use Saved View: [new]

Details Clear Group AND Group OR

Age Is Less Than 25

Select

Use Query Find

MARKETING LIST

Test List

Locked: No

Last Used on (Date):

Owner: crm admin

Summary

Information		Members		Campaigns	
*Name	Test List	Name	Topic	Name ↑	Campa
*List Type	Dynamic	Susanna Stubberod (sample)	Mailed an interest card back ...	No Campaigns found for this Marketing List. Select Add (+).	
Purpose	.....			
*Targeted At	Lead				
Source	.....			
Currency	रुपया				
Modified On	26-04-2018 16:50				

Active

File Save and Close Insert/Update Delete Actions Help

Email Template: My Email Template

Working on solution: Default Solution

Details

Type * Global Template Language English

*Title My Email Template

Description

Subject * Promotion of new product.

Hello,
 This is regarding our newly launched product.


[+ NEW](#) [DEACTIVATE](#) [DELETE](#) [COPY AS CAMPAIGN](#) [COPY AS TEMPLATE](#) [PROCESS](#) [ASSIGN](#) [SHARE](#) [EMAIL A LINK](#)

CAMPAIGN: **New Campaign** | Template: No | Estimated Revenue: ₹0.00 | Status Details: Proposed | Owner: crm.admin


Summary

CAMPAIGN	
Name	New Campaign
Campaign Code	CMP-01009-X3G8V
Currency	₹
Campaign Type	Advertisement
Expected Response(%)	

SCHEDULES	
Proposed Start	
Proposed End	

ASSISTANT	ACTIVITIES	NOTES
 There are currently no actions waiting to be completed.		

MARKETING LISTS	
Name ↑	Members Cou...
No Marketing Lists found for this Campaign. Select Add (+).	

LEADS			
Name ↑	Owner	Status	
			

javascript: ⌵

Look Up Records ✕

Enter your search criteria.

Look for

Look in

Search

Show Only My Records

<input type="checkbox"/>	Name	Type	Purpose	Mark <input type="button" value="↻"/>
<input type="checkbox"/>	Static Marketi...	Static		Contact
<input checked="" type="checkbox"/>	Dynamic Mar...	Dynamic		Contact
<input type="checkbox"/>	Test List	Dynamic		Lead

1 - 3 of 3 (1 selected)
⏪ ⏩ Page 1

Selected records:

Look Up Records ✕

Enter your search criteria.

Look for **Show Only My Records**

Look in

Search ✕

✓	Name	Type	Purpose	Marketing List I
✓	My New List	Dynamic		Lead

1 - 1 of 1 (1 selected) ⏪ ⏩ Page 1

Selected records:

My New List

SAVE SAVE & CLOSE FLOWS FORM EDITOR

CAMPAIGN ACTIVITY

New Campaign Activity

Priority: Normal


Status Details: Proposed

Owner: crm admin

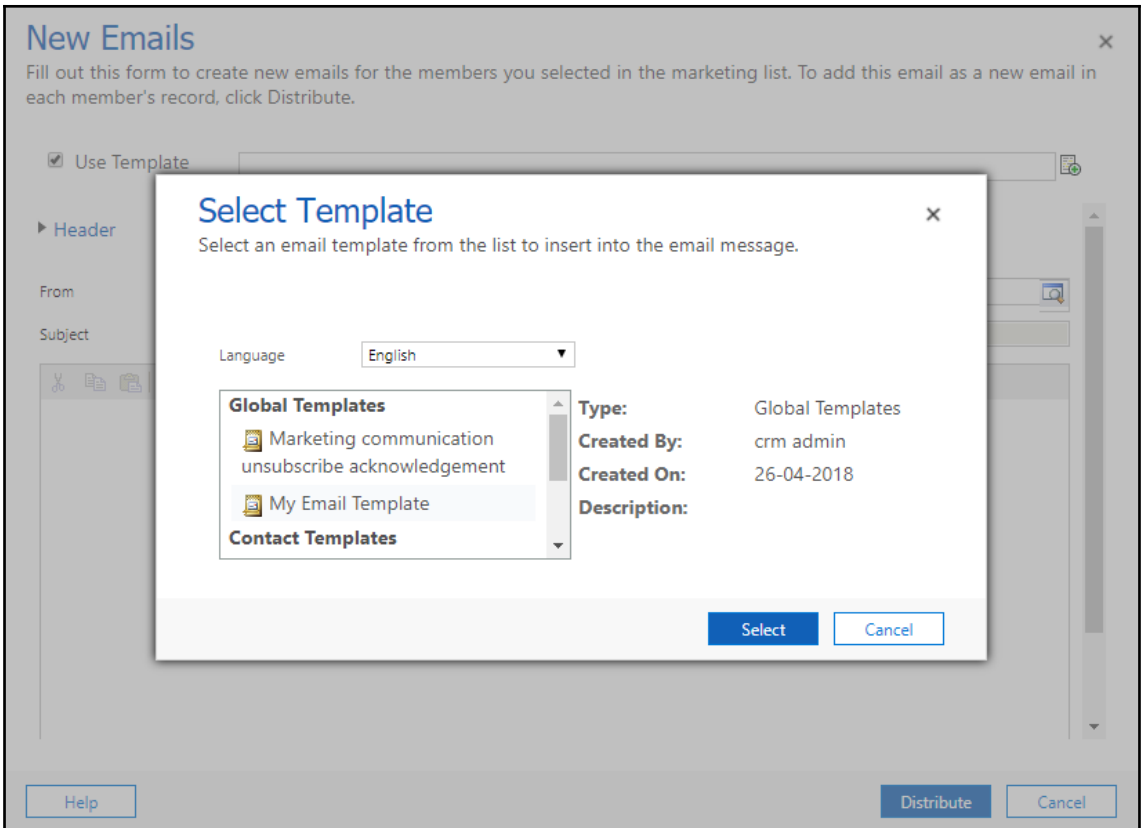
Campaign Activity

SUMMARY	
* Subject	Test Activity
* Used in Campaign	New Campaign
Type	.....
Channel	Email
Outsource Vendors	.....
Description	.....
Scheduled Start	.....
Scheduled End	.....
Actual Start	.....

MARKETING LISTS	
Name ↑ | Marketing List Member Type	
To enable this content, create the record.	

ASSISTANT	ACTIVITIES	NOTES
 <p>There are currently no actions waiting to be completed.</p>		

Open



New Emails

Fill out this form to create new emails for the members you selected in the marketing list. To add this email as a new email in each member's record, click Distribute.

Use Template

► Header

From:

Subject:

Distribute Email Messages

Before you distribute the Email Messages, choose who you want to assign them to.

Email Messages Owner:

- The owners of the records in the target marketing lists
- Assign to Me
- Assign to other user or team
- Add to a queue

Choose whether you want to close the e-mail activities.

Distribute **Cancel**

Distribute **Cancel**

Microsoft Social Engagement Search Setup

Summary Custom Sources Blocked Content

All Categories

Category	Search Topics	Posts
All Categories	5	
Competitors	0	
Accounts	0	
Contacts	0	
Leads	0	
Campaigns	0	
Uncategorized	4	
Products	0	

Search Topic	Category	Posts
[Redacted]	Uncategorized	30
[Redacted]	Uncategorized	5
[Redacted]	Uncategorized	52
[Redacted]	IMRO Conversations	0
[Redacted]	Uncategorized	1

QUOTA

— Limit — All Categories

✓ Within limits:
Your solution with the current configuration is expected to stay within the post quota. No action is required.

Microsoft Social Engagement Search Setup

Summary Custom Sources Blocked Content

All Categories

CATEGORIES

Category	Search Topics
<input type="text"/> ✓ ✕	
All Categories	5
Competitors	0 ...
Accounts	0 ...
Contacts	0 ...
Leads	0 ...

SEARCH TOPICS

Search Topic	Category	Posts
Galway Music	Uncategorized	
Galway Venues	Uncategorized	
IFI Cinema	Uncategorized	
Public Perception of IMRO	IMRO Conversations	
Rule Test 1	Uncategorized	

Microsoft Social Engagement Search Setup

Summary Custom Sources Blocked Content

All Categories

CATEGORIES

Category	Search Topics
All Categories	5
Competitors	0 ...
Accounts	0 ...
Contacts	0 ...
Leads	0 ...

SEARCH TOPICS

Search Topic	Category	Posts	
[REDACTED]	Uncategorized	30	🗑
[REDACTED]	Uncategorized	5	🗑
[REDACTED]	Uncategorized	52	🗑
[REDACTED]	IMRO Conversations	0	🗑
[REDACTED]	Uncategorized	1	🗑



Summary

Custom Sources

Blocked Content

Rule Test 1

SEARCH TOPIC SETTINGS



Name

Rule Test 1

Category

Uncategorized



Owner



Created

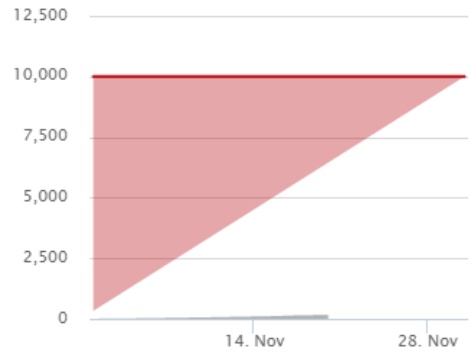
01/11/2016



RULES



QUOTA



— Limit — All Categories — Rule Test 1

▸ Posts per language

▸ Posts per source

Summary Custom Sources Blocked Content

Rule Test 1

SEARCH TOPIC SETTINGS

Name:

Category:

Owner: Created: 01/11/2016

RULES:

ADD RULE

Choose the type of search rule to configure.

- Keywords rule**
 The keyword search rule lets you set up a search query with keywords, inclusions, and exclusions, and choose which languages and sources to search. For example, if you use Microsoft, MSFT as keywords, and Dynamics 365 as inclusions, you'll get posts that contain Microsoft OR MSFT AND Dynamics 365.
- Facebook page rule**
 The Facebook page rule allows you to capture all conversations on a public Facebook page. The conversations are captured regardless of any previously defined keyword search rule in the same search topic.
- Twitter rule**
 The Twitter rule allows you to track the conversations for a specific Twitter profile. The Twitter profiles are captured regardless of any previously set keyword search rule in the same topic.
- Custom sources rule**
 Gather all posts from a previously created group of custom sources without matching any keywords.
- Private messages rule**
 You can acquire private messages from authenticated Twitter and Facebook Accounts when (i) a Facebook or Twitter Profile is authenticated on the Social Profiles page; and (ii) the acquisition of private messages has been enabled by the owner of the profile.
- Instagram rule**
 The Instagram rule allows you to track the posts and comments for a specific Instagram account. The posts

Microsoft Social Engagement Analytics

All Search Topics

Today 20/11/2016 4 posts

SENTIMENT

10.0 index 0.0 change →

CATEGORIES BY SENTIMENT: Uncategori... +10

VOLUME

Volume Average

PHRASES

SEARCH TOPICS: 4

LOCATION INSIGHTS

SOURCES

	4
--	---

AUTHORS

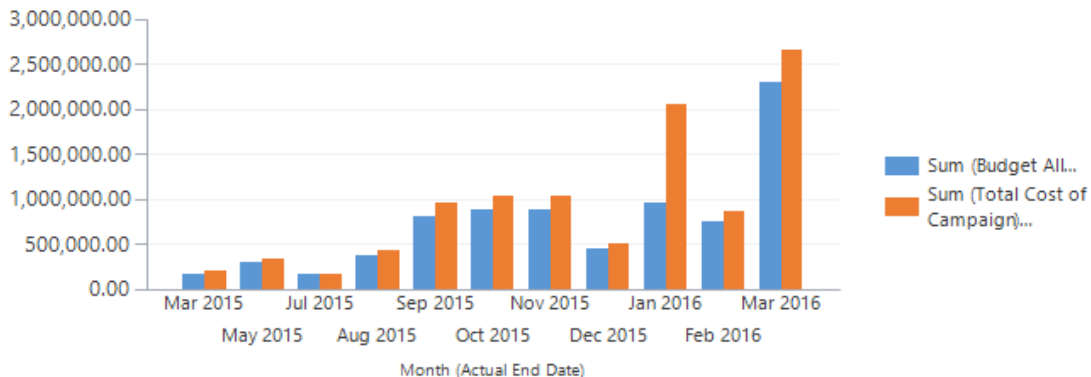
	1
	1
	1

LANGUAGES

English	4
---------	---

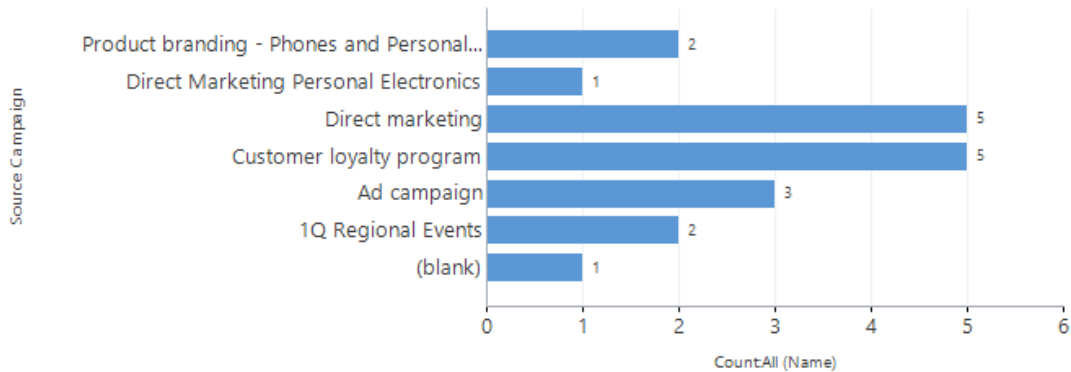
Campaign Budget vs. Actual Costs (by Month)

All Campaigns and Campaign Templates



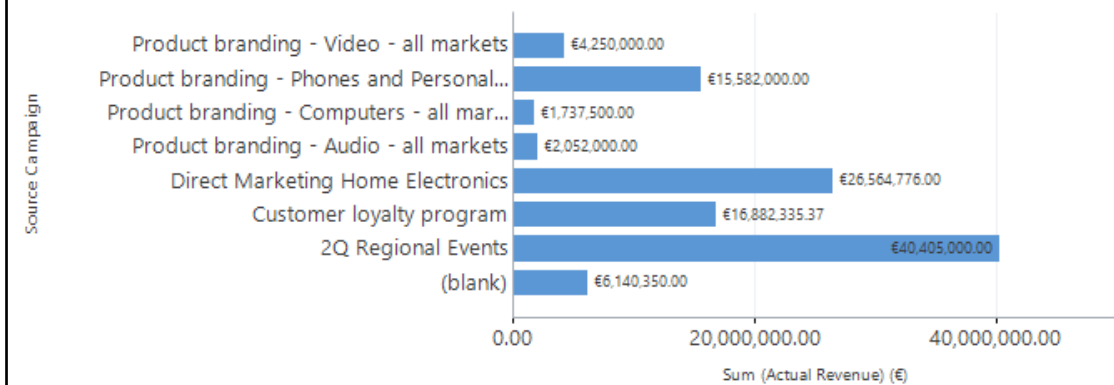
Leads by Source Campaign

All Leads

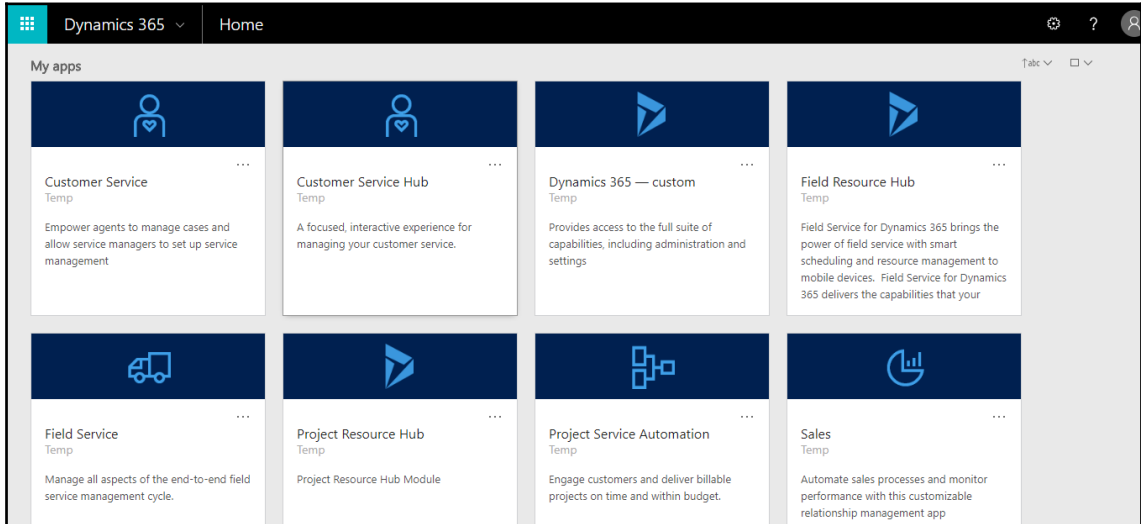


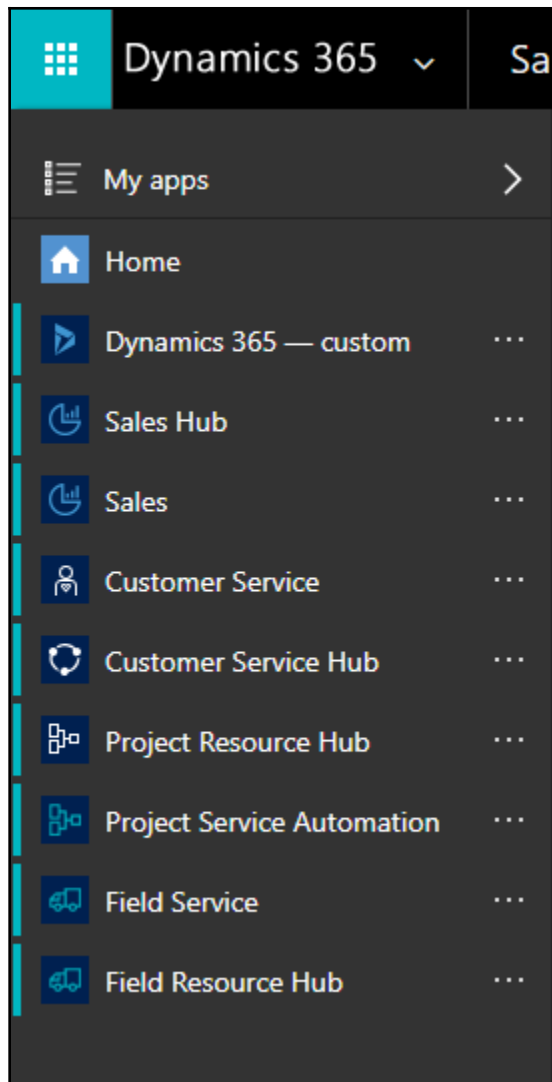
Revenue Generated by Campaign

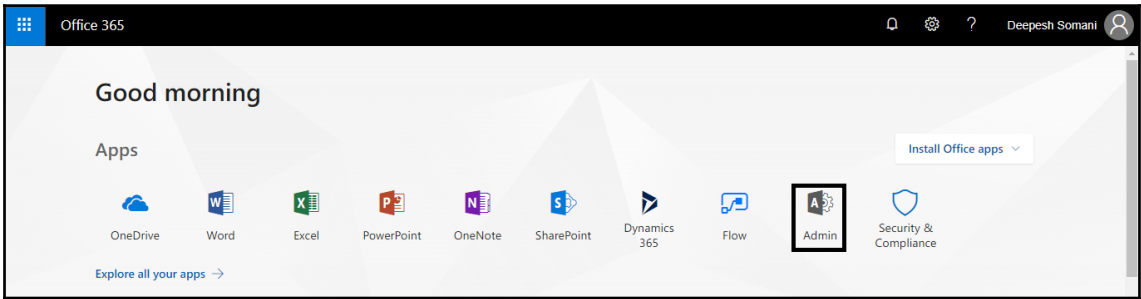
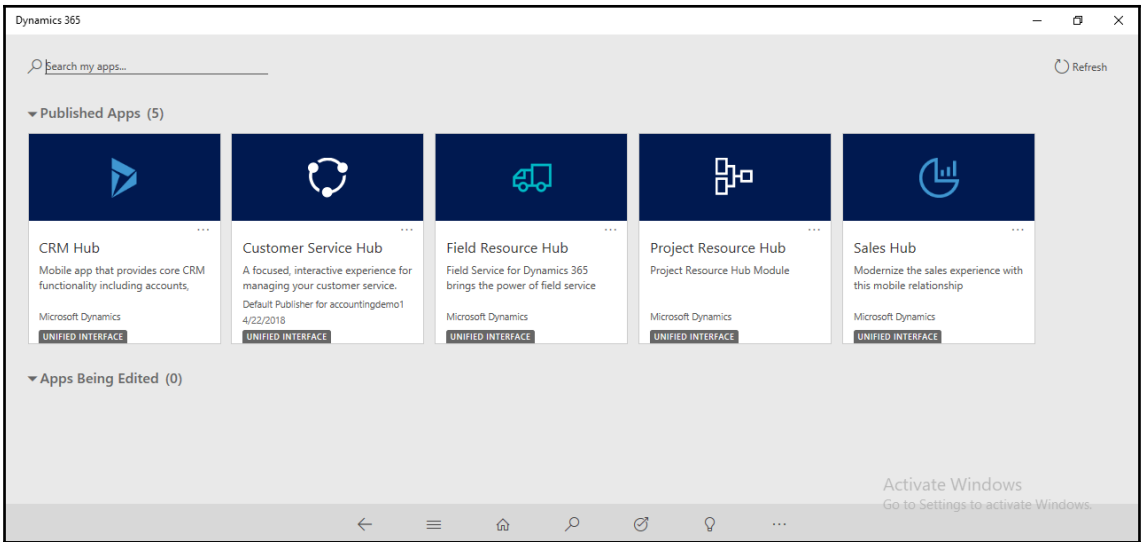
Closed Opportunities

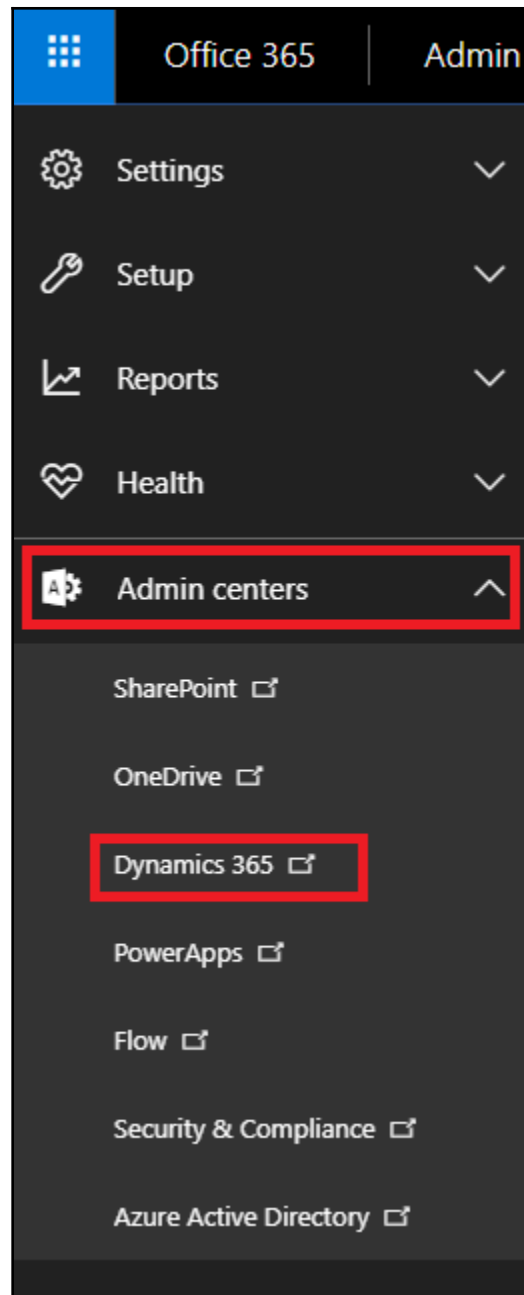


Chapter 4: Understanding the New Unified User Interface









Dynamics 365 Administration Center


INSTANCES | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS



Manage your Dynamics 365 instances

Region:


Instance Type:

NAME	STATE	REGION	INSTANCE TYPE
Temp	ready	Europe, Middle East, Africa ...	Production

Temp
PRODUCTION
Dynamics 365, version 9.0  OPEN

 EDIT  NOTIFICATIONS

Purpose
Add purpose by editing instance

Solutions 
CDS Management, Dynamics 365 Sales Application, Dynamics 365 Customer Service Application, Customer Service Hub, OData v4 Data Provider

Dynamics 365 Administration Center

INSTANCES | **UPDATES** | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

Manage your solutions

← Manage your solutions

Select a preferred solution to manage on selected instance: Temp

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Not installed
Customer Service Hub	9.0.2.68	1/1/2050	Installed
Dynamics 365 Customer S...	2.0.0.4	1/1/2050	Installed
Dynamics 365 for Marketing	1.25.1014.4	1/1/2020	Not installed
Dynamics 365 Portals - Ba...	8.4.0.275	1/1/2050	Not installed
Dynamics 365 Portals - Co...	8.4.0.275	1/1/2050	Not installed
Dynamics 365 Portals - Cu...	8.4.0.275	1/1/2050	Not installed
Dynamics 365 Portals - Cu...	8.4.0.275	1/1/2050	Not installed
Dynamics 365 Portals - Em...	8.4.0.275	1/1/2050	Not installed

Crm Hub



Created by: Microsoft Dynamics
[Learn more](#)



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Your use of Bing Maps is governed by the Bing Maps End User Terms of Use available at <https://go.microsoft.com/?linkid=9710837> and the Bing Maps Privacy Statement available at <https://go.microsoft.com/fwlink/?LinkID=248686>. Your use of third party mapping services is governed by their service specific end user terms and privacy statements. You should carefully review these other end user terms and privacy statements.

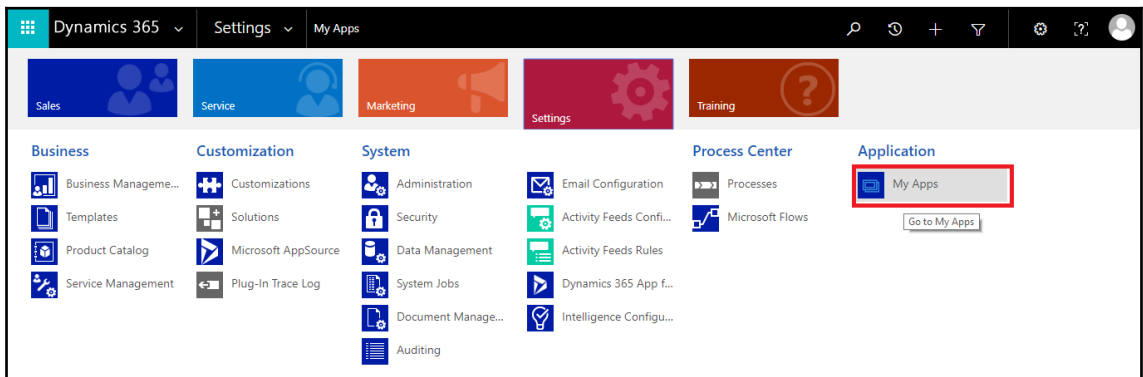
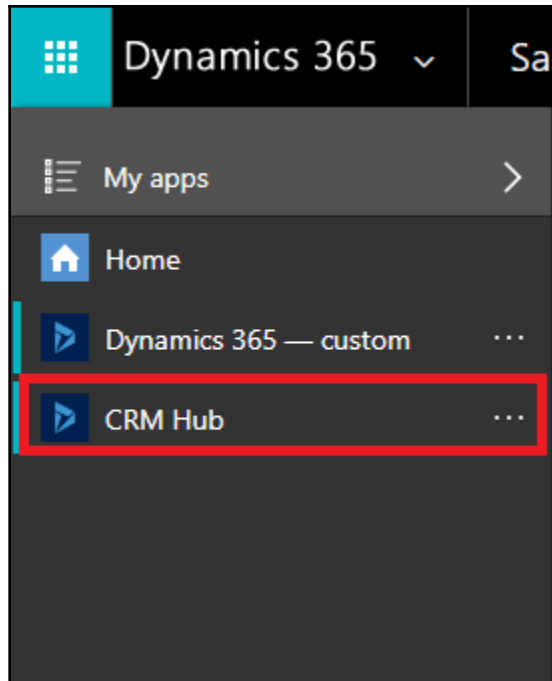
You may not reverse engineer, decompile or disassemble the software, or otherwise attempt to derive the source code for the software except, and solely to the extent: (i) permitted by applicable law, despite this limitation; or (ii) required to debug changes to any libraries licensed under the GNU Lesser General Public License which are included with and linked to by the software.

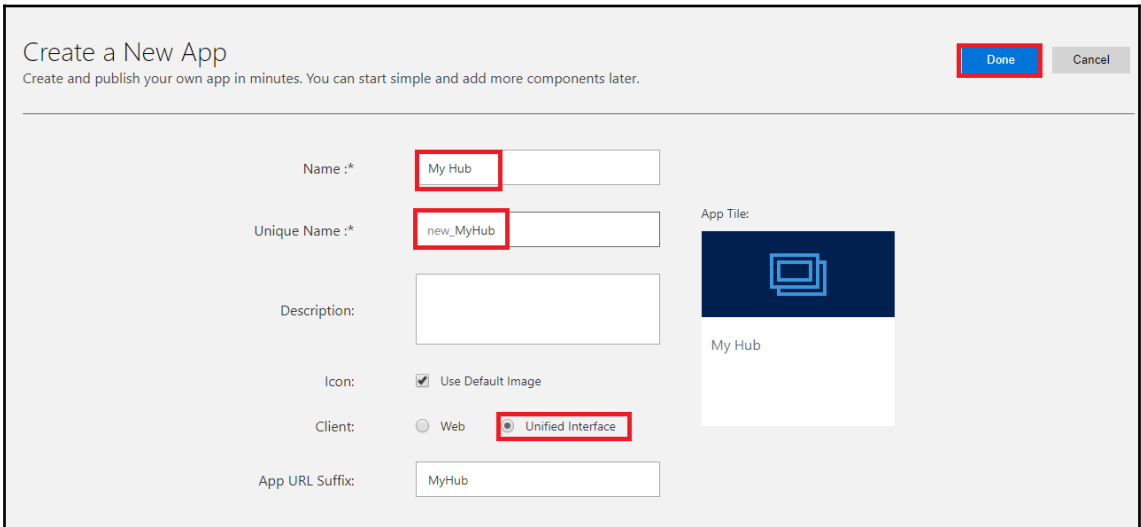
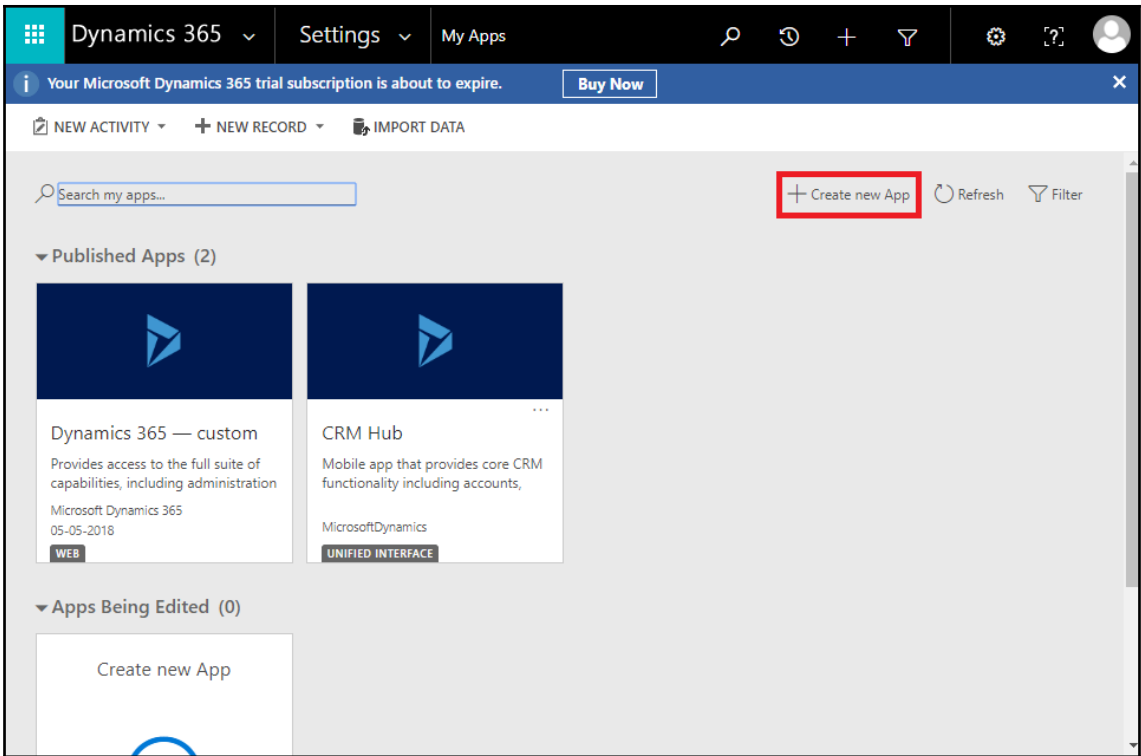
Third Party Notices: <https://go.microsoft.com/fwlink/p/?LinkId=832172>

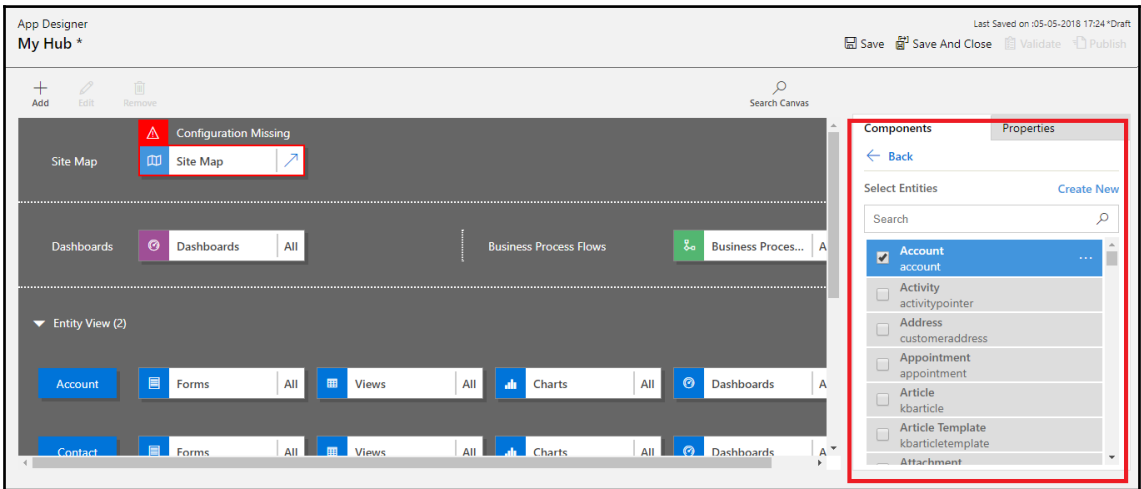
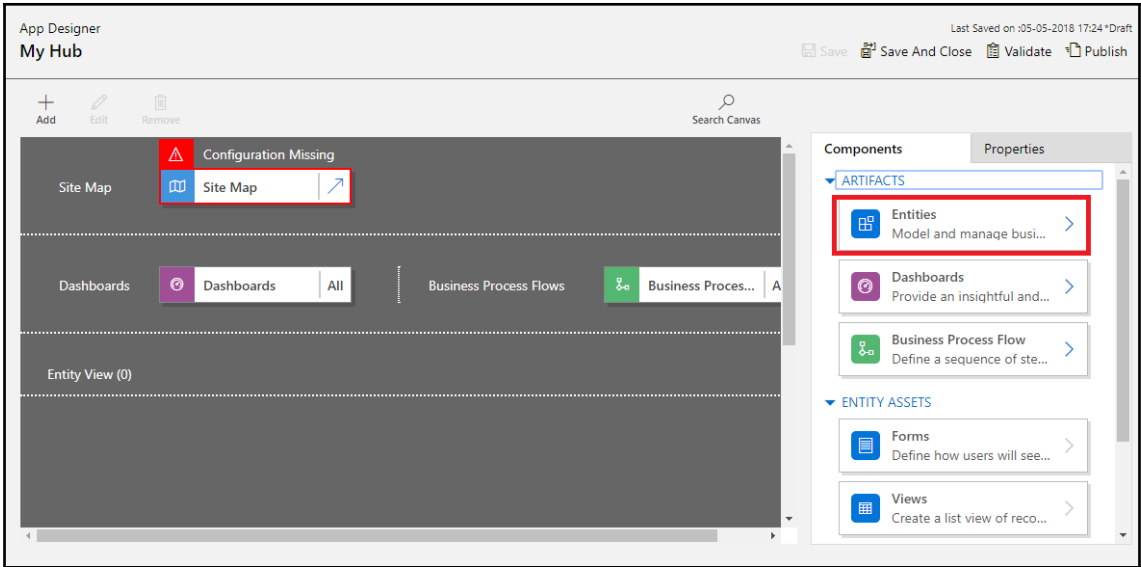
cancel

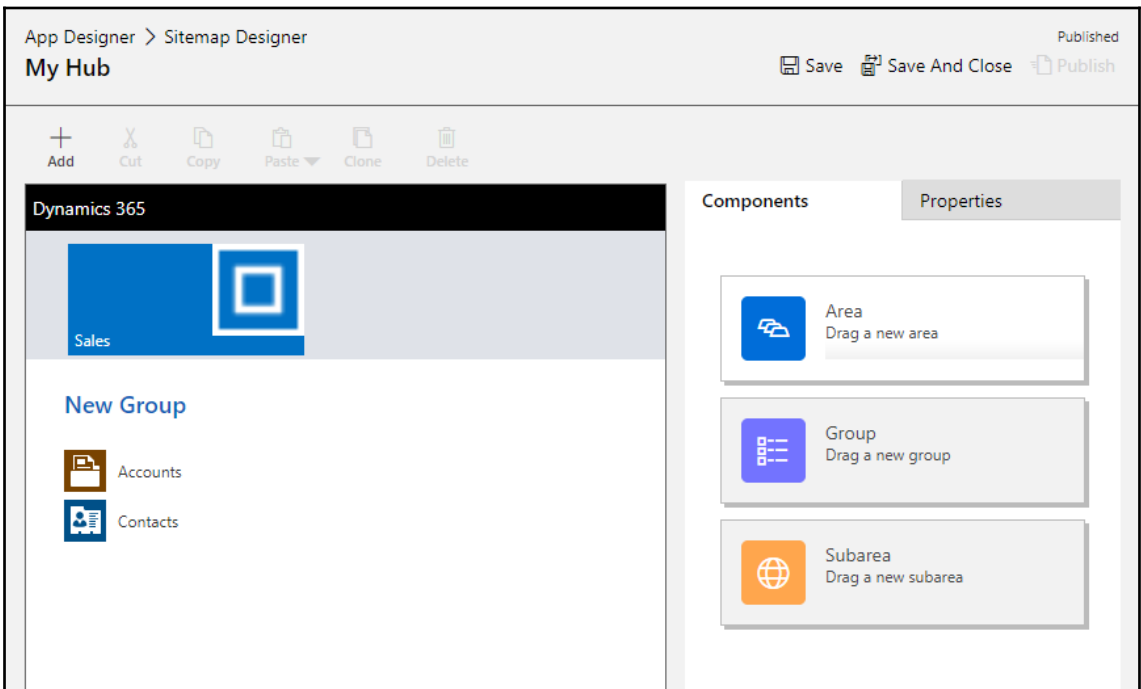
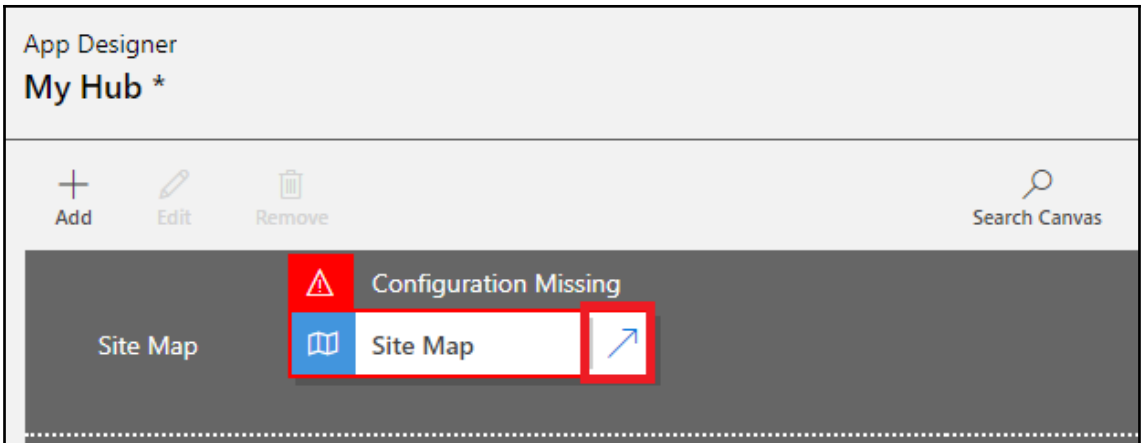
install

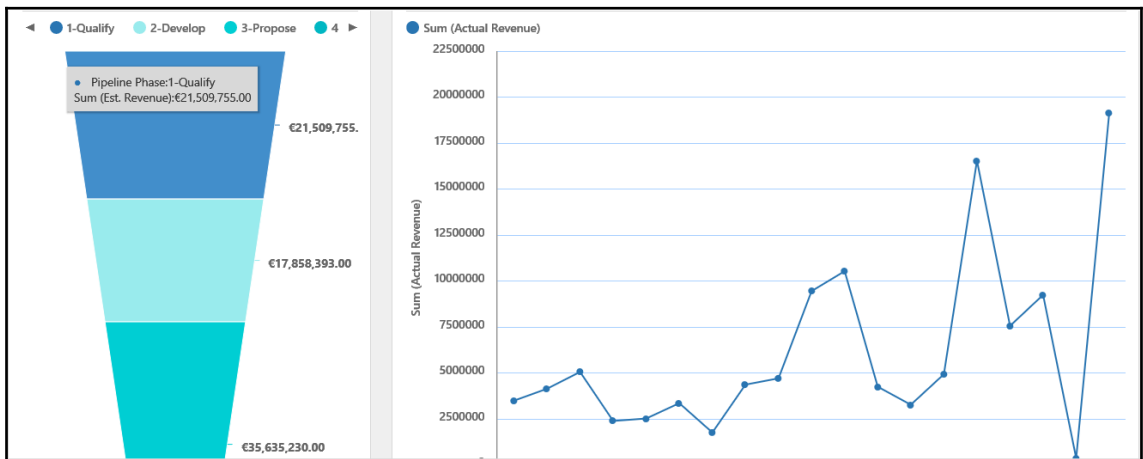
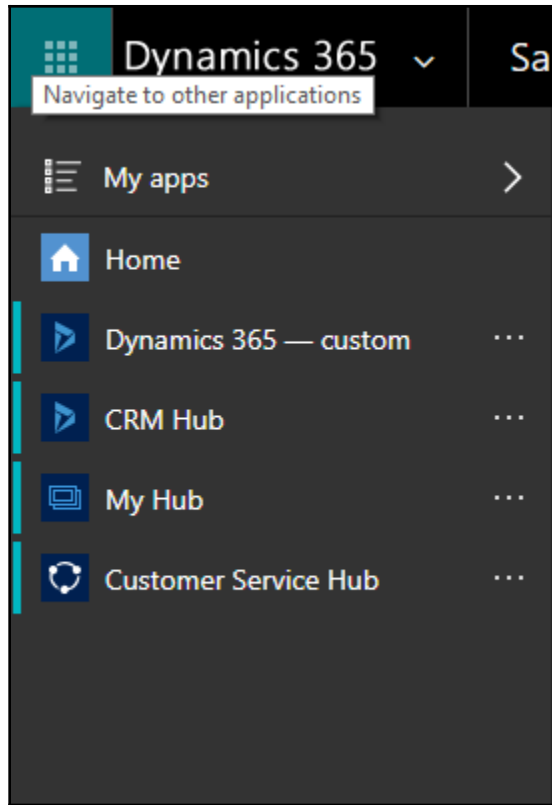
By clicking install/upgrade you are agreeing to the above terms of service agreement.











Open Opportunities ▼ Search for records 🔍

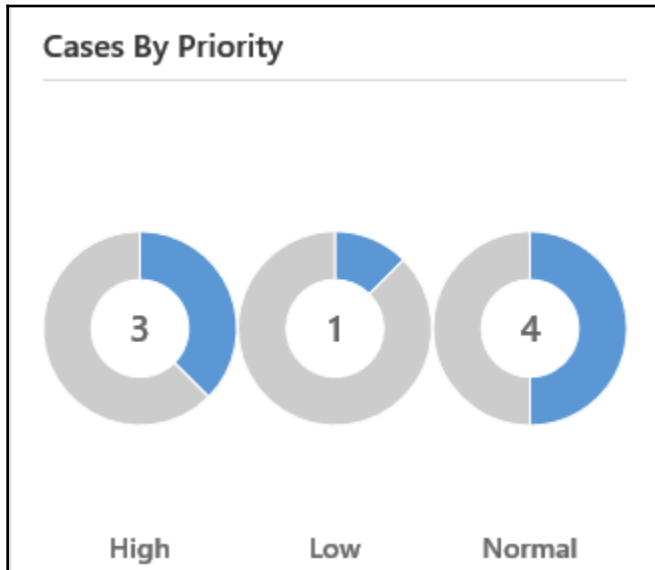
Opportunity Pipeline by S... ▼ 📄

◀ ● Close ● Develop ● Propose ● Qual ▶

✓ Topic	Account	Owner	Est. Close...	↑	Probability	Est. Re...	↓
Expressed interest in A. Datum X line of p	Northwind Tr	Veronica	05/06/2017		70	€10,568,9...	
Printers	Adventure W	Christa Ge	15/07/2017		80	€4,931,30...	
Notebooks	City Power &	Veronica	31/08/2017		60	€2,441,47...	
PC Selection	Humongous	Sven Mor	13/07/2017		60	€2,095,68...	
Laptops	Proseware, Ir	Sven Mor	26/05/2017		40	€1,361,20...	
Home Electronics Consolidation	The Phone C	Molly Clar	15/06/2017		60	€900,000.00	

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

1 - 11 of 11 (0 selected)



+ New Deactivate Assign Email a Link Delete Refresh Process Follow Flows Word Templates

Account: Account **Contosso** Annual Revenue: €54,000.00 Number of Employ...: 10

Summary Project Price Lists Details Field Service Scheduling Related

ACCOUNT INFORMATION

Account Name * **Contosso**

Phone ---

Fax ---

Website ---

Parent Account ---

Ticker Symbol ---

Timeline

Enter a note...

TODAY

Auto-post on Contosso's wall - Just now

Account: Created By **Deepesh Somani**

Like Reply

Relationship Assistant

This record hasn't been created yet. To enable this content, create the record.

Primary Contact ---

CONTACTS

Summary Project Price Lists Details Field Service Scheduling Related

ACCOUNT INFORMATION

Account Name * **Contosso**

Phone ---

Fax ---

Website ---

Parent Account ---

Ticker Symbol ---

Timeline

Enter a note...

TODAY

Auto-post on Contosso's wall - Just now

Account: Created By **Deepesh Somani**

Like Reply

Related - Common

- Activities
- Social Profiles
- Contacts
- Connections
- Entitlements
- Actuals
- Resource Preferences
- Opportunity Lines
- Quotes

Timeline

Enter a note...

Filter by (Click To Filter) ✕

By record type

All

1
1 Posts

Show more filters

TODAY ↓ ⓘ

Auto-post on **Contosso's** wall - Just now

+ New 🗑️ Delete 🔄 Refresh 🏠 Quality 📅 Process 🚫 Disqualify 👤 Assign 📧 Email a Link ★ Follow ⋮

Lead: Lead ▼
Gabriele Cannata

Lead Source
Advertisement

Rating
Hot

Lead to Opportunity Sale...
Active for 16 days

● Qualify (16 D)

Develop

Propose

Close

Summary Details Related

[92]

Dynamics 365 | Sales Hub | Sales > Dashboards

Dashboard

My Work

- Dashboards
- Activities

Customers

- Accounts
- Contacts

Sales

- Leads
- Opportunities
- Competitors

Collateral

- Quotes
- Orders

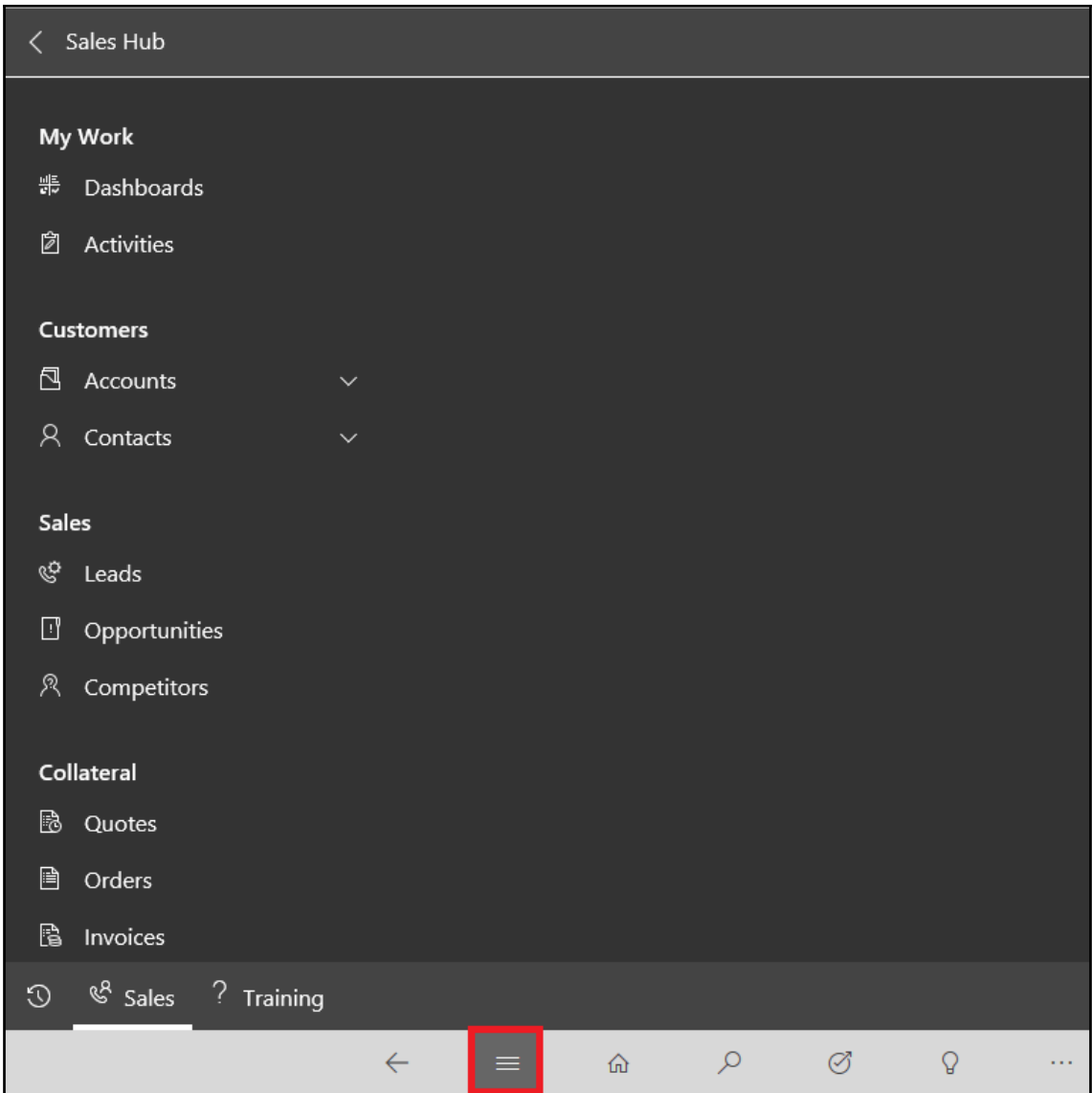
Sales Hub

Goal Progress (Money)

There was an error retrieving the chart from the server. Please try again.






Open Leads

- Alex Wu
Expressed interest in A. Datum X line...
New
- Allison Brown
Wants to expand
New
- Brian LaMee
Interested in online only store
New
- Cat Francis
Interested in our newer offerings
New
- Cathan Cook

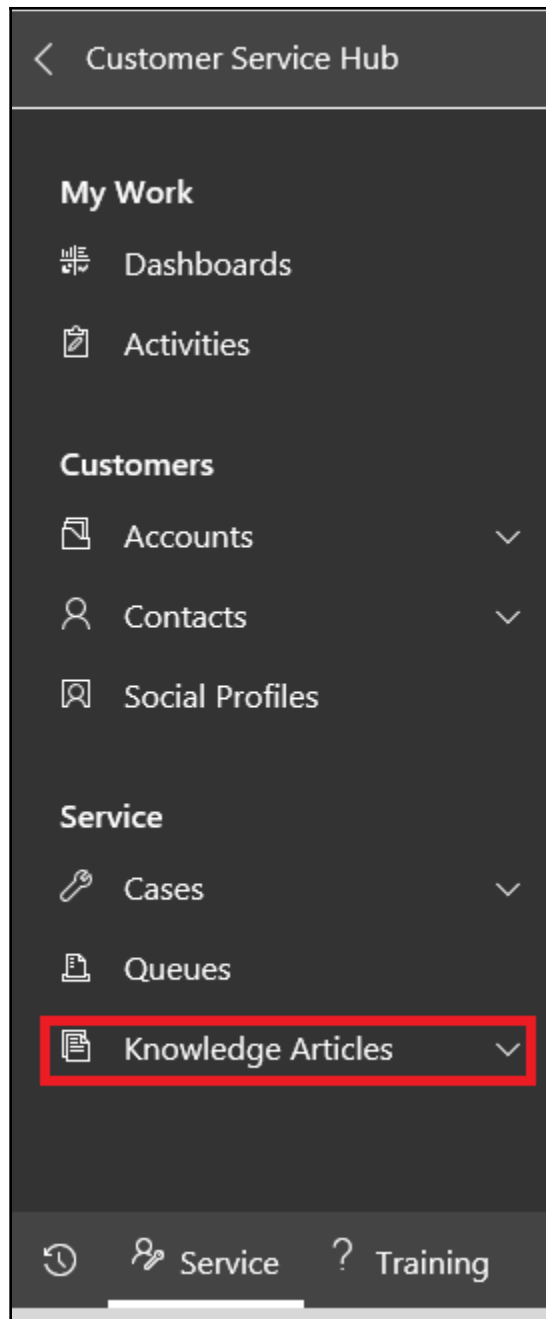


Search my apps... Refresh

▼ Published Apps (5)

 CRM Hub Mobile app that provides core CRM functionality including accounts, Microsoft Dynamics UNIFIED INTERFACE	 Customer Service Hub A focused, interactive experience for managing your customer service. Default Publisher for accountingdemo1 4/22/2018 UNIFIED INTERFACE	 Field Resource Hub Field Service for Dynamics 365 brings the power of field service Microsoft Dynamics UNIFIED INTERFACE	 Project Resource Hub Project Resource Hub Module Microsoft Dynamics UNIFIED INTERFACE	 Sales Hub Modernize the sales experience with this mobile relationship Microsoft Dynamics UNIFIED INTERFACE
---	--	---	--	--

▼ Apps Being Edited (0)



Show Chart + New Delete Refresh Flows Excel Templates Export to Excel

My Active Articles

Article Publi...	Title	Status	Major Version...	Minor Version...	Views
<input checked="" type="checkbox"/>					

Save Save & Close + New Flows

KNOWLEDGE ARTICLE

New Knowledge Article

Language: **English - United S** | Status Reason: **Proposed**

New Process (Active for less than one mi...)

 Author (< 1 Min) | Review | Publish

Content | Summary | Analytics

ARTICLE CONTENT

Title: * Sample Article | Description: ---

Keywords: + ---

CONTENT

← ☰ 🏠 🔍 🔄 💡 ⋮

KNOWLEDGE ARTICLE Knowledge Article

Language English - United St Status Reason Approved

CONTENT

Designer HTML | Preview

Styles | Format | Font | Size | **B** *I* U **S** | A- | [Icons]

Fix Laptop Problem

if You are unable to start laptop follow below steps to fix problem.

- Check Power Supply is Connected.
- Check battery is properly inserted.

KNOWLEDGE ARTICLE New Knowledge Article

Language English - United S Status Reason Proposed

New Process Active for less than one mi... Author (< 1 Min) Review Publish

Content Summary Analytics

ARTICLE CONTENT

Title * Sample Article

Keywords + ---

Description ---

Set Keywords * ---

Article Subject * ---

Assign Primary Author * Deepesh

Mark for Review * Mark Comple...

CONTENT

KNOWLEDGE ARTICLE Knowledge Article

Language English - United St Proposed

New Process Completed in 13 minutes

Author Review Publish

Content Summary Analytics Related

ARTICLE CONTENT

Completed

Review

New Add to Queue Assign Refresh Process Create major version Create minor version Associate Category

KNOWLEDGE ARTICLE Knowledge Article

Language English - United St

New Process Completed in 13 minutes

Author Review

Content Summary Analytics Related

ARTICLE CONTENT

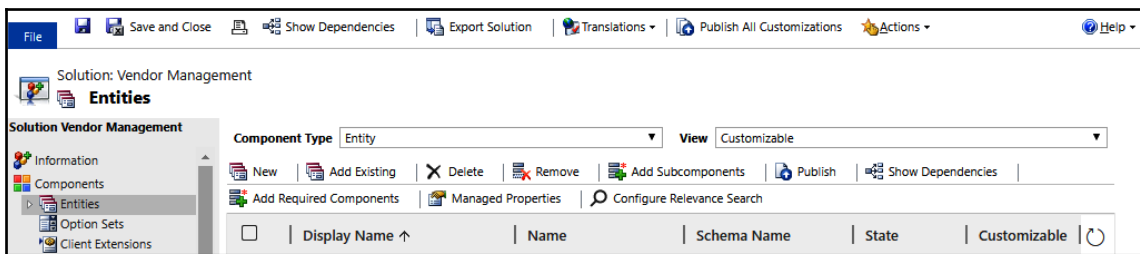
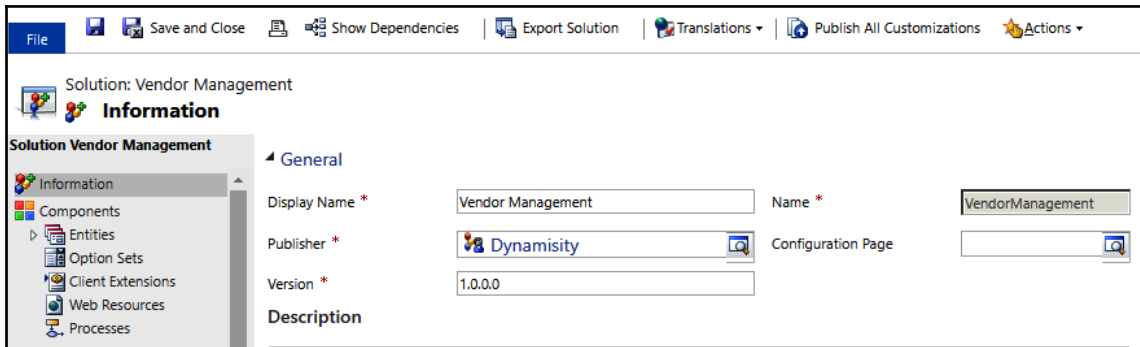
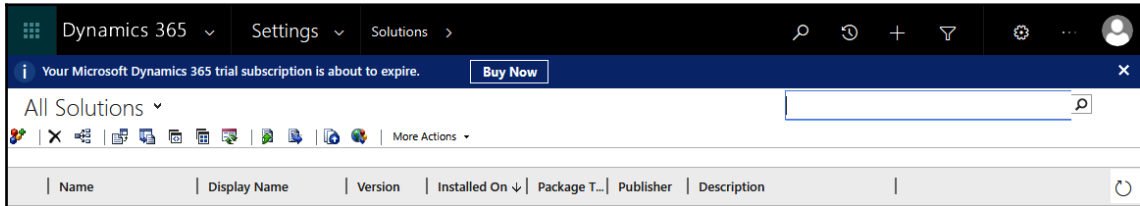
Title Knowledge Article Description

Keywords demo

CONTENT

- Translate
- Publish
- Archive
- Send to Trash
- Revert to Draft
- Relate Article
- Relate Product
- Mark Internal
- Email a Link
- Follow

Chapter 5: Designing Unified Interface Apps



General Primary Field Controls

Entity Definition

Display Name * Virtual Entity

Plural Name * Data Source

Name * Ownership *

Primary Image

Color

Description

Areas that display this entity

Sales Service Marketing Settings

Training

Process

Business process flows (fields will be created) †

Communication & Collaboration

Feedback †

Notes (includes attachments) †

File Publish All Customizations Help

Vendor Fields

Solution Vendor Management

Information Components Entities Vendor Forms Views Charts Fields Keys 1:N Relationships N:1 Relationships N:N Relationship...

View: All

New X Edit More Actions

<input type="checkbox"/>	Name	Schema Name ↑	Display Name	Type	Field Type	State
<input type="checkbox"/>	createdby	CreatedBy	Created By	Lookup	Simple	Unmanaged
<input type="checkbox"/>	createdon	CreatedOn	Created On	Date and Time	Simple	Unmanaged
<input type="checkbox"/>	createdonbehalfby	CreatedOnBehalfBy	Created By (D...	Lookup	Simple	Unmanaged
<input type="checkbox"/>	importsequencenumber	ImportSequenceNum...	Import Seque...	Whole Number	Simple	Unmanaged

FILE HOME INSERT

Section Three Columns Three Columns Two Columns Two Columns Two Columns One Column Sub-Grid Spacer Quick View Form IFRAME Web Resource Bing Maps Navigation Link Social Insights Timer Knowledge Base Search ACI Control Relationship Assistant Predictive Lead Scoring

3 Tabs 2 Tabs 1 Tab Control

जानकारी
General

Solution: Vendor Management
Form: Vendor

Common
Audit History

Sales

Service

Marketing

General

General

Name *

Phone

Email

Set Properties

Set the List or Chart properties.

Display **Formatting** Controls

Name

Specify a unique name.

Name *

Name

Label *

Display label on the Form

Panel header color

Data Source

Specify the primary data source for this list or chart.

Records ▼

Entity ▼

Default View ▼

Additional Options

Display Search Box

Dynamics 365 Settings Product Catalog

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

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.

Dynamics 365 Settings Product Catalog

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

[+ NEW](#)
[DELETE](#)
[EMAIL A LINK](#)
[FLOWS](#)
[RUN REPORT](#)
[EXCEL TEMPLATES](#)
[EXPORT TO EXCEL](#)
[IMPORT DATA](#)
[CHART PANE](#)

⇒ Active Unit Groups





Name ↑
Default Unit

Create Unit Group ✕



You have chosen to add a new unit group to the product catalog. First, you specify the primary unit from which the other units will be derived.

Name *

Primary Unit *

 Dynamics 365  Settings  Product Catalog Length 

Common

-  Units
-  Audit History

General

Name *	Length

Dynamics 365 Settings Product Catalog Length

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

UNIT GROUP : INFORMATION

Length

Unit Group Units Associated View

+ ADD NEW UNIT RUN REPORT EXCEL TEMPLATES EXPORT UNITS

<input type="checkbox"/>	Name ↓	Base Unit	Quantity
	Millimetre		1.00000

DELETE EMAIL A LINK FLOWS WORD TEMPLATES RUN REPORT FORM EDITOR

UNIT : INFORMATION

Centimetre

General

Name *	Centimetre
Quantity *	10.00000
Base Unit *	Millimetre

UNIT GROUP : INFORMATION

Length ☰

Unit Group Units Associated View ▾

+ ADD NEW UNIT ▶ RUN REPORT ▾ 📄 EXCEL TEMPLATES ▾ 📄 EXPORT UNITS | ▾

<input type="checkbox"/>	Name ↓	Base Unit	Quantity
	Millimetre		1.00000
	Metre	Centimetre	100.00000
	Kilometre	Metre	1,000.00000
	Centimetre	Millimetre	10.00000

UNIT GROUP : INFORMATION

Weight ☰

Unit Group Units Associated View ▾

+ ADD NEW UNIT ▶ RUN REPORT ▾ 📄 EXCEL TEMPLATES ▾ 📄 EXPORT UNITS | ▾

<input type="checkbox"/>	Name ↓	Base Unit	Quantity
	Milligram		1.00000
	Kilogram	Gram	1,000.00000
	Gram	Milligram	1,000.00000

Dynamics 365 Settings Product Catalog Vendor PriceList

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG

PRICE LIST : PRICELEVEL

Vendor PriceList

Name *	Vendor PriceList	Description
Start Date	03-06-2018	
End Date	24-07-2018	
Currency *	₹ रुपया	

Dynamics 365 Sales Products

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ADD FAMILY ADD PRODUCT ADD BUNDLE DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL

All Products, Families & Bundles

Dynamics 365 Sales Products > Product Family: Bath... >

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

PUBLISH | CLONE | REVISE | RETIRE | DELETE | PROCESS | VIEW HIERARCHY | EMAIL A LINK | RUN WORKFLOW

PRODUCT Product Family: Bathroom Products Status* Active

SUMMARY

Name *	Bathroom Products	Unit Group	.....
Product ID *	Bathroom Products	Default Unit	.....
Family Hierarchy	.....	Default Price List	.....
Valid From	01-06-2018	Decimals Supported	.....
Valid To	31-08-2018	Subject	.....
Description	.....	

Dynamics 365 Sales Products > Product Family: Bath... >

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

PUBLISH | CLONE | REVISE | RETIRE | DELETE | PROCESS | VIEW HIERARCHY | EMAIL A LINK | RUN WORKFLOW

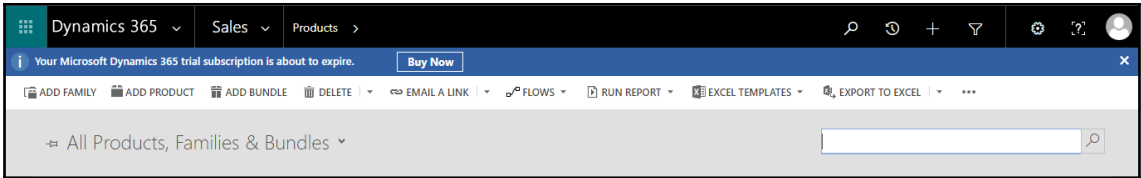
PRODUCT Product Family: Bathroom Products

Confirm Hierarchy Publish ✕

Do you want to publish the product family hierarchy?

This operation will set the child records of the selected product family to the active state.

[Publish Hierarchy](#) [Cancel](#)



SUMMARY

Name *	Soap Holder	Unit Group *	Length
Product ID *	Soap Holder	Default Unit *	Centimetre
Parent	Bathroom Products	Default Price List +	-----
Valid From	01-06-2018	Decimals Supported *	2
Valid To	31-08-2018	Subject	-----
Description	-----		

Lookup Record



Enter your search criteria.

Look for

Look in

Search

Name ↑	Currency	
<input checked="" type="checkbox"/> Vendor PriceList	रुपया	

1 - 1 of 1 (1 selected) Page 1

[New](#)

[Add](#)

[Cancel](#)

[Remove Value](#)

PRICE LIST ITEM : PRODUCT PRICE LIST

Price List Item: Soap ...

General

Price List *	Vendor PriceList	Currency	रुपया
Product *	Soap Holder	Discount List	--
Unit *	Centimetre	Quantity Selling Option *	No Control

Pricing

Pricing Method *	Currency Amount
Amount *	₹50.00
Percentage	--

Dynamics 365 | Sales | Products > Product: Soap Holder

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PREVIEW | CLONE | REVISE | RETIRE | DELETE | PROCESS | VIEW HIERARCHY | EMAIL A LINK | RUN WORKFLOW

PRODUCT | Status: Active

Product: Soap Holder

ADDITIONAL DETAILS

PRICE LIST ITEMS					PRODUCT RELATIONSHIPS		
Price List ↓	Unit	Pricing Method	Amount	Percentage	Related Product ↑	Sales Relations...	Direction
Vendor PriceList	Centimetre	Currency Am...	₹50.00		No Product Relationships found for this Product. Select Add (+).		

Dynamics 365 Sales Products > Product: Towel Holder

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PREVIEW CLONE REVISE RETIRE DELETE PROCESS VIEW HIERARCHY EMAIL A LINK RUN WORKFLOW

PRODUCT Product: Towel Holder Status: Active

SUMMARY

Name *	Towel Holder	Unit Group *	Length
Product ID *	Towel Holder	Default Unit *	Metre
Family Hierarchy	Bathroom Products	Default Price List *	Vendor PriceList
Valid From	01-06-2018	Decimals Supported *	2
Valid To	31-08-2018	Subject	
Description			

Dynamics 365 Settings Product Catalog > Vendor PriceList

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NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS WORD TEMPLATES RUN REPORT

PRICE LIST : PRICELEVEL Vendor PriceList Status: Active

Start Date	03-06-2018
End Date	24-07-2018
Currency *	₹

Price List Items

Product ↑	Unit	Amount
Soap Holder	Centimetre	₹50.00
Towel Holder	Metre	₹300.00

Solution: Vendor Management

Apps

Solution Vendor Management Component Type: App

Information

New Add Existing Delete Remove Show Dependencies Add Required Components

Create a New App

Create and publish your own app in minutes. You can start simple and add more components later.

Done Cancel

Name :* Name is required

Unique Name :*

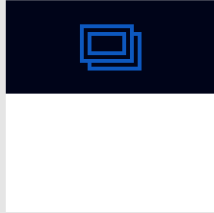
Description:

Icon: Use Default Image

Client: Web Unified Interface

App URL Suffix:

Use existing solution to create the App

App Tile: 

App URL Suffix:

Use existing solution to create the App

Choose a welcome page for the app

Enable Mobile Offline

Name :* Vendor Management

Unique Name :* mdl_VendorManagement

Description: This app manages all the Vendors and the Products.

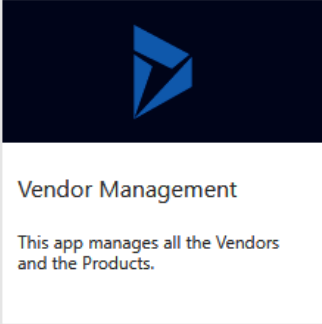
Icon: Use Default Image

Legacy_Crm_Icon.png

Client: Web Unified Interface

App URL Suffix: VendorManagement

App Tile:



Vendor Management

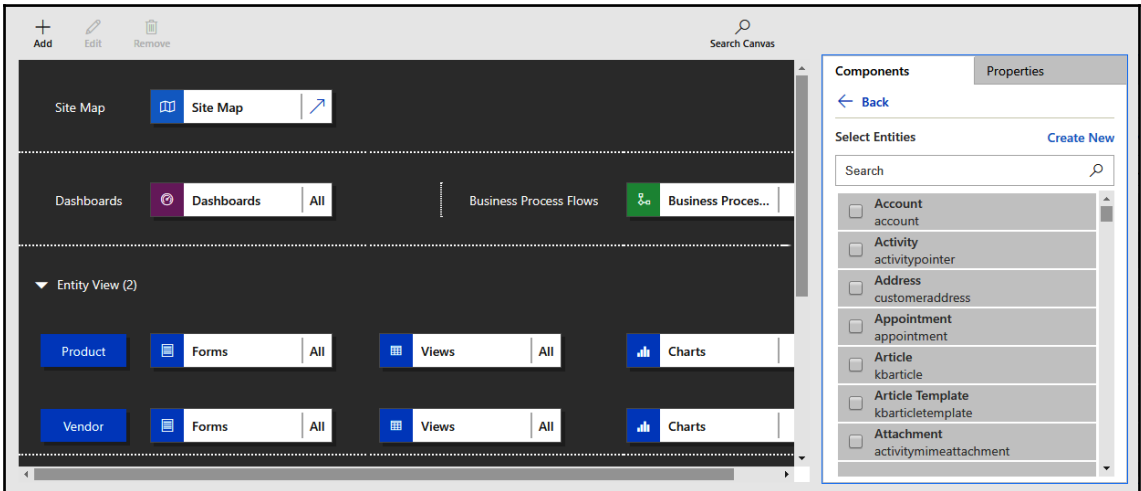
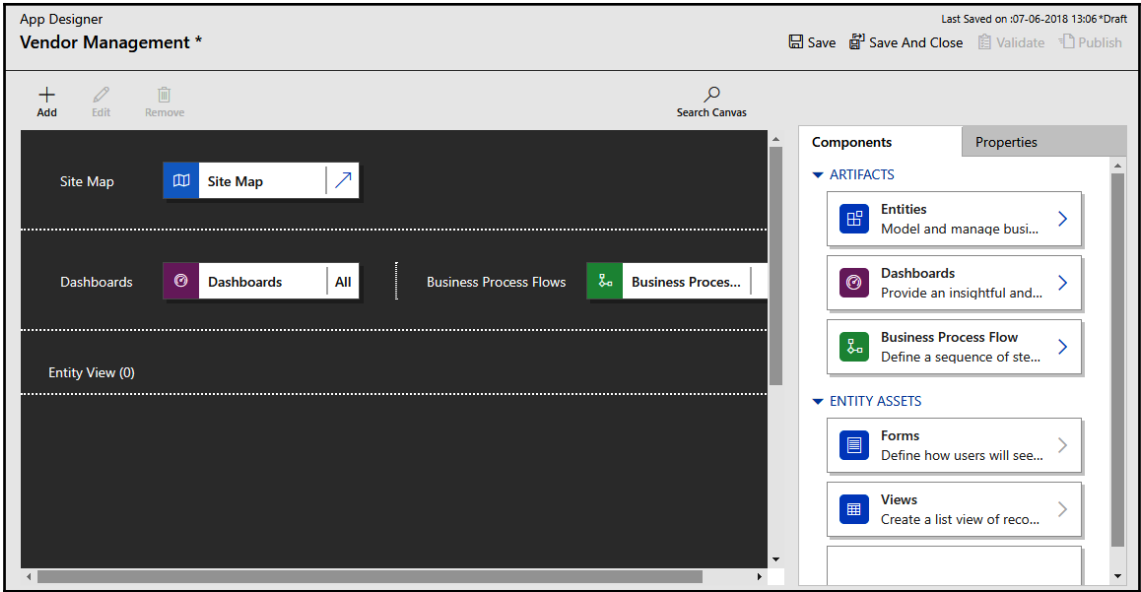
This app manages all the Vendors and the Products.

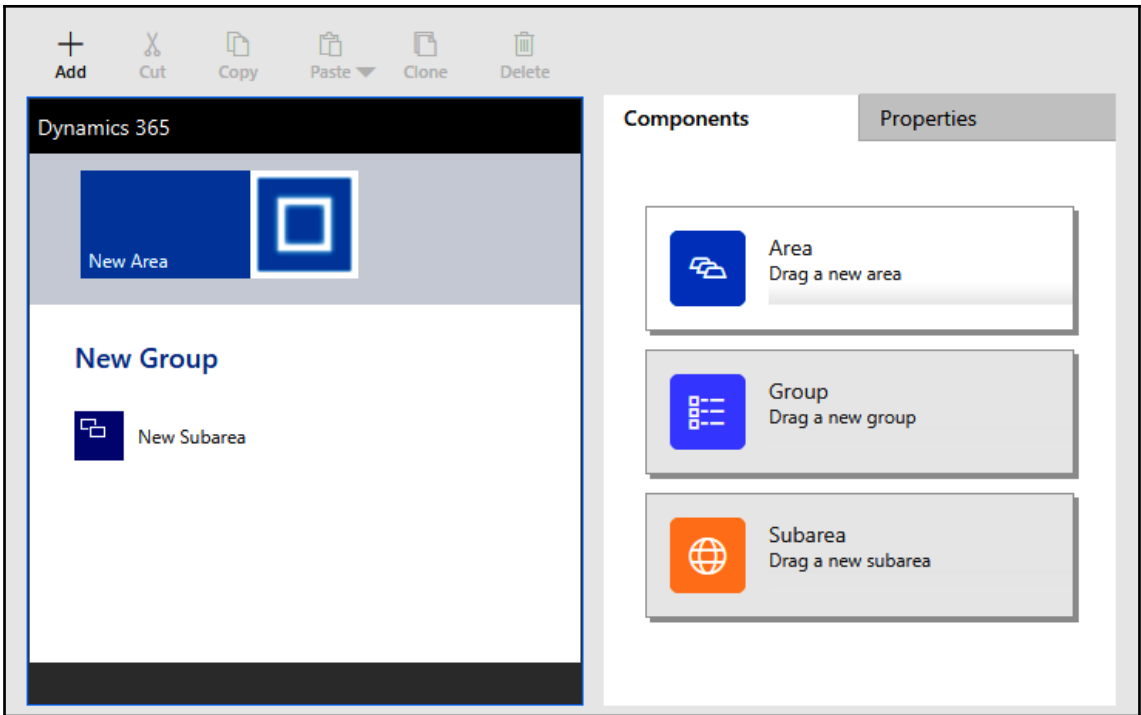
PowerApps

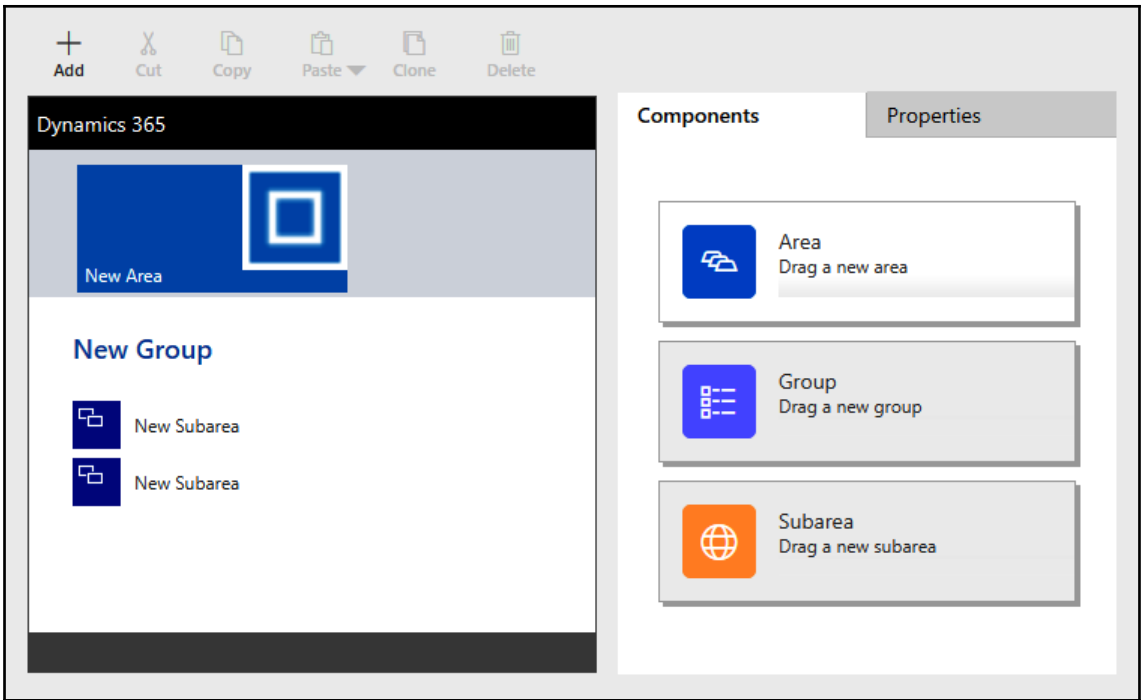
Create a New App

Create and publish your own app in minutes. You can start simple and add more components later.

[Done](#) [Cancel](#)







The screenshot displays the Dynamics 365 user interface. At the top, a toolbar contains icons for 'Add', 'Cut', 'Copy', 'Paste', 'Clone', and 'Delete'. Below the toolbar, the main workspace is titled 'Dynamics 365' and features a blue header with a white square icon and the text 'Vendor Manage...'. The central area is titled 'New Group' and contains two 'New Subarea' options, each with a blue square icon. On the right side, a 'Properties' panel is open, showing the configuration for an 'AREA'. The 'General' section includes a 'Title (1033)' field with the value 'Vendor Management', an 'Icon' dropdown menu set to 'Use Default Image', and an 'ID *' field with the value 'New_VendorArea'. A 'Show Groups' checkbox is checked. An 'Advanced' section is partially visible below.

+

Add

Cut

Copy

Paste

Clone

Delete

Dynamics 365

Vendor Manage...

New Group

New Subarea

New Subarea

Components

Properties

AREA

General

Title (1033)

Vendor Management

Icon

Use Default Image

ID *


New_VendorArea

Show Groups


Advanced


Components	Properties
Type	<input type="text" value="Entity"/>
Entity *	<input type="text" value="Vendor"/>
URL	<input type="text"/>
Default Dashboard	<input type="text" value="Select a dashboard"/>
Title (1033)	<input type="text"/>
Icon	<input type="text" value="Use Default Image"/>

Dynamics 365

Vendor Manage... 

Sales

 Vendors

 Products

Components **Properties**

GROUP

∨ General

Title (1033)

ID *

> Advanced

Components
Properties

←
Back

Select Dashboards
Create New

- Shows an overview of your data in Mi...
- Organization Insights Dashboard**
Insights into activities and performanc...
- Sales Activity Dashboard**
Shows the day-to-day work related da...
- Sales Activity Social Dashboard**
Shows the day-to-day work related da...
- Sales Dashboard**
Shows the dashboard used by a mobil...
- Sales Overview Dashboard**
Shows the performance of the sales te...
- Sales Performance Dashboard**
Shows the sales performance of the sa...
- Server-Side Synchronization Monitor...**

Dynamics 365
Components
Properties

Sales

Vendors

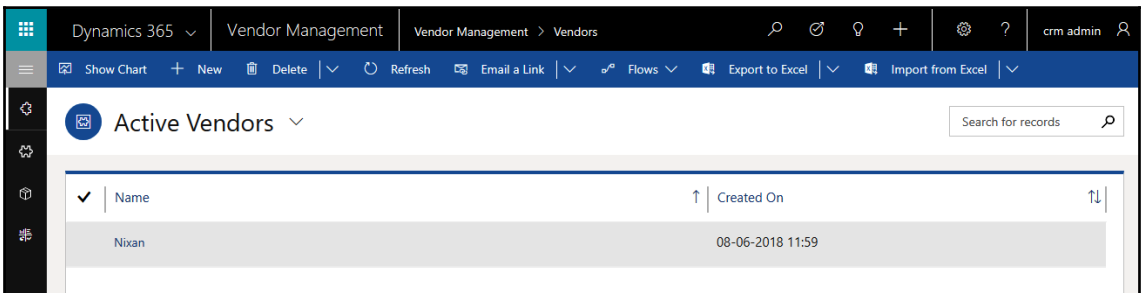
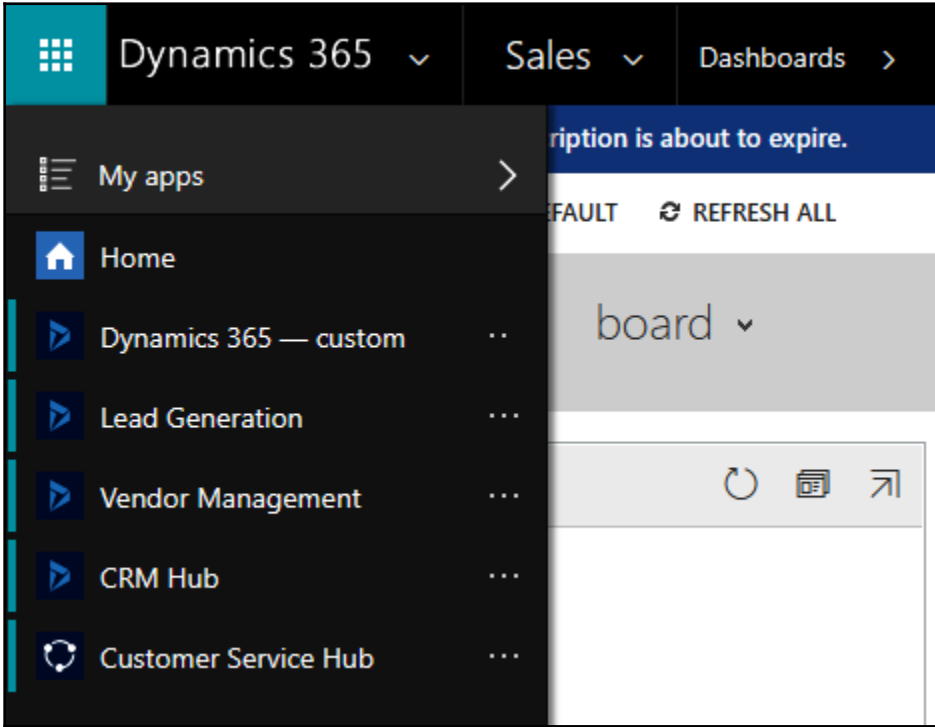
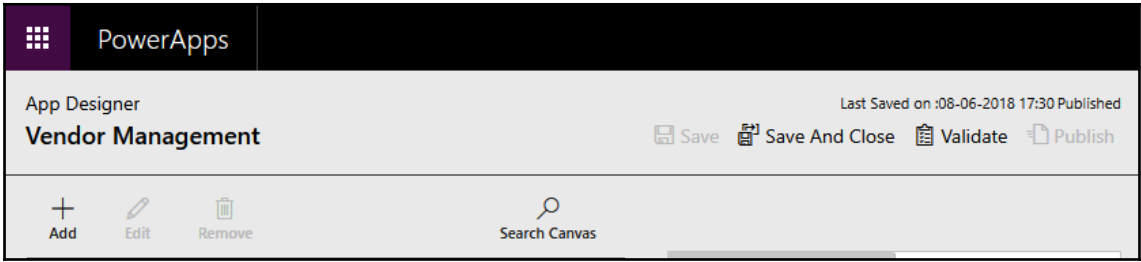
Activities

📄
📄

Dashboards

URL *

Default Dashboard



Dynamics 365 Vendor Management Vendor Management > Vendors > Nixan

Owner: crm admin

VENDOR: Nixan

Name: Nixan
 Phone: 9954158154
 Email: nixanpro@gmail.com

Products

Name	Product ID	Hierarchy Path	Valid From	Valid To	Product Struct...
Bathroom Products	Bathroom Produ...	---	01-06-2018	31-08-2018	Product Family
Soap Holder	Soap Holder	Bathroom Products	01-06-2018	31-08-2018	Product
Towel Holder	Towel Holder	Bathroom Products	01-06-2018	31-08-2018	Product

Show Chart Add Family Add Product Add Bundle Delete Refresh Email a Link Export to Excel

All Products, Families & Bundles

Name	Product ID	Hierarchy Path	Valid From	Valid To	Status	Product Stru...
Bathroom Products	Bathroom Pro...	---	01-06-2018	31-08-2018	Active	Product Family
Soap Holder	Soap Holder	Bathroom Products	01-06-2018	31-08-2018	Active	Product
Towel Holder	Towel Holder	Bathroom Products	01-06-2018	31-08-2018	Active	Product

Solution: New Solution

Information

Solution New

- Information
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes

General

Display Name * Vendor Name * Vendor

Publisher * Dynamisity Configuration Page

Version * 1.0.0.0

Description

Solution: Vendor

Apps

Solution Vendor

Component Type: App

Components

New Add Existing Delete Remove Show Dependencies Add Required Components

Create a New App

Create and publish your own app in minutes. You can start simple and add more components later.

Next Cancel

Unique Name :*

Description:

Icon: Use Default Image


Client: Web Unified Interface

App URL Suffix:

Unified Interface URL: <https://dynamisitydemo23.crm8.dynamics.com/Apps/Vendor>

Use existing solution to create the App

App Title:



Vendor

Create app from existing solution

Select a solution and site map to create your new app from.

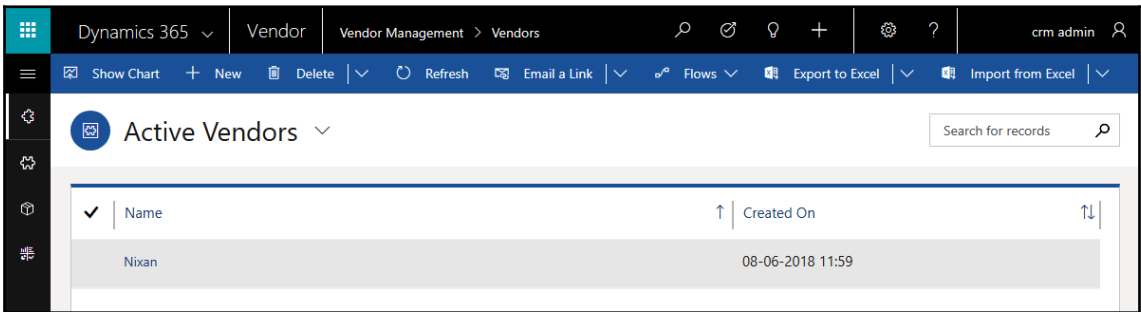
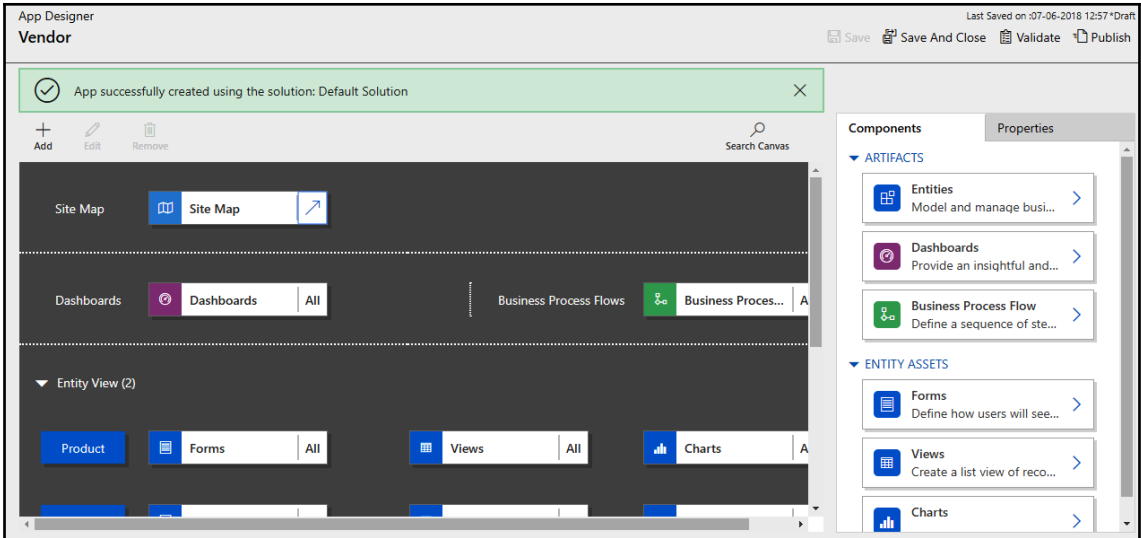
Previous Done Cancel

Select Solution:*

Configure site map later

Select Sitemap:*

i Choosing the default solution will add only the site map picked (if any) and its corresponding components to the app.



Search my apps...

Published Apps (7)

Dynamics 365 — custom

Provides access to the full suite of capabilities, including administration

Microsoft Dynamics 365
07-06-2018

WEB

CRM Hub

Mobile app that provides core CRM functionality including accounts,

Microsoft Dynamics 365

UNIFIED INTERFACE

Customer Service Hub

A focused, interactive experience for managing your customer service.

Default Publisher for dynamislydemo23
05-05-2018

UNIFIED INTERFACE

Dynamics 365 App for O...

Provides access to Dynamics 365 App for Outlook for enabled users.

Microsoft Dynamics 365

UNIFIED INTERFACE

Vendor

Vendor Management

This app manages all the Vendors and the Products.

Manage Roles - Vendor Manager

Choose an app URL that is easy to remember and then select which roles can access it.

> App URL Suffix

Roles

Name	Business Unit
<input checked="" type="checkbox"/> Activity Feeds	dynamisity...
<input checked="" type="checkbox"/> CEO-Business Manager	dynamisity...
<input checked="" type="checkbox"/> Common Data Service User	dynamisity...
<input checked="" type="checkbox"/> CSR Manager	dynamisity...
<input checked="" type="checkbox"/> Customer service app access	dynamisity...
<input checked="" type="checkbox"/> Customer Service Representa...	dynamisity...
<input checked="" type="checkbox"/> Delegate	dynamisity...
<input checked="" type="checkbox"/> Environment Maker	dynamisity...
<input checked="" type="checkbox"/> Knowledge Manager	dynamisity...
<input checked="" type="checkbox"/> Marketing Manager	dynamisity...

2 of 21 selected

Save

Cancel

Manage Roles - Vendor Manager ✕

Choose an app URL that is easy to remember and then select which roles can access it.

> App URL Suffix

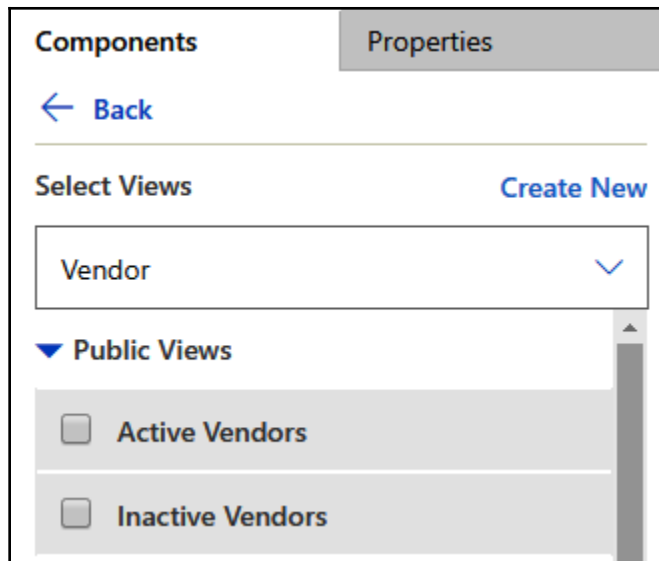
✓ Roles



✓	Name	Business Unit
✓	Relationship Insights Admin	dynamisity...
✓	Sales Manager	dynamisity...
✓	Salesperson	dynamisity...
✓	Schedule Manager	dynamisity...
✓	Scheduler	dynamisity...
✓	Support User	dynamisity...
✓	System Administrator	dynamisity...
✓	System Customizer	dynamisity...
✓	Vice President of Marketing	dynamisity...
✓	Vice President of Sales	dynamisity...

4 of 21 selected

Save
Cancel



Product	Forms | All	Views | All	Charts
Vendor	Forms | All	Views | All	Charts




 **Add**  **Remove**

▼ Filter Criteria

Group And Group Or Clear | Ungroup Delete Group

Select  

▼ Columns

All Vendors 

Name	

▼ Filter Criteria

Group And Group Or Clear | Ungroup Delete Group

▼ Columns

All Vendors *✎*

Name	Email	Phone	Owner

Components **Properties**

[← Back](#)

Vendor

Components
Properties

Entity:
Vendor

Column Name:
Name

Data Type:
StringType

Set Width:

⤴
⤵

Advanced ▼

Dynamics 365 Vendor Vendor Management > Vendors

Search for records

✓	Name	Email	Phone	Owner
	Nixan	nixanpro@gmail.com	9954158154	crm admin

Solution: Vendor Management

Web Resources

Solution Vendor Management

Component Type: Web Resource

Information

New Add Existing Delete Remove Publish Show Dependencies

Solution: Vendor Management

Web Resource: Image

General

General

Name*

Display Name

Description

Content

Type*

Language

Upload File No file chosen





Solution: Vendor Management

Web Resource: Welcome Page.Html

General

Dependencies

General

Name *

mdl_

welcomepage.html

Display Name

Welcome Page.Html

Description

Content

Type *

Webpage (HTML)



Text Editor

Language

Upload File

Choose File

No file chosen

Components	Properties
<p>Client:</p> <p><input type="radio"/> Web <input checked="" type="radio"/> Unified Interface</p> <p>App URL Suffix:</p> <p>VendorManagement</p> <p>Unified Interface URL:</p> <p>https://dynamisitydemo23.crm8.dynamics.com/Apps/VendorManagement </p> <p><input checked="" type="checkbox"/> Choose a welcome page for the app</p> <p>Welcome Page:</p> <p>Welcome Page.Html </p>	

Welcome to Vendor Management App



Do not show this Welcome Screen next time

Continue

Chapter 6: Customization Enhancements in Dynamics 365

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type *

Field Type *

Use Existing Option Set Yes No

Options

+ - ↑ ↓ ↕ ↔

Label *

Value *

Description

Color

Add Control

Select a custom control from the field.

Calendar Control


Editable Grid

Timeline control

Editable Grid

Modes: Edit + Read
Types: Grid

Use this control to enable inline editing and customization for grids and subgrids.



Add

Add Control

Select a custom control from the field.

- Calendar Control
- CC_MailAppListControl
- CC_SimilarCases_GridControl_Name
- Read Only Grid

Calendar Control

Modes: Edit + Read
Types: Grid

Use this control to display items in a calendar view.

September 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

3:00AM Ask Regional Manager to Call B...

[Add](#)

Add Control


Select a custom control from the field.

- CC_MailAppListControl
- CC_SimilarCases_GridControl_Name
- Read Only Grid
- Timeline control

Timeline control

Modes: Edit + Read
Types: Grid

Use this control to display list data in a timeline.



Dynamics 365
Settings
Solutions

Don't Lose Access to Dynamics 365. Convert to a paid subscription

All Solutions

✕
🔍
📄
📄
📄
📄
📄
📄
📄
📄
🌐
More Actions

Name	Display Name	Version	Installed On	Package T..
VendorManagement	Vendor Management	1.0.0.0	04-07-2018	Unmanag...

Field

Type of Product of Vendor

Common

- Information
- Business Rules

General

Appears in global filter in interactive experience

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365](#)

Type







Data Type *

Field Type *

Use Existing Option Set Yes No

Default Value

Options


- Bathroom Products
- Computers
- Car
- Fast Food

Field **Industry of Vendor**

Common

- Information
- Business Rules

General

 This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365](#)







Type

Data Type * MultiSelect Option Set

Field Type * Simple

Use Existing Option Set Yes No

Options

- AutoMobile
- Sales
- Technology
- Retail
- Food & Beverages



Solution: Vendor Management

Form: **Vendor**

▲ **General**

General

Name *	<input type="text" value="Name"/>
Phone	<input type="text" value="Phone"/>
Email	<input type="text" value="Email"/>
Type of Product	<input type="text" value="Type of Product"/>
Industry	<input type="text" value="Industry"/>

Products

Products

SAVE DELETE PREVIEW SHOW DEPENDENCIES PUBLISH PUBLISH ALL CUSTOMIZ...

Solution: Vendor Management

Web Resource: SetMultiSelectOptionSet

General Dependencies

General

Name *

Display Name

Description

Content

Type *

Language

Upload File No file chosen

URL

URL

Form Properties

Modify this form's properties.

Events | **Display** | Parameters | Non-Event Dependencies

Add | Remove | Up | Down | Edit

Name	Display Name	Description
mdl_setmultiselectoptionset	SetMultiSelectOpti...	

▲ **Event Handlers**

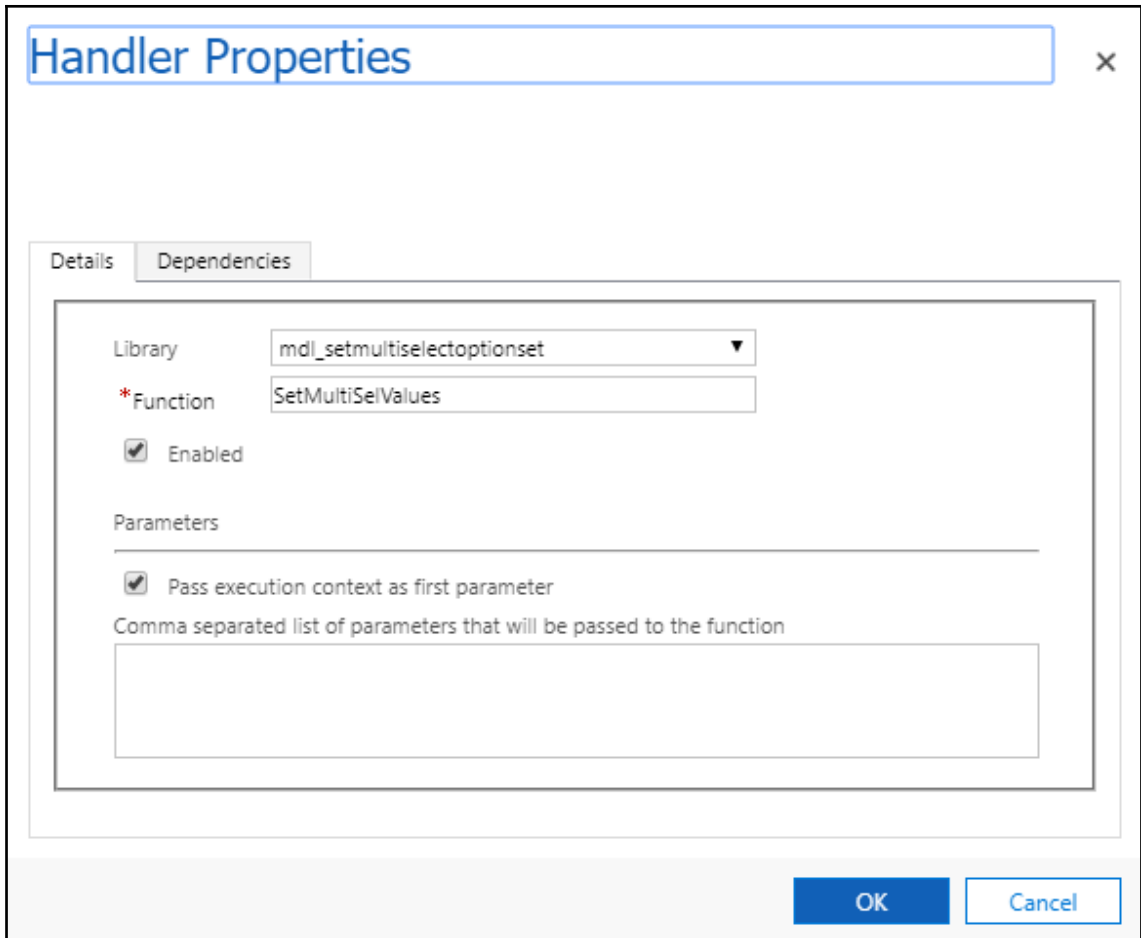
Manage functions that are called for form or field events.

Control:

Event:

Add | Remove | Up | Down | Edit | Edit Library

Library	Function	Enabled
mdl_setmultiselectoptionset	SetMultiSelValues	True



Dynamics 365 Settings Solutions

My apps >

- Home
- Dynamics 365 — custom
- CRM Hub
- Vendor Management

Convert to a paid subscription

More Actions

me	Version	Install
Management	1.0.0.0	04
r New Prev...	1.0.0.0	03

+ New Deactivate Delete Refresh Assign Email a Link Flows

VENDOR
Nixan

General Related

Name	* Nixan
Phone	9958154256
Email	nixanpro@gmail.com
Type of Product	---
Industry	<input type="text" value="Enter text here"/>



VENDOR

Nixan

General

Related

Name * Nixan

Phone 9958154256

Email nixanpro@gmail.com

Type of Product Bathroom Products

Industry

Sales x

Retail x

Enter text here

Solution: Vendor Management

Components

Solution Vendor Management

Component Type: All

New |
 Add Existing |
 Delete |
 Remove |
 Publish |
 Show Dependencies |
 Add Required Components

<input type="checkbox"/>	Display Name ↑	Name	Type	State	Customizable
	mdl_bathroomimage	mdl_bathroomimage	Web Resource	Unmanaged	True
	mdl_setmultiselectoptionset	mdl_setmultiselectopti...	Web Resource	Unmanaged	True
	mdl_welcomepage.html	mdl_welcomepage.html	Web Resource	Unmanaged	True
	Product	product	Entity	Managed	True
	Vendor	mdl_vendor	Entity	Unmanaged	True
	Vendor Management	mdl_VendorManagem...	Client Extensions	Unmanaged	
	Vendor Management	mdl_VendorManagem...	App	Unmanaged	

Vendor

Information

Solution Vendor Management

General | Primary Field | Controls

Control	Web	Phone	Tablet
Read-only Grid (default)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Add Control...			

Property	Value
Grid view	
Add Lookup	
Nested grid view	
Nested grid parent ID	
Group by Column *	Enabled (Enum)
Allow filtering	Enabled (Enum)

All Vendors Search for records

Group By: (no grouping)

✓	Name	Phone	Email	Owner
	Nixan	9958154256	nixanpro@gmail.com	crm admin

All Vendors Search for records

Group By: Name

✓	Name	Phone	Email	Owner
	Nixan			
	Nixan	9958154256	nixanpro@gmail.com	crm admin

All Vendors Search for records


Group By: Name

✓	Name	Phone	Email	Owner
	Nixan			
✓	Nixan	7814562562	nixanpro@gmail.com	crm admin

All Vendors Search for records

Group By: Name


✓	Name	Phone	Email	Owner
	Nixan			
✓	Nixan	7814562562	nixanpro@gmail.com	crm admin





VENDOR

Nixan

Owner *

 **crm admin**

General
Related

Name	* Nixan	
Phone	7814562562	
Email	nixanpro@gmail.com	
Type of Product	Bathroom Products	
Industry	<div style="border: 1px solid #ccc; padding: 2px;"> Sales x Retail x </div> <p style="font-size: small; margin-top: 5px;">Enter text here ▼</p>	

Vendor

Information

Solution Vendor Management

- Information
- Components
- Entities
 - Vendor
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processin...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates

General
Primary Field
Controls
Events

Primary Image

Color

Description

Define as an activity entity.

Display in Activity Menus

Areas that display this entity

Sales Service Marketing

Training

Process

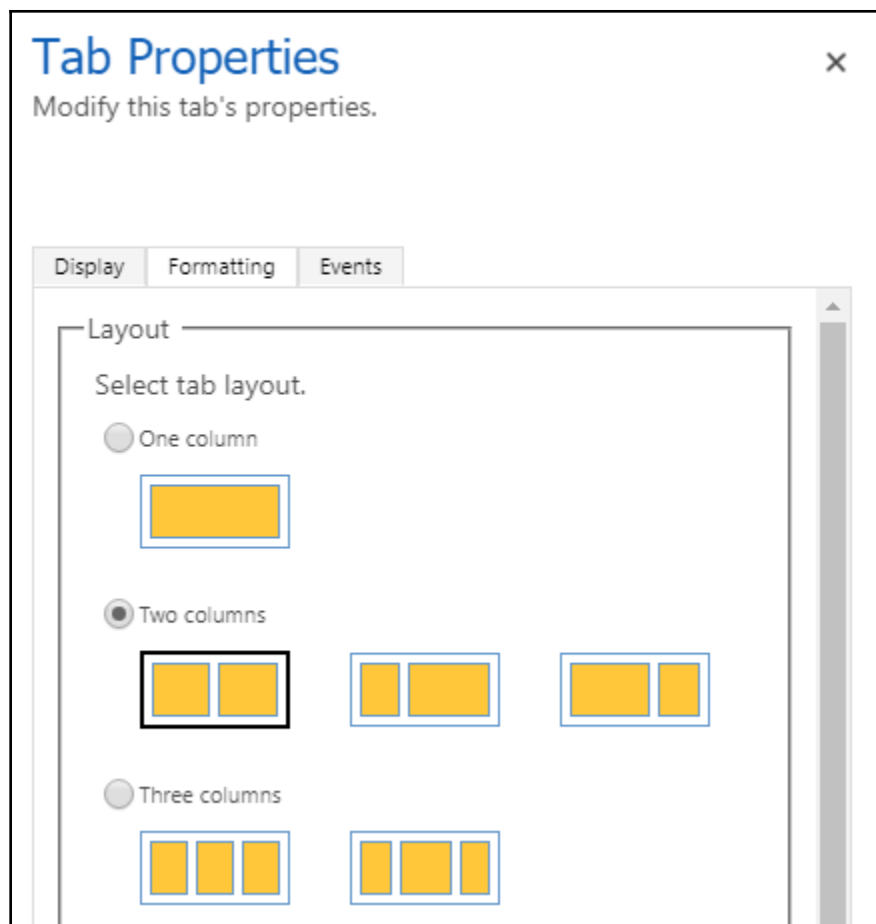
Business process flows (fields will be created) †

Communication & Collaboration

Feedback †

Notes (Includes attachments) †

Activities †



FILE HOME INSERT

Section Three Columns Three Columns Two Columns Two Columns Two Columns One Column Sub-Grid Spacer Quick View Form Web Resource IFRAME Timeline Bing Maps Navigation Link Social Insights Timer Knowledge Base Search ACI Control Relationship Assistant Control

जानकारी Solution: Vendor Management Form: Vendor

General

Header

Owner* Owner

General

Name* Name

Phone Phone

Email Email

Section

Note Text

FILE HOME INSERT

Save Save As Save and Close Publish Save Change Properties Remove Undo Redo Header Footer Navigation Business Rules Form Properties Preview Form Enable Security Roles Show Dependencies Managed Properties Merge Forms Upgrade

जानकारी Solution: Vendor Management Form: Vendor

General

Header

Owner* Owner

General

Name* Name

Phone Phone

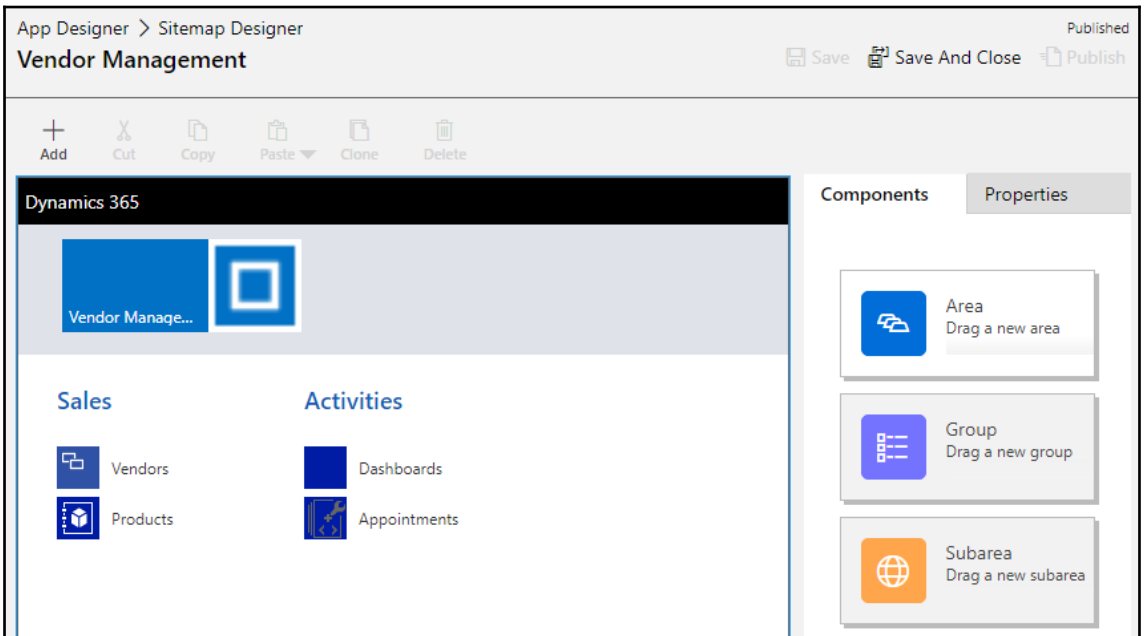
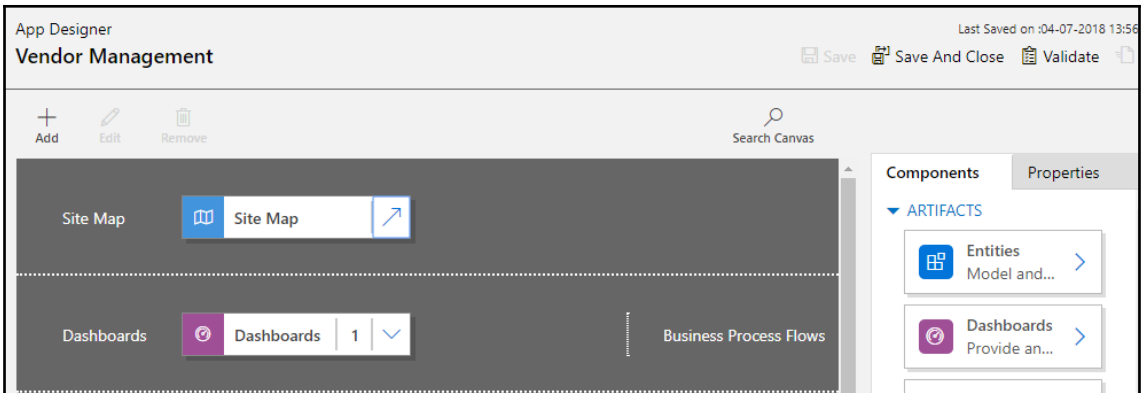
Email Email


Type of Product Type of Product


Industry Industry

Section




Note Text




 **VENDOR**
Nixan

Owner *
 **crm admin**






General Related

Name	* Nixan
Phone	7814562562 
Email	nixanpro@gmail.com 
Type of Product	Bathroom Products
Industry	<div style="border: 1px solid #ccc; padding: 2px;">Sales x Retail x Enter text here </div>

Timeline + ...

Enter a note... 

No records to show.

-  Activity
-  Appointment
-  Email
-  Phone Call
- Task
-  Note

Quick Create: Appointment ✕

Owner * [crm admin](#)

Required Attendees ---

Optional Attendees ---

Subject * **Sales Meeting**

Location ---

Start Time * 07-11-2018 11:00 AM

All Day Event

End Time * 07-11-2018 1:00 PM

Duration

Description ---

Regarding [Nixan](#)

[Save](#) [Save & Create New](#)

Appointment Views

Solution Default Solution

View: All Active Views

New X More Actions

Name ↑	Type	State	Customizable
All Appointments	Public View	Managed	True
Appointment Advanced Find Vi...	Advanced Find View	Managed	True
Appointment Associated View	Associated View	Managed	True

Components

- Entities
 - Account
 - Activity
 - Address
 - Appointment
 - Forms
 - Views
 - Charts

File Save As Save and Close Help

Vendor Appointment Working on solution: Default Solution

Subject ▲ Regarding Start Time End Time Duration




View results are displayed here.

Common Tasks

- ← →
- View Properties
- Custom Controls
- Edit Filter Criteria
- Configure Sorting
- Add Columns
- Change Properties
- Remove

Edit Filter Criteria ✕

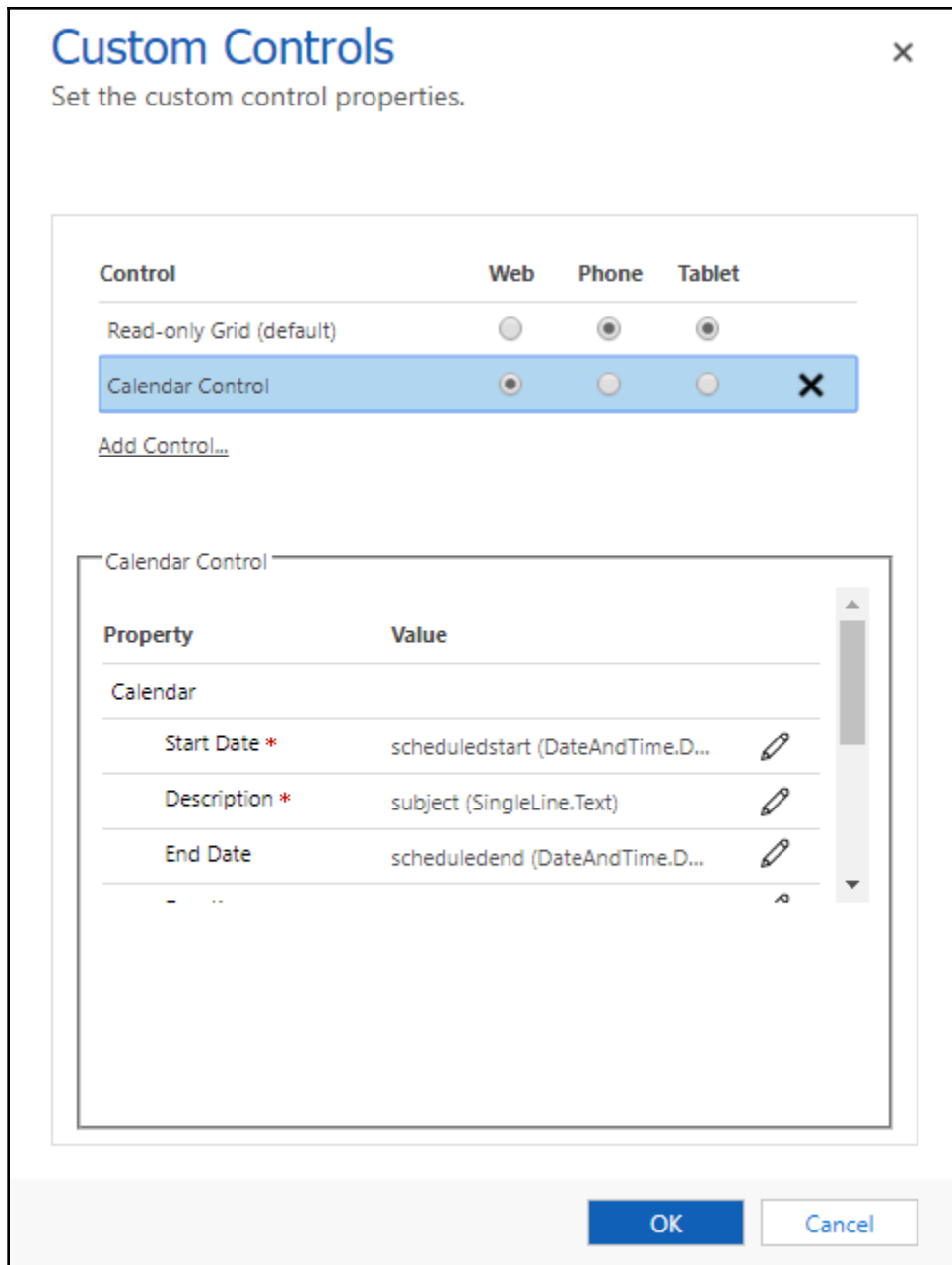
Define the filter and search criteria for this view to use.

 Clear |  Group AND |  Group OR

Select

▼ Regarding (Vendor) ▼

Select



My Appointments Search for records

✓	Subject	Regarding	Location	Priority	Start Time	End Time
	Sales Meeting	Nixan	---	Normal	11-07-2018 11:00	11-07-2018 13:00

Vendor Appointments Search for records

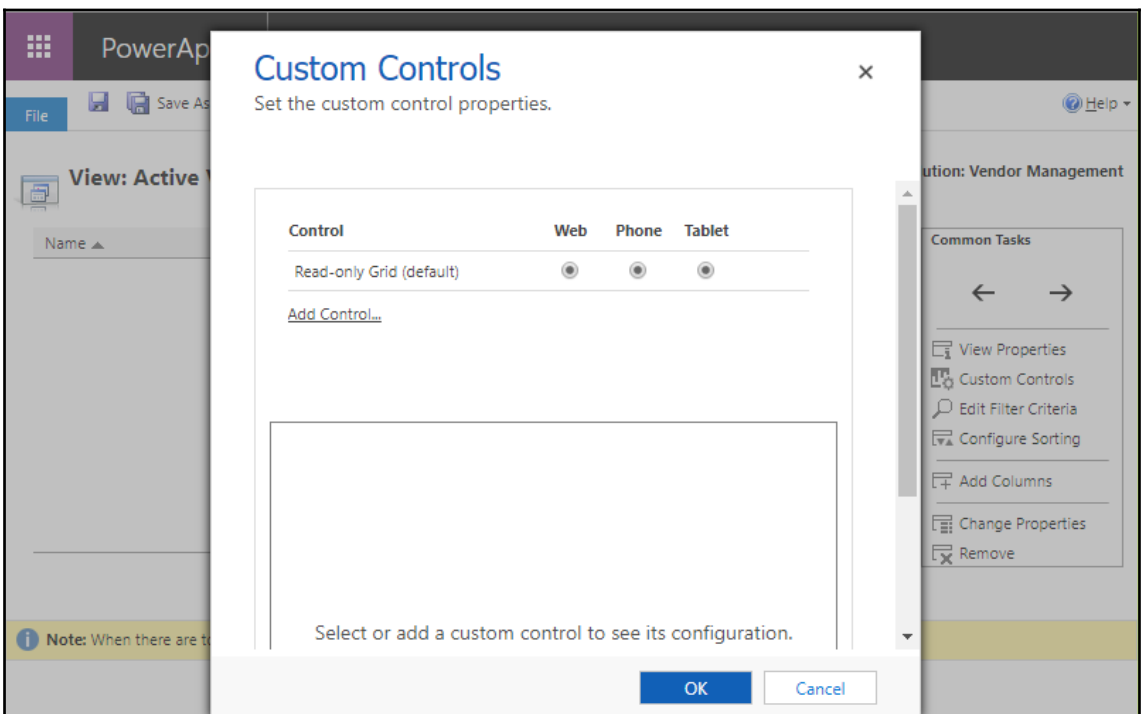
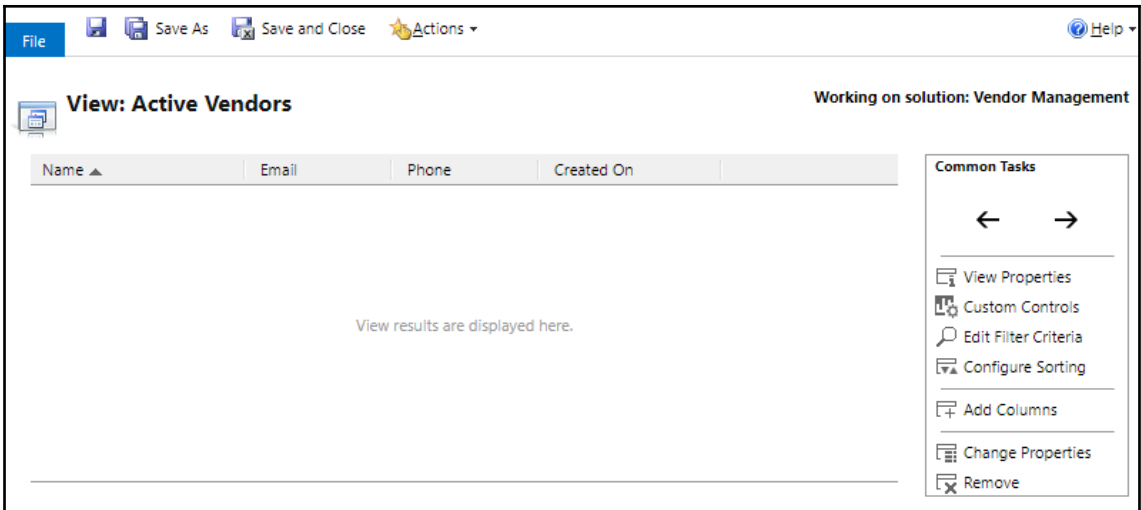
DAY | WEEK | MONTH 08-07-2018 - 14-07-2018 TODAY

	08 JUL 2018	09 JUL 2018	10 JUL 2018	11 JUL 2018	12 JUL 2018	13 JUL 2018	14 JUL 2018
11				Sales Meeting			
12							
13							
14							

Appointment: Appointment Sales Meeting Priority: **Normal** Status: **Open**

No data available.

Start Time	11-07-2018 11:00 AM	All Day Event	<input type="checkbox"/>
End Time	11-07-2018 1:00 PM	Duration	2 hours



Custom Controls

Set the custom control properties.

Control	Web	Phone	Tablet
Read-only Grid (default)	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Timeline control	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Add Control...](#)

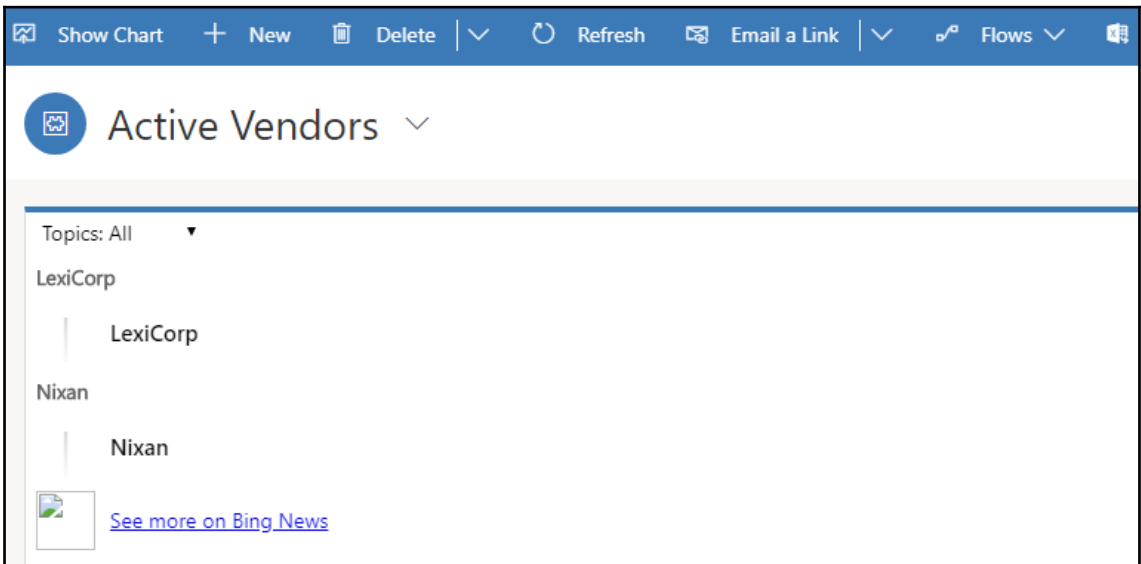
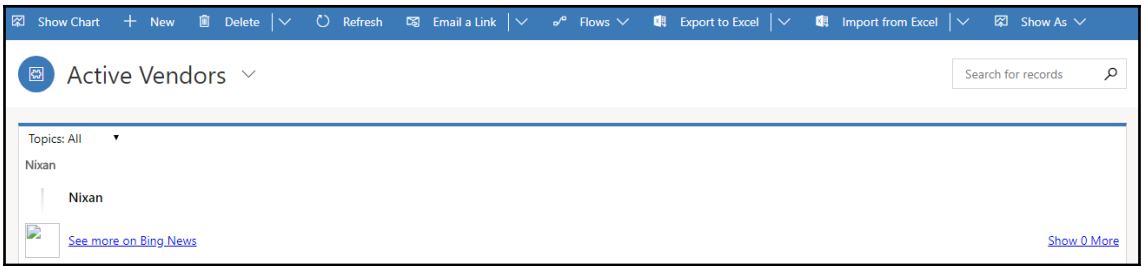
Timeline control

Timestamp *	createdon (DateAndTime.DateA...	
Group *	mdl_name (SingleLine.Text)	
Group Order *	owneridtype (Whole.None)	
URL		
Thumbnail		
Filter *	mdl_name (SingleLine.Text)	

Active Vendors

Group By: (no grouping)

Name	Email	Phone	Created On
Nixan	nixanpro@gmail.com	7814562562	04-07-2018 15:07



Chapter 7: Business Process Flows and Rules in Dynamics 365

The screenshot shows the Dynamics 365 'Information' pane for a solution named 'testsolution'. The left-hand navigation pane shows a tree view with 'Entities' expanded to show 'Account', 'Attendance', 'Contact', and 'Opportunity'. The main pane displays a table of entities with the following data:

Display Name	Name	Type	State	Customizable
Account	account	Entity	Managed	True
Attendance	new_attendance	Entity	Unmanaged	True
Contact	contact	Entity	Managed	True
Opportunity	opportunity	Entity	Managed	True

PowerApps

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: Default Solution

Entities

Solution Default Solution

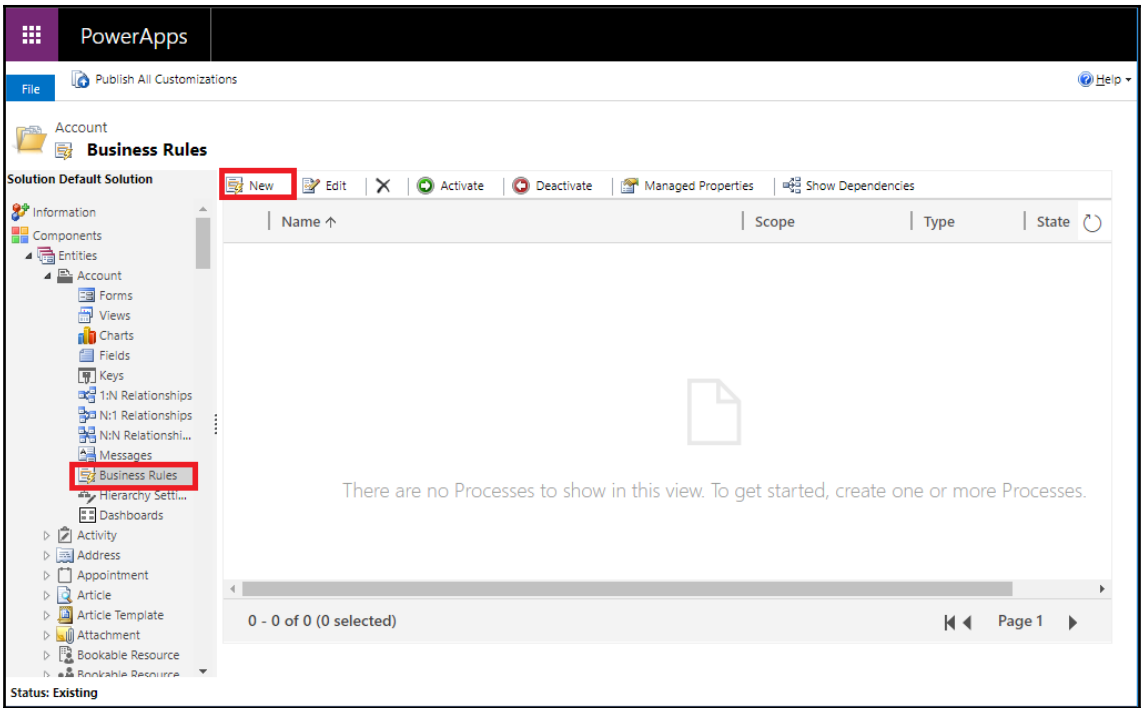
Component Type: Entity View: Customizable

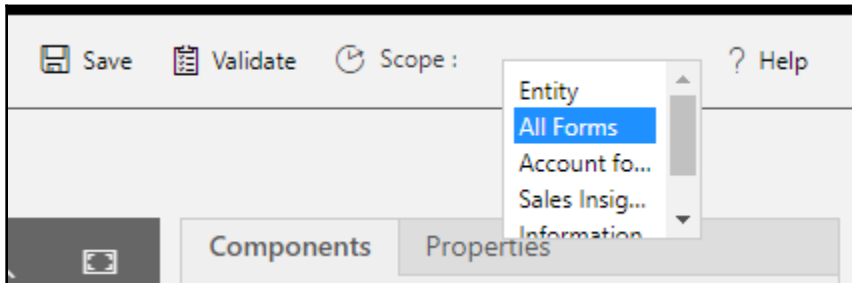
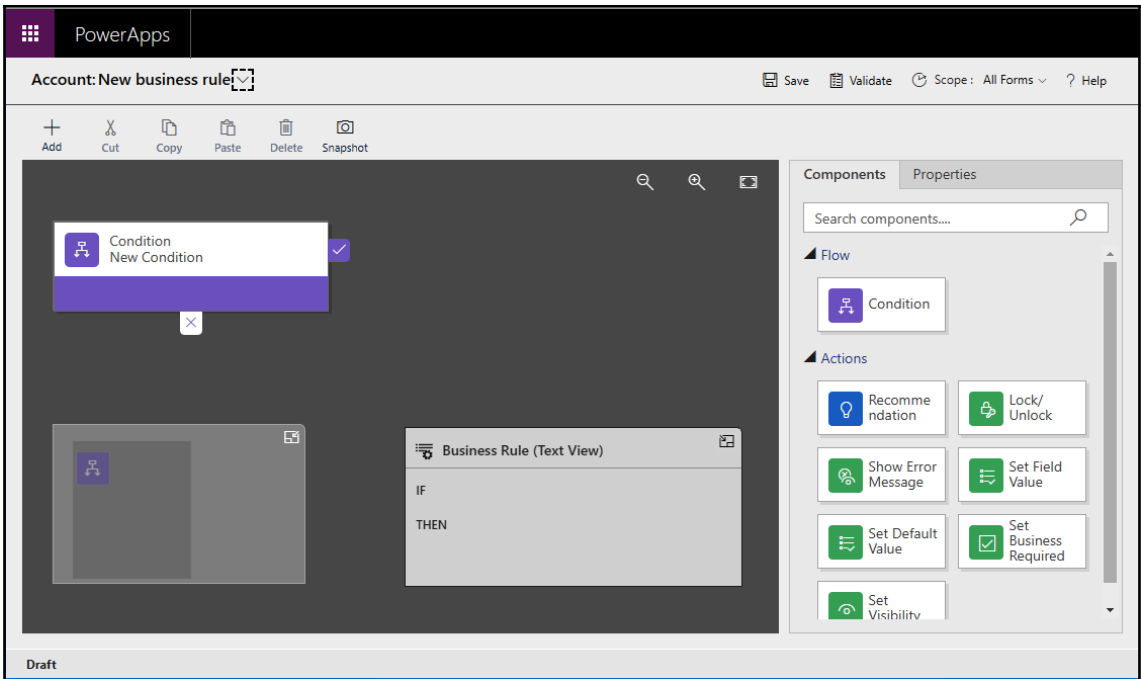
New Delete Publish Show Dependencies Managed Properties Configure Relevance Search

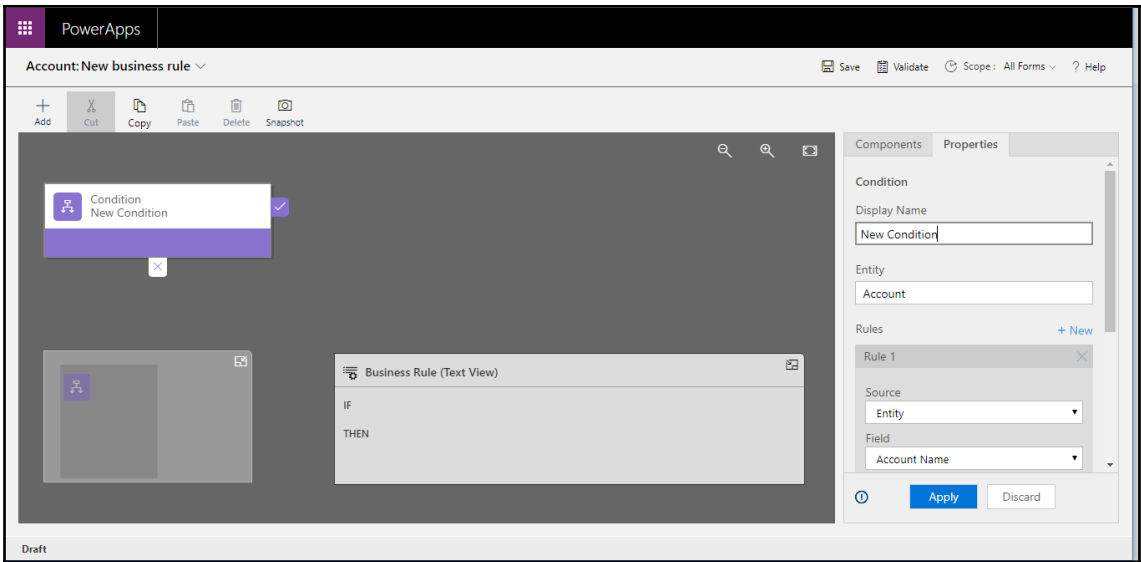
<input type="checkbox"/>	Display Name ↑	Name	Schema Name	State	Customizable	↻
<input type="checkbox"/>	Account	account	Account	Managed	True	
<input type="checkbox"/>	Activity	activitypointer	ActivityPointer	Managed	True	
<input type="checkbox"/>	Address	customeraddress	CustomerAddress	Managed	True	
<input type="checkbox"/>	Appointment	appointment	Appointment	Managed	True	
<input type="checkbox"/>	Article	kbarticle	KbArticle	Managed	True	
<input type="checkbox"/>	Article Template	kbarticletemplate	KbArticleTemplate	Managed	True	
<input type="checkbox"/>	Attachment	activitymimeattachment	ActivityAttachment	Managed	True	
<input type="checkbox"/>	Bookable Resource	bookableresource	BookableResource	Managed	True	

1 - 50 of 153 (0 selected) Page 1

Status: Existing







Rules + New

Rule 1 ✕

Source

Field

Operator

Type

Value
 Preferred Customer
 Standard

Condition Expression (Text View)

Components Properties

Condition

Display Name

New Condition

Entity

Account

Rules [+ New](#)

Rule 1 ✕

Source

Entity

Field

Category

Operator

Equals

Type

Value

[Apply](#) [Discard](#)

Rule 2 ✕

Source
Entity ▼

Field
Business Type ▼

Operator
Equals ▼

Type
Value ▼

Value
 Default Value

Rule Logic
AND ▼

Condition Expression (Text View)
(Category Equals [Preferred Customer]) AND

Apply Discard

SAVE VALIDATE

BUSINESS RULE: Account

Enter Rule Name

Click to add description

+ Add
 ✂ Cut
 📄 Copy
 📄 Paste
 🗑 Delete
 📷 Snapshot

Condition
New Condition

Business Rule (Text View)

```

IF
    Category equals "Preferred Customer" AND Business Type equals "Default Value"
THEN
  
```

+ Add
 ✂ Cut
 📄 Copy
 📄 Paste
 🗑 Delete
 📷 Snapshot

Condition
New Condition

Condition
New Condition

Business Rule (Text View)

```

IF
    Category equals "Preferred Customer" AND Business Type equals "Default Value"
THEN ELSE IF
    Category equals "Preferred Customer" AND Business Type equals "Default Value"
THEN
  
```

Components Properties

Source: Entity

Field: Business Type

Operator: Equals

Type: Value

Value: Default Value

Rule Logic: AND

Condition Expression (Text View)

```

(Category Equals [Preferred Customer]) AND
(Business Type Equals [Default Value])
  
```

Apply Discard

BUSINESS RULE: Account

Enter Rule Name

Click to add description

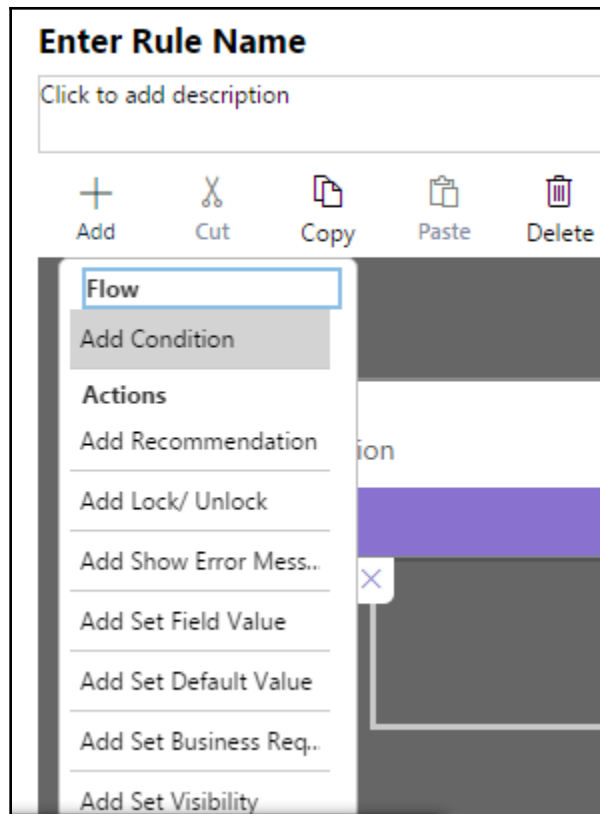
+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot

Condition
New Condition

Condition
New Condition

Business Rule (Text View)

```
IF  
    Category equals "Preferred Customer" AND Business Type equals "Default Value"  
THEN  
ELSE IF
```



Enter Rule Name

Click to add description

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot

Condition
New Condition ✓ +



Condition
New Condition ✓ +



+ (dashed box)

BUSINESS RULE: Account

Enter Rule Name

Click to add description



Add



Cut



Copy



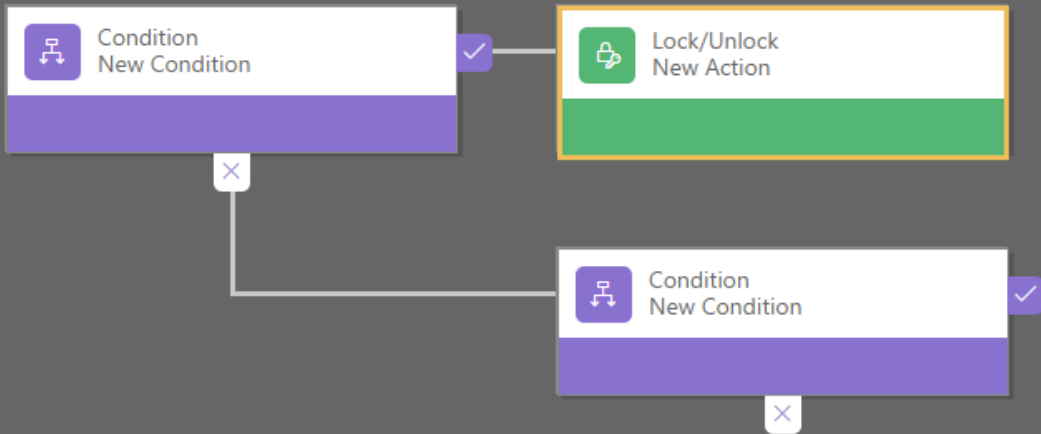
Paste



Delete



Snapshot



The image shows a software interface with two tabs: 'Components' and 'Properties'. The 'Properties' tab is active. Below the tabs, there are several sections:

- Lock/Unlock**: A section header.
- Display Name**: A text input field containing 'New Action'.
- Entity**: A text input field containing 'Account'.
- Lock/Unlock**: A section header.
- Field**: A dropdown menu with 'Email' selected.
- Status**: A dropdown menu with 'Lock' selected.

SAVE VALIDATE

BUSINESS RULE: Account

Enter Rule Name

Click to add description

+

Add

✂

Cut

📄

Copy

📄

Paste

🗑

Delete

📷

Snapshot

```
graph LR; C1[Condition New Condition] --> A[Lock/Unlock New Action]; C1 --> C2[Condition New Condition];
```

SAVE VALIDATE

BUSINESS RULE: Account

Enter Rule Name

Click to add description

Validation Failed ! 3 errors found in the process

Add Cut Copy Paste Delete Snapshot

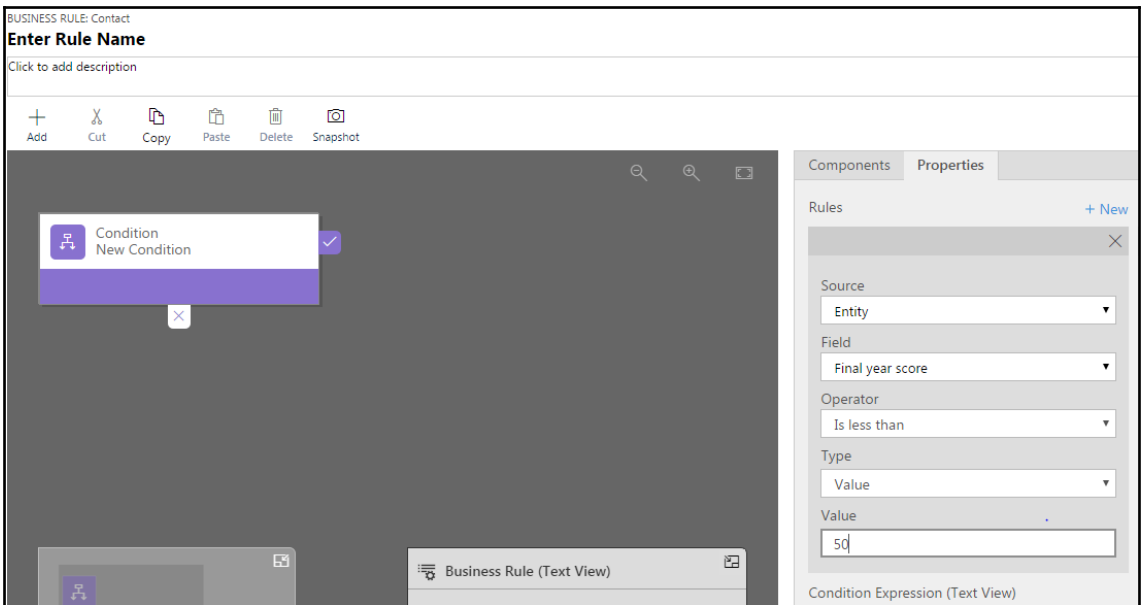
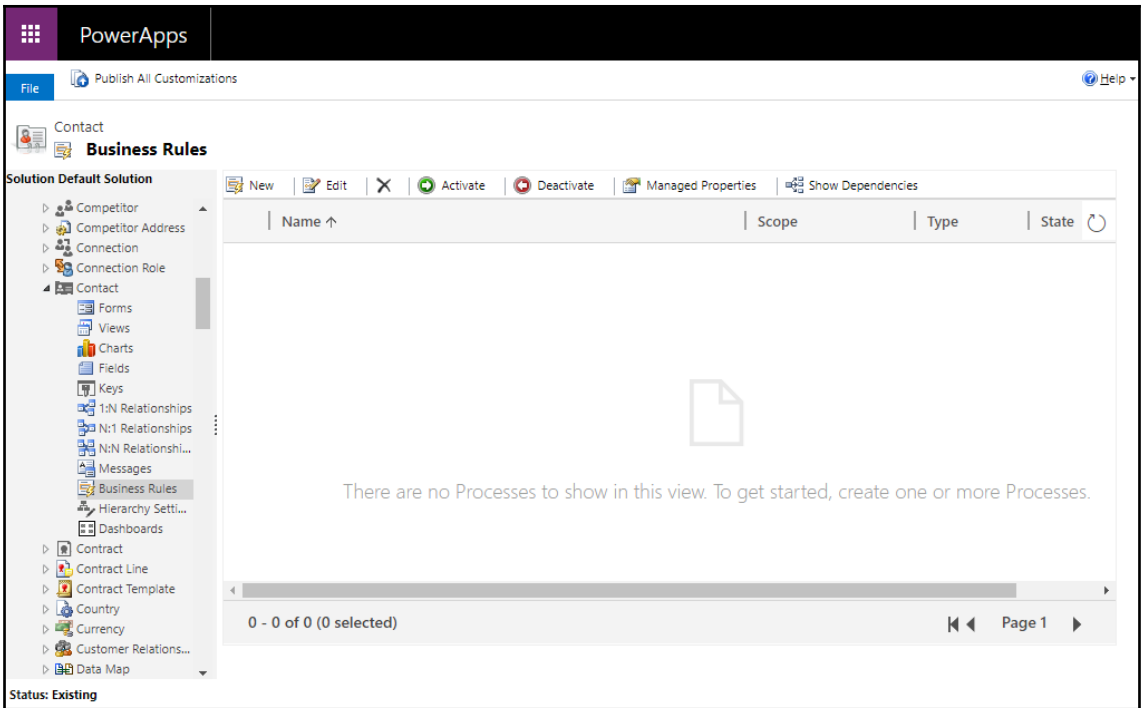
Condition New Condition

Lock/Unlock New Action

Condition New Condition

There is 1 error on this action

There are 2 errors on this condition



The screenshot shows a configuration window for a Business Rule. The main area displays the rule logic in a text view:

```

IF
    Final year score less than 50
THEN

```

The right-hand 'Properties' panel is open, showing the following configuration:

- Source:** Entity
- Field:** Last year attendance
- Operator:** Is less than
- Type:** Value
- Value:** 50
- Rule Logic:** AND
- Condition Expression (Text View):** (Final year score Is less than [50]) AND (Last year attendance Is less than [50])

Buttons for 'Apply' and 'Discard' are visible at the bottom of the properties panel.

The screenshot shows a configuration window for a Business Rule named 'Contact'. The main area displays a visual flow with a 'Condition' block connected to a 'Show Error Message' block. Below this, a 'Business Rule (Text View)' shows the logic:

```

IF
    Final year score less than 50 AND Last year attendance less than 50
THEN
    Show the error message "Student attendance as well as marks are below expectation." against field Final year score

```

The right-hand 'Properties' panel is open, showing the configuration for the 'Show Error Message' block:

- Display Name:** New Action
- Entity:** Contact
- Error Message:**
 - Field:** Final year score
 - Message:** Student attendance as well as marks are below expectation.

Buttons for 'Apply' and 'Discard' are visible at the bottom of the properties panel.

Components Properties

Rules [+ New](#)

Rule 1 ✕

Source
Entity ▼

Field
Final year score ▼

Operator
Is less than ▼

Type
Value ▼

Value
50

Condition Expression (Text View)
(Final year score Is less than [50])

[Apply](#) [Discard](#)

BUSINESS RULE: Contact

Enter Rule Name

Click to add description

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot

```

graph TD
    C1[Condition where both attendanc...] --> A[Show Error Message New Action]
    C2[Condition where only final year ...] --> A
  
```

Business Rule (Text View)

```

IF
    Final year score less than 50 AND Last year attendance less than 50
THEN
    Show the error message "Student attendance as well as marks are below expectation." against field Final year score
ELSE IF
  
```

BUSINESS RULE: Contact

Enter Rule Name

Click to add description

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot

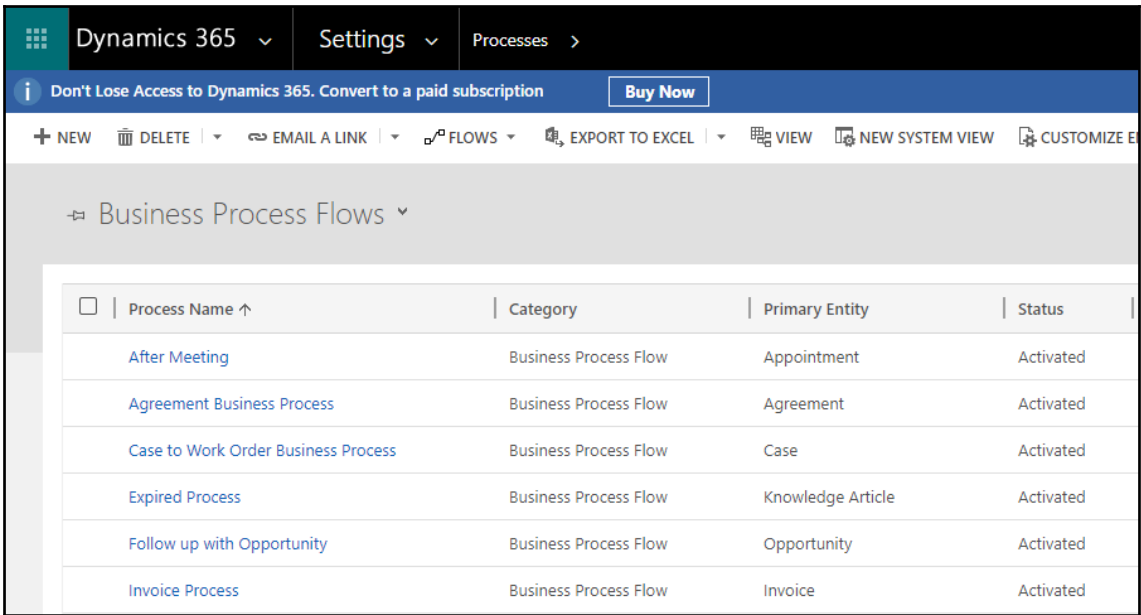
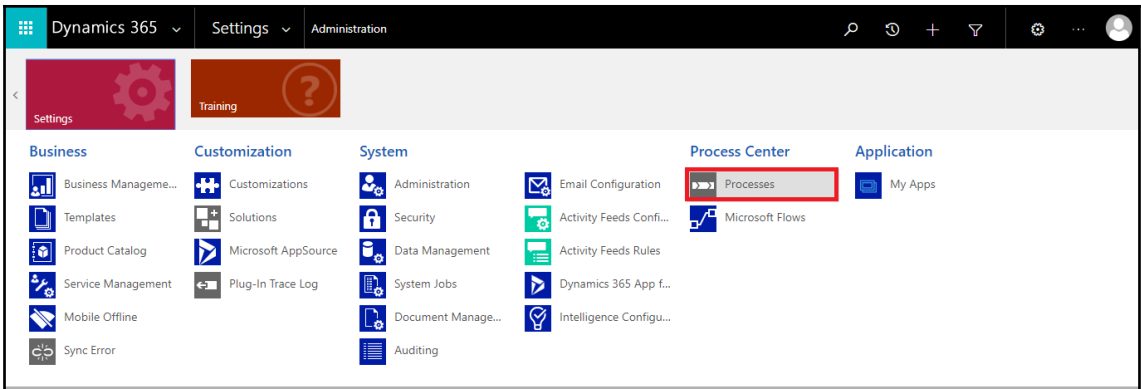
```

graph TD
    C1[Condition where both attendanc...] --> A1[Show Error Message New Action]
    C2[Condition where only final year ...] --> A2[Show Error Message New Action]
  
```

Business Rule (Text View)

```

IF
    Final year score less than 50 AND Last year attendance less than 50
THEN
    Show the error message "Student attendance as well as marks are below expectation." against field Final year score
ELSE IF
  
```



Components

- Entities
 - Account
 - Attendance
 - Contact
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships...
 - Messages
 - Business Rules
 - Hierarchy Settlin...
 - Dashboards
 - Opportunity
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processin...
 - Service Endpoints
 - Dashboards

Display Name *

Plural Name *

Name *

Primary Image

Color

Description

Ownership *

Define as an activity entity.

Display in Activity Menus

Areas that display this entity

Sales Service Marketing Field Service

Project Service Resource Scheduling Settings Training

Options for Entity

Enable for interactive experience

Process

Business process flows (fields will be created) †

Communication & Collaboration

Feedback †

Name	Schema Name	Display Name	Type	Field Type	State	Field Security	Audit Status	Customizable	Description
postponeactivityprocessing...	PostponeActivityProcessing...	Delay activity pro...	Date and Time	Simple	Unmanaged	Non Applicable	Enabled	True	For internal use only.
prioritycode	PriorityCode	Priority	Option Set	Simple	Unmanaged	Non Applicable	Enabled	True	Priority of the activity.
processid	ProcessId	Process	Unique Identifier	Simple	Unmanaged	Non Applicable	Enabled	True	Unique Identifier of the Process.
regardingobjectid	RegardingObjectId	Regarding	Lookup	Simple	Unmanaged	Non Applicable	Enabled	True	Unique identifier of the object with which the
requiredattendees	RequiredAttendees	Required Attend...	Party List	Simple	Unmanaged	Disabled	Enabled	True	List of required attendees for the activity.
resources	Resources	Resources	Party List	Simple	Unmanaged	Disabled	Enabled	True	Users or facility/equipment that are required f
scheduledurationminutes	ScheduledDurationMinutes	Scheduled Durat...	Whole Number	Simple	Unmanaged	Non Applicable	Enabled	True	Scheduled duration of the activity, specified in
scheduledend	ScheduledEnd	Due Date	Date and Time	Simple	Unmanaged	Non Applicable	Enabled	True	Scheduled end time of the activity.
scheduledstart	ScheduledStart	Start Date	Date and Time	Simple	Unmanaged	Non Applicable	Enabled	True	Scheduled start time of the activity.
sendermailboxid	SenderMailboxId	Sender's Mailbox	Lookup	Simple	Unmanaged	Non Applicable	Enabled	True	Unique identifier of the mailbox associated wi
senton	SentOn	Date Sent	Date and Time	Simple	Unmanaged	Non Applicable	Enabled	True	Date and time when the activity was sent.
seriesid	SeriesId	Series Id	Unique Identifier	Simple	Unmanaged	Non Applicable	Disabled	True	UniqueIdentifier specifying the id of recurring
serviceid	ServiceId	Service	Lookup	Simple	Unmanaged	Non Applicable	Enabled	True	Unique identifier of an associated service.
slaid	SLAId	SLA	Lookup	Simple	Unmanaged	Non Applicable	Enabled	True	Choose the service level agreement (SLA) that
slainvokedid	SLAInvokedId	Last SLA applied	Lookup	Simple	Unmanaged	Non Applicable	Enabled	True	Last SLA that was applied to this case. This fie
sortdate	SortDate	Sort Date	Date and Time	Simple	Unmanaged	Non Applicable	Enabled	True	Shows the date and time by which the activit
stageid	StageId	Process Stage	Unique Identifier	Simple	Unmanaged	Non Applicable	Enabled	True	Unique identifier of the Stage.
statecode	StateCode	Activity Status	Status	Simple	Unmanaged	Non Applicable	Enabled	True	Status of the activity.

PowerApps

File Save and Close Show Dependencies Export Solution Translations Publish All Customizations Actions Help

Solution: Default Solution

Processes

Solution Default Solution

Component Type: Process View: Customizable

New Delete Activate Deactivate Show Dependencies Managed Properties More Actions

<input type="checkbox"/>	Process Name ↑	Category	Primary Entity	Acti
	Accept Proposed Booking	Action	Resource Requirement	Acti
	AcceptTeamRecommendation	Action		Acti
	Add Invoice Line Details	Action	Invoice	Acti
	After Meeting	Business Process Flow	Appointment	Acti
	Agreement Business Process	Business Process Flow	Agreement	Acti
	Apply work template	Action		Acti
	Apply work template for resources	Action		Acti
	Approval Status Approve	Action	Project Approval	Acti

1 - 50 of 237 (0 selected) Page 1

Status: Existing

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: * Record Capture Flow.

Category: * Business Process Flow Entity: * Account

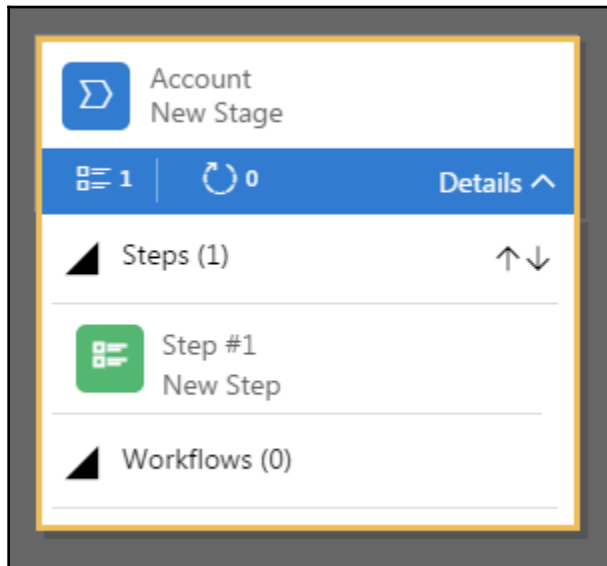
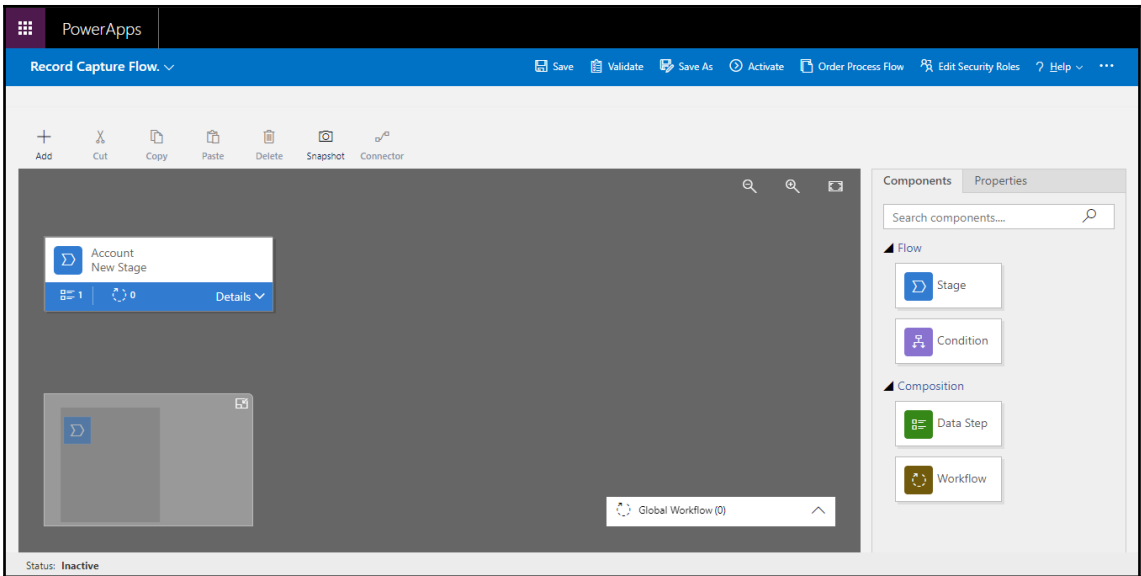
Business Process Type:

 Run process as a business flow (Classic)

 Run process as a task flow (Unified Interface only)

Name: * new_recordcapture

OK Cancel



BUSINESS PROCESS FLOW
Record Capture Flow
 Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

Account
New Stage

1 | 0 Details ^

Steps (1) ↑↓

Step #1
Account Name

Workflows (0)

Global Workflow (0) ^

Components Properties

Step

Display Name
Account Name

Data Field
Account Name

Required

Sequence
1

Apply Discard

BUSINESS PROCESS FLOW
Record Capture Flow
 Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

Flow

Add Stage

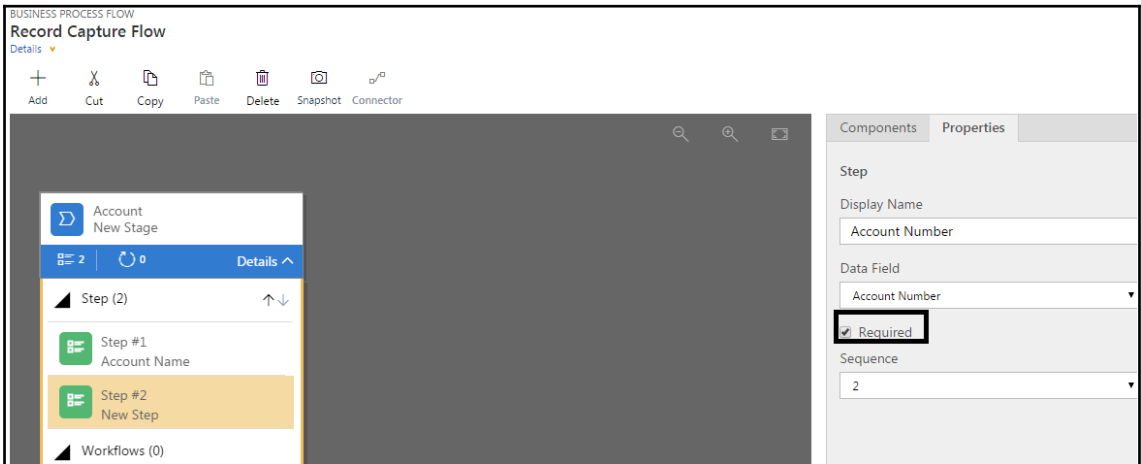
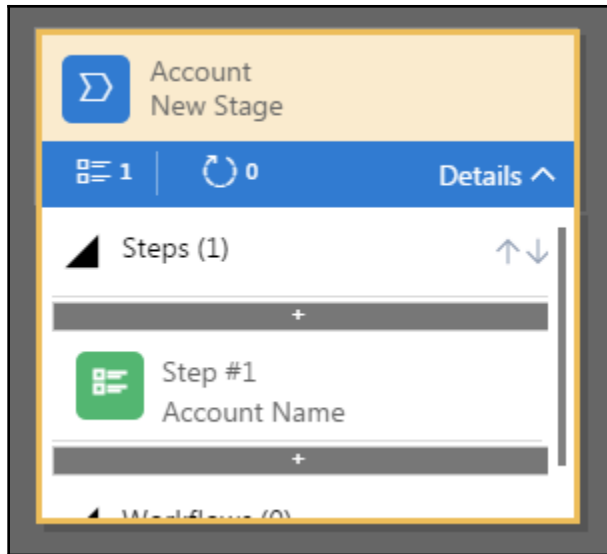
Add Condition

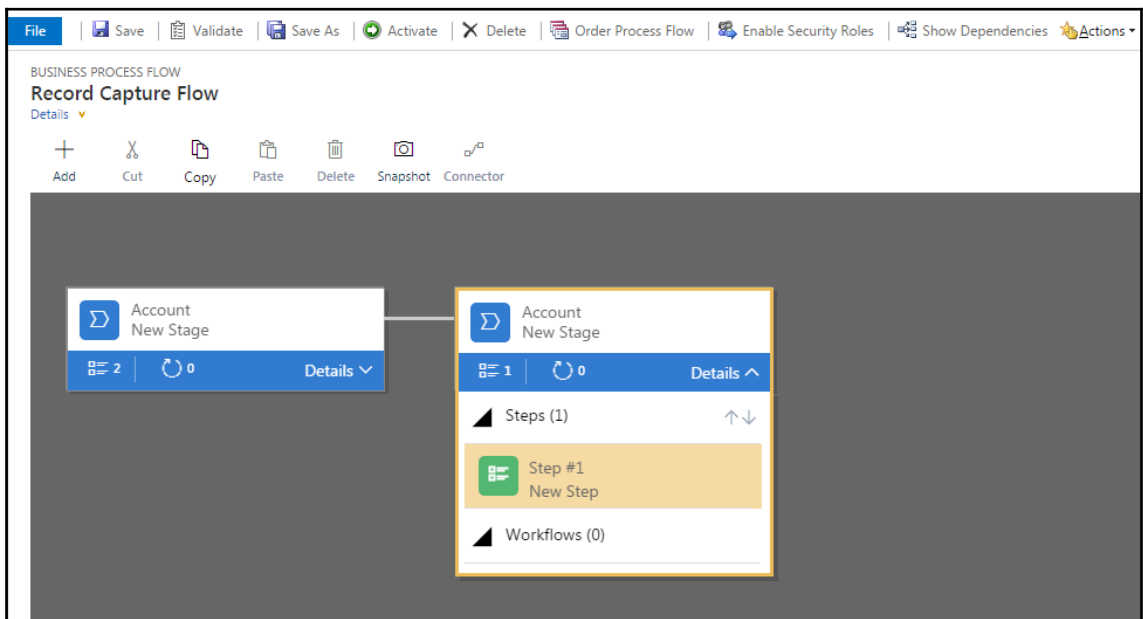
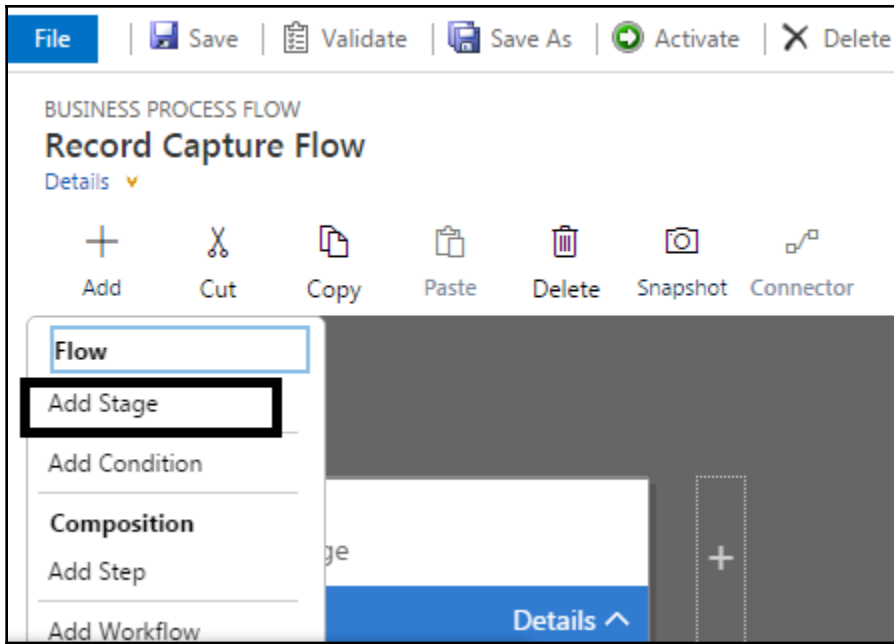
Composition

Add Step

Add Workflow

Details ^





BUSINESS PROCESS FLOW
Record Capture Flow
 Details ▾

Add
 Cut
 Copy
 Paste
 Delete
 Snapshot
 Connector

Components Properties

Stage

Display Name
New Stage

Category

Entity

- Account
- Account
- Agreement
- Agreement Booking Setup
- Agreement Invoice Setup
- Appointment
- Attendance
- Bookable Resource

File | Save | Validate | Save As | Activate | Delete | Order Process Flow

BUSINESS PROCESS FLOW
Record Capture Flow
 Details ▾

Add
 Cut
 Copy
 Paste
 Delete
 Snapshot
 Connector

Flow

- Add Stage
- Add Condition

Composition

- Add Step

Account New Stage

BUSINESS PROCESS FLOW

Record Capture Flow

Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

The screenshot shows a workflow editor interface. At the top, there's a title bar with 'BUSINESS PROCESS FLOW' and 'Record Capture Flow'. Below the title bar is a toolbar with icons for Add, Cut, Copy, Paste, Delete, Snapshot, and Connector. The main workspace contains two 'Account New Stage' components. Each component is a white box with a blue header and a blue footer. The footer contains a list icon with the number '2', a refresh icon with the number '0', and a 'Details' dropdown. The two components are connected by a plus sign connector. There are also plus sign connectors on the right side of each component, suggesting they can be added to the flow.

BUSINESS PROCESS FLOW

Record Capture Flow

Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

The screenshot shows the same workflow editor interface as the first image, but with a third component, 'Condition New Condition', added to the flow. The 'Condition New Condition' component is highlighted with a yellow border. The properties panel on the right side is open, showing the configuration for this component. The properties panel has two tabs: 'Components' and 'Properties'. The 'Properties' tab is active, showing the following configuration options:

- Condition
- Display Name: New Condition
- Rules: + New
- Rule 1:
 - Field: Account Name
 - Operator: Equals
 - Type: Value
 - Value: (empty text box)
- Condition Expression (Text View): (empty text box)
- Buttons: Apply, Discard

At the bottom of the workspace, there is a 'Global Workflow (0)' button.

BUSINESS PROCESS FLOW
Record Capture Flow
 Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

Components **Properties**

Condition

Display Name
 New Condition

Rules + New

Rule 1 ✕

Field
 Address 1: City

Operator
 Equals

Type
 Value

Value
 Texas

Condition Expression (Text View)

Apply Discard

Information

testsolution

Information

Components

Entities

Option Sets

Client Extensions

Web Resources

Processes

Plug-in Assemblies

Sdk Message Processing St...

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 Updat...

SLAs

Apps

Mobile Offline Profiles

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: * Contact Capture Flow

Category: * Business Process Flow Entity: * Contact

Business Process Type:

Run process as a business flow (Classic)
 Run process as a task flow (Mobile only)

Name: * new_contactcaptureflow

OK Cancel

BUSINESS PROCESS FLOW

Contact Capture Flow

Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

▶ Contact New Stage
☰ 1 🔄 0 Details ^

▲ Steps (1) ↑↓

☰ Step #1 New Step

▲ Workflows (0)

▶ Global Workflow (0) ^

Components Properties

Step

Display Name

Data Field

Required

Sequence

Apply Discard

BUSINESS PROCESS FLOW

Contact Capture Flow

Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

▶ Contact New Stage ▶ Condition New Condition ✓

☰ 1 🔄 0 Details ▾

▶ Global Workflow (0) ^

Components Properties

Condition

Display Name

Rules + New

Rule 1 ✕

Field

Operator

Type

Value

Student
 Teacher
 Parent

Apply Discard

BUSINESS PROCESS FLOW
Contact Capture Flow
 Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

```

    graph LR
      A[Contact New Stage] --> B[Condition New Condition]
      B --> C[Contact New Stage]
  
```

Global Workflow (0)

Components | **Properties**

Step

Display Name
Job Title

Data Field
Job Title

Required

Sequence
1

Apply Discard

BUSINESS PROCESS FLOW
Contact Capture Flow
 Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

```

    graph LR
      A[Contact New Stage] --> B[Condition New Condition]
      B --> C[Contact New Stage]
      B --> D[Condition New Condition]
  
```

Global Workflow (0)

Components | **Properties**

Condition

Display Name
New Condition

Rules + New

Rule 1 ✕

Field
Contact type

Operator
Equals

Type
Value

Value

Student
 Teacher
 Parent

Apply Discard

BUSINESS PROCESS FLOW
Contact Capture Flow
Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

Global Workflow (0)

Components Properties

Step

Display Name
Last school

Data Field
Last school

Required

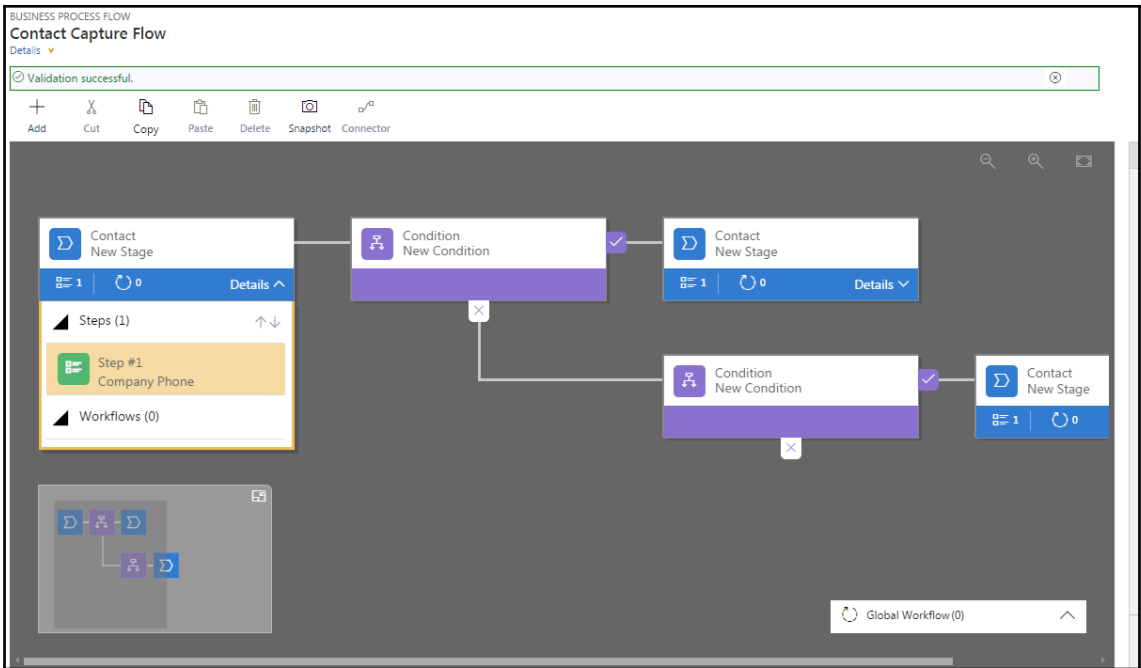
Sequence
1

Apply Discard

File Save **Validate** Save As Activate Delete Order Process Flow Enable Security Roles Show Dependencies Actions

BUSINESS PROCESS FLOW
Contact Capture Flow
Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector



Dynamics 365 Sales Contacts > Maria Campbell (sa... >

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS ...

CONTACT ▾ Switch Process

Dynamics 365 Sales Contacts Maria Campbell (sa...)

Switch Process

Select a different process.

- Contact Capture Flow (Not Started)

Archived Processes >>

Select Cancel

CONTACT: Maria Campbell (sample)

Summary

CONTACT INFORMATION

*Full Name: Maria Campbell (sample)

Designation: Purchasing Manager

Department: -----

*Email: someone_d@example.com

*Business Phone: 555-0103

Mobile Phone: -----

Extension Number: -----

*Account Name: Fabrikam, Inc. (sample)

Active

Dynamics 365 Sales Contacts Maria Campbell (sa...)

CONTACT: Maria Campbell (sample)

Owner: crm admin

New Stage (Active for 1 minute)

Contact Type: [click to enter](#)

Contact Capture Flow (Active for 1 minute) Finish

CONTACT: Maria Campbell (sample)

Owner: crm admin

New Stage (Active for 1 minute) → New Stage

✓ Contact Type: Parent

Contact Capture Flow (Active for 1 minute) Next Stage

CONTACT ▾
Maria Campbell (sample) ☰

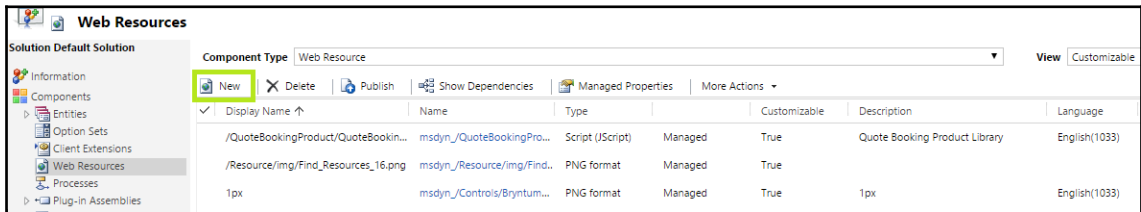
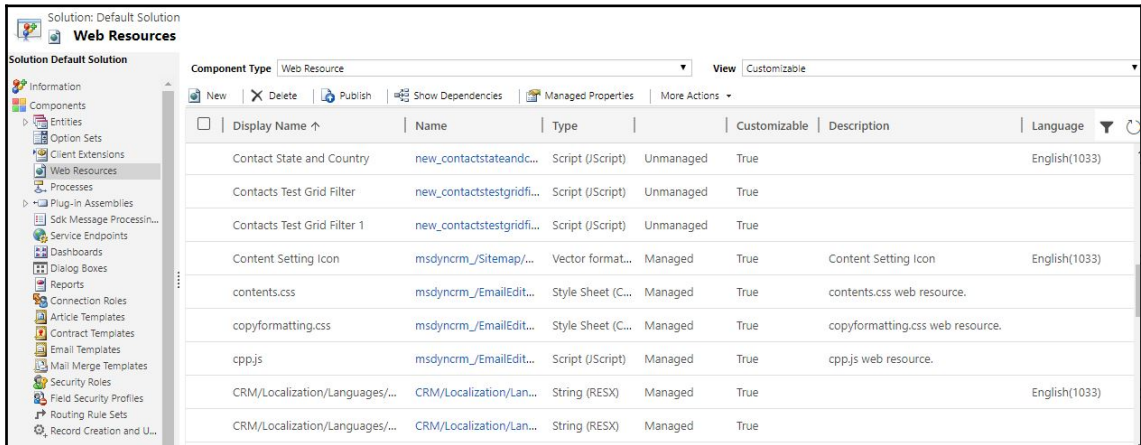
Owner
crm admin

✓ New Stage → New Stage (Active for 1 minute) ▶

Job Title [click to enter](#)

Contact Capture Flow (Active for 5 minutes) ● Finish ● ^

Chapter 8: Client-Side Scripting



SAVE PUBLISH PUBLISH ALL CUSTOMIZAT..

Solution: Default Solution
Web Resource: New

General

Name *

Display Name

Description

Content

Type *

Language

Upload File No file chosen

URL

URL

Edit Content

Edit Web Resource Content.

Source

```
function suggestZipCodes() {
    // List of 6 sample ZIP codes to suggest
    zipCodes = [
        { name: '94102'},
        { name: '94103'},
        { name: '94104'},
        { name: '94105'},
        { name: '94107'},
        { name: '94108'},
    ];

    var keyPressFcn = function (ext) {
        try {
            var userInput = Xrm.Page.getControl("address_postalcode").getValue();
            resultSet = {
                results: new Array(),
                commands: {

```

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

OK
Cancel

Contact

Forms

Solution Default Solution

- CDN Configuration
- Channel Property
- Channel Property G...
- Characteristic
- City
- College Student
- Competitor
- Competitor Address
- Connection
- Connection Role
- Contact
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationshi...
 - Messages
 - Business Rules
 - Hierarchy Settl...
- Dashboards
- Content Settings
- Contact

System Forms **Active Forms** ▾

New Delete Enable Security Roles Form Order Activate Deactivate More Actions

Name	Form State	Form Type ↑	State	Customizable	Version	Description
Contact Card form	Active	Card	Managed	True	8.0.0.0	Default Contact card form.
Insights	Active	Main	Managed	True	5.0.0.0	
Sales Insights	Active	Main	Managed	True	1.0	Updated default Contact form.
Contact for interactive experie...	Active	Main	Managed	True	8.0.0.0	Default interactive experience Contact form.
Contact	Active	Main	Managed	True	5.0.0.0	Updated default Contact form.
Contact Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Default quick create form for Contact
App for Outlook Contact Card	Active	Quick View F...	Managed	True	1.0	
Contact Reference Panel	Active	Quick View F...	Managed	True	8.0.0.0	A form that displays Reference Panel of Contact.

1 - 14 of 14 (0 selected)

Contact

Forms

Solution: Default Solution

System Forms Active Forms ▾

Name	Form State	Form Type ↑	State	Customizable	Version	Description
Contact Card form	Active	Card	Managed	True	8.0.0.0	Default Contact card form.
✓ Contact - MoCa	Active	Main	Managed	True	6.1.0.0	This form is used for MoCa.
✓ Contact	Active	Main	Managed	True	5.0.0.0	Updated default Contact form.
Contact for Interactive experience	Active	Main - Interactiv...	Managed	True	8.0.0.0	Default Interactive experience Contact form.
Information	Active	Mobile - Express	Managed	True	5.0.0.0	This is the form that is displayed for the Dynamics 365 for phones express
Contact Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Default quick create form for Contact
Contact Reference Panel	Active	Quick View Form	Managed	True	8.0.0.0	A form that displays Reference Panel of Contact.
Social Profiles	Active	Quick View Form	Managed	True	6.1.0.0	A form that displays social profiles of contact.
Recent Cases and Entitlements	Active	Quick View Form	Managed	True	8.0.0.0	A form that displays the recent cases and entitlements.
Contact Quick Form	Active	Quick View Form	Managed	True	5.0.0.0	This is the form that is displayed for the contact Quick Form.
Opportunity Contact Quick View	Active	Quick View Form	Managed	True	2015.6.4	
account contact card	Active	Quick View Form	Managed	True	6.0.0.0	A form that displays the contact card in account.
contact card	Active	Quick View Form	Managed	True	5.0.0.0	A form that displays the contact card.

FILE **HOME** **INSERT**

Save Save and Close Publish Save Edit Select Form Upgrade

Change Properties Remove Undo Redo Header Footer Navigation Business Rules Form Properties Preview Enable Security Roles Show Dependencies Managed Properties Merge Forms

Contact

Summary Details

Solution: Default Solution

Form: **Contact**

Form Properties

Modify this form's properties.

Events | Display | Parameters | Non-Event Dependencies

Manage libraries that will be available in the form.

+ Add | - Remove | ↑ Up | ↓ Down | 📄 Edit

msdyn_talkingpointsloader.js	talkingpointsloader
new_preferredmethodofcontactrequir...	Preferred Method...
new_contactinfovalidation	Contact Info Valid...
new_contactstateandcountrylookup	Contact State and...
new_zipCodeAutoComplete	Zip Code Auto Co...
new_deactivatecontactform	Deactivate Contac...

▲ Event Handlers

Manage functions that are called for form or field events.

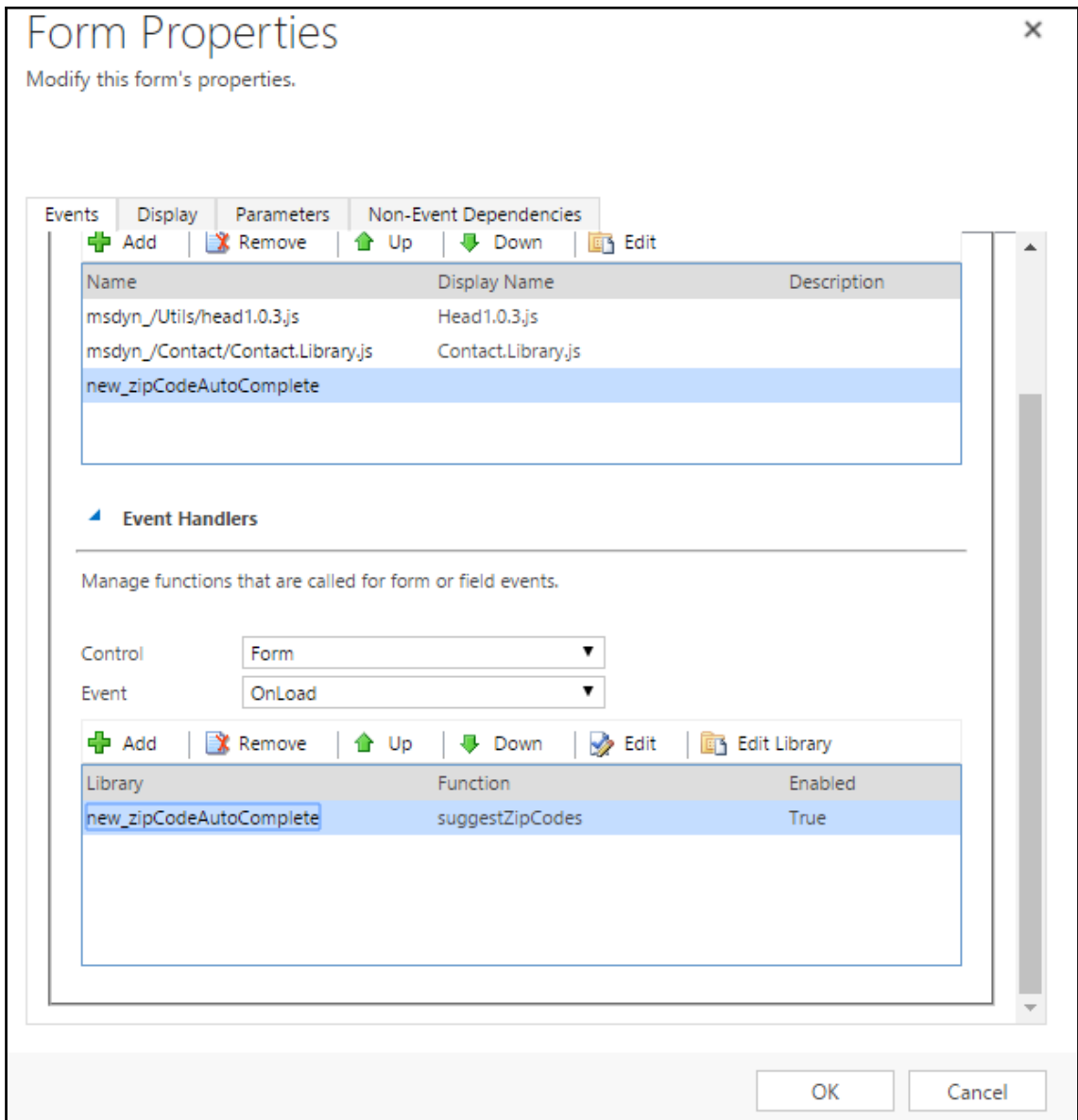
Control: Form ▼


Event: OnLoad ▼

+ Add | - Remove | ↑ Up | ↓ Down | 📄 Edit | 📄 Edit Library

Library	Function	Enabled
msdyn_talkingpointsloader.js	loadTalkingPoints	True
new_zipCodeAutoComplete	suggestZipCodes	True

OK Cancel






CONTACT ▾

Mohan CM ▾

Account Name	📁 Loyola
Email	mohan@gmail.com
Business Phone	94102
Mobile Phone	94103
Fax	94104
Preferred Method of Contact	94105
Address	94107
Address 1: ZIP/Postal Code	94108
Aadhar Number	-----

6 results
[Search in Bing](#)



CONTACT ▾

Mohan CM ▾

Account Name	📁 Loyola
Email	mohan@gmail.com
Business Phone	94102
Mobile Phone	94103
Fax	94104
Preferred Method of Contact	94105
Address	94107
Address 1: ZIP/Postal Code	94108
Aadhar Number	-----

6 results
[Search in Bing](#)

SAVE DELETE PREVIEW SHOW DEPENDENCIES PUBLISH PUBLISH ALL CUSTOMIZ...

Solution: Default Solution

Web Resource: Contact Address Progress Bar

General Dependencies

General

Name *

Display Name

Description

Content

Type *

Language

Upload File No file chosen

URL

URL

Modify this form's properties.

Events | Display | Parameters | Non-Event Dependencies

new_preferredmethodofcontactrequir... Preferred Method...
new_contactinfovalidation Contact Info Valid...
new_contactstateandcountrylookup Contact State and...
new_zipCodeAutoComplete Zip Code Auto Co...

Event Handlers

Manage functions that are called for form or field events.

Control: Form
Event: OnLoad

+ Add | Remove | Up | Down | Edit | Edit Library

Library	Function	Enabled
msdyn_talkingpointsloader.js	loadTalkingPoints	True
new_zipCodeAutoComplete	suggestZipCodes	True
new_deactivatecontactform	checkAccountStatus	True
new_contactaddressprogressbar	progressIndicator	True

OK Cancel

CONTACT ▾ Sudevan G ☰

Owner sudarsan venginissery

Summary

CONTACT INFORMATION

*Full Name Sudevan G

Job Title

Account Name Act Sven

Email sudevan_gm@gmail.com

Business Phone 8789111452

Mobile Phone 8789111452

Fax

Preferred Method of Contact Any

NOTES

Company Act Sven

RECENT OPPORTUNITIES +

Topic	Est. Revenue	Est. Cl
Purchase of Bike	₹62,000.00	31

POST

All posts Auto posts User posts

Purchase of Bike
sudarsan venginissery won Opportunity for Contact Sudevan G: ₹54,700.00. Congratulations!
On Purchase of Bike's wall
5/3/2018 12:19:06 PM

Sudevan G
Lead: Qualified by sudarsan venginissery and converted to Contact Sudevan G, Opportunity Purchase of Bike.
On Sudevan G's wall

Waiting for home.dynamics.com...

CONTACT ▾ Sudevan G ☰

Email sudevan_gm@gmail.com

Business Phone 8789111452

Mobile Phone 8789111452

Fax

Preferred Method of Contact Any

Address Hyderabad India

Address 1: ZIP/Postal Code

Aadhar Number

City

All posts Auto posts User posts

Purchase of Bike
sudarsan venginissery won Opportunity for Contact Sudevan G: ₹54,700.00. Congratulations!
On Purchase of Bike's wall
5/3/2018 12:19:06 PM

Sudevan G
Lead: Qualified by sudarsan venginissery and converted to Contact Sudevan G, Opportunity Purchase of Bike.
On Sudevan G's wall
5/3/2018 11:32:33 AM

Purchase of Bike
Opportunity: Created by sudarsan venginissery for Contact Sudevan G.
On Purchase of Bike's wall
5/3/2018 11:32:32 AM

Sudevan G
Contact: Created By sudarsan venginissery.
On Sudevan G's wall
5/3/2018 11:32:32 AM

PowerApps

SAVE DELETE PREVIEW SHOW DEPENDENCIES PUBLISH PUBLISH ALL CUSTOMIZ...

Solution: Default Solution

Web Resource: Contact Dynamic Option Set

General Dependencies

General

Name *

Display Name

Description

Content

Type *

Language

Upload File No file chosen

URL

URL

Mobile

Enable for mobile

FILE HOME INSERT

Section Three Columns Three Columns Two Columns Two Columns Two Columns One Column Sub-Grid Spacer Quick View Form Web Resource IFRAME Bing Maps Navigation Link

3 Tabs 2 Tabs 1 Tab

4 Contact

- Summary
- Details

Solution: Default Solution

Form: **Contact**

Web Resource Properties

Modify this Web resource's properties.

General Formatting Dependencies

Web resource

Web resource *

Field Name and Properties

Name *

Label *

Display label on the Form

Visibility

Visible by default

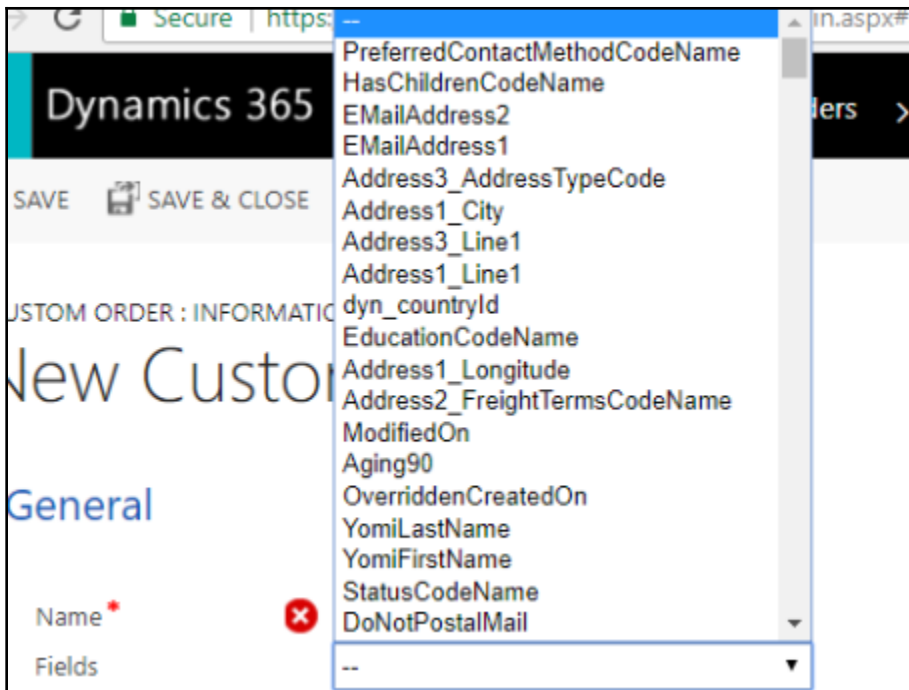
Enable for mobile

Web Resource Properties

Custom Parameter(data)

Restrict cross-frame scripting, where supported.

OK Cancel



SAVE DELETE PREVIEW SHOW DEPENDENCIES PUBLISH PUBLISH ALL CUSTOMIZ...

Solution: Default Solution

Web Resource: Active Account Dynamic Table

General Dependencies

General

Name*

Display Name

Description

Content

Type*

Language

Upload File No file chosen

URL

URL

SAVE DELETE PREVIEW SHOW DEPENDENCIES PUBLISH PUBLISH ALL CUSTOMIZ...

Solution: Default Solution

Web Resource: Active Account Dynamic Table.Html

General Dependencies

General

Name *

Display Name

Description

Content

Type *

Language

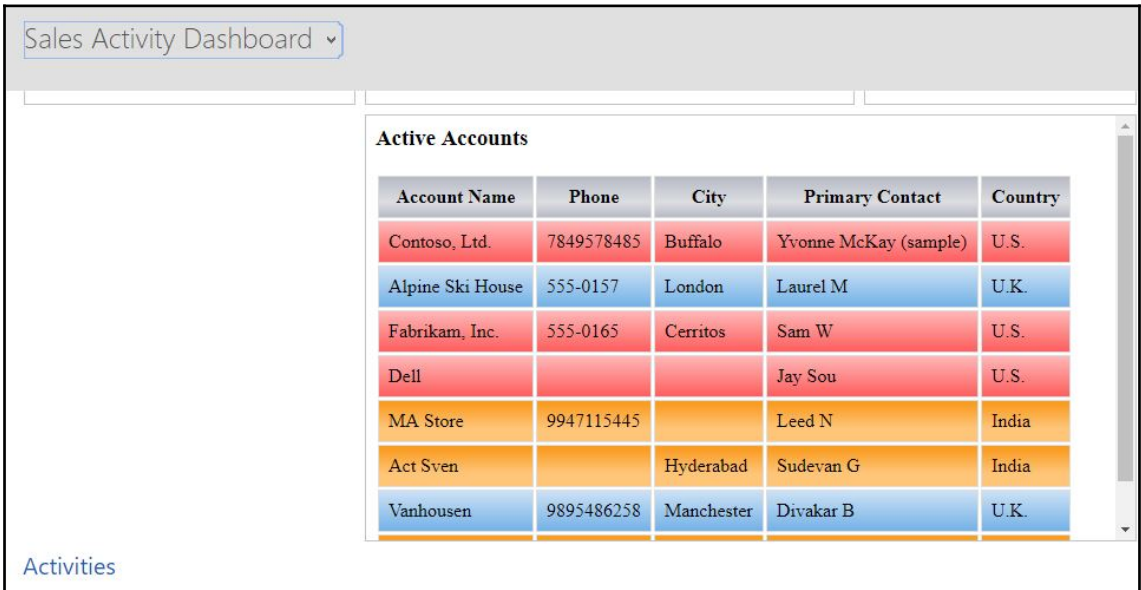
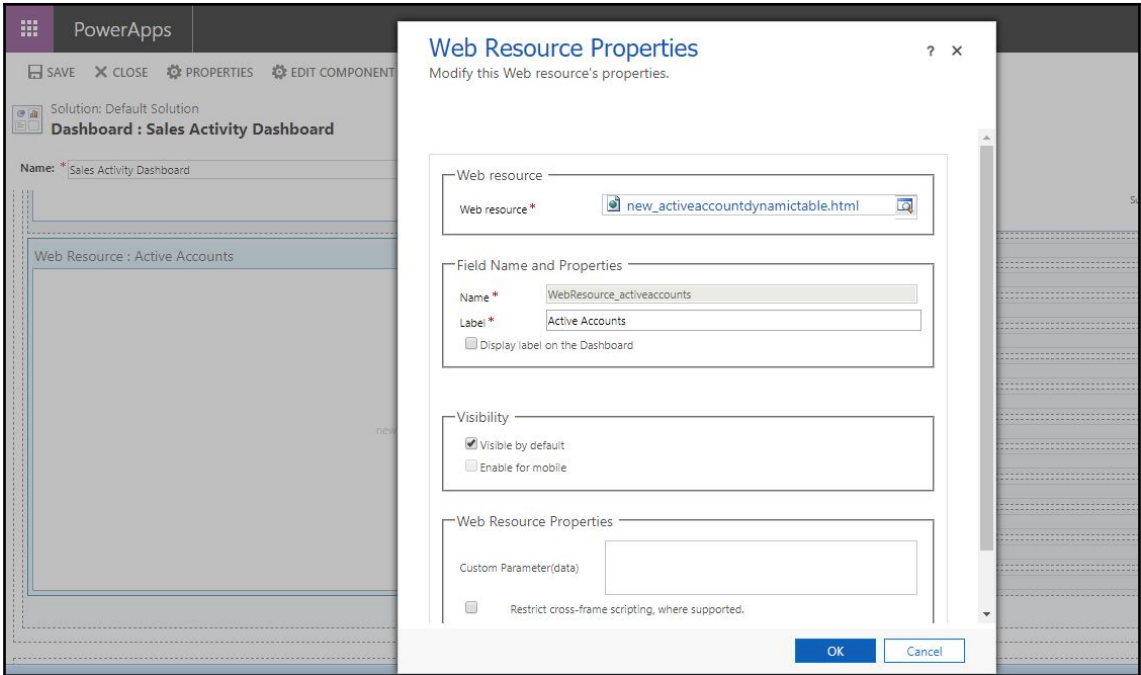
Upload File No file chosen

URL

URL


Mobile

Enable for mobile



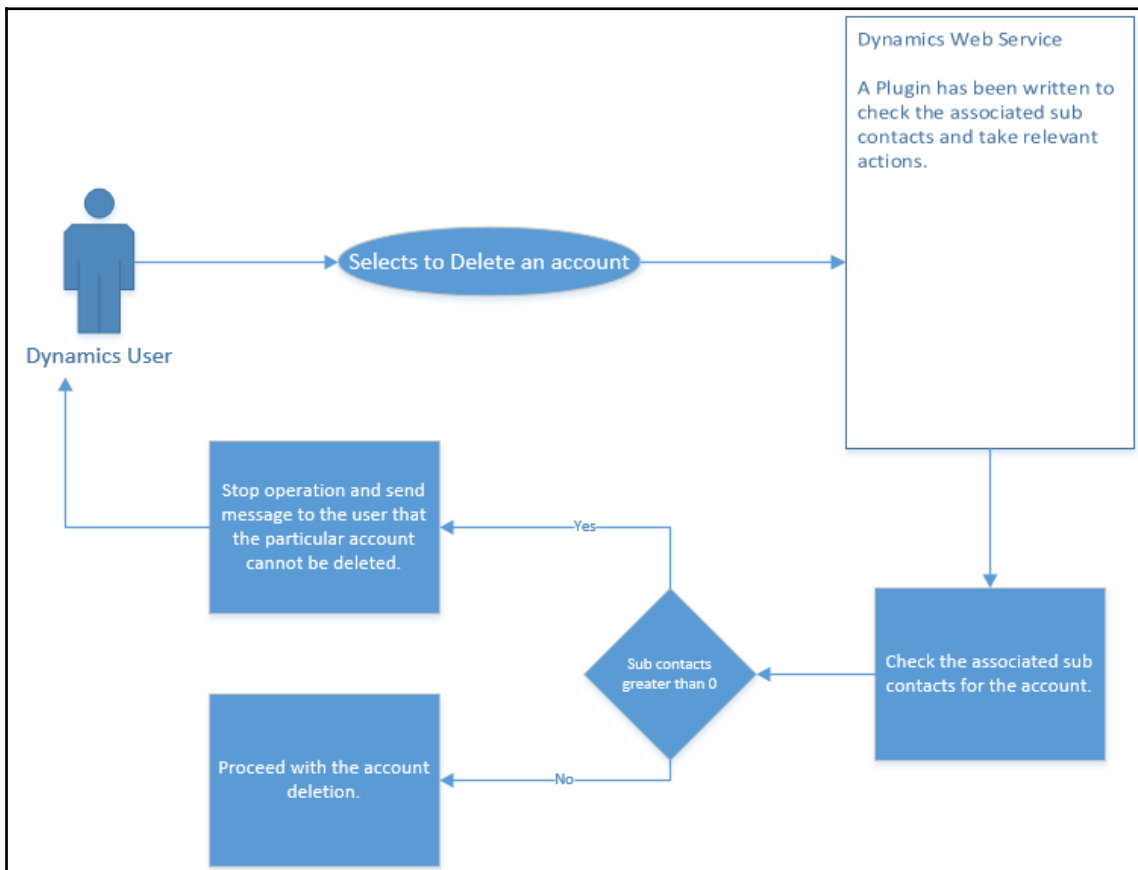
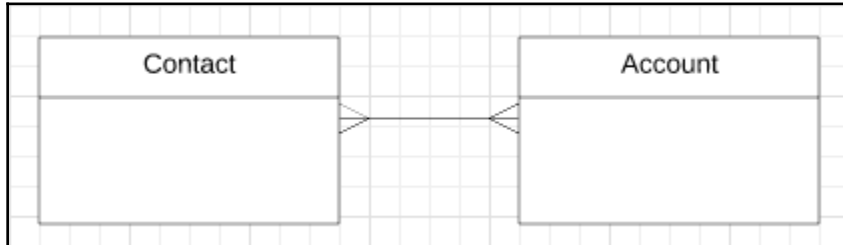
Information:Form Disabled!

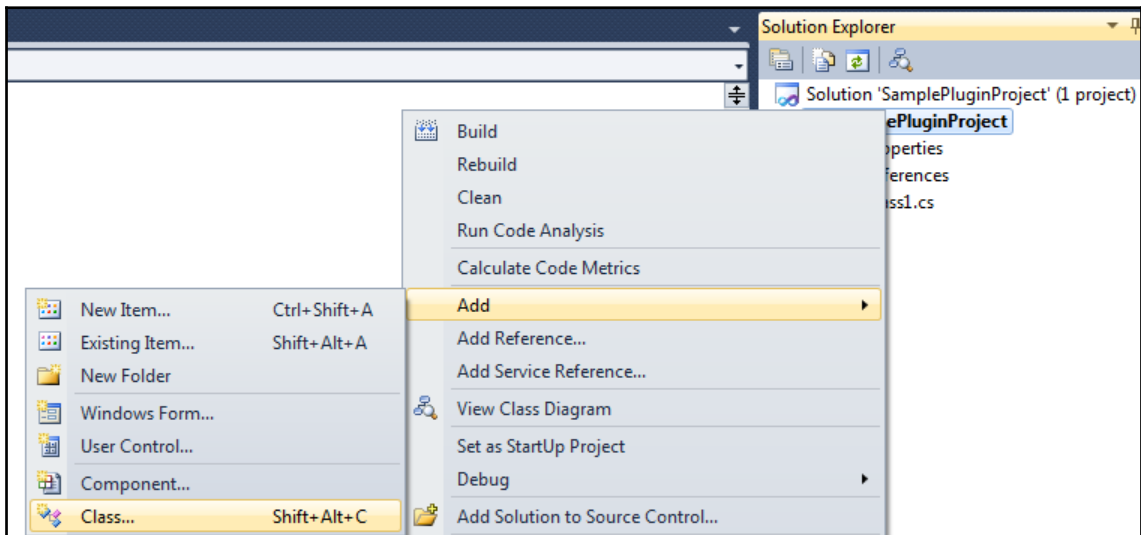
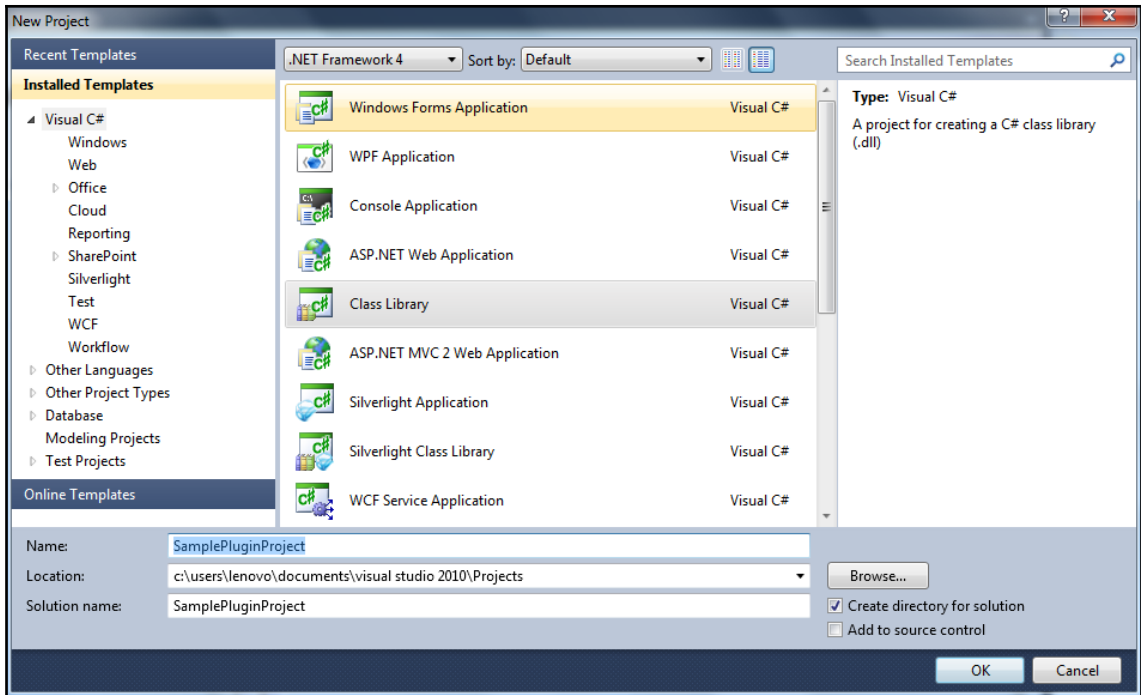
CONTACT INFORMATION

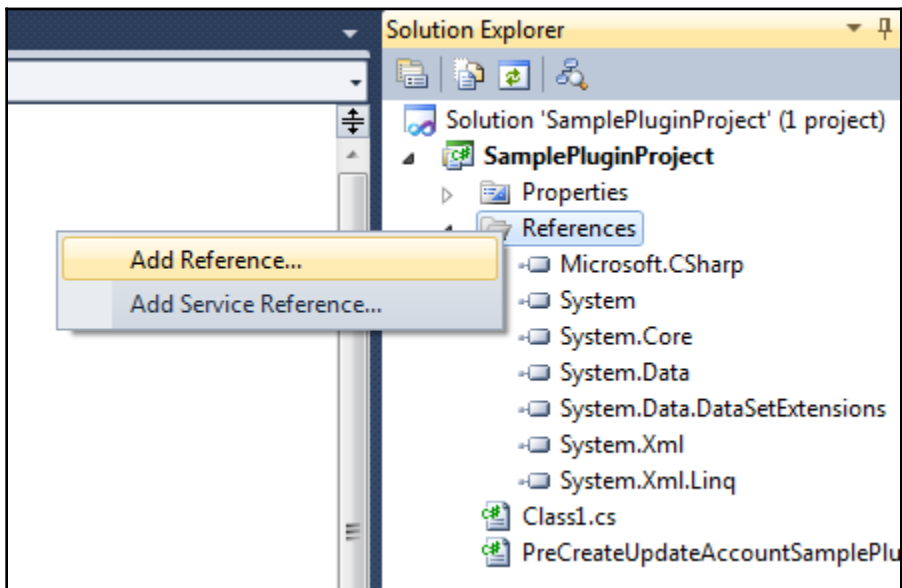
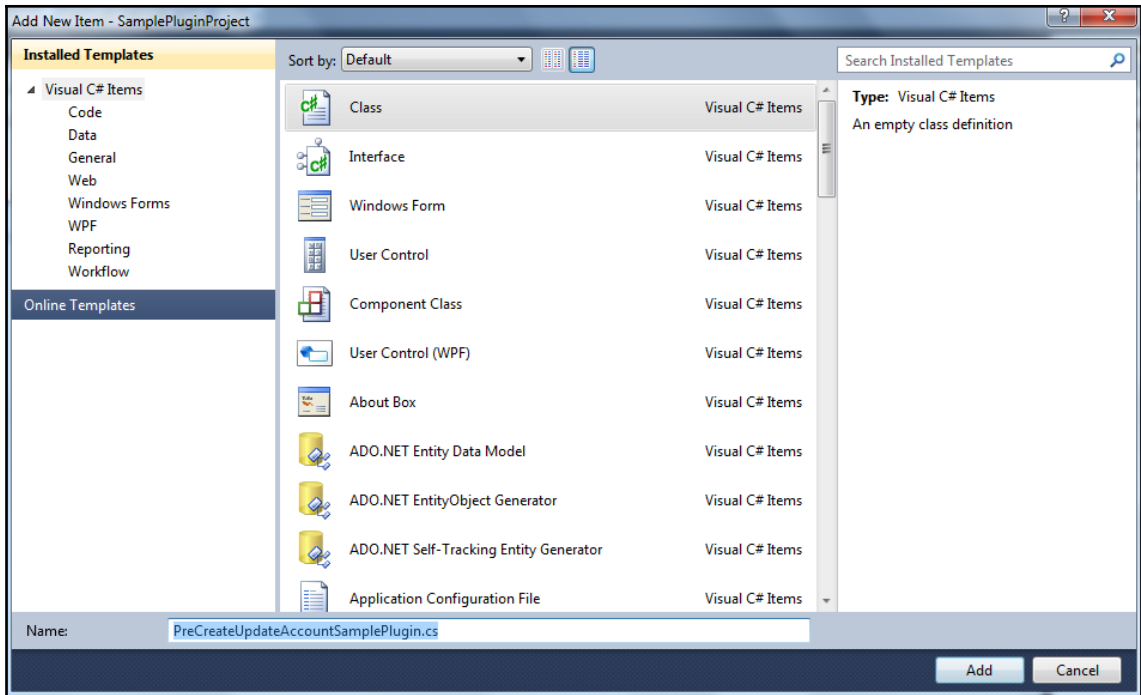
Full Name *	🔒 Adrian Dumitrascu
Job Title	🔒 Purchasing Manager
Account Name	🔒  Adventure Works
Email	🔒 Adrian@adventure-wo
Business Phone	🔒 768-555-0156
Mobile Phone	🔒 --
Preferred Method of c	🔒 Any
Address	🔒 1111 William Nicol Drive Johannesburg 2100 South Africa
UpdateFlag	🔒 --
Twitter	🔒

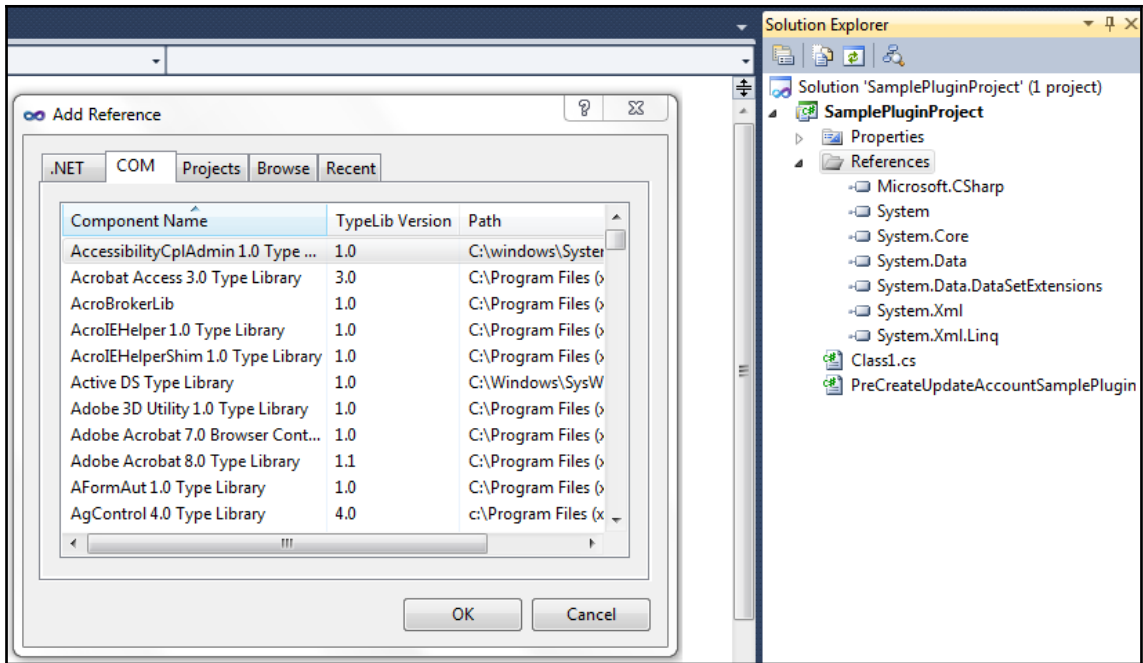
Active

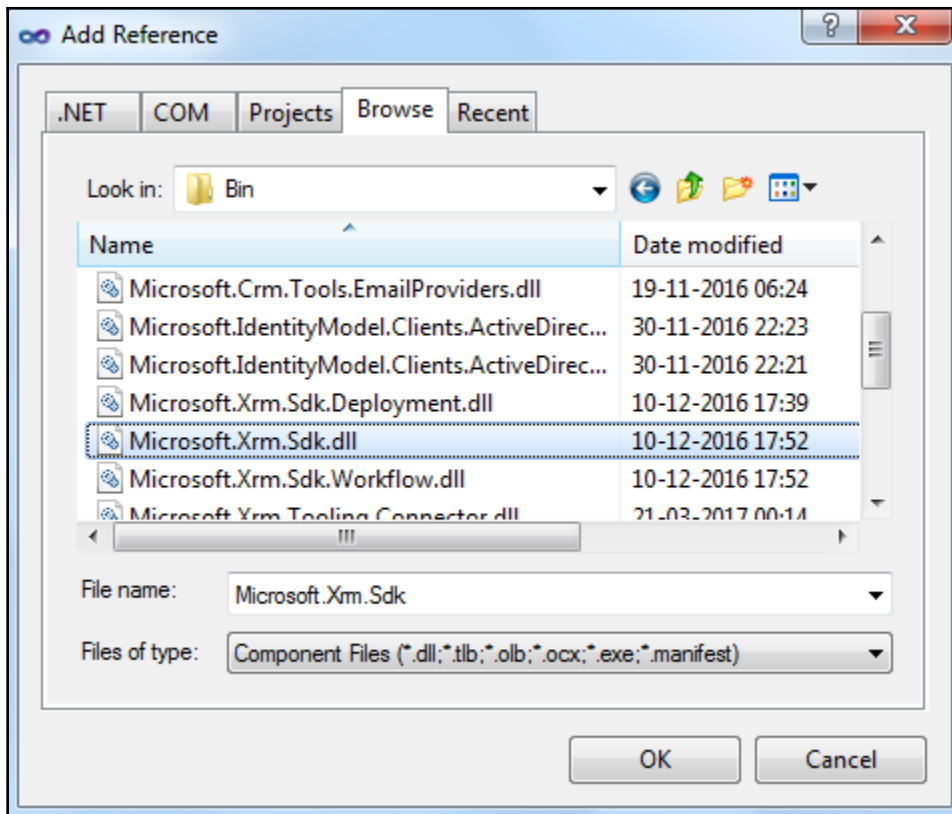
Chapter 9: Plugin Development with Dynamics 365

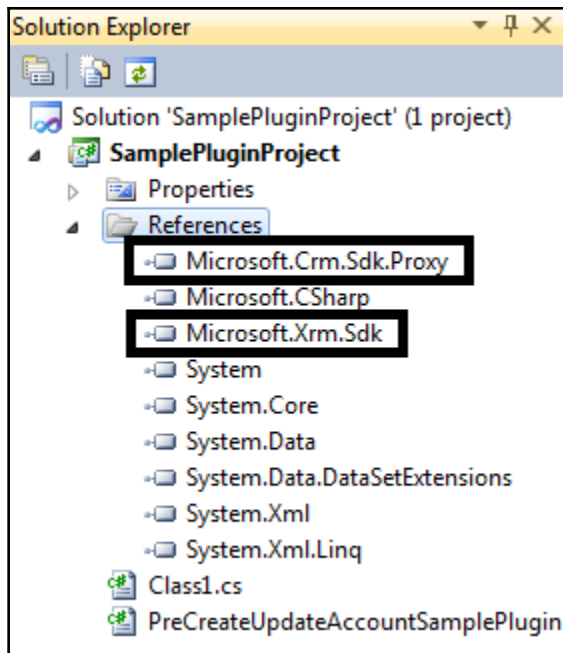


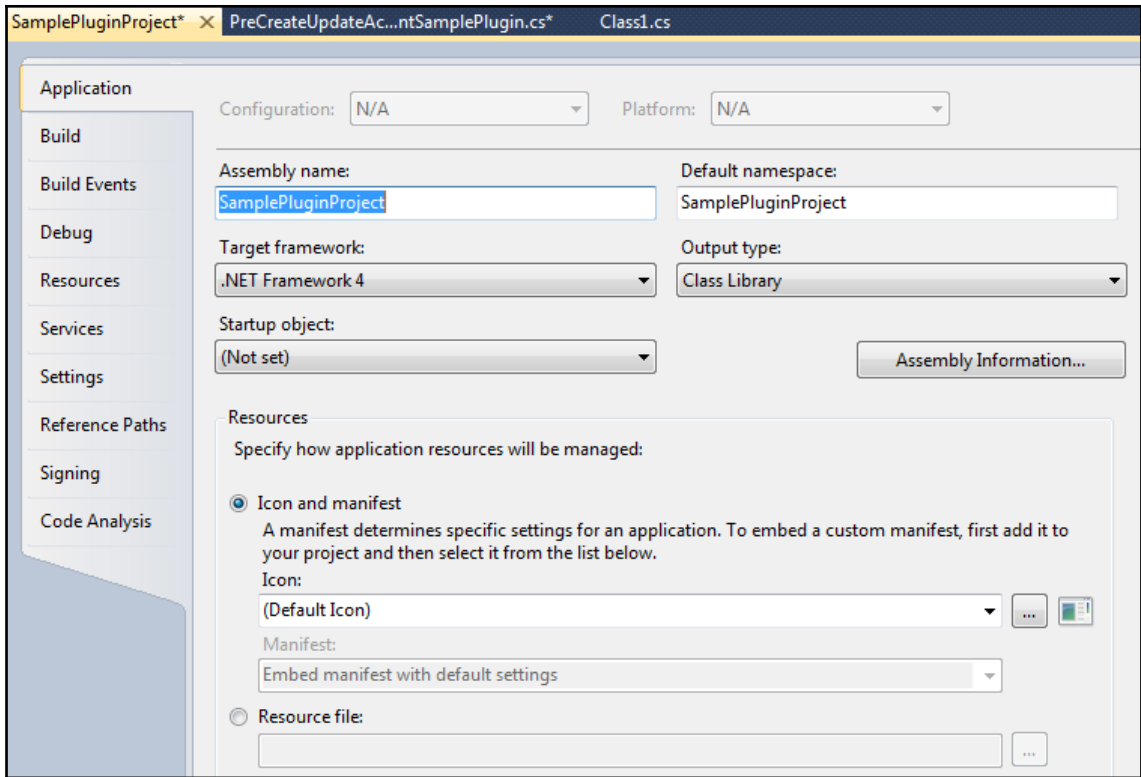


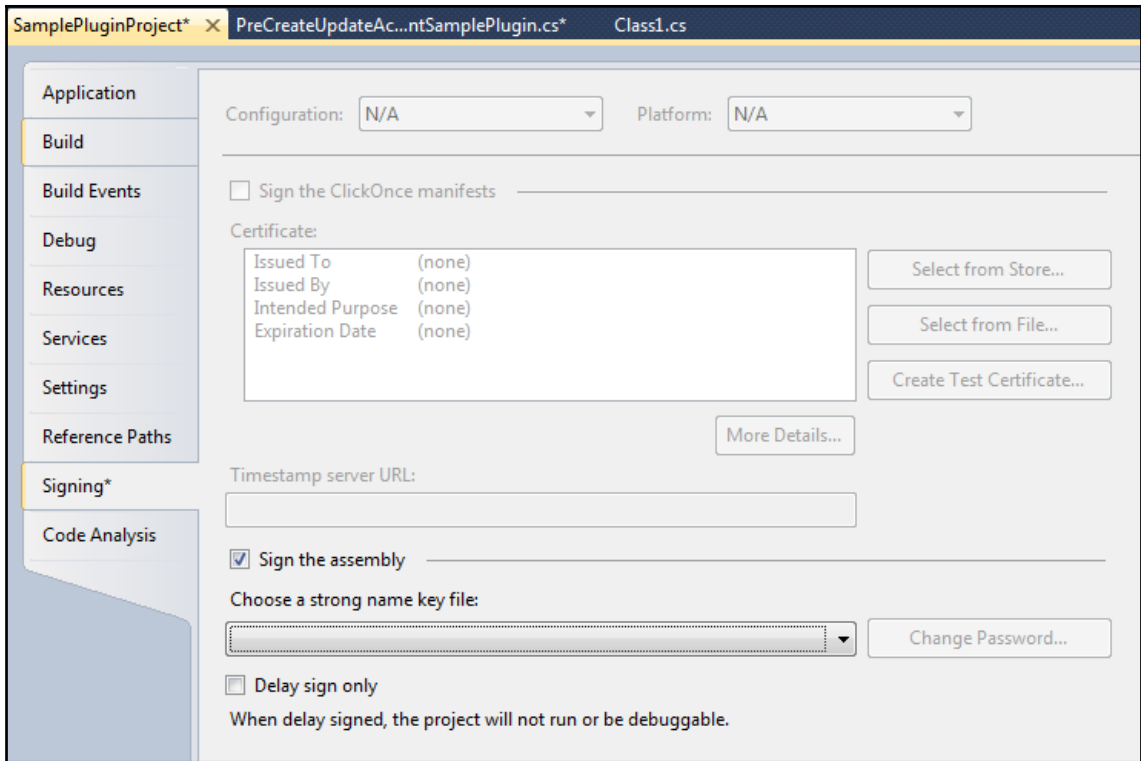


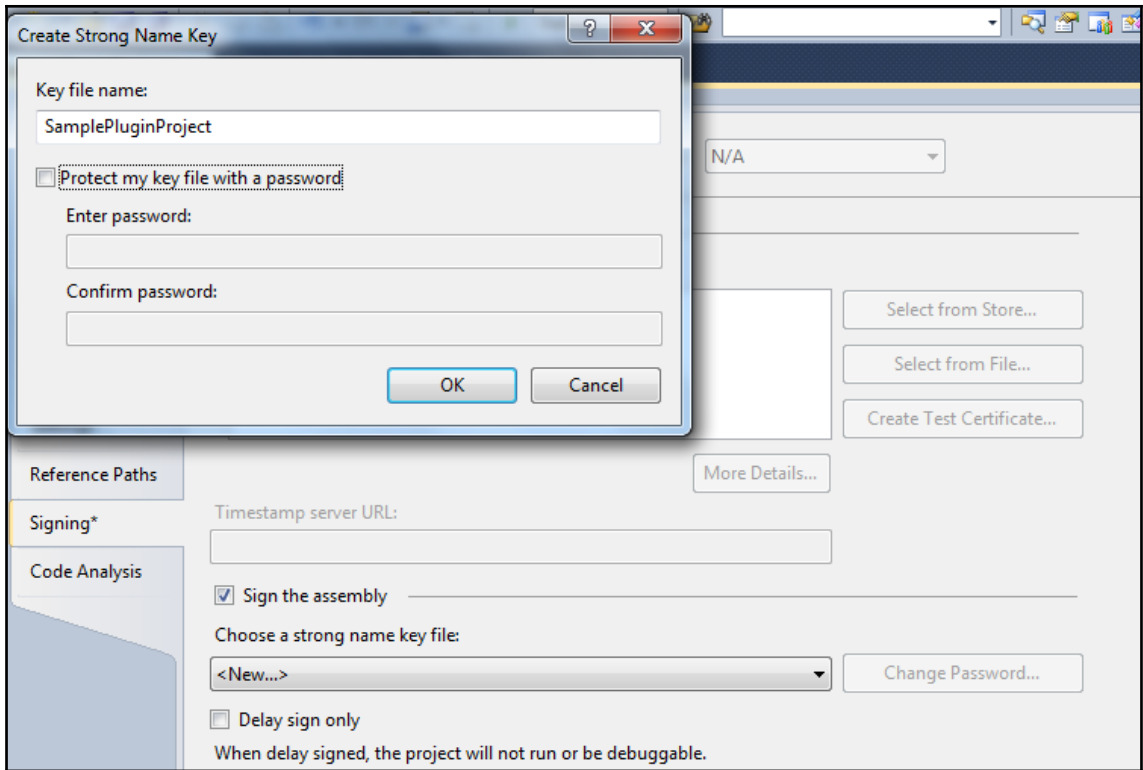

























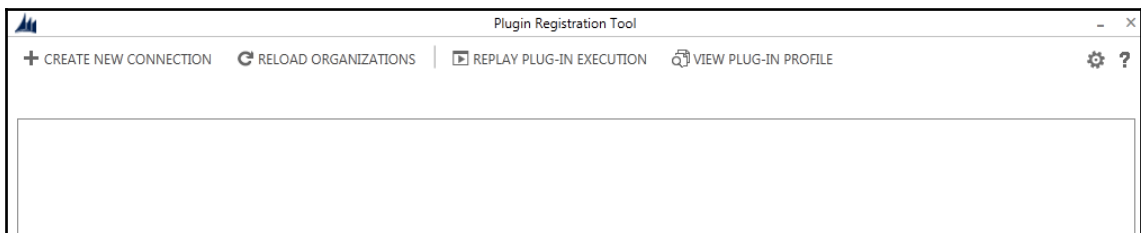


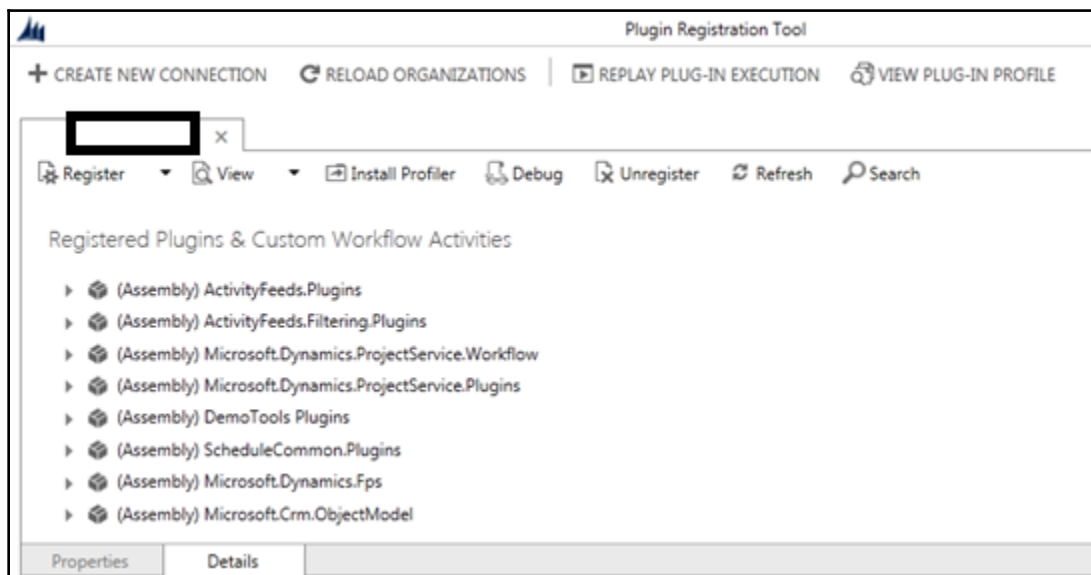
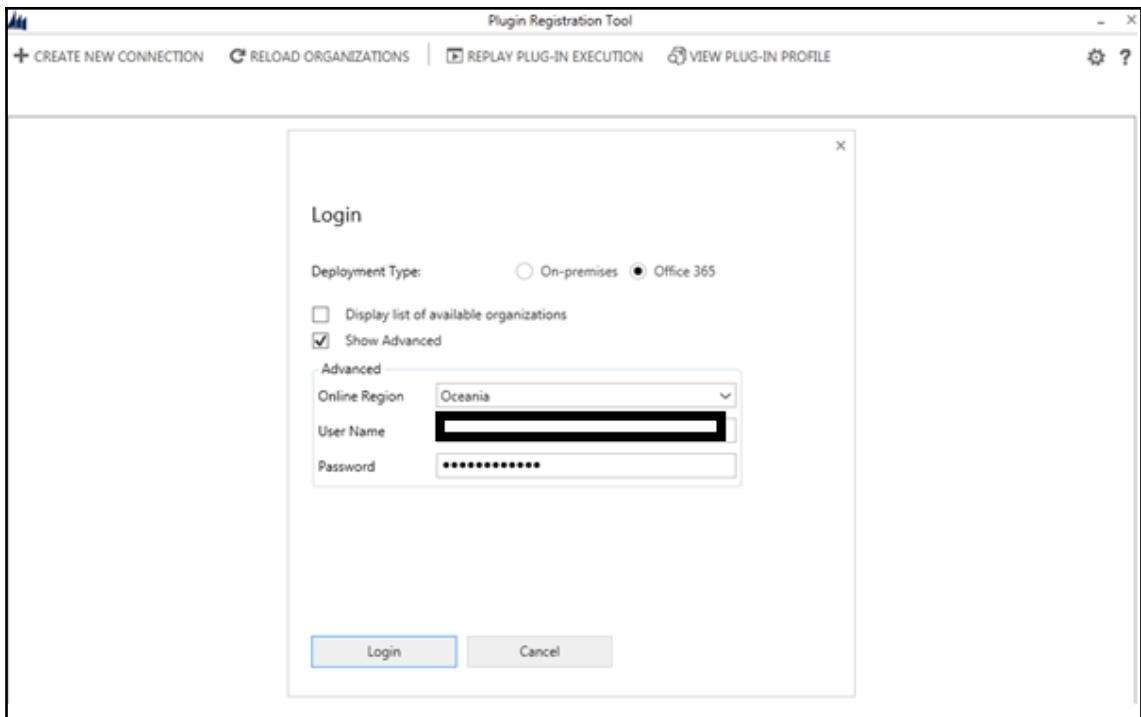


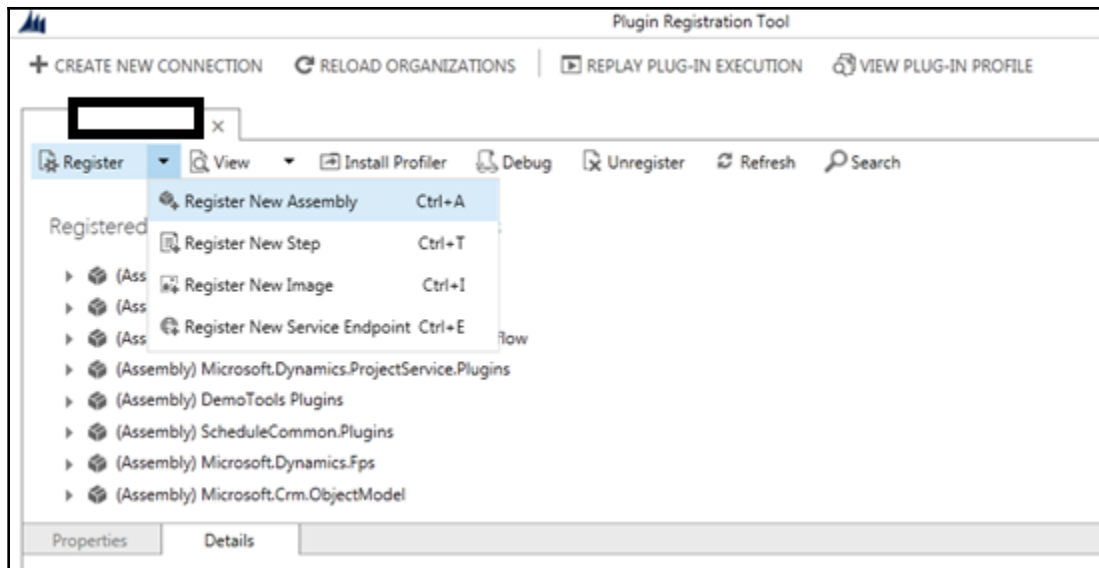
Local Disk (C:) > crm 2016 sdk > SDK > Tools > PluginRegistration >

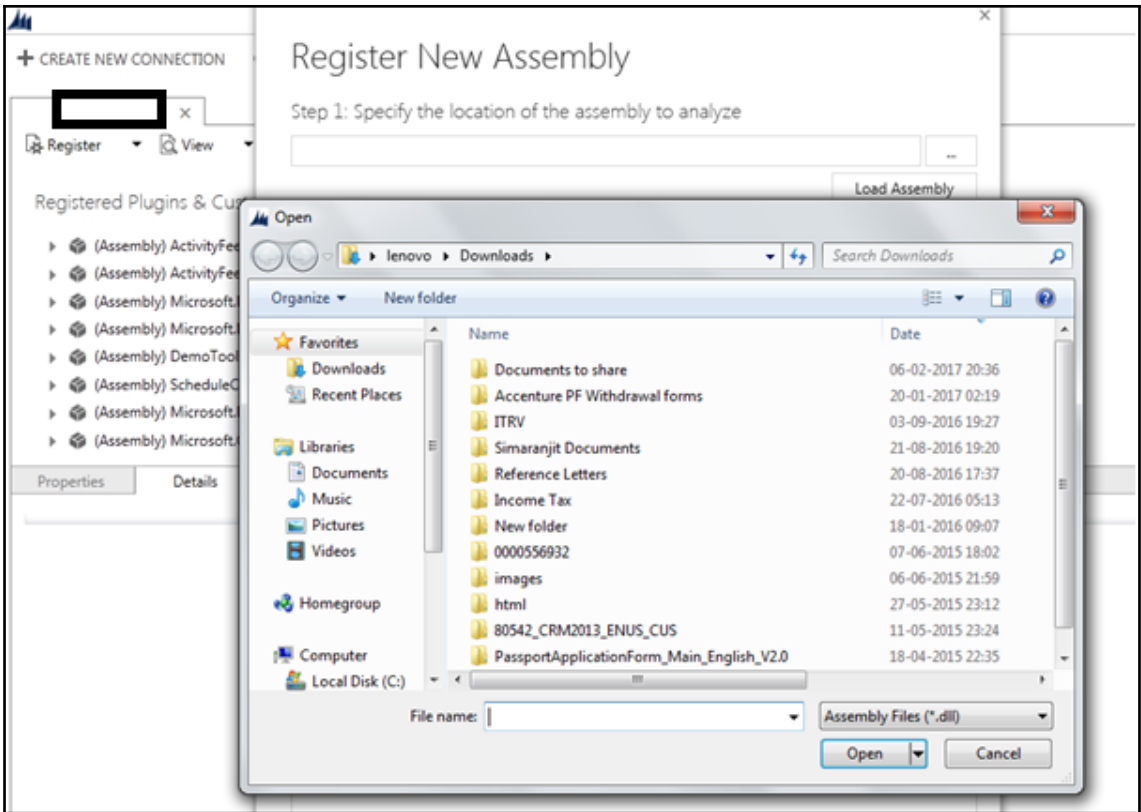
Burn New folder

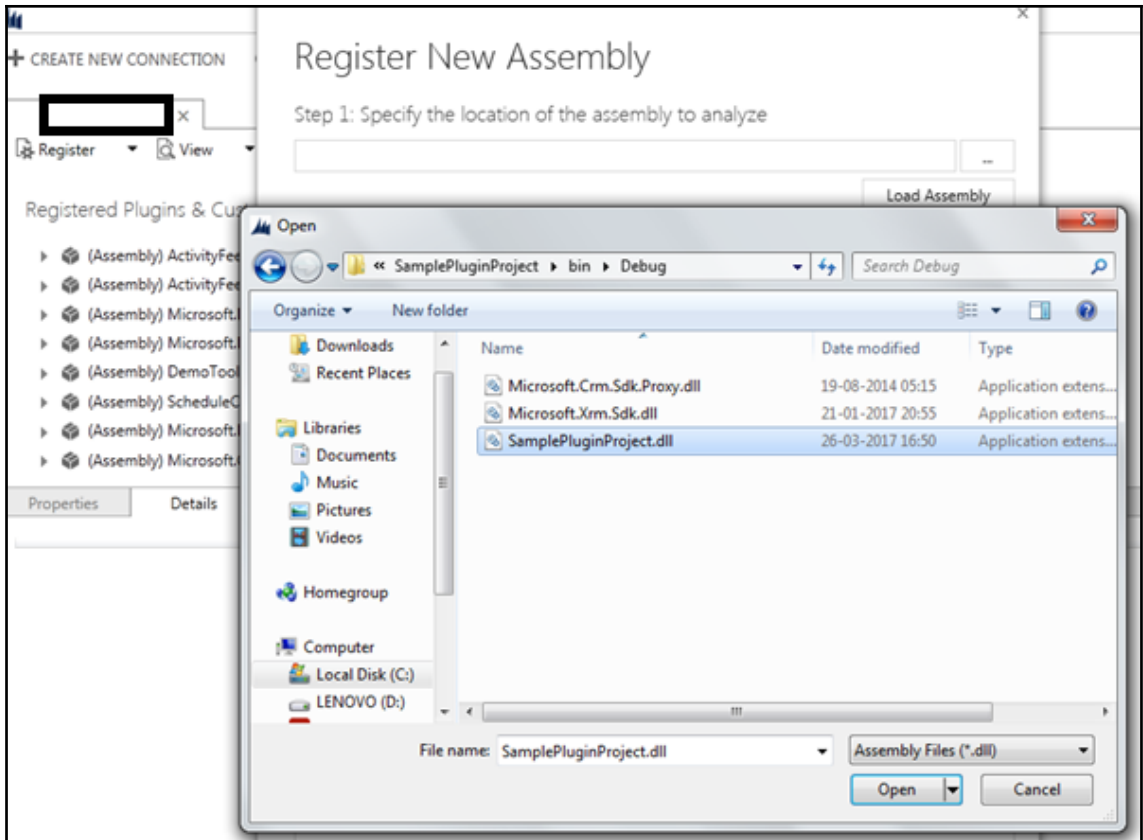
Name	Date modified	Type	Size
 AssemblyRegistration.dll	23-05-2016 21:41	Application extens...	53 KB
 CrmLibraries.dll	23-05-2016 21:42	Application extens...	824 KB
 DebugPlugin.dll	23-05-2016 21:41	Application extens...	50 KB
 ImageRegistration.dll	23-05-2016 21:41	Application extens...	41 KB
 Microsoft.Crm.Sdk.Proxy.dll	23-05-2016 21:33	Application extens...	259 KB
 Microsoft.Expression.Interactions.dll	23-05-2016 21:41	Application extens...	106 KB
 Microsoft.IdentityModel.Clients.ActiveDi...	23-05-2016 21:33	Application extens...	205 KB
 Microsoft.IdentityModel.Clients.ActiveDi...	23-05-2016 21:33	Application extens...	61 KB
 Microsoft.ServiceBus.dll	23-05-2016 21:34	Application extens...	3,573 KB
 Microsoft.Xrm.Sdk.Deployment.dll	23-05-2016 21:33	Application extens...	96 KB
 Microsoft.Xrm.Sdk.dll	23-05-2016 21:33	Application extens...	520 KB
 Microsoft.Xrm.Sdk.Workflow.dll	23-05-2016 21:33	Application extens...	58 KB
 Microsoft.Xrm.Tooling.Connector.dll	23-05-2016 21:33	Application extens...	198 KB
 Microsoft.Xrm.Tooling.CrmConnectCont...	23-05-2016 21:33	Application extens...	1,939 KB
 Microsoft.Xrm.Tooling.Ui.Styles.dll	23-05-2016 21:33	Application extens...	95 KB
 PluginCommonControls.dll	23-05-2016 21:41	Application extens...	109 KB
 PluginProfiler.Debugger	23-05-2016 21:41	Application	67 KB

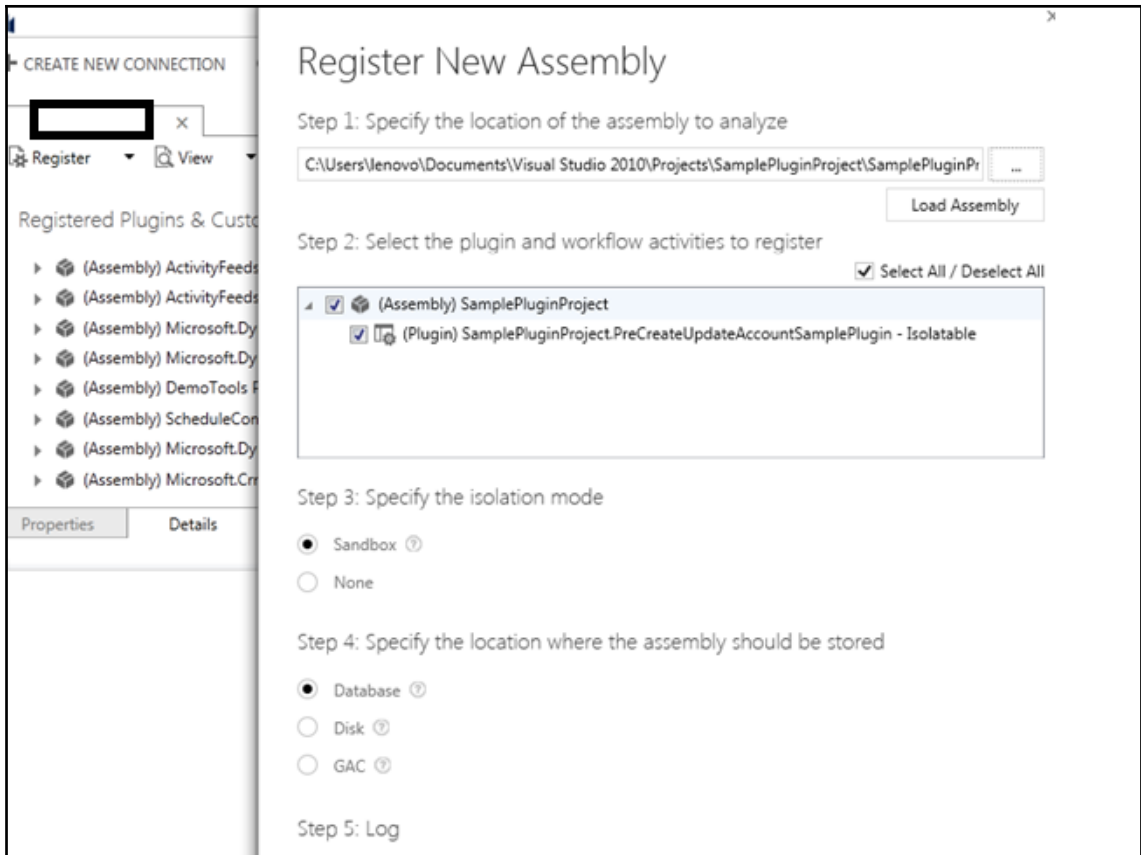












CREATE NEW CONNECTION

Register View

Registered Plugins & Cust...

- (Assembly) ActivityFeeds
- (Assembly) ActivityFeeds
- (Assembly) Microsoft.Dy
- (Assembly) Microsoft.Dy
- (Assembly) DemoTools F
- (Assembly) ScheduleCon
- (Assembly) Microsoft.Dy
- (Assembly) Microsoft.Cr

Properties Details

Register New Assembly

Step 1: Specify the location of the assembly to analyze

C:\Users\lenovo\Documents\Visual Studio 2010\Projects\SamplePluginProject\SamplePluginPr ...

Load Assembly

Step 2: Select the plugin and workflow activities to register

Select All / Deselect All

- (Assembly) SamplePluginProject
 - (Plugin) SamplePluginProject.PreCreateUpdateAccountSamplePlugin - Isolatable

Step 3: Specify t...

Sandbox ?
 None

Step 4: Specify t...

Database ?
 Disk ?
 GAC ?

Step 5: Log

```

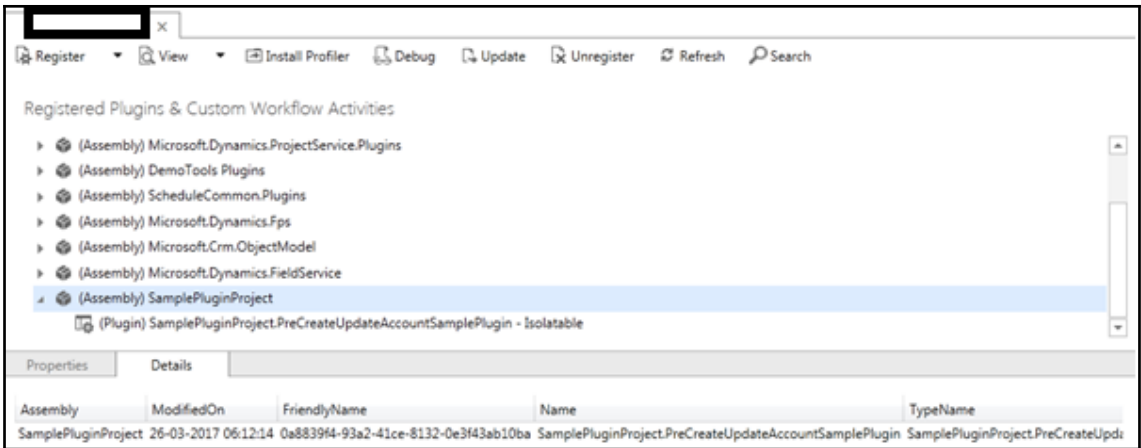
Preparing Registration
SUCCESS: Plugin Assembly was registered
SUCCESS: Plugin SamplePluginProject.PreCreateUpdateAccountSamplePlugin was registered.
SUCCESS: Created On / Modified On dates updated
SUCCESS: Selected Plugins have been registered
          
```

Registered Plugins

i The selected Plugins have been registered.

- 1 Assembly Registered
- 0 Assembly Ignored
- 0 Assembly Updated
- 1 Plugin(s) Registered
- 0 Plugin(s) Ignored
- 0 Plugin(s) Encountered Errors
- 0 Plugin(s) Removed

OK



Register New Step

General Configuration

Message:

Primary Entity:

Secondary Entity:

Filtering Attributes:

Event Handler:

Step Name:

Run in User's Context:

Execution Order:

Description:

Event Pipeline Stage of Execution: Pre-validation Pre-operation Post-operation

Execution Mode: Asynchronous Synchronous

Deployment: Server Offline

Delete AsyncOperation if StatusCode = Successful

Unsecure Configuration

Secure Configuration

Dynamics 365 Settings System Jobs

Your Microsoft Dynamics 365 trial subscription is about to expire. [Buy Now](#)

NEW ACTIVITY NEW RECORD IMPORT DATA

System Jobs

Entity: All View: Completed System Jobs


More Actions

System Job Type	System Job Name	Regarding	Status Reason	Owner	Started On
Calculate Rollup ...	Calculate rollup fields for the salesorder entity		Succeeded	SYSTEM	3/25/2017 10:32 PM
Calculate Rollup ...	Calculate rollup fields for the quote entity		Succeeded	SYSTEM	3/25/2017 10:32 PM
Calculate Rollup ...	Calculate rollup fields for the msdyn_project entity		Succeeded	SYSTEM	3/25/2017 10:32 PM
Calculate Rollup ...	Calculate rollup fields for the msdyn_projectteam entity		Succeeded	SYSTEM	3/25/2017 10:32 PM
Calculate Rollup ...	Calculate rollup fields for the contact entity		Succeeded	SYSTEM	3/25/2017 10:11 PM
Calculate Rollup ...	Calculate rollup fields for the knowledgearticle entity		Succeeded	SYSTEM	3/25/2017 9:48 PM
Calculate Rollup ...	Calculate rollup fields for the account entity		Succeeded	SYSTEM	3/25/2017 9:48 PM

Active Region


Name	Created On
Central Delhi	26-06-2018 17:39
Gurgaon - Arjun Nagar	26-06-2018 17:40
West Delhi	26-06-2018 17:39

⌕ + New 📄 Deactivate 🗑️ Delete ↻ Refresh 👤 Assign 📧 Email a Link 🔄 Flows ▾

 REGION
Central Delhi


General Related

Name
* Central Delhi


 Active Bus Region Rosters ▾



✓	Post Code	↕	Created On
	122001		26-06-2018 17:49
	110015		26-06-2018 17:49
	110001		26-06-2018 17:48

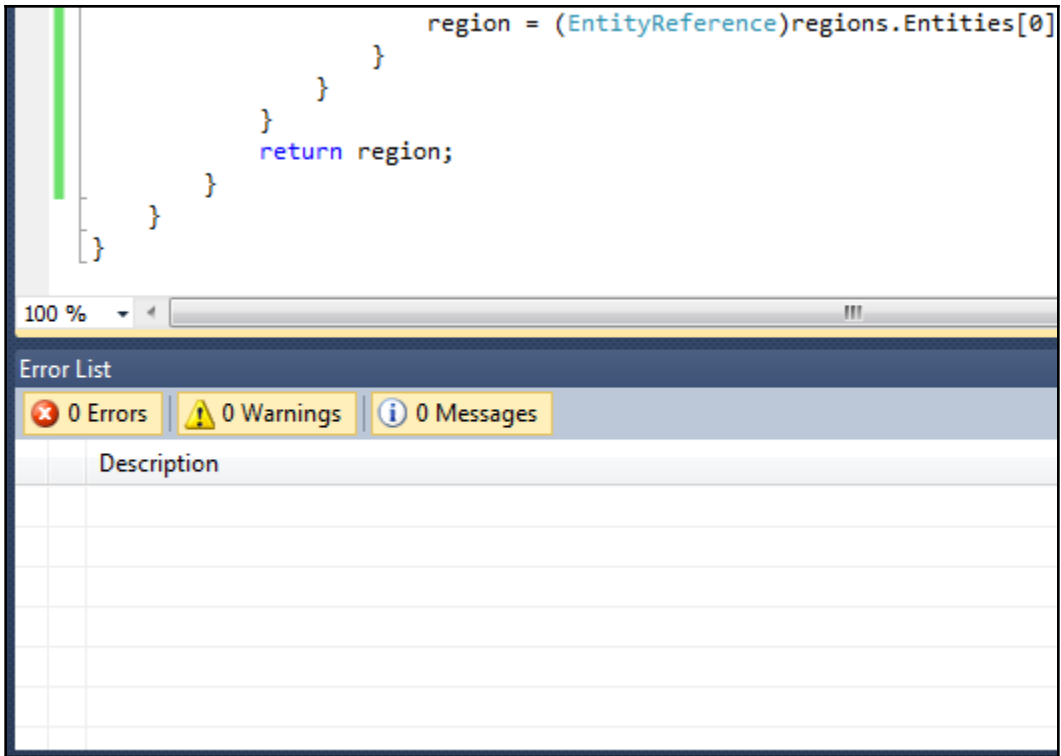
Navigation bar: + New, Deactivate, Delete, Refresh, Assign, Email a Link

 BUS REGION ROSTER
110001

General | Related

Post Code	* 110001
Region	 Central Delhi
City	Delhi

+ New		Deactivate	Assign	Email a Link
	Contact: Contact ▼	Abraham Mccormik		
Fax	---			
Preferred Method of Contact	Any			
Street 1	---			
Street 2	---			
City	---			
Post Code	---			
 Region	---			



Register New Step

General Configuration

Message:

Primary Entity:

Secondary Entity:

Filtering Attributes:

Event Handler: (Plugin) SamplePluginProject.PreCreateUpdateAccountSample

Step Name: SamplePluginProject.PreCreateUpdateAccountSamplePlugin: Not

Run in User's Context: Calling User

Execution Order: 1

Description: SamplePluginProject.PreCreateUpdateAccountSamplePlugin: Not

Event Pipeline Stage of Execution	Execution Mode	Deployment
<input type="radio"/> Pre-validation	<input type="radio"/> Asynchronous	<input checked="" type="checkbox"/> Server
<input type="radio"/> Pre-operation	<input checked="" type="radio"/> Synchronous	<input type="checkbox"/> Offline
<input checked="" type="radio"/> Post-operation		
<input type="checkbox"/> Delete AsyncOperation if StatusCode = Successful		

Unsecure Configuration

Secure Configuration

Register New Step

General Configuration

Message:

Primary Entity:

Secondary Entity:

Filtering Attributes:

Event Handler: (Plugin) SamplePluginProject.PreCreateUpdateAccountSample

Step Name: SamplePluginProject.PreCreateUpdateAccountSamplePlugin: Not

Run in User's Context: Calling User

Execution Order:

Description:

Event Pipeline Stage of Execution: SYSTEM (Disabled)

Event Pipeline Stage of Execution	Execution Mode	Deployment
<input type="radio"/> Pre-validation	<input type="radio"/> Asynchronous	<input checked="" type="checkbox"/> Server
<input type="radio"/> Pre-operation	<input checked="" type="radio"/> Synchronous	<input type="checkbox"/> Offline
<input checked="" type="radio"/> Post-operation		
<input type="checkbox"/> Delete AsyncOperation if StatusCode = Successful		

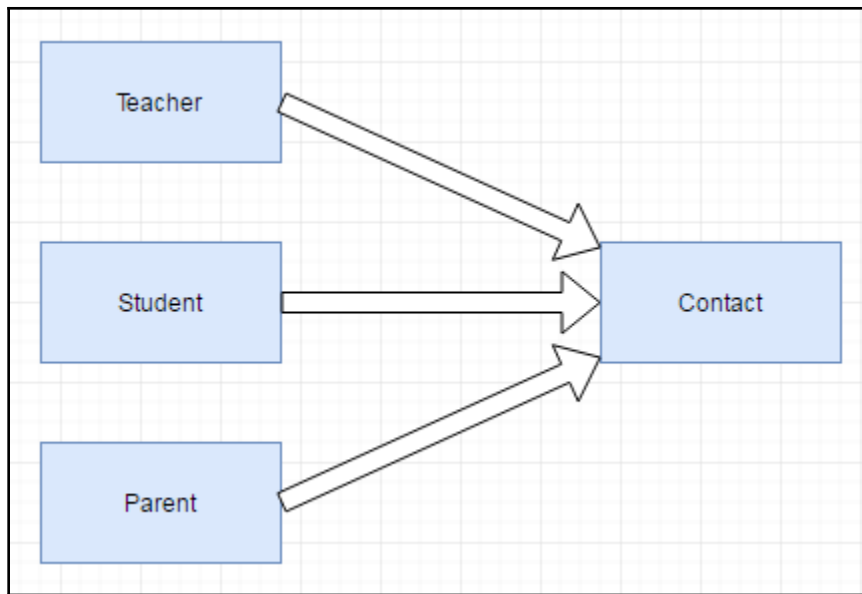
Unsecure Configuration

Secure Configuration

Chapter 10: Working with the XRM Framework

The screenshot shows a CRM contact record for Abraham McCormik. At the top left is a purple circular profile picture with the initials 'AM'. To its right, the text reads 'Contact: Contact' with a dropdown arrow, followed by the name 'Abraham McCormik'. Below this is a navigation bar with three tabs: 'Summary' (which is underlined), 'Details', and 'Related'. Under the 'Summary' tab, there is a large empty rectangular box. Below that is a section titled 'CONTACT INFORMATION' with a blue header bar. This section contains four rows of information, each with a label, a status icon, and a value: 'First Name' with a blue plus icon and the value 'Abraham'; 'Middle Name' with a grey minus icon and the value '---'; 'Last Name' with a red asterisk icon and the value 'McCormik'; and 'Contact Type' with a grey minus icon and the value '---'.

CONTACT INFORMATION		
First Name	+	Abraham
Middle Name	---	---
Last Name	*	McCormik
Contact Type	---	---



Service Management



Article Templates

Create and manage templates for articles in the knowledge base.

Service Scheduling



Business Closure

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.









Sites

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

Facilities/Equipment







View: Local Facilities/Equipment ▼

 New |  |  |   Add Connection |  Run Workflow... |  Start Dialog | More Actions ▼

Name ↑	Business Unit
--------	---------------

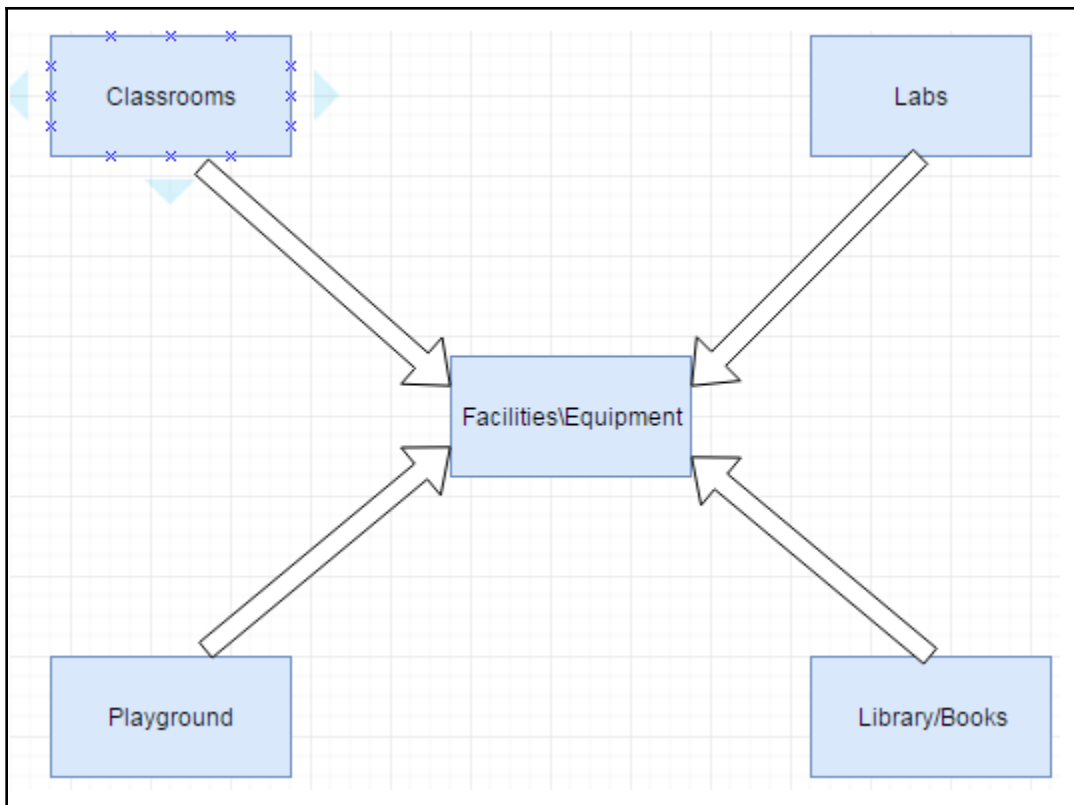
Facilities/Equipment

View: Local Facilities/Equipment ▼

 New |  |  |   Add Connection | 

✓ | Name ↑

Classroom A
Classroom B
Playground



General

Schema

Display Name* RollupField Field Requirement* Optional ▼

Name* new_rollupfield Searchable Yes ▼

Field Security Enable Disable

⚠ Enabling field security? [What you need to know](#)

Auditing* Enable Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type* Whole Number ▼

Field Type* Simple ▼

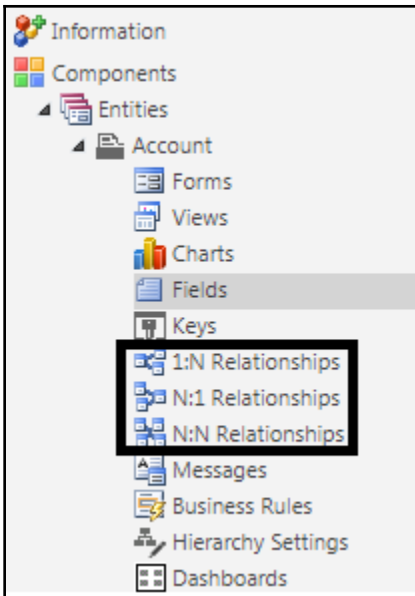
Format* Simple

Minimum Value* Calculated

Maximum Value* Rollup

IME Mode* 2,147,483,647

IME Mode* auto ▼



Common Information Mappings	General			
	Relationship Definition			
	Primary Entity *	Account	Related Entity *	Contact
	Name *	new_account_contact		
	Searchable	Yes		
	Hierarchical	No		
	Lookup Field			
	Display Name *	Lead Account	Name *	new_leadaccountid
	Field Requirement *	Optional		
	Description			
Navigation Pane Item for Primary Entity				
Display Option *	Use Custom Label	Custom Label *	Associated Child Contacts	
Display Area *	Details	Display Order *	10,000	
Relationship Behavior				
Type of Behavior *	Parental			
Assign *	Cascade All	Reparent *	Cascade All	
Share *	Cascade All	Delete *	Cascade All	
Unshare *	Cascade All	Merge *	Cascade All	

Current Entity

Entity Name * Account

Display Option * Do not Display Custom Label *

Display Area * Details Display Order * 10,000

Other Entity

Entity Name * Contact

Display Option * Do not Display Custom Label *

Display Area * Details Display Order * 10,000

Relationship Definition

Name * new_account_contact

Relationship Entity Name * new_account_contact

Searchable Yes

General Primary Field

Entity Definition

Display Name * Attendance

Plural Name * Attendance

Name * new_attendance

Primary Image

Color

Description

Ownership * User or Team

Define as an activity entity.

Display in Activity Menus

Contact_CustomerAddress	Contact	Address	System	Parent
Contact_Appointments	Contact	Appointment	Parental	Regarding
contact_msdyn_approvals	Contact	Approval	Parental	Regarding
contact_new_attendances	Contact	Attendance	Parental	Regarding

New for Contact

Common

- Information
- Business Rules

General

Schema

Display Name * Field Requirement *

Name * Searchable

Field Security Enable Disable

⚠ Enabling field security? [What you need to know](#)

Auditing * Enable Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type *

Field Type *

Format *

Minimum Value *

Maximum Value *

IME Mode *

 SAVE  SAVE AND CLOSE

ROLLUP FIELD

Last year attendance

▲ SOURCE ENTITY

Source: **Contact**

Use Hierarchy: **NO**

▲ RELATED ENTITY

+ Add related entity

▲ AGGREGATION

+ Add aggregation

SAVE SAVE AND CLOSE

ROLLUP FIELD

Last year attendance

▲ SOURCE ENTITY

Source: **Contact**

Use Hierarchy: **NO**

▲ RELATED ENTITY

Related

Accounts (Primary Contact) ▼

Actuals (Vendor)

Appointments (Regarding)

Approvals (Regarding)

Attendance (Regarding)

Bookable Resources (Contact)

Booking Alerts (Regarding)

Cases (Contact)

▲ AGGREGATION



Add aggregation

Attendance (Regarding)

ROLLUP FIELD

Last year attendance

▲ SOURCE ENTITY

Source: **Contact**

Use Hierarchy: **NO**

▲ RELATED ENTITY

Related: **Attendance (Regarding)**

▲ FILTERS (OPTIONAL)

If **Start Date** is greater than or equal to "**5/1/2017, 8:00:00 AM**"

and **Start Date** is less than "**5/1/2018, 8:00:00 AM**"

+ Add condition

▾ RELATED ENTITY

Related: **Attendance** (Regarding)

▾ FILTERS (OPTIONAL)

If **Start Date** is greater than or equal to "5/1/2017, 8:00:00 AM"

and **Start Date** is less than "5/1/2018, 8:00:00 AM"

+ Add condition

▾ INCLUDE INDIRECTLY RELATED ACTIVITIES

+ Add related entity

▾ AGGREGATION

Aggregate Function

COUNT

Aggregated Related Entity Field

Attendance



Contact: Contact ∨

Abraham McCormik

Summary

Details

Related

CONTACT INFORMATION

First Name + **Abraham**

Middle Name ---

Last Name * **Mccormik**

 Last Year Attendance **0**

Last updated: **Not Available**

Contact Type ---


General

Schema


Display Name* Field Requirement*

Name* Searchable

Field Security Enable Disable

 Enabling field security? [What you need to know](#)

Auditing* Enable Disable

 This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type*

Field Type*

Format*

Minimum Value*

Maximum Value*

IME Mode*


General

Schema


Display Name * Field Requirement *

Name * Searchable

Field Security Enable Disable

 Enabling field security? [What you need to know](#)

Auditing * Enable Disable

 This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type *

Field Type *

Format *

Minimum Value *

Maximum Value *

IME Mode *

SAVE SAVE AND CLOSE ?

CALCULATED FIELD

Set Weighted Score

IF...THEN

CONDITION (OPTIONAL)

+ Add condition

ACTION

Set Weighted Score (whole number) ?

= new

new_finalyearscore (whole number)	Final year score
new_ghhg (whole number)	ghhg
new_internalassignments (whole number)	Internal Assignments

SAVE SAVE AND CLOSE ?

CALCULATED FIELD

Set Weighted Score

IF...THEN

CONDITION (OPTIONAL)

+ Add condition

ACTION

Set Weighted Score (whole number) ?

= $new_internalassignments * .2 + new_midyearscore * .3 + new_finalyearscore * .5$

✓ ✕

Contact: Contact ▾
 Abraham McCormik

Owner
 crm admin

First Name	Abraham
Middle Name	---
Last Name	McCormik
Contact Type	---
Job Title	---
Account Name	---
Description	---
Email	someone29@contoso...

Enter a note...

What you missed (Click To Filter) ✕
 New posts (1)

TODAY

Auto-post on Abraham McCormik's wall - Just now
 Contact: Created By crm admin.

Like | Reply | ...

There are currently no insights.

Company ---

RECENT OPPORTUNITIES ...

No data available.

RECENT CASES ...

+ NEW
 DEACTIVATE
 CONNECT
 ADD TO MARKETING LIST
 ASSIGN
 EMAIL A LINK
 DELETE
 FORM
 PROCESS
 ...

CONTACT
 Abraham McCormick

Solution: Default Solution
Form: **Contact**

Summary

CONTACT INFORMATION

Full Name

Job Title

Account Name

Email

Business Phone

Mobile Phone

Preferred Method of Contact

Address

SOCIAL PANE

CUSTOMER DETAILS

Company

Company Name

RECENT CASES

RECENT CASES

RECENT OPPORTUNITIES

RECENT OPPORTUNITIES

Social Details

Facebook

Twitter

Field Explorer

Filter:

Only show unused fields

- Address 1: Address Type
- Address 1: City
- Address 1: Country/Region
- Address 1: County
- Address 1: Fax
- Address 1: Name
- Address 1: Phone
- Address 1: Post Office Box
- Address 1: Primary Contact Name
- Address 1: State/Province
- Address 1: Street 1
- Address 1: Street 2
- Address 1: Street 3
- Address 1: Telephone 2
- Address 1: Telephone 3
- Address 1: UPS Zone
- Address 1: UTC Offset
- Address 1: ZIP/Postal Code

FILE HOME INSERT

Save Save As Change Properties Remove Undo Redo Business Rules Form Properties Preview Form Managed Properties Merge Forms

Save Edit Form Upgrade

Contact

- Summary
- Details
- Scheduling

Solution: Default Solution
Form: **Contact**

Summary

Publish Properties Navigation Rules

Save Edit Select

Contact

- Summary
- Details
- Scheduling

Common

- Activities
- Entitlements
- Social Profiles
- Connections
- Audit History
- Feedback
- Contact Price Lists

Sales

- Opportunities

Solution: Default Solution

Form: Contact

Summary

CONTACT INFORMATION

Full Name

Job Title

Account Name

Email

Business Phone

Mobile Phone

Preferred

SOCIAL PANE

FILE HOME INSERT

Section

Three Columns Three Columns

Two Columns Two Columns Two Columns

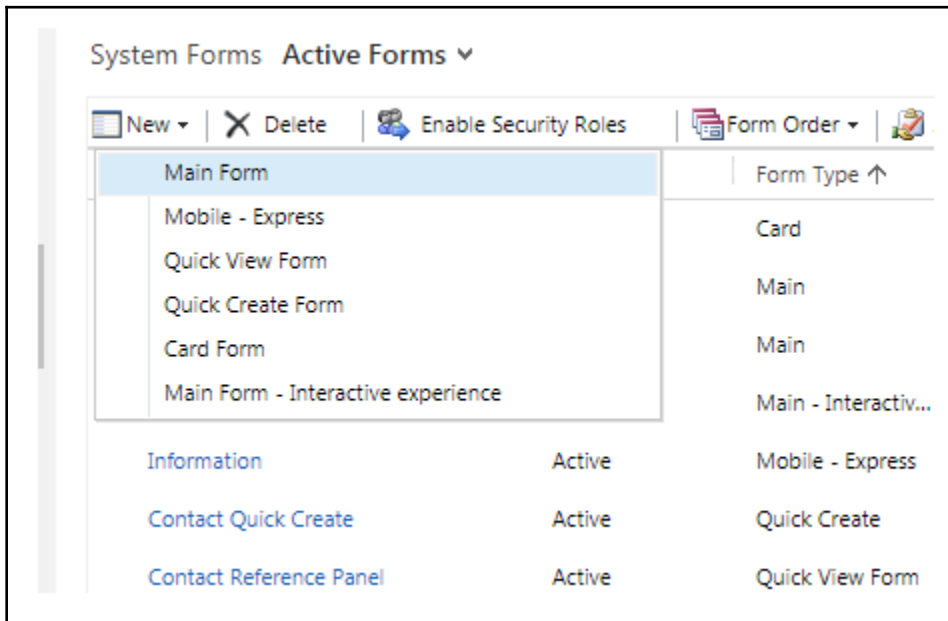
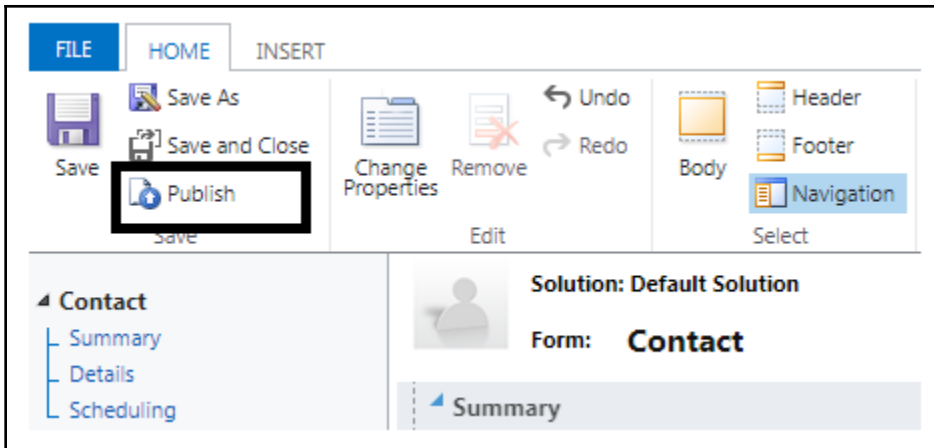
One Column

Sub-Grid Spacer Quick View Form

Web Resource IFRAME Notes

3 Tabs 2 Tabs 1 Tab

Solution: Default Solution



Dynamics 365 Student Management New Area > Contacts > Abraham Mccormik

+ New Deactivate Assign Email a Link Delete Refresh Process Follow Flows

Contact: Contact Abraham Mccormik Owner crm admin

Summary Details Related

CONTACT INFORMATION	
First Name	Abraham
Middle Name	---
Last Name	Mccormik

Timeline
Enter a note...
TODAY
Auto-post on Abraham Mccormik's wall - 14 Minutes

Relationship Assistant	
There are currently no insights.	
Company	---

Quick Create: Contact ×

Details

First Name + ---

Last Name * ---

Job Title ---

Account Name ---

Contact Information

Email ---

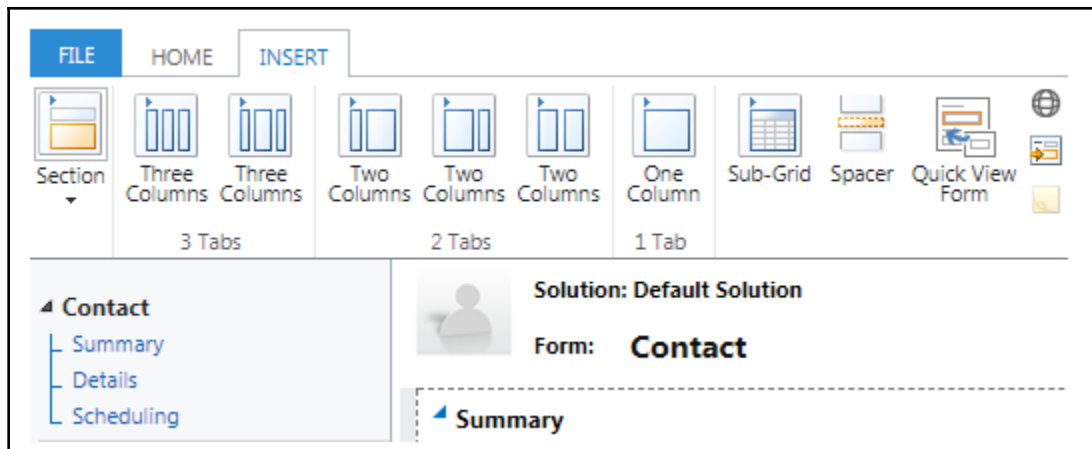
Mobile Phone ---

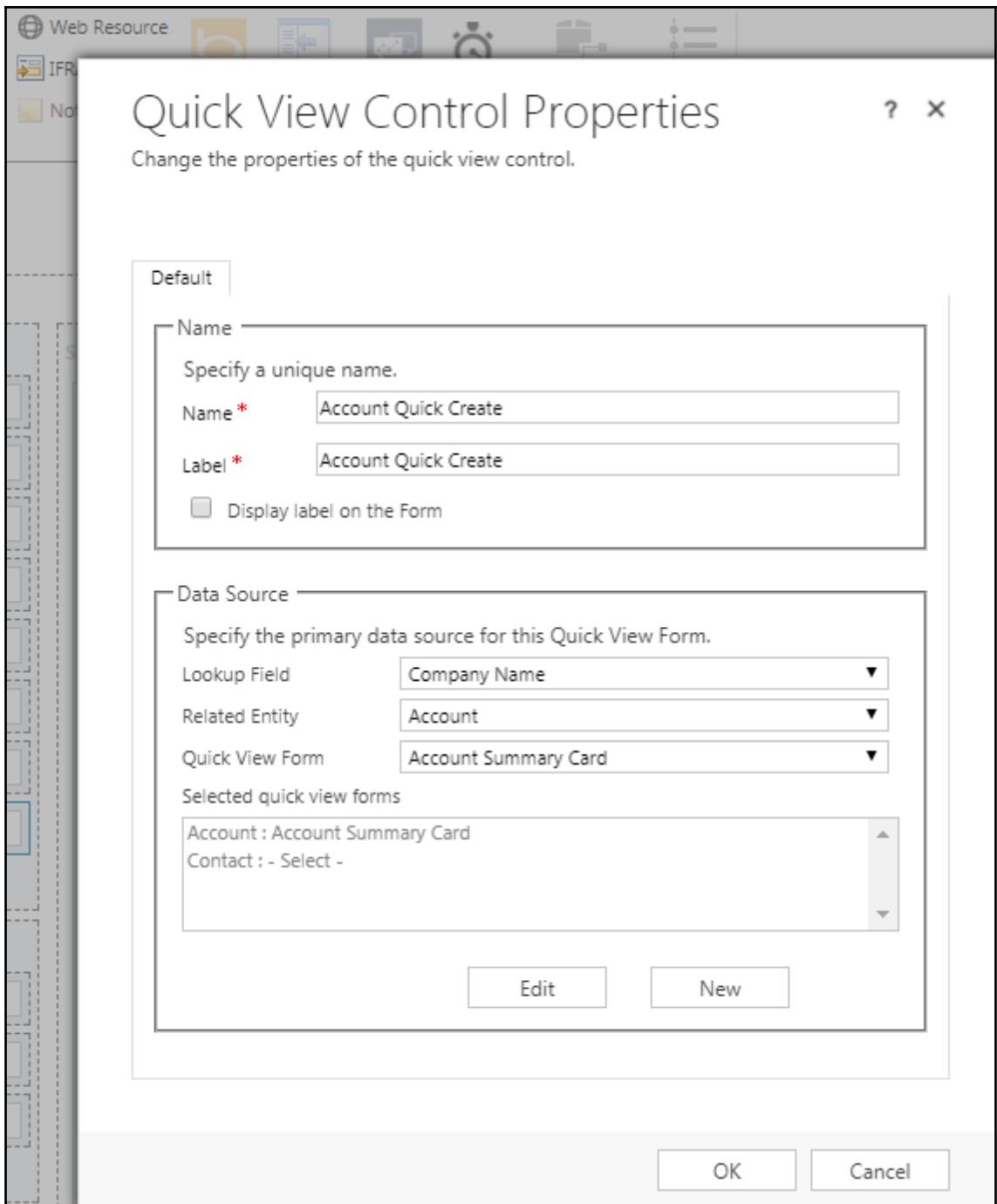
Business Phone ---

Description ---

Address

Save Save & Create New







Contact: Contact ▾

David Bowe

Address 1: City ---

Address 1:
State/Province ---

Address 1: ZIP/Postal
Code ---

Address 1:
Country/Region ---

 Primary Contact  [Sudevan V](#)

 Email ---

 Address Phone ---

Contact
Views

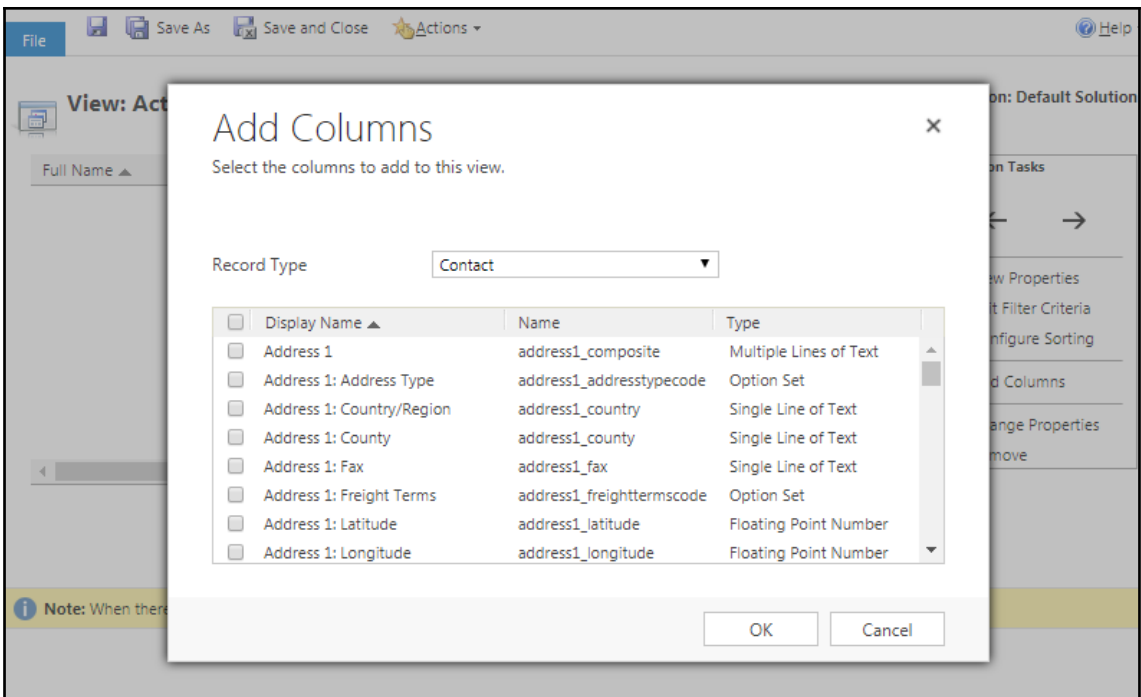
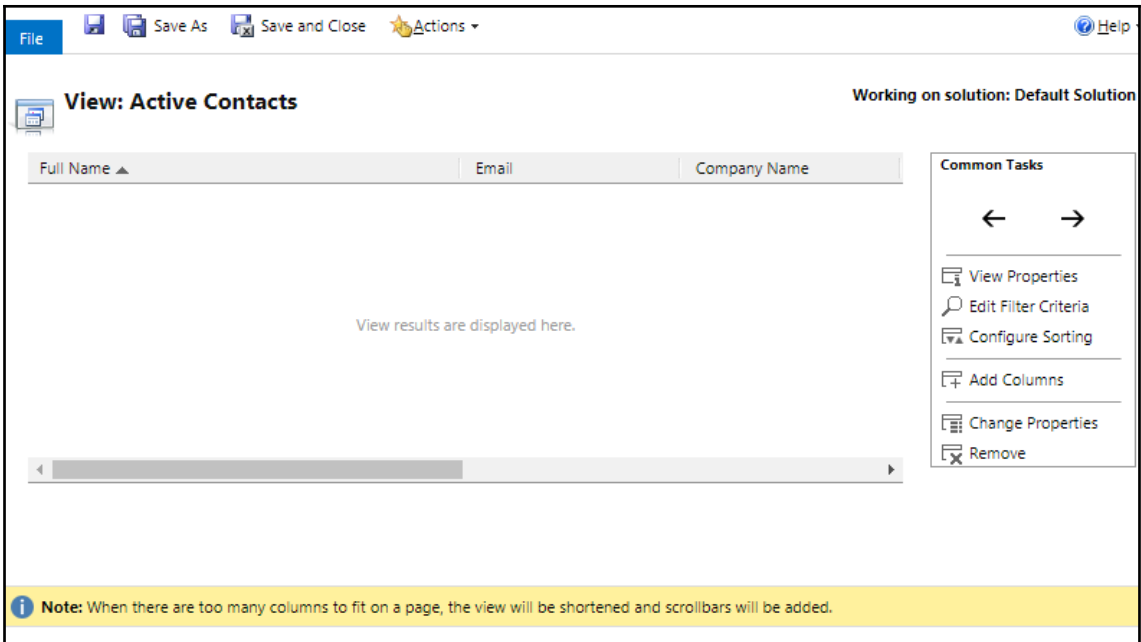
olution Default Solution

- Channel Property Group
- Characteristic
- Competency Requiremen...
- Competitor
- Competitor Address
- Connection
- Connection Role
- Contact
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships
 - Messages
 - Business Rules
 - Hierarchy Settings
 - Dashboards
- Contact Price List
- Contact
- Contract Line
- Contract Template
- Currency
- Customer Asset
- Customer Relationship
- Data Map
- Delegation
- Discount
- Discount List
- Document Location

View: All Active Views

New X More Actions

Name ↑	Type	State	Customizable
Active Contacts	Default Public View	Managed	True
Active Contacts Subgrid View	Public View	Managed	True
Contact Associated View	Associated View	Managed	True
Contact List Members View	Associated View	Managed	True
Contacts Advanced Find View	Advanced Find View	Managed	True
Contacts Being Followed	Public View	Unmanaged	True
Contacts BulkOperation View	Associated View	Managed	True
Contacts I Follow	Public View	Unmanaged	True
Contacts Lookup View	Lookup View	Managed	True
Contacts: Influenced Deals That We ...	Public View	Managed	True
Contacts: No Campaign Activities in ...	Public View	Managed	True
Contacts: No Orders in Last 6 Months	Public View	Managed	True
Contacts: Responded to Campaigns i...	Public View	Managed	True
Entitlement Contacts	Associated View	Managed	False
Inactive Contacts	Public View	Managed	True
My Active Contacts	Default Public View	Managed	True
My Connections	Public View	Managed	True
Quick Find Active Contacts	Quick Find View	Managed	True



Edit Filter Criteria



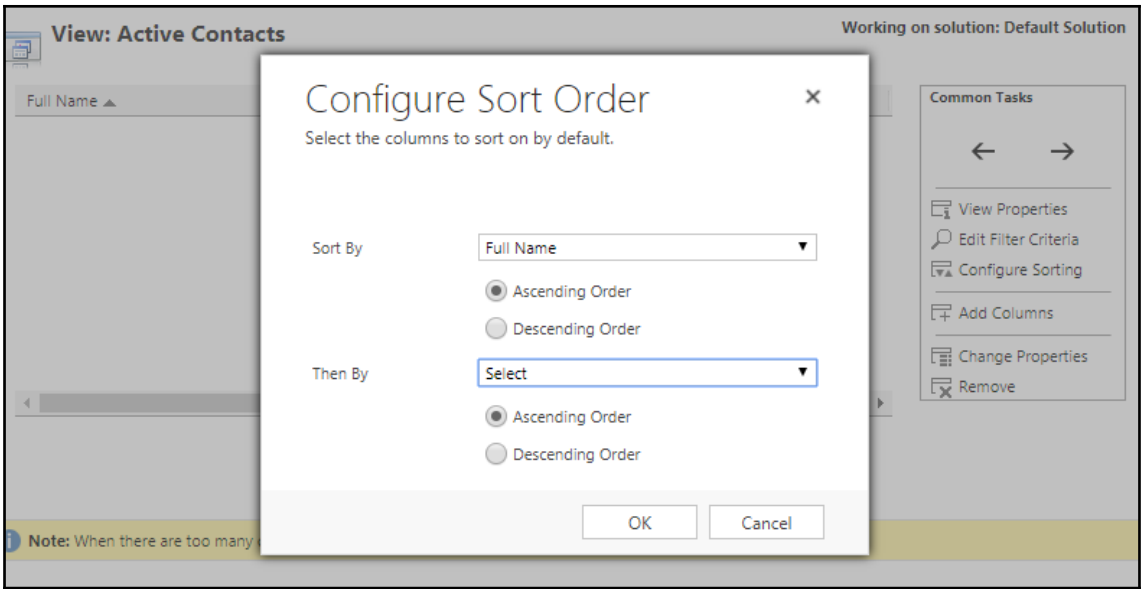
Define the filter and search criteria for this view to use.

Clear | Group AND | Group OR

<input type="checkbox"/> <u>S</u> tatus	<u>E</u> quals	<u>A</u> ctive
<u>S</u> elect		

OK

Cancel




Change Column Properties ✕

The properties of the selected column are listed below. You can change the width in pixels of the column.

Entity Name:	Contact
Column Title:	Full Name
Data Type:	Single Line of Text
Name:	fullname

Enable presence for this column

Web Resource: 

Function Name:

Select a width for this column:

25px 50px 75px 100px 125px 150px 200px 300px

tion Default Solution

- Channel Property Group
- Characteristic
- Competency Requiremen...
- Competitor
- Competitor Address
- Connection
- Connection Role
- Contact
 - Forms
 - Views
 - Charts

View: All Active Views

New X More Actions ▾

Name ↑	Type
✓ Active Contacts	Default Public View
Active Contacts Subgrid View	Public View
Contact Associated View	Associated View
Contact List Members View	Associated View
Contacts Advanced Find View	Advanced Find View

Contacts >

SEARCH 🔍 REFRESH ↻ + FILTER 🗑️

N REPORT ▾ EXCEL TEMPLATES ▾ EXPORT TO EXCEL ▾ IMPORT DATA ▾ CHART PANE ▾ VIEW ⚙️ ...

FILE | **ADVANCED FIND** | **SAVED VIEWS**

Query | Saved Views | Results | New | Save | Save As | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Details | Download Fetch XML | Debug

Look for: Contacts ▾ Use Saved View: Active Contacts

Status Equals [Active](#)

FILE | **ADVANCED FIND** | **SAVED VIEWS**

Query | Saved Views | Results | New | Save | Save As | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Details | Download Fetch XML

Show | View | Query | Debug

Look for: Contacts Use Saved View: [new]

Final year score Is Less Than 40

Select

FILE | **ADVANCED FIND** | **SAVED VIEWS**

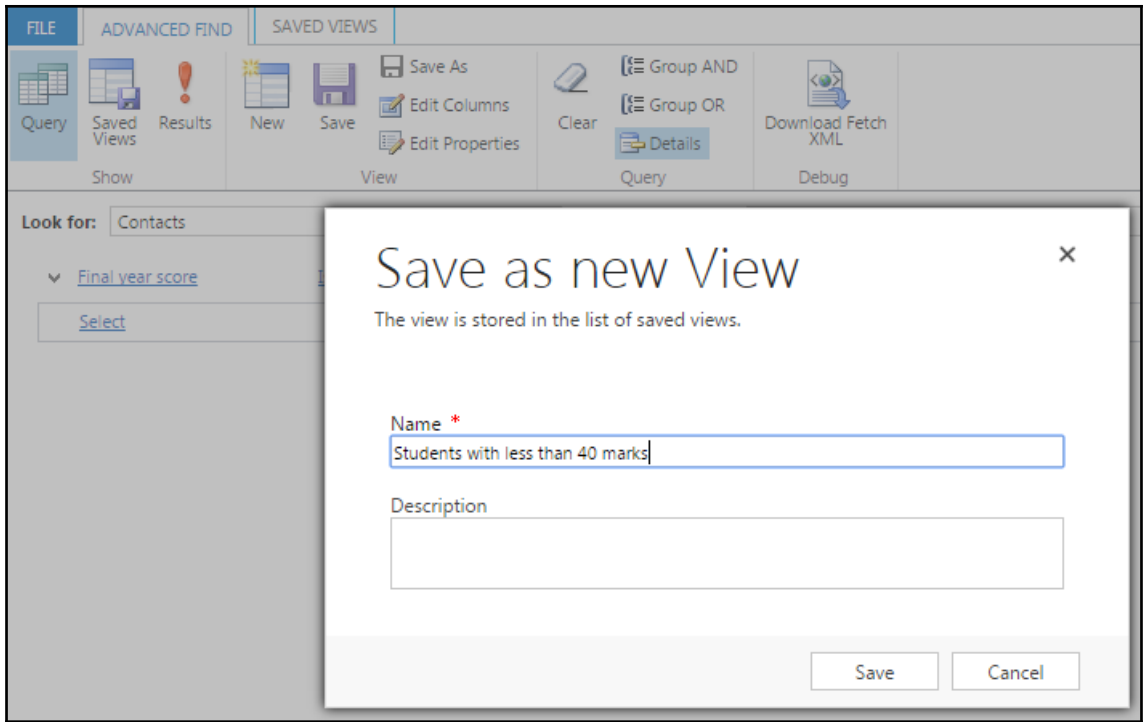
Query | Saved Views | Results | New | Save | **Save As** | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Details | Download Fetch XML

Show | View | Query | Debug

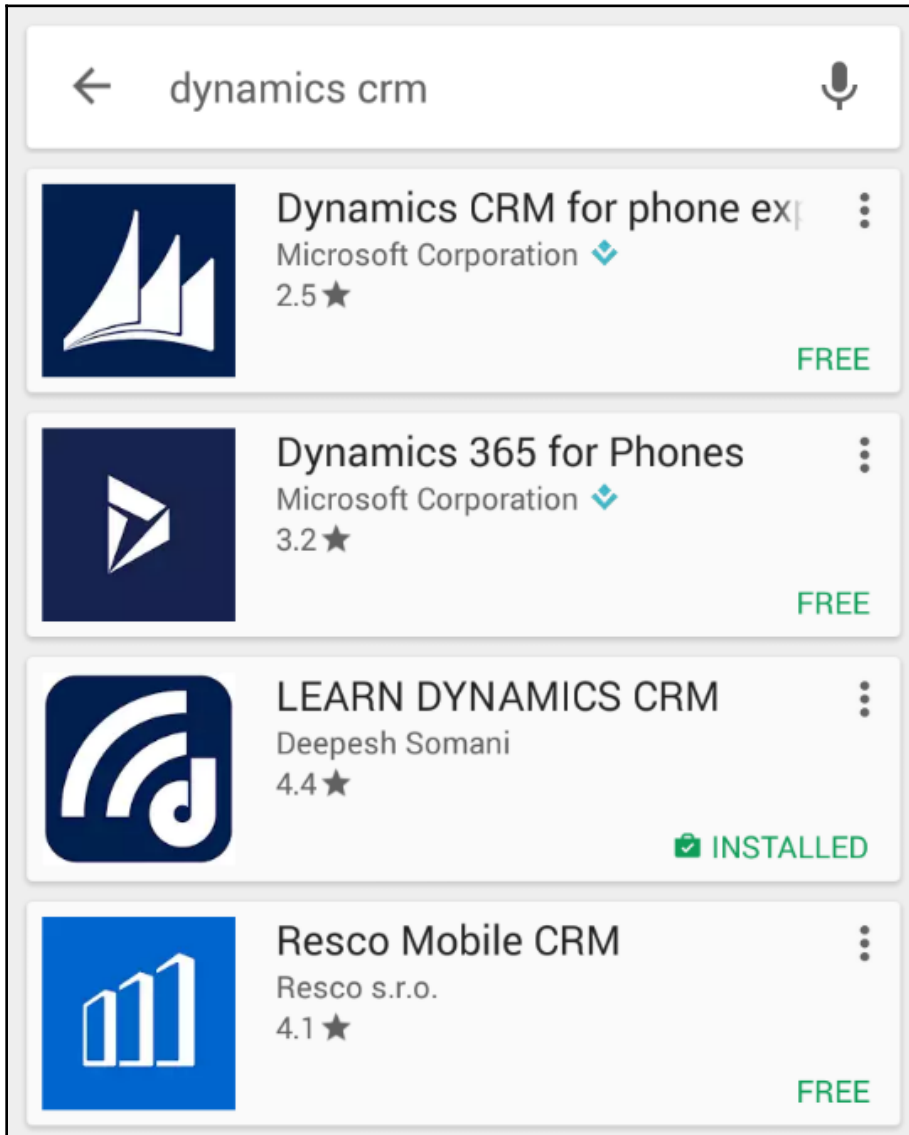
Look for: Contacts Use Saved View: [new]


Final year score Is Less Than 40




Select









Chapter 11: Mobile Enhancements in Dynamics 365





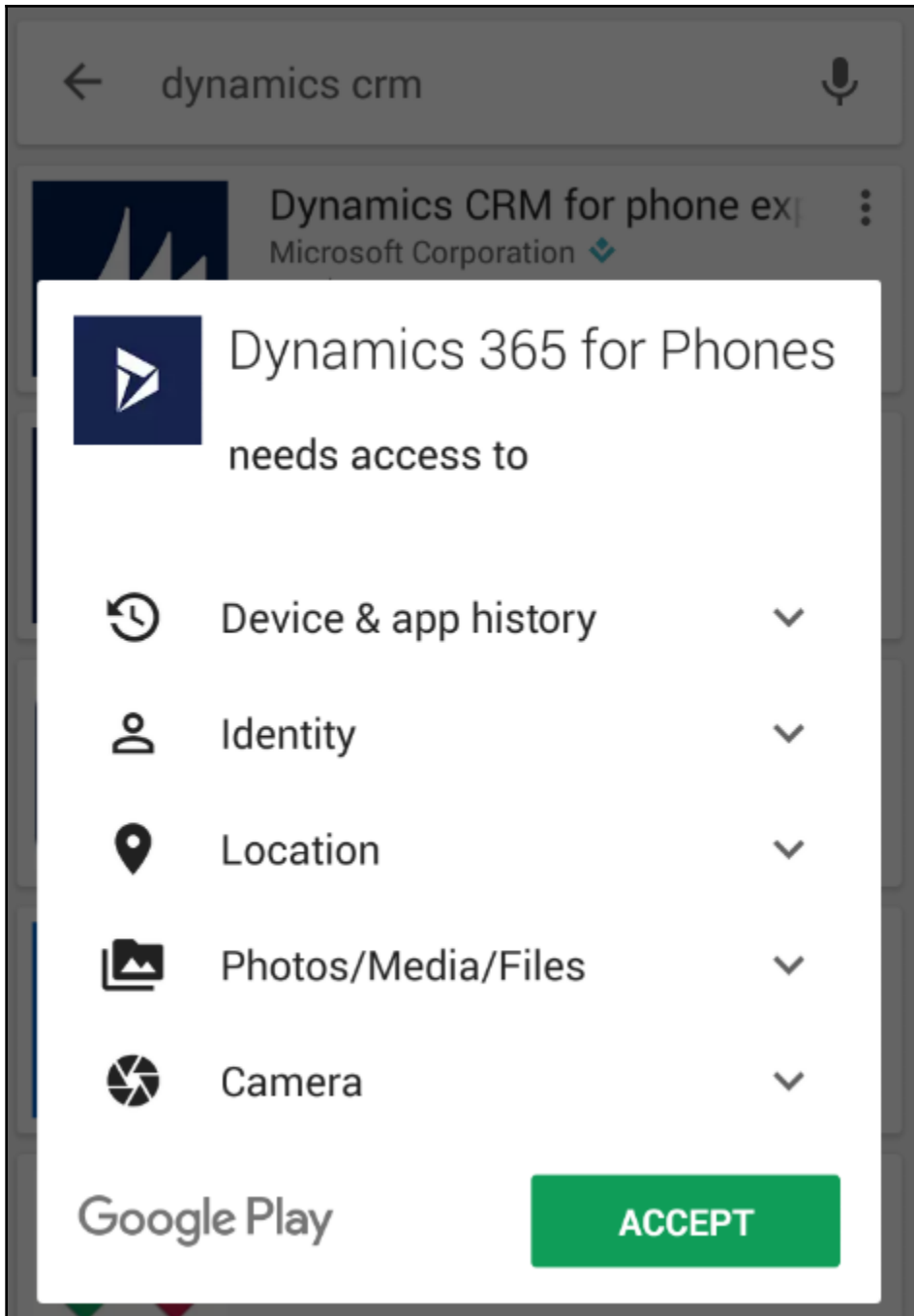
← dynamics crm 

 **Dynamics CRM for phone extension** 
Microsoft Corporation 
2.5 ★ FREE

 **Dynamics 365 for Phones** 
Microsoft Corporation 
3.2 ★ Install


 **LEARN DYNAMICS CRM** 
Deepesh Somani
4.4 ★  INSTALLED

 **Resco Mobile CRM** 
Resco s.r.o.
4.1 ★ FREE



The screenshot shows the Google Play Store page for the app "Dynamics 365 for Phones" by Microsoft Corporation. At the top, there is a navigation bar with a back arrow, a search icon, and a menu icon. Below this, the app's icon is displayed on the left, followed by the app name "Dynamics 365 for Phones" and the developer name "Microsoft Corporation" in green. A "Business" category tag is shown below the developer name. Two buttons are present: "UNINSTALL" in a white box with a green border and "OPEN" in a solid green box. The "What's new" section indicates the app was last updated on 03-Oct-2018 and lists "Bug fixes". The "Rate this app" section prompts users to "Tell others what you think" and shows five empty star icons with a "Write a review" link below them. The "Developer contact" section is expanded, showing options for "Website", "Email" (with the address "dynamobisup@microsoft.com"), and "Address" (with the partial address "One Microsoft Way").

← 🔍 ☰

 **Dynamics 365 for Phones**
Microsoft Corporation
Business

UNINSTALL OPEN

What's new •
Last updated 03-Oct-2018
Bug fixes

Rate this app
Tell others what you think

☆ ☆ ☆ ☆ ☆

[Write a review](#)

Developer contact ^

- 🌐 Website
- ✉ Email
dynamobisup@microsoft.com
- 📍 Address
One Microsoft Way

Dynamics 365



Let's get set up!

Enter your company's Microsoft Dynamics 365 web address



Microsoft Dynamics 365



Sign in

Email, phone, or Skype

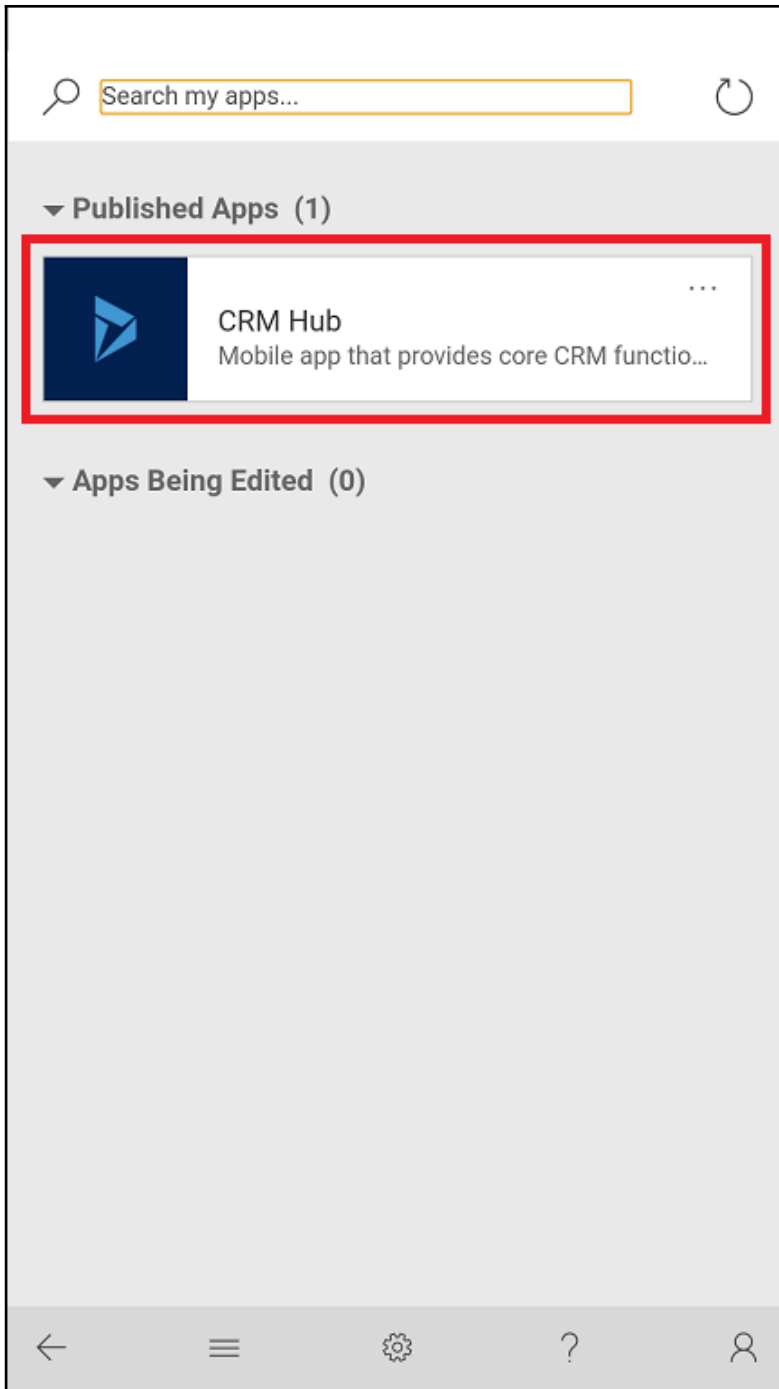
[Can't access your account?](#)

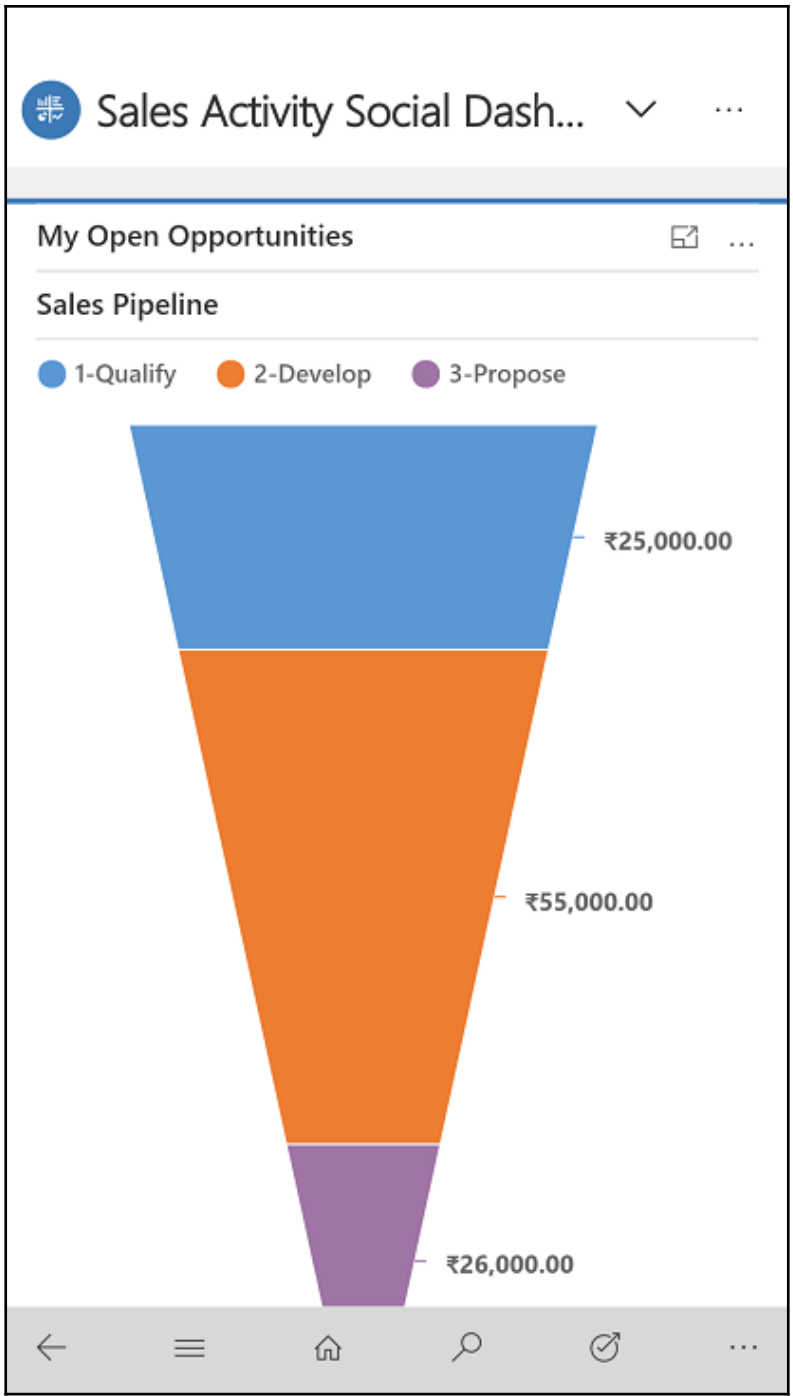
Next

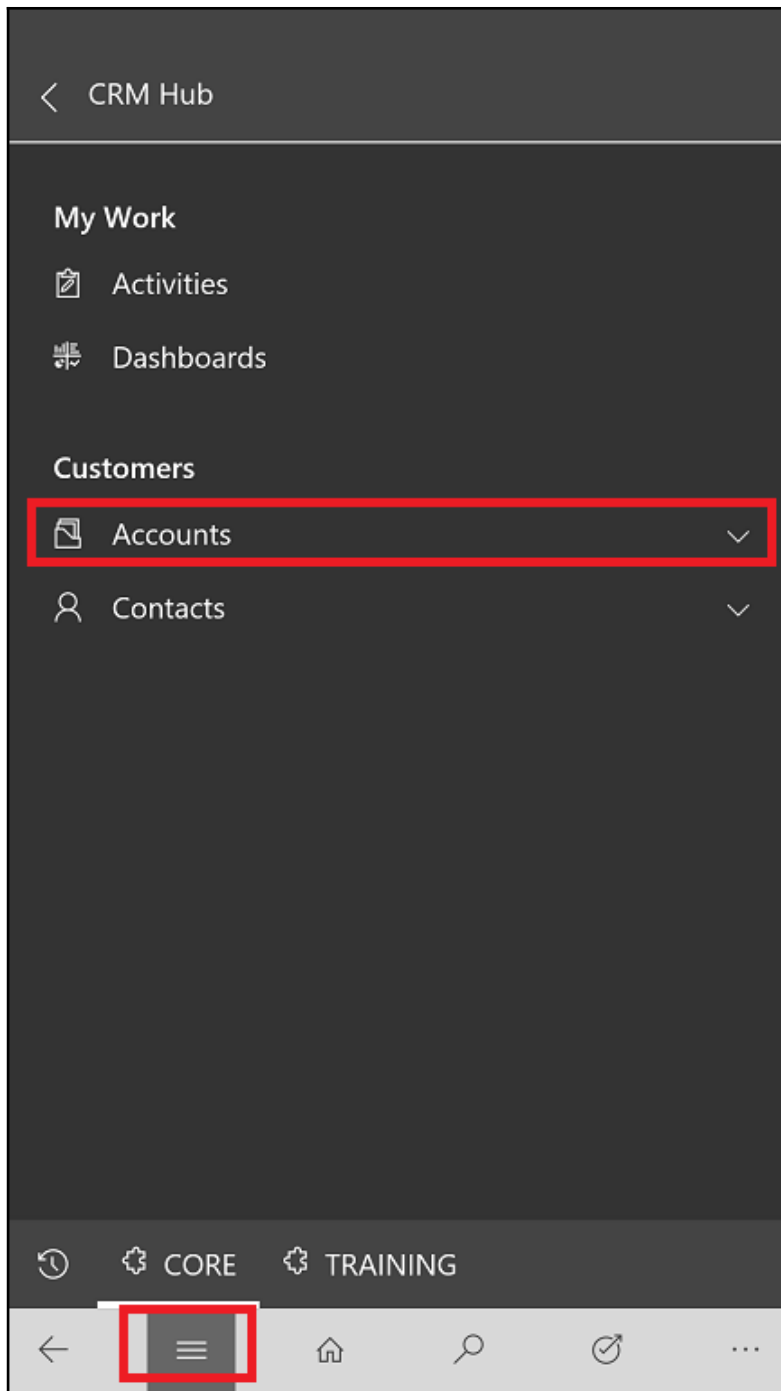
Dynamics 365

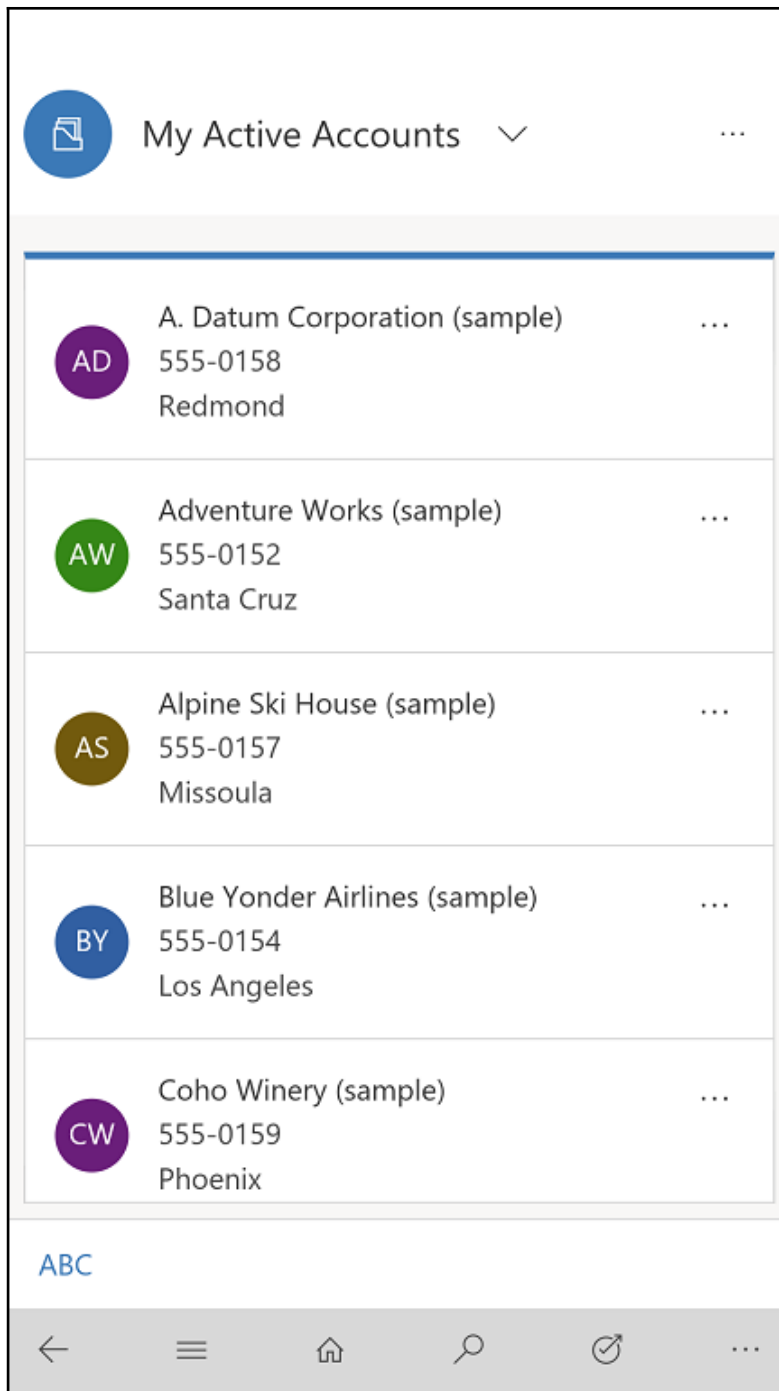


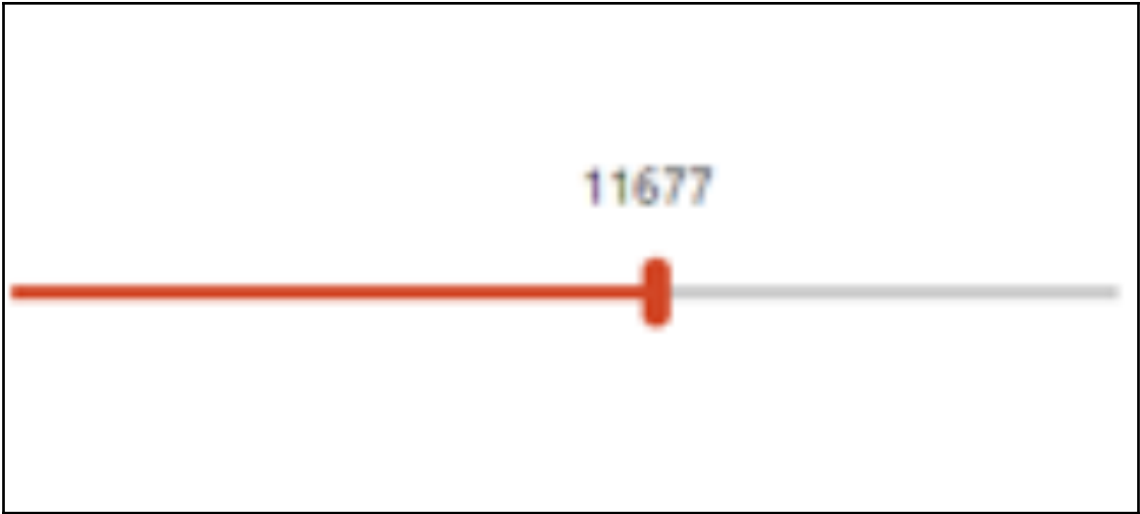
Welcome





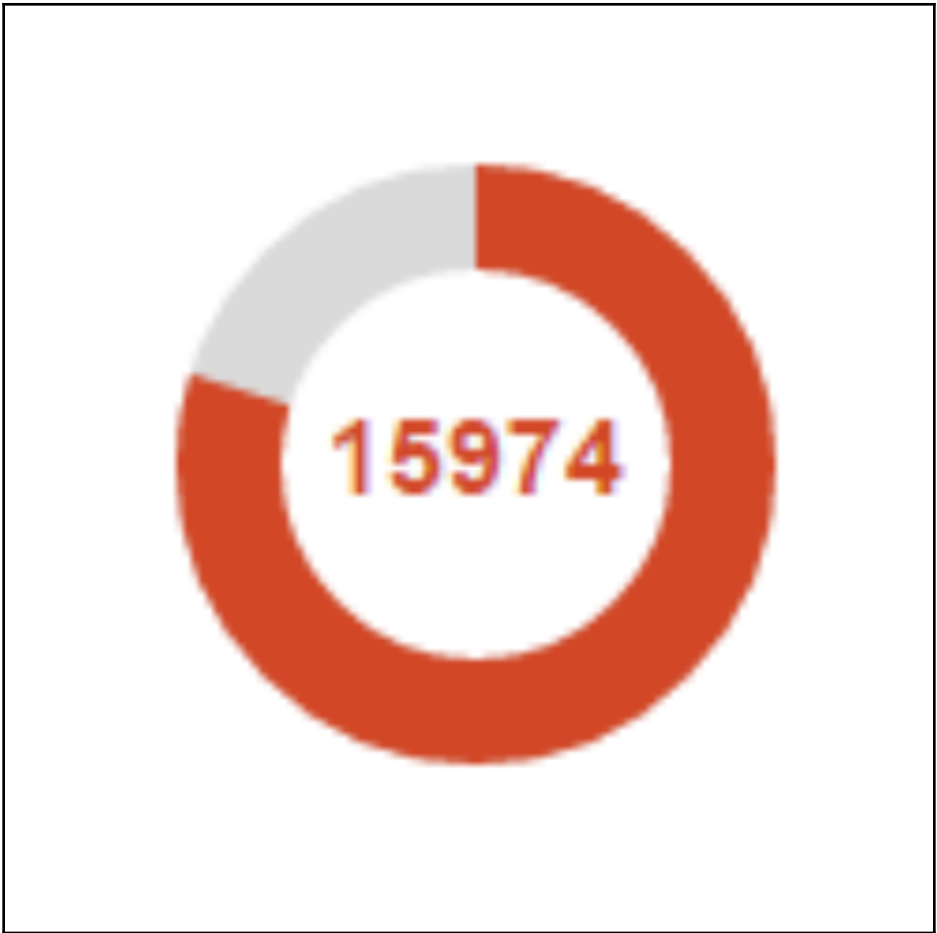






Direct	Indirect	Unknown
--------	----------	---------

Yes







<https://www.microsoft.com>



Microsoft

Microsoft Corporation is an American multinational technology company headquartered in Redmond, Washington, that develops, manufactures, licenses, supports and sells computer software...

Annual Revenue

– \$1,000,000.00 +

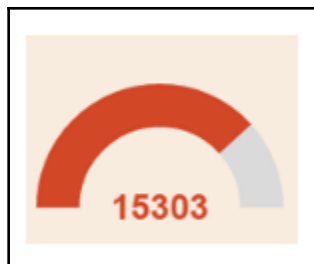
Business Phone

(555)-011-0111

No. of Employees

14431

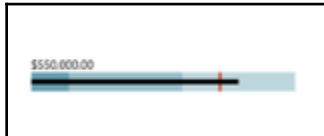




Ser

- Consumer **S**ervices
- Inbound Repair and **S**ervices
- Legal **S**ervices
- Outbound Consumer **S**ervice
- S**ervice Retail






https://youtu.be/e5F-x9u_fb4?list=PLRvH_Jgj96N...



Dynamics 365 Settings Customizations

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 365.
 Themes Adjust your organization's colors. Create, change, or delete themes that are used in your organization.	

Solution Default Solution

- Mobile Offline Profile
- Mobile Offline Profile Item
- Mobile Offline Profile Item A...
- New Process
- Note
- Opportunity**
- Views
- Charts
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Messages
- Business Rules
- Hierarchy Settings
- Opportunity Close

General Primary Field **Controls**

Entity Definition

Display Name *

Plural Name *

Name *

Primary Image

Color

Description

Ownership *

Define as an activity entity.

Display in Activity Menus

Areas that display this entity

Sales Service Marketing Field Service

Project Service Resource Scheduling Settings Training

Opportunity

Information

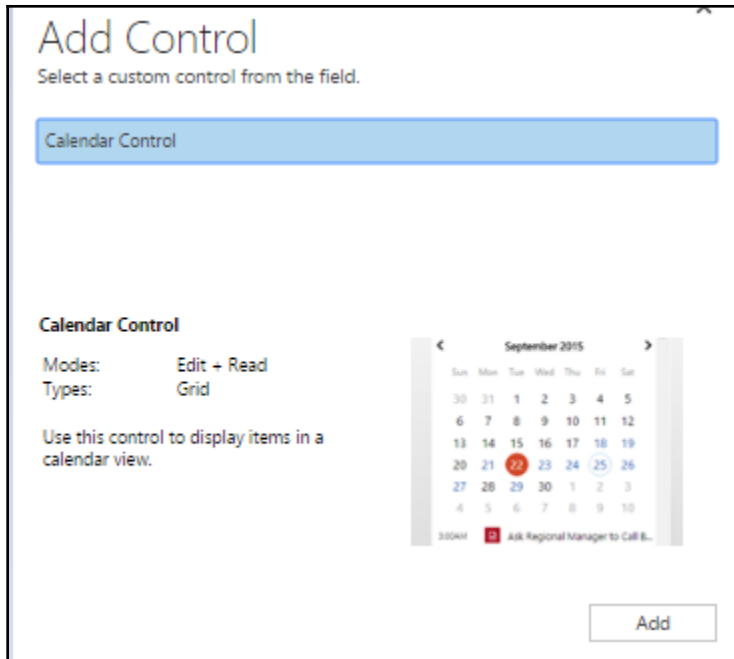
Solution Default Solution

- Mobile Offline Profile
- Mobile Offline Profile Item
- Mobile Offline Profile Item A...
- New Process
- Note
- Opportunity**
- Forms
- Views
- Charts
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Messages
- Business Rules
- Hierarchy Settings

General Primary Field **Controls**

Control	Web	Phone	Tablet
Microsoft Dynamics 365 Read-only Grid (default)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Control...			

Tablet is not a valid custom control to add its configuration.



General Primary Field Controls

Control: Microsoft Dynamics 365 Read-only Grid (default) Web Phone Tablet

Calendar Control

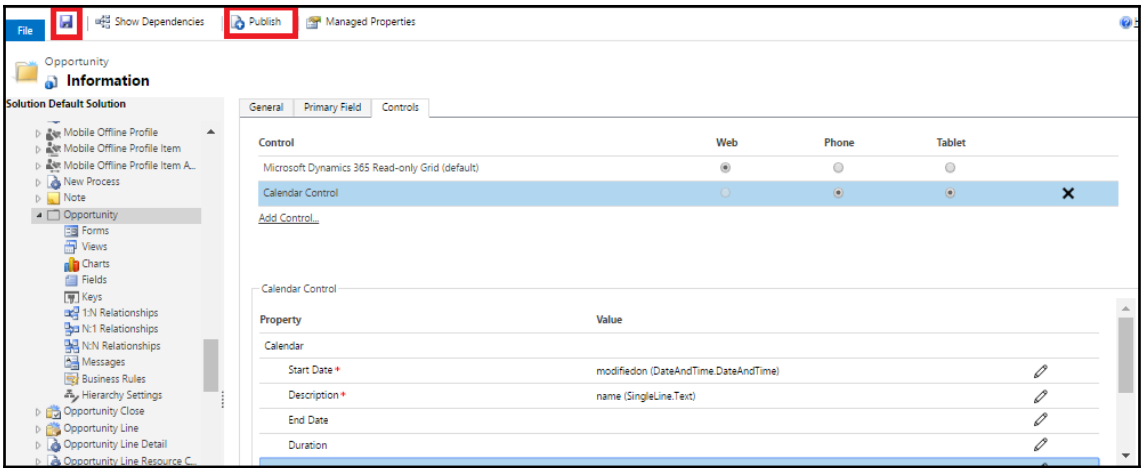
[Add Control...](#)

Calendar Control

Property	Value
Calendar	
Start Date *	modifiedon (DateTime.DateAndTime) <input type="text"/>
Description *	name (SingleLine.Text) <input type="text"/>
End Date	<input type="text"/>
Duration	<input type="text"/>

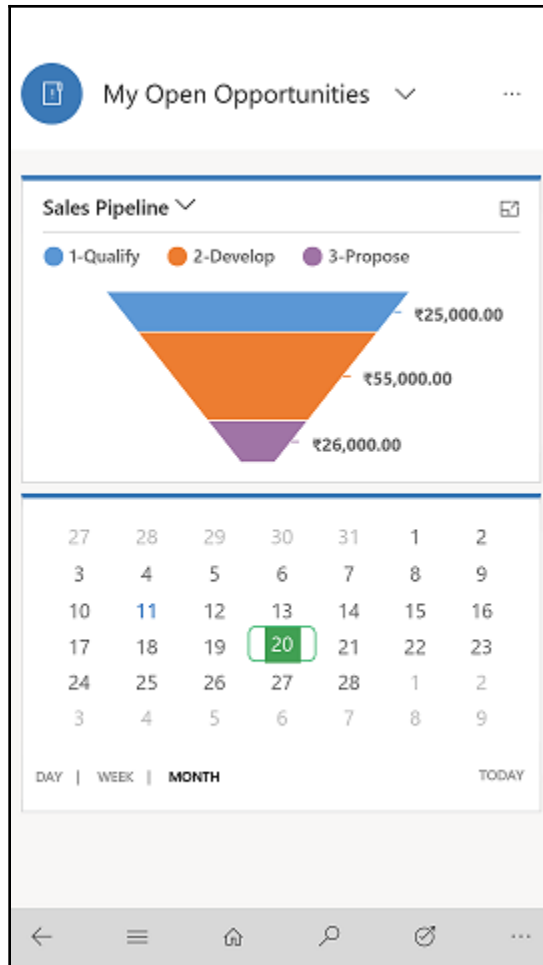
Description (required)
Compatible types: Whole.None, Whole.Duration, Whole.TimeZone, Whole.Language, TwoOptions, DateAndTime.DateOnly, DateAndTime.DateAndTime, Decimal, Enum, FP, Lookup.Simple, Lookup.Customer, Lookup.Owner, Lookup.PartyList, Lookup.Regarding, Multiple, Currency, OptionSet, SingleLine.Email, SingleLine.Text, SingleLine.TextArea, SingleLine.URL, SingleLine.Ticker, SingleLine.Phone

The calendar item text value shown by the control.



The screenshot displays the CRM Hub interface. On the left is a dark sidebar with navigation options: 'My Work' (Activities, Dashboards), 'Customers' (Accounts, Contacts), and 'CORE TRAINING'. The main area shows 'Sales Activity Social Dash...' with a 'My Open Opportunities' section. A 'Sales Pipeline' chart is visible, featuring a funnel with three segments: blue (top, ₹25,000.00), orange (middle, ₹55,000.00), and purple (bottom, ₹26,000.00). A context menu is open over the chart, showing 'Refresh' and 'View Records' options. The bottom navigation bar includes a menu icon (highlighted with a red box) and other standard mobile navigation symbols.

Opportunity Stage	Value (₹)
1-Qualify	25,000.00
2-Develop	55,000.00
3-Propose	26,000.00



Dynamics 365 Settings Customizations

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 365.

Themes
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.

Opportunity

Fields

Solution Default Solution

View: All

New X Edit More Actions

Name	Schema Name	Display Name	Type	Field Type	State	Field Security	Audit Status	Custom
actualclosedate	ActualCloseDate	Actual Close Date	Date and Time	Simple	Managed	Disabled	Enabled	True
actualvalue	ActualValue	Actual Revenue	Currency	Simple	Managed	Disabled	Enabled	True
actualvalue_base	ActualValue_Base	Actual Revenue ...	Currency	Simple	Managed	Non Applicable	Enabled	True
budgetamount	BudgetAmount	Budget Amount	Currency	Simple	Managed	Disabled	Enabled	True
budgetamount_base	BudgetAmount_Base	Budget Amount ...	Currency	Simple	Managed	Non Applicable	Enabled	True
budgetstatus	BudgetStatus	Budget	Option Set	Simple	Managed	Disabled	Enabled	True
campaignid	CampaignId	Source Campaign	Lookup	Simple	Managed	Disabled	Enabled	True
captureproposalfeedback	CaptureProposalFeedback	Proposal Feedba...	Two Options	Simple	Managed	Disabled	Enabled	True
closeprobability	CloseProbability	Probability	Whole Number	Simple	Managed	Disabled	Enabled	True

File Save and Close Help

Field

New for Opportunity

Working on solution: Default Solution

Common

Information Business Rules

General

Schema

Display Name * Signature Field Requirement * Optional

Name * new_Signature Searchable Yes

Field Security

Enable Disable

⚠ Enabling field security? [What you need to know](#)

Auditing *

Enable Disable

⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

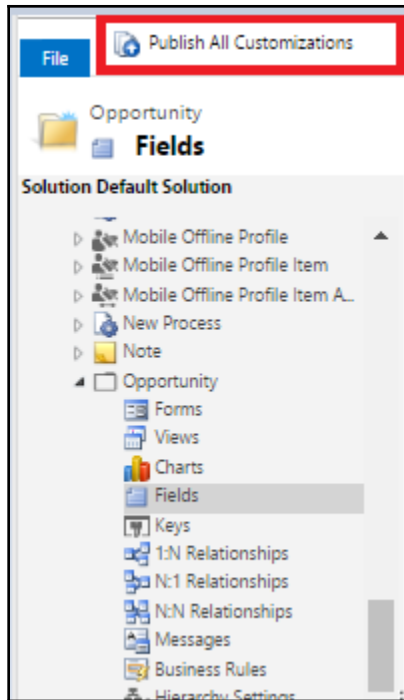
For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type * Multiple Lines of Text

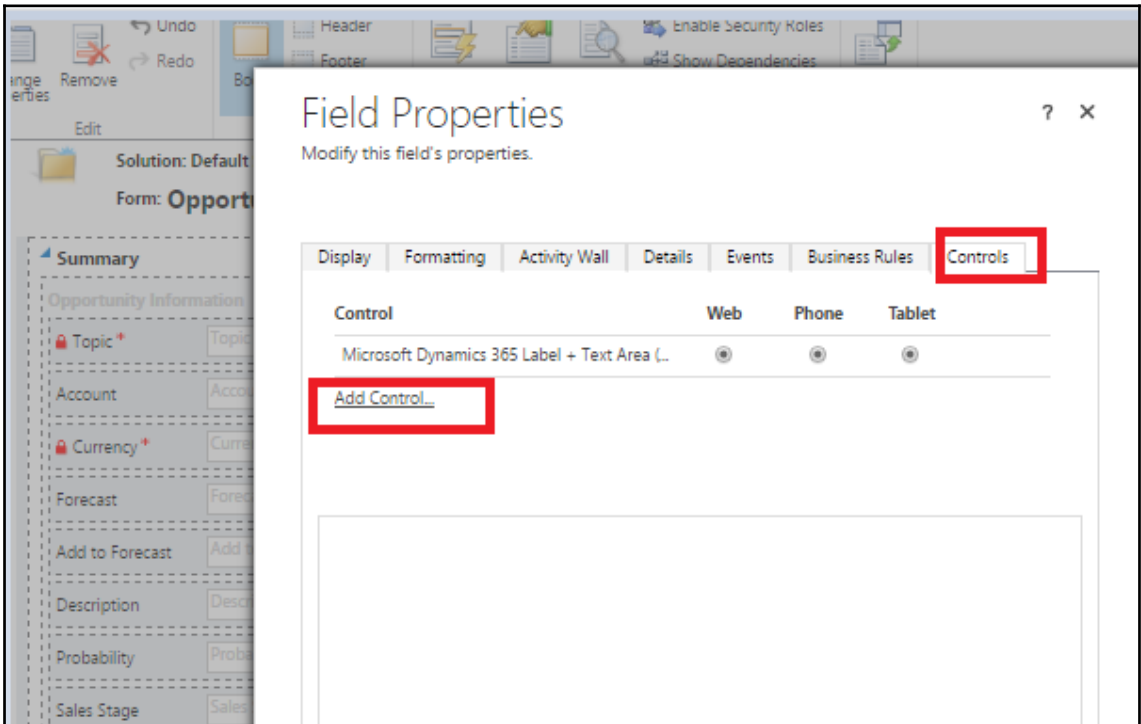
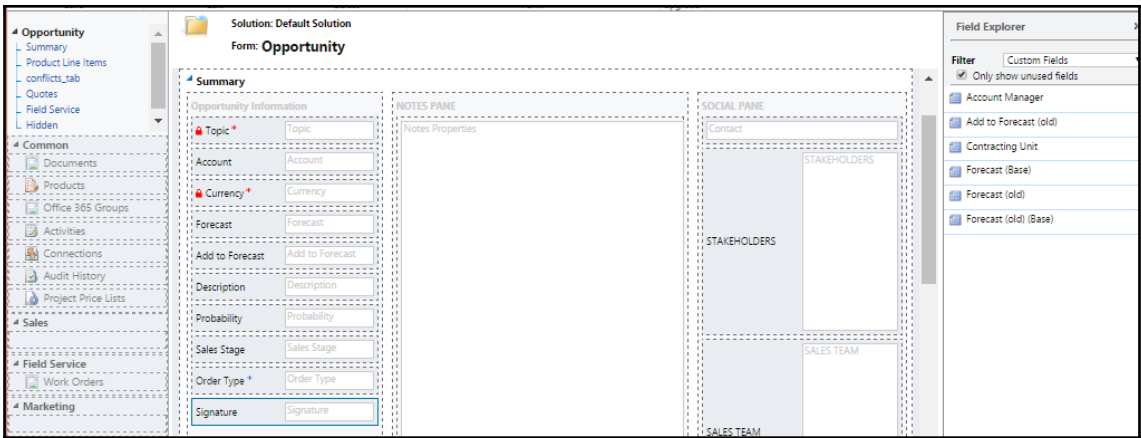
Maximum Length * 2,000

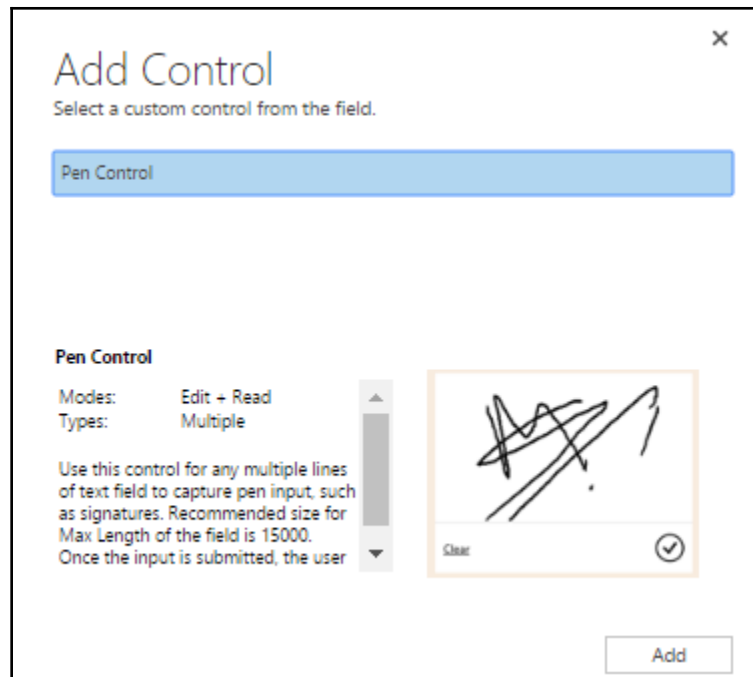
IME Mode * auto

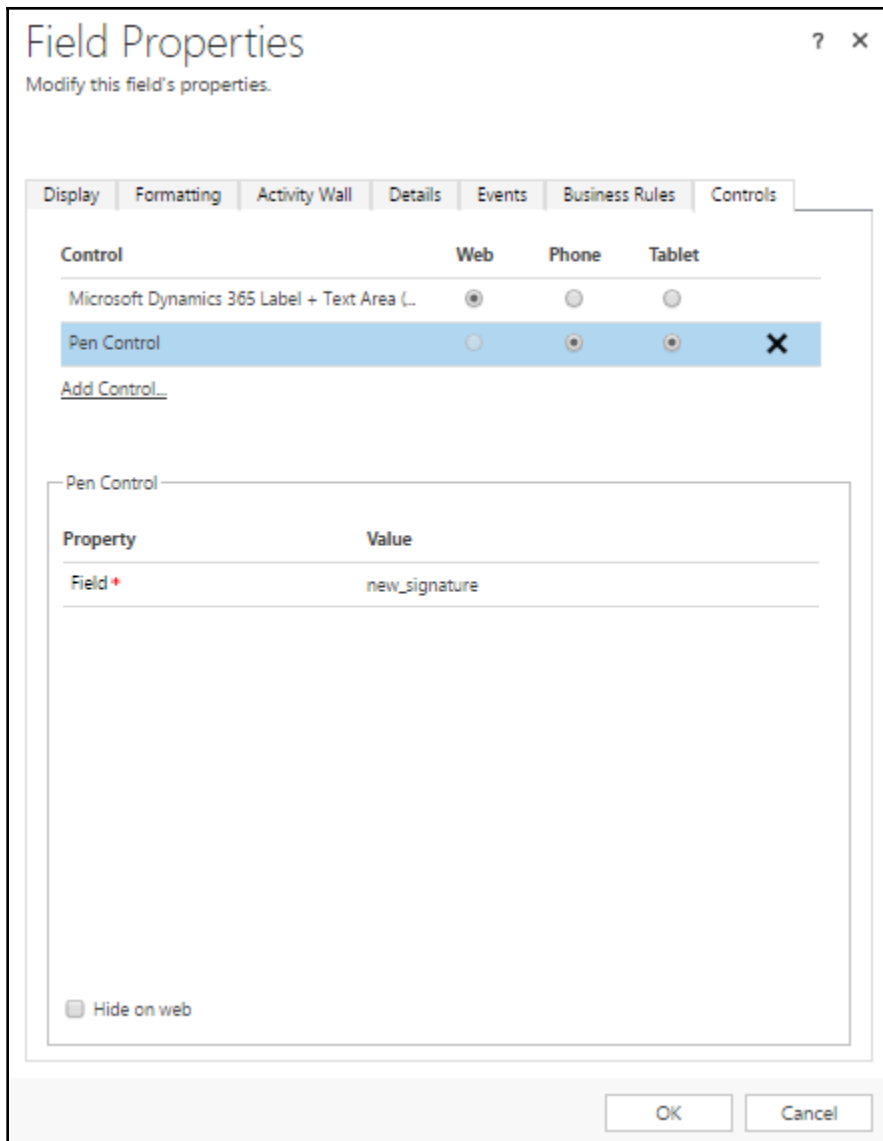


System Forms Active Forms

Name	Form State	Form Type	State	Customizable	Version	Description
Field Service Information	Active	Main	Managed	True	6.1.0.0	This form includes information about Service Maintena
Opportunity	Active	Main	Managed	True	5.0.0.0	Updated default Opportunity form
Project Information	Active	Main	Managed	True	1.0.0.1	Shows opportunity information for Project Service.
Information	Active	Main	Managed	True	1.0	A form for this entity.
Information	Active	Mobile - Express	Managed	True	5.0.0.0	This is the form that is displayed for the CRM Mobile a
Opportunity	Active	Quick Create	Managed	True	6.0.0.0	Default quick create form for Opportunity







The image shows a software interface with a ribbon at the top and a form editor below. The ribbon includes sections for 'Save', 'Edit', 'Select', 'Form', and 'Upgrade'. The 'Save' section contains 'Save', 'Save As', 'Save and Close', and 'Publish' buttons, with 'Save' and 'Publish' highlighted by red boxes. The 'Form' section contains 'Business Rules', 'Form Properties', 'Preview', 'Managed Properties', 'Show Dependencies', and 'Enable Security Roles'. The 'Upgrade' section contains 'Merge Forms'.

The main area displays 'Solution: Default Solution' and 'Form: Opportunity'. The form is titled 'Summary' and contains several fields under 'Opportunity Information':


- Topic * (Text input)
- Account (Text input)
- Currency * (Text input)
- Forecast (Text input)
- Add to Forecast (Text input)
- Description (Text input)
- Probability (Text input)
- Sales Stage (Text input)
- Order Type * (Text input)
- Signature (Text input)

Other panels include 'NOTES PANE' (Notes Properties), 'SOCIAL PANE' (Contact), and 'STAKEHOLDERS'. A large yellow box in the center of the form contains the text 'Publishing customizations...'.

New Opportunity 📄 💾 ⋮

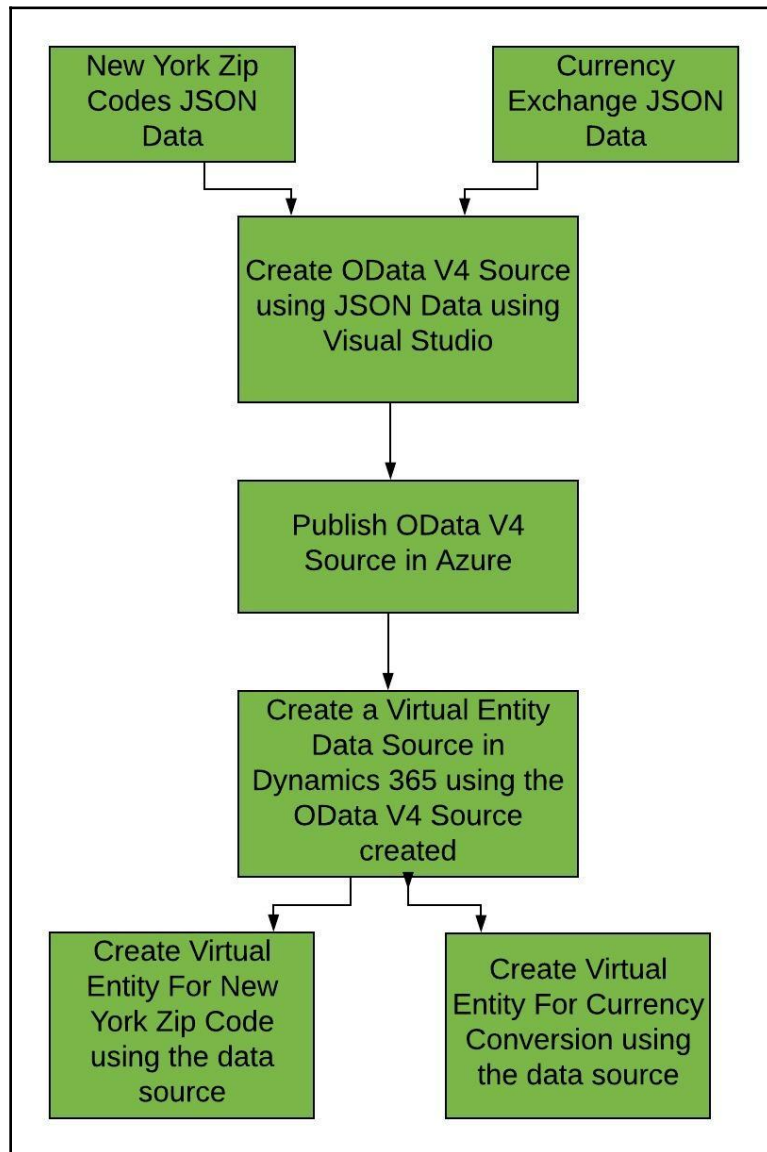
< **Qualify (< 1 Min)** ○ ○ Propose >

Summary ⋮

Budget Amount	---
Purchase Process	---
Signature	 <u>Clear</u> ✔
Description	---
Current Situation	---

< ☰ 🏠 🔍 🔄 ⋮

Chapter 12: Virtual Entities in Dynamics 365 365



Services News Government Local

DATA.NY.GOV OPEN NY CATALOG DEVELOPERS HELP ABOUT

Search data.ny.gov

New York State ZIP Codes-County FIPS

Cross-Reference Government & Finance

View Data Visualize Export API

```
[{"county": "Albany", "county_code": "001", "county_fips": "36001", "file_date": "2007-07-25T00:00:00.000", "state_fips": "36", "zip_code": "12046"}, {"county": "Albany", "county_code": "001", "county_fips": "36001", "file_date": "2007-07-25T00:00:00.000", "state_fips": "36", "zip_code": "12083"}, {"county": "Albany", "county_code": "001", "county_fips": "36001", "file_date": "2007-07-25T00:00:00.000", "state_fips": "36", "zip_code": "12085"}, {"county": "Albany", "county_code": "001", "county_fips": "36001", "file_date": "2007-07-25T00:00:00.000", "state_fips": "36", "zip_code": "12201"}]
```

```
{"success": true, "terms": "https://currencylayer.com/terms", "privacy": "https://currencylayer.com/privacy", "timestamp": 1531479248, "source": "USD", "quotes": {"USDAED": 3.672898, "USDAFN": 72.000238, "USDALL": 107.699997, "USDAID": 480.989999, "USDAIG": 1.842497, "USDAIA": 254.225006, "USDARS": 27.177004, "USDAUD": 1.354698, "USDANG": 1.78, "USDAZN": 1.699498, "USDBAH": 1.684795, "USDBBD": 1, "USDBDT": 83.749779, "USDBGN": 1.677701, "USDBHD": 0.3782, "USDBIF": 1750.979998, "USDBMD": 1, "USDBND": 1.349302, "USDBOB": 6.859997, "USDBRL": 3.882402, "USDBSD": 1, "USDBTC": 0.00016, "USDBTM": 68.595999, "USDBUP": 10.240897, "USDBVY": 2.000308, "USDBYR": 1.997600, "USDBZD": 1.997801, "USDCAD": 1.31971, "USDCDF": 1155.503721, "USCCHF": 1.00002, "USCCLF": 0.02263, "USDCLP": 646.940002, "USDCNY": 6.694998, "USDCOP": 2872.800049, "USDCRC": 564.487314, "USDCUC": 1, "USDCUP": 126.5, "USDCVE": 194.199997, "USDCZK": 22.295962, "USDDJF": 177.50246, "USDDKK": 6.412597, "USDDOP": 49.659706, "USDDZD": 117.718002, "USDEGP": 17.840138, "USDERN": 14.989592, "USDETB": 27.299999, "USDEUR": 0.859902, "USDFJD": 2.088046, "USDFKP": 0.758303, "USDBGP": 0.761891, "USDGEL": 2.430099, "USDDGP": 0.761863, "USDGH": 4.758494}}
```

New Project

Recent

Sort by: Default

Search (Ctrl+E)

Visual C#

- ASP.NET Core Web Application Visual C#
- ASP.NET Web Application (.NET Framework) Visual C#

Web

Previous Versions

- .NET Core
- .NET Standard
- Cloud
- Test
- WCF

Visual Basic

Visual F#

SQL Server

Other Project Types

Online

Not finding what you are looking for?

[Open Visual Studio Installer](#)

Name: NewYorkZipCode

Location: E:\ Browse...

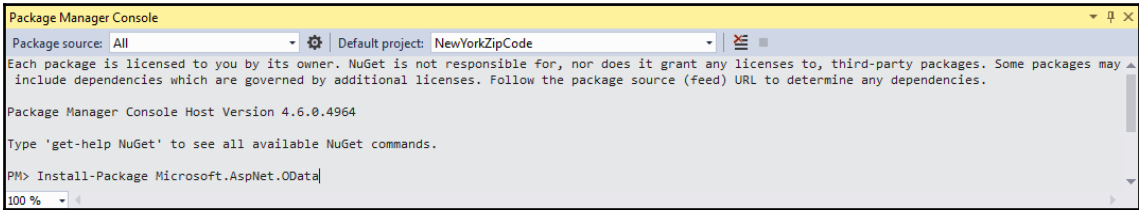
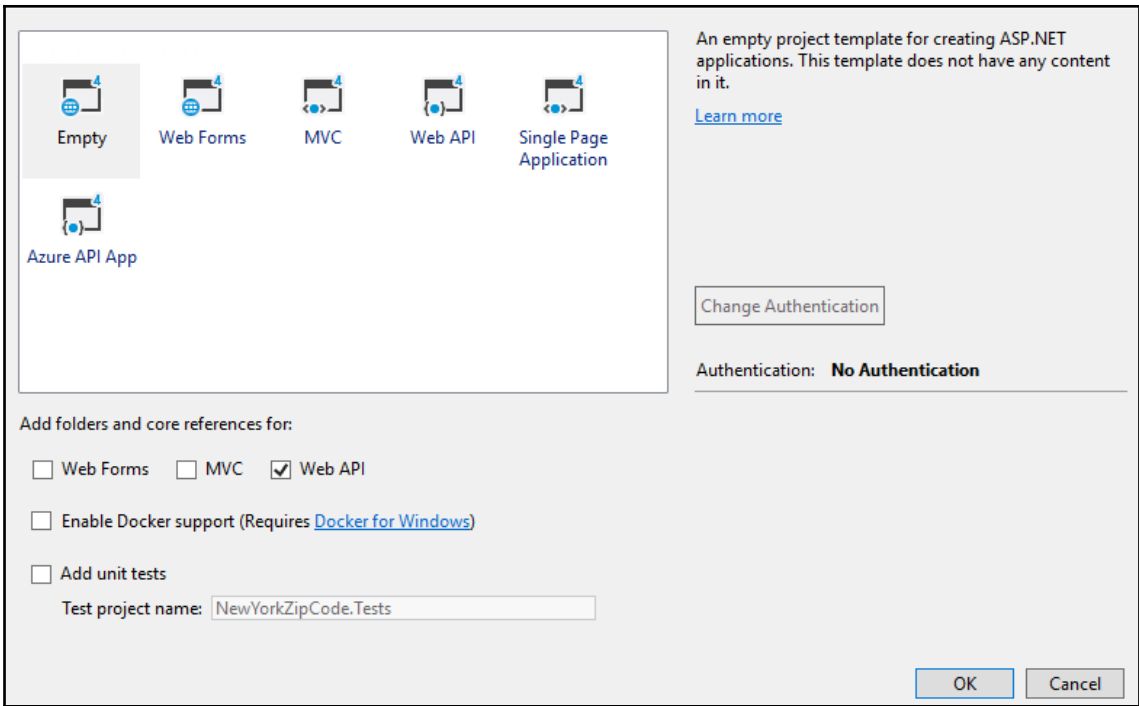
Solution name: NewYorkZipCode

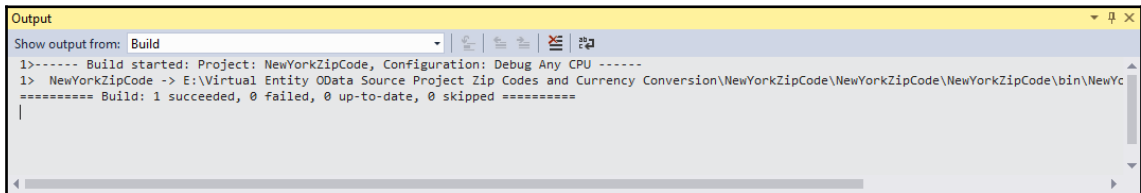
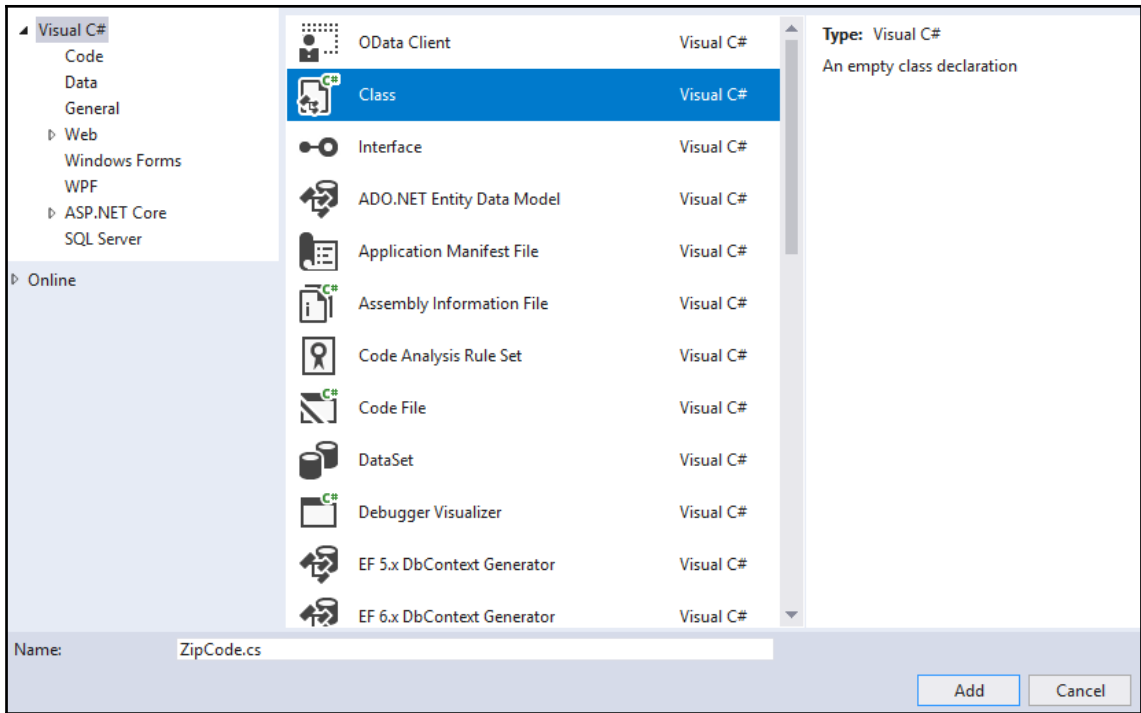
Framework: .NET Framework 4.5.2

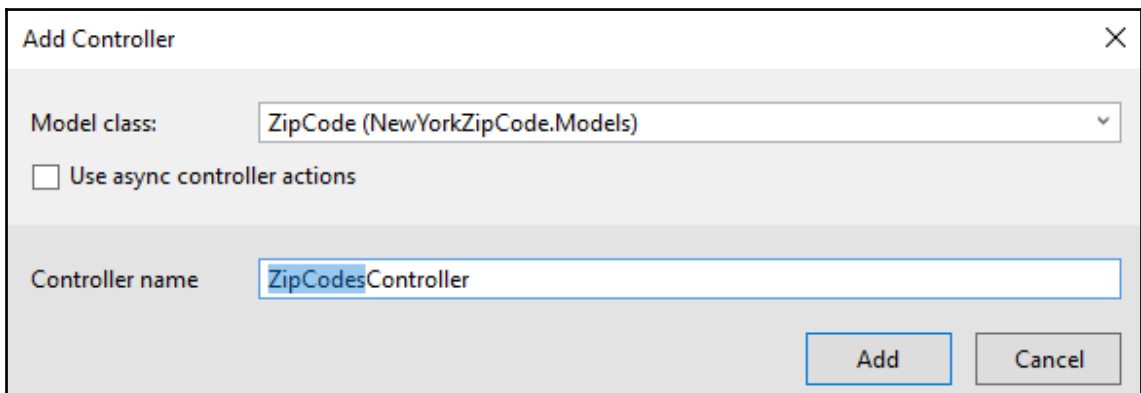
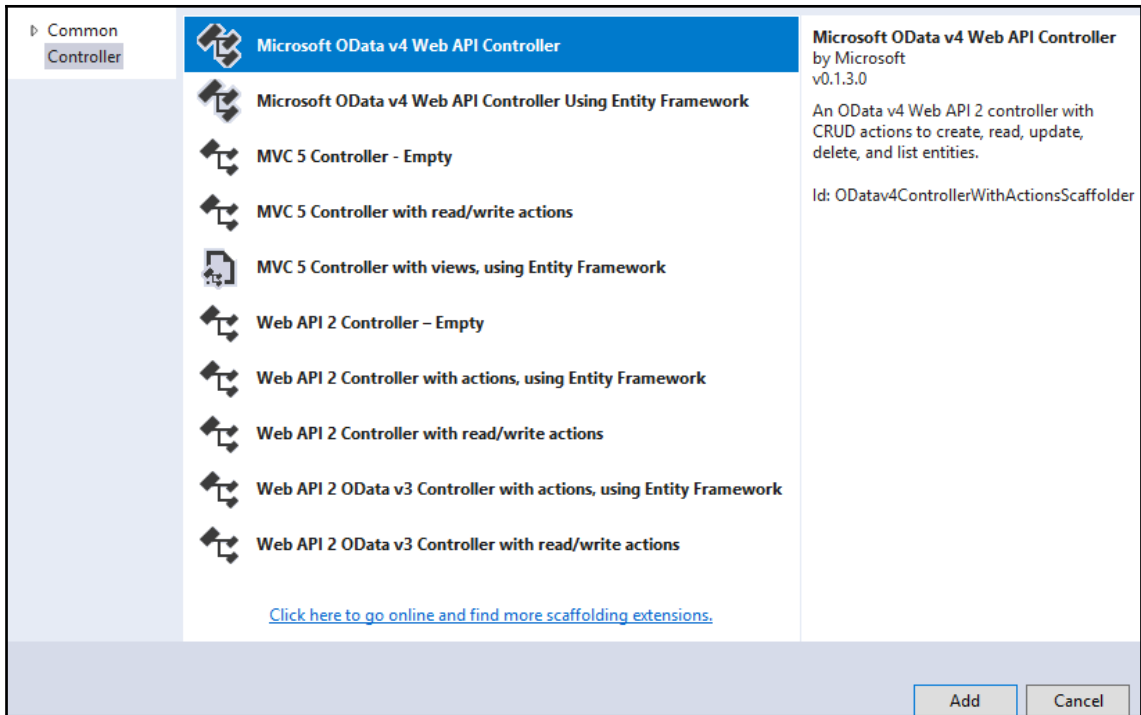
Create directory for solution

Add to Source Control

OK Cancel








Overview

Connected Services

Publish

Publish

Publish your app to Azure or another host. [Learn more](#)

 NewYorkZipCode - Web Deploy

[Create new profile](#)


Overview

Connected Services

Publish

Publish

Publish your app to Azure or another host. [Learn more](#)

 NewYorkZipCode - Web Deploy

[Create new profile](#)

Summary

Site URL	http://newyorkzipcode.azurewebsites.net/	App Service
Resource Group	WebDeployment	Settings...
Configuration	Release	Preview...
Username	\$NewYorkZipCode	Rename Pro
Password	*****	Delete Profil

Output

Show output from: **Build**

```

2>Adding ACLs for path (NewYorkZipCode)
2>Adding ACLs for path (NewYorkZipCode)
2>Publish Succeeded.
2>Web App was published successfully http://newyorkzipcode.azurewebsites.net/
===== Build: 1 succeeded, 0 failed, 0 up-to-date, 0 skipped =====
===== Publish: 1 succeeded, 0 failed, 0 skipped =====

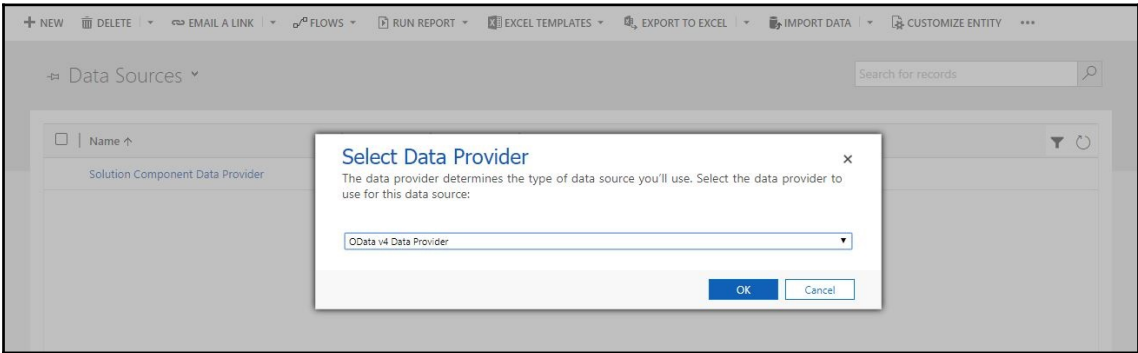
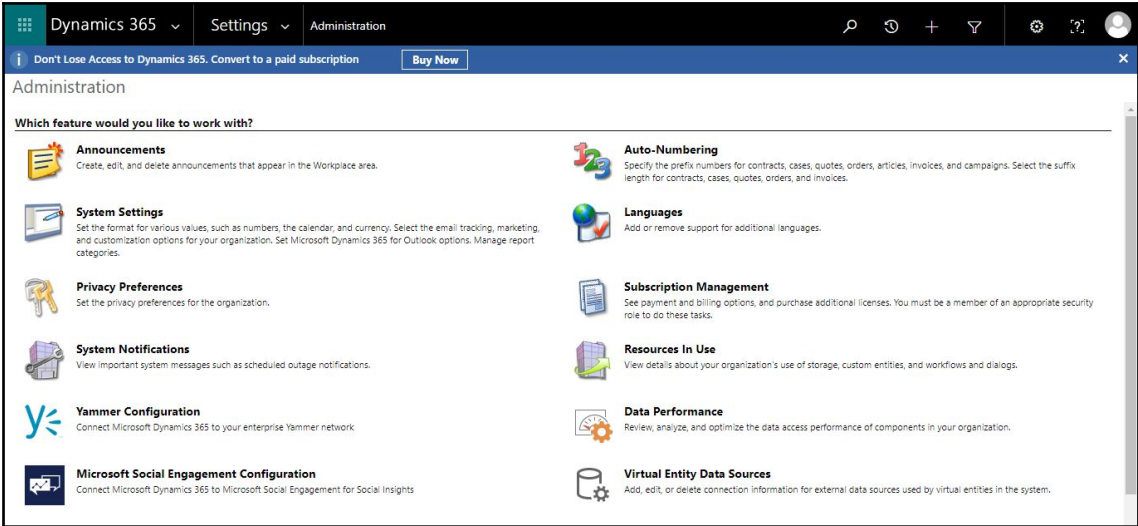
```

```
{
  "@odata.context": "http://newyorkzipcode.azurewebsites.net/$metadata", "value": [
    {
      "name": "ZipCodes", "kind": "EntitySet", "url": "ZipCodes"
    }, {
      "name": "CurrencyConversions", "kind": "EntitySet", "url": "CurrencyConversions"
    }
  ]
}
```

```
<?xml version="1.0" encoding="utf-8" standalone="no" ?>
<edmx:Edmx xmlns:edmx="http://docs.oasis-open.org/odata/ns/edmx" Version="4.0">
  <edmx:DataServices>
    <Schema xmlns="http://docs.oasis-open.org/odata/ns/edm" Namespace="NewYorkZipCode.Models">
      <EntityType Name="ZipCode">
        <Key>
          <PropertyRef Name="ID"/>
        </Key>
        <Property Name="ID" Type="Edm.Guid" Nullable="false"/>
        <Property Name="CountyName" Type="Edm.String"/>
        <Property Name="StateFIPS" Type="Edm.String"/>
        <Property Name="CountyCode" Type="Edm.String"/>
        <Property Name="CountyFIPS" Type="Edm.String"/>
        <Property Name="Zipcode" Type="Edm.String"/>
      </EntityType>
      <EntityType Name="CurrencyConversion">
        <Key>
          <PropertyRef Name="ID"/>
        </Key>
        <Property Name="ID" Type="Edm.Guid" Nullable="false"/>
        <Property Name="SourceCurrency" Type="Edm.String"/>
        <Property Name="TargetCurrency" Type="Edm.String"/>
        <Property Name="ConversionRate" Type="Edm.Decimal" Nullable="false"/>
      </EntityType>
    </Schema>
    <Schema xmlns="http://docs.oasis-open.org/odata/ns/edm" Namespace="Sample">
      <EntityContainer Name="DefaultContainer">
        <EntitySet Name="ZipCodes" EntityType="NewYorkZipCode.Models.ZipCode"/>
        <EntitySet Name="CurrencyConversions" EntityType="NewYorkZipCode.Models.CurrencyConversion"/>
      </EntityContainer>
    </Schema>
  </edmx:DataServices>
</edmx:Edmx>
```

```
{
  "@odata.context": "http://newyorkzipcode.azurewebsites.net/$metadata#ZipCodes", "value": [
    {
      "ID": "b421e98a-3b71-4337-b6ea-7b81f2259ddc", "CountyName": "Albany", "StateFIPS": "36", "CountyCode": "001", "CountyFIPS": "36001", "Zipcode": "12046"
    }, {
      "ID": "c35f39ba-9e98-4215-9378-3538b076928b", "CountyName": "Albany", "StateFIPS": "36", "CountyCode": "001", "CountyFIPS": "36001", "Zipcode": "12083"
    }, {
      "ID": "a6b72382-cebd-43f8-a442-9fb85bb138a6", "CountyName": "Albany", "StateFIPS": "36", "CountyCode": "001", "CountyFIPS": "36001", "Zipcode": "12085"
    }, {
      "ID": "930c4ffd-b57d-4774-b16b-790b17421079", "CountyName": "Albany", "StateFIPS": "36", "CountyCode": "001", "CountyFIPS": "36001", "Zipcode": "12201"
    }, {
      "ID": "4280a1bb-c0cc-452b-ae13-5506593d2c17", "CountyName": "Albany", "StateFIPS": "36", "CountyCode": "001", "CountyFIPS": "36001", "Zipcode": "12203"
    }, {
      "ID": "232d8513-373c-447f-a76e-16eebc7bf935", "CountyName": "Albany", "StateFIPS": "36", "CountyCode": "001", "CountyFIPS": "36001", "Zipcode": "12055"
    }
  ]
}
```

```
{
  "@odata.context": "http://newyorkzipcode.azurewebsites.net/$metadata#CurrencyConversions", "value": [
    {
      "ID": "4f4b947d-9c66-468e-b609-cc111f003ada", "SourceCurrency": "USD", "TargetCurrency": "AED", "ConversionRate": 3.6727
    }, {
      "ID": "30622531-beaf-474e-bcfc-8135b667c292", "SourceCurrency": "USD", "TargetCurrency": "AFN", "ConversionRate": 71.999983
    }, {
      "ID": "b1d7e29b-d58e-43d0-8086-a705ce7ac271", "SourceCurrency": "USD", "TargetCurrency": "ALL", "ConversionRate": 107.720001
    }, {
      "ID": "7e87f93b-3356-4408-b758-577f9e82fcdd", "SourceCurrency": "USD", "TargetCurrency": "AMD", "ConversionRate": 480.98999
    }
  ]
}
```



ODATA V4 DATA SOURCE : INFORMATION ▾

Zip Code and Currency Data Source ☰

General

Name * Zip Code and Currency Data Source

URL * http://newyorkzipcode.azurewebsites.net/

Timeout 60

Pagination Mode * Client-side Paging

Return Inline Count True

Request Parameters

Parameter Type	Parameter Name	Value
Query String	-----	*****

Solution: Virtual Entity Demo

Information

Solution Virtual Entity Demo

General

Display Name * Virtual Entity Demo Name * VirtualEntityDemo

Publisher * Dynamisity Configuration Page

Version * 1.0.0.0

Description

File Save and Close Show Dependencies Publish Update Icons Delete Managed Properties Help

Zip Code Working on solution: Virtual Entity Demo

Information

Common

Information Forms Views Fields Keys 1:N Relationships N:1 Relationships N:N Relationships Business Rules Hierarchy Settings Dashboards

General Primary Field Controls

Entity Definition

Display Name * Zip Code

Plural Name * Zip Codes

Name * mdl_zipcode

External Name * ZipCode

External Collection Name * ZipCodes

Primary Image

Color

Description

Virtual Entity

Data Source Zip Code and Currency Data Source

Ownership * Organization

Define as an activity entity

Display in Activity Menus

Areas that display this entity

Sales Training Service Marketing Settings

```

▼ <edmx:Edmx xmlns:edmx="http://docs.oasis-open.org/odata/ns/edmx" Version="4.0">
  ▼ <edmx:DataServices>
    ▼ <Schema xmlns="http://docs.oasis-open.org/odata/ns/edm" Namespace="NewYorkZipCode.Models">
      ▶ <EntityType Name="ZipCode">...</EntityType>
      ▶ <EntityType Name="CurrencyConversion">...</EntityType>
    </Schema>
    ▼ <Schema xmlns="http://docs.oasis-open.org/odata/ns/edm" Namespace="Sample">
      ▼ <EntityContainer Name="DefaultContainer">
        <EntitySet Name="ZipCodes" EntityType="NewYorkZipCode.Models.ZipCode"/>
        <EntitySet Name="CurrencyConversions" EntityType="NewYorkZipCode.Models.CurrencyConversion"/>
      </EntityContainer>
    </Schema>
  </edmx:DataServices>
</edmx:Edmx>

```

Field **ID of Zip Code** Working on solution: Virtual Entity Demo

Common

- Information
- Business Rules

General

Schema

Display Name * ID Field Requirement * System Required

Name * mdl_zipcodeid Searchable Yes

External Name ID

Field Security Enable Disable

⚠ Enabling field security? [What you need to know](#)

Auditing * Enable Disable

Description Unique identifier for entity instances

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type * Primary Key

```

▼ <EntityType Name="ZipCode">
  ▼ <Key>
    <PropertyRef Name="ID"/>
  </Key>
  <Property Name="ID" Type="Edm.Guid" Nullable="false"/>
  <Property Name="CountyName" Type="Edm.String"/>
  <Property Name="StateFIPS" Type="Edm.String"/>
  <Property Name="CountyCode" Type="Edm.String"/>
  <Property Name="CountyFIPS" Type="Edm.String"/>
  <Property Name="Zipcode" Type="Edm.String"/>
</EntityType>

```

Field Working on solution: Virtual Entity Demo

Zip Code of Zip Code

Common
 Information
 Business Rules

General

Schema

Display Name * Field Requirement *

Name * Searchable

External Name

Field Security Enable Disable
 ⚠ Enabling field security? [What you need to know](#)

Auditing * Enable Disable
 ⚠ This field will not be audited until you enable auditing on the entity.

Description

Appears in global filter in interactive experience Sortable in interactive experience dashboard

For information about how to interact with entities and fields programmatically, see the [Microsoft Dynamics 365 SDK](#)

Type

Data Type *

Field Type *

Format *

Maximum Length *

View: All Zip Codes Working on solution: Zip Code Virtual Entity

Zip Code	County Name	County Code	State FIPS	County FIPS
View results are displayed here.				

Common Tasks

← →

- View Properties
- Custom Controls
- Edit Filter Criteria
- Configure Sorting

- Add Columns
- Change Properties
- Remove

Form: **Zip Code**

Filter All Fields
 Only show unused fields

General

Common
 Audit History
 Sales
 Service
 Marketing
 Process Sessions

Header

General

General

Zip Code Zip Code

County Name County Name

County Code County Code

County FIPS County FIPS

State FIPS State FIPS

Form: **Zip Code**

Filter All Fields
 Only show unused fields

GENERAL

Zip Code Zip Code

County Name County Name

County Code
 County FIPS
 State FIPS

🏠 All Zip Codes ▾

<input type="checkbox"/>	Zip Code	County Name	County Code	State FIPS	County FIPS
	12246	Albany	001	36	36001
	12524	Putnam	079	36	36079
	13490	Oneida	065	36	36065
	12022	Rensselaer	083	36	36083
	12174	Columbia	021	36	36021
	10124	New York	061	36	36061
	12205	Albany	001	36	36001
	12512	Dutchess	027	36	36027
	13076	Oswego	075	36	36075

ZIP CODE : INFORMATION

12046 ▾

◀ General

Zip Code	12046
County Name	Albany
County Code	001
County FIPS	36001
State FIPS	36

Relationship Working on solution: Default Solution

New

Common

- Information
- Mappings

General

Primary Entity* Zip Code Related Entity* Account

Name* new_zipcode_account

Searchable Yes

Hierarchical No

Lookup Field

Display Name* Zip Code Name* new_ZipCodeId

Field Requirement* Optional

Description

Navigation Pane Item for Primary Entity

Display Option* Use Plural Name Custom Label*

Display Area* Details Display Order* 10,000

Relationship Behavior

Type of Behavior* Referential

Assign* Cascade None Reparent* Cascade None

Account

- Summary
- Details

Common

- Activities
- Social Profiles
- Contacts
- Documents
- Connections
- Documents
- Audit History
- Entitlements
- Cars

Sales

- Leads

Solution: Default Solution

Form: **Account**

Summary

ACCOUNT INFORMATION	SOCIAL PANE
Account Name* <input type="text" value="Account Name"/>	
Phone <input type="text" value="Main Phone"/>	
Fax <input type="text" value="Fax"/>	
Website <input type="text" value="Website"/>	
Parent Account <input type="text" value="Parent Account"/>	
Ticker Symbol <input type="text" value="Ticker Symbol"/>	
Zip Code <input type="text" value="Zip Code"/>	

ACCOUNT ▾

A. Datum Corporation (sample) ☰

Summary

ACCOUNT INFORMATION

Account Name * 10004

Phone 10006

Fax 10007

Website 10009

Parent Account 10010

Ticker Symbol 10011

Zip Code 10014

10016

10017

10019

[Look Up More Records](#)

10 results

Currency Conversion Working on solution: Virtual Entity Demo

Information

Common

- Information
- Forms
- Views
- Fields
- Keys
- 1:N Relationships
- N:1 Relationships
- N:N Relationships
- Business Rules
- Hierarchy Settings
- Dashboards

General Primary Field Controls

Entity Definition

Display Name* Currency Conversion

Plural Name* Currency Conversions

Name* [mid_currencyconversion]

External Name* CurrencyConversion

External Collection Name* CurrencyConversions

Primary Image

Color

Description

Virtual Entity

Data Source Zip Code and Currency Data Source

Ownership* Organization

Define as an activity entity;

Display in Activity Menus

Areas that display this entity

Sales Service Marketing Settings

Training

```

    <EntityType Name="CurrencyConversion">
      <Key>
        <PropertyRef Name="ID"/>
      </Key>
      <Property Name="ID" Type="Edm.Guid" Nullable="false"/>
      <Property Name="SourceCurrency" Type="Edm.String"/>
      <Property Name="TargetCurrency" Type="Edm.String"/>
      <Property Name="ConversionRate" Type="Edm.Decimal" Nullable="false"/>
    </EntityType>
  </Schema>
  <Schema xmlns="http://docs.oasis-open.org/odata/ns/edm" Namespace="Sample">
    <EntityContainer Name="DefaultContainer">
      <EntitySet Name="ZipCodes" EntityType="NewYorkZipCode.Models.ZipCode"/>
      <EntitySet Name="CurrencyConversions" EntityType="NewYorkZipCode.Models.CurrencyConversion"/>
    </EntityContainer>
  </Schema>

```

View: All Currency Conversions Working on solution: Zip Code Virtual Entity

Source Currency	Target Currency	Conversion Rate

Common Tasks

← →

View Properties
Custom Controls

General

- Common
 - Audit History
- Sales
- Service
- Marketing
- Process Sessions

Form: Currency Conversion

Header

--	--	--	--

General

Source Currency	Source Currency
Target Currency	Target Currency
Conversion Rate *	Conversion Rate

☰ All Currency Conversions ▾

<input type="checkbox"/>	Source Currency	Target Currency	Conversion Rate
	USD	TJS	9.419500
	USD	RUB	62.032398
	USD	JOD	0.708302
	USD	SGD	1.362820
	USD	SYP	514.979980
	USD	PGK	3.287013
	USD	KES	100.550003
	USD	HUF	278.209991

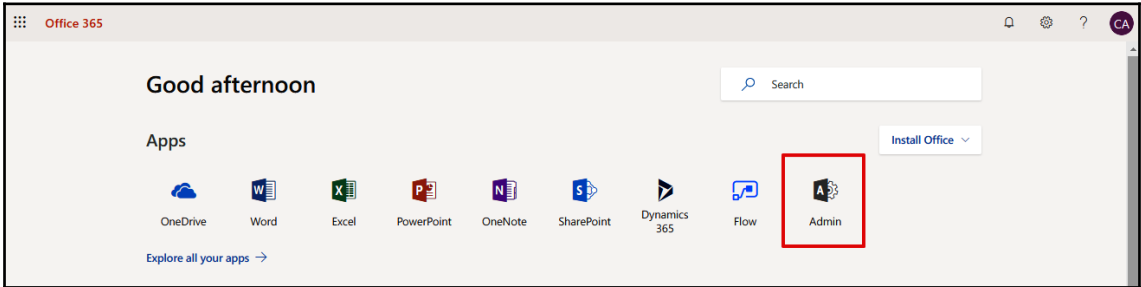
CURRENCY CONVERSION : INFORMATION

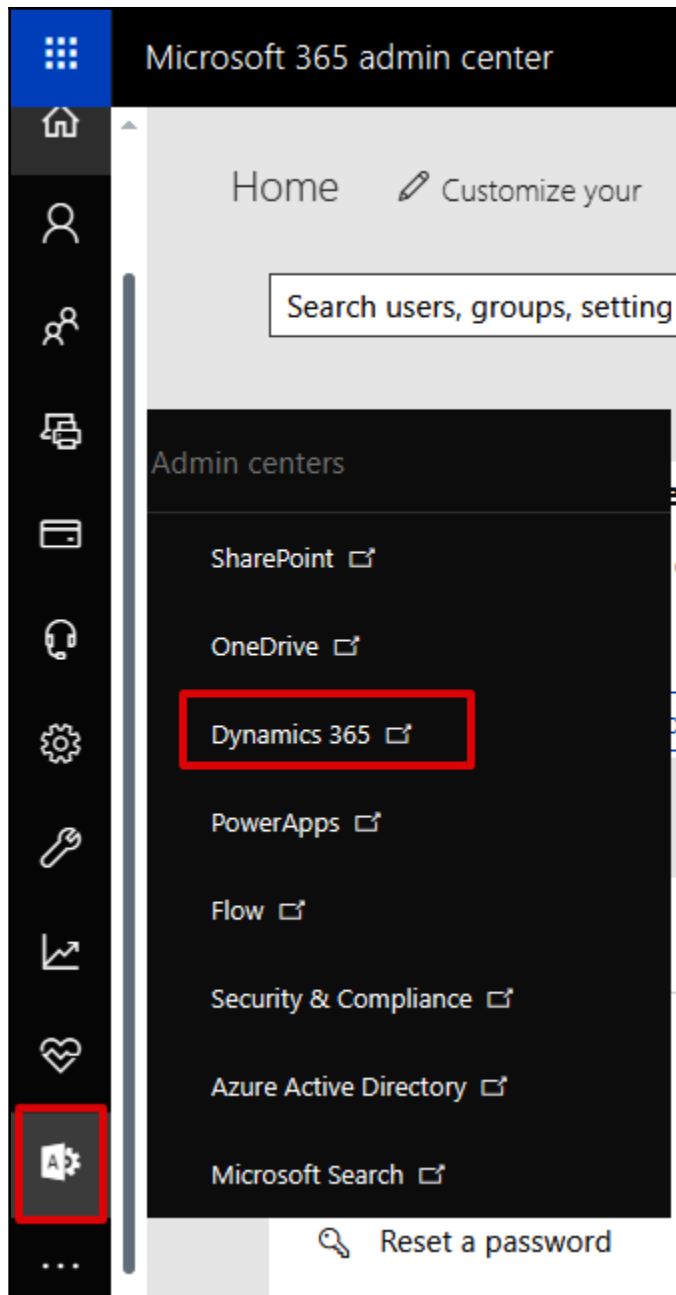
AED ▾

▾ General

Source Currency	USD
Target Currency	AED
Conversion Rate *	3.672700

Chapter 13: Working with Dynamics 365 Portals






There's a better way to manage your instances. [Try the new Admin center](#)

INSTANCES UPDATES SERVICE HEALTH BACKUP & RESTORE **APPLICATIONS**

Manage applications

APPLICATION	STATUS	
Dynamics 365 AI for Sales	NotCo...	<h3>Portal Add-On</h3>  <p>MANAGE</p> <p>Portal is an Add-On subscription for CRM Online that allows you to extend the engagement with Customer and Employee audiences into an Azure-hosted web portal. This Add-On requires a pre-existing CRM Online subscription and may only be associated with one instance per Portal. Each portal includes 1,000,000 page views per month.</p>
Dynamics 365 Connector for LinkedIn Lead Gen Forms	NotCo...	
Dynamics 365 Customer Service Application	Enabled	
Dynamics 365 Customer Service Hub	Enabled	
Dynamics 365 for Field Service	Enabled	
Dynamics 365 for Project Service Automation	Enabled	
Dynamics 365 for Sales, Enterprise Edition App	Enabled	
Dynamics 365 Marketing Application	NotCo...	
Dynamics 365 Service Scheduling	Enabled	
HCM Talent	Enabled	
Live Assist for Dynamics 365 Powered by CaféX	NotCo...	
Microsoft Dynamics 365 - Gamification	Enabled	
Microsoft Dynamics 365 CRM Hub	Microsoft Dynamics 365 - Gamification	
Portal Add-On	NotCo...	
Voice of the Customer	NotCo...	



Configure Your Portal

General Settings

*Name

*Type

Select Portal URL

*Portal URL

.microsoftcrmportals.com

You can update it to a vanity domain name once the portal is provisioned.

Select a Dynamics 365 instance

*Dynamics 365 Instance

*Select Portal Language

*Select Portal Administrator

*Portal Audience

Partner

Customer

Employee

*Select Portal to be deployed

Dynamics 365 Portals - Community Portal

Dynamics 365 Portals - Custom Portal

Dynamics 365 Portals - Customer Self-Service Portal

Enable portal for early upgrade

By clicking Submit, you agree to our [terms and conditions](#).

Please read the [Privacy statement](#).

Submit

Terms of Service



PLEASE NOTE: Microsoft Corporation (or based on where you reside, one of its affiliates) licenses this supplement to you. You may use it with each validly licensed subscription of Microsoft Dynamics 365 Online service (the "Online Service"). You may not use this supplement if you do not have a license for the Online Service. Microsoft provides support services for this supplement as described in the Service Level Agreement for Microsoft Online Services. Please note that "User Hours" are defined as users of the Online Service and not users of this supplement.

The license terms for the Online Service apply to your use of this supplement, except as follows:

- Customer is explicitly prohibited from using the supplement to design and transmit promotional SMS messages either via integration with a third-party service, or as otherwise may be possible.

If you do not agree to these additional terms, do not install this supplement.

IMPORTANT: By installing this supplement, you consent to allow authorized users of Microsoft Dynamics 365 to configure and enable certain functionality, including but not limited to the following, which may:

By clicking accept, you are agreeing to the above terms of service agreement.

Accept

Cancel

Microsoft Dynamics 365

- Portal Details
- Portal Actions
- Manage Dynamics 365 Instance
- Set up SharePoint integration
- Set up Power BI integration
- Manage portal authentication key
- Set up IP address restriction

Portal Details

General Settings

*Name

*Type

Portal URL
Base Portal URL

Portal Audience

*Portal Audience

Change Portal State

*Portal State

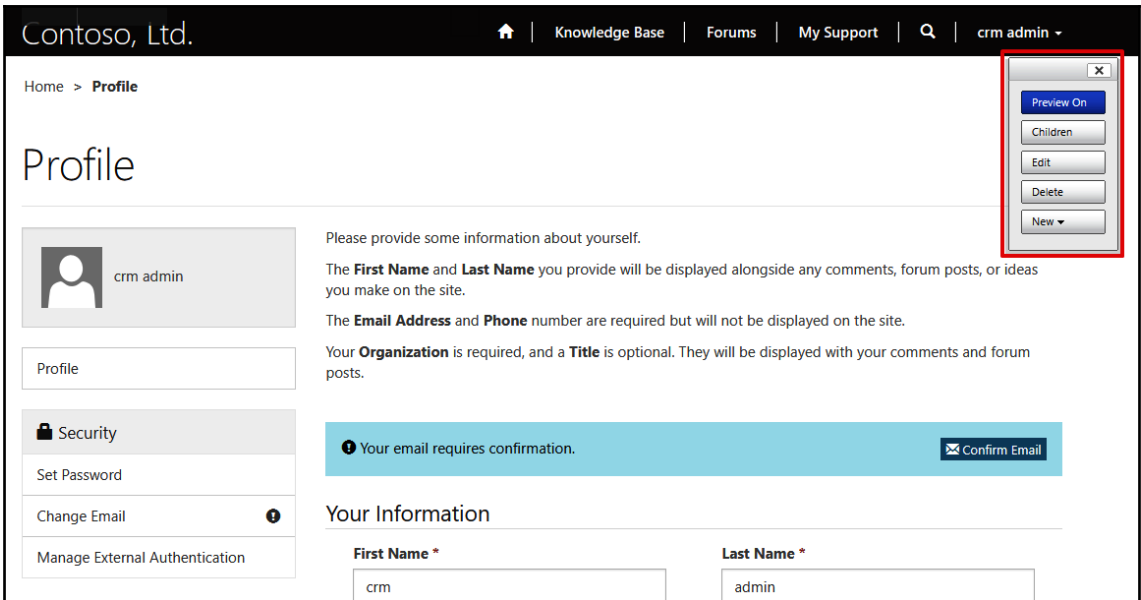
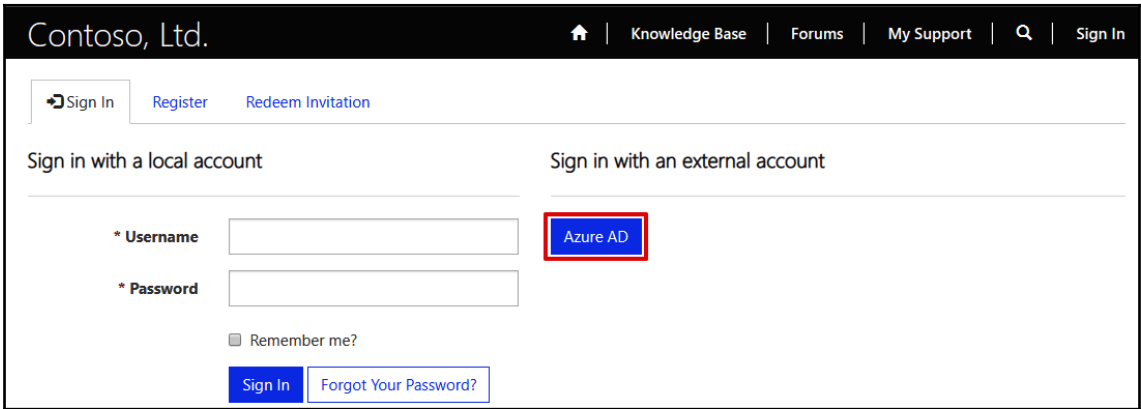
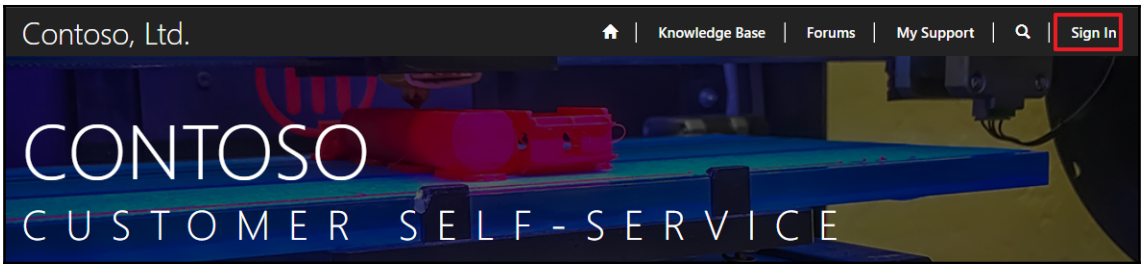
Enable portal for early upgrade

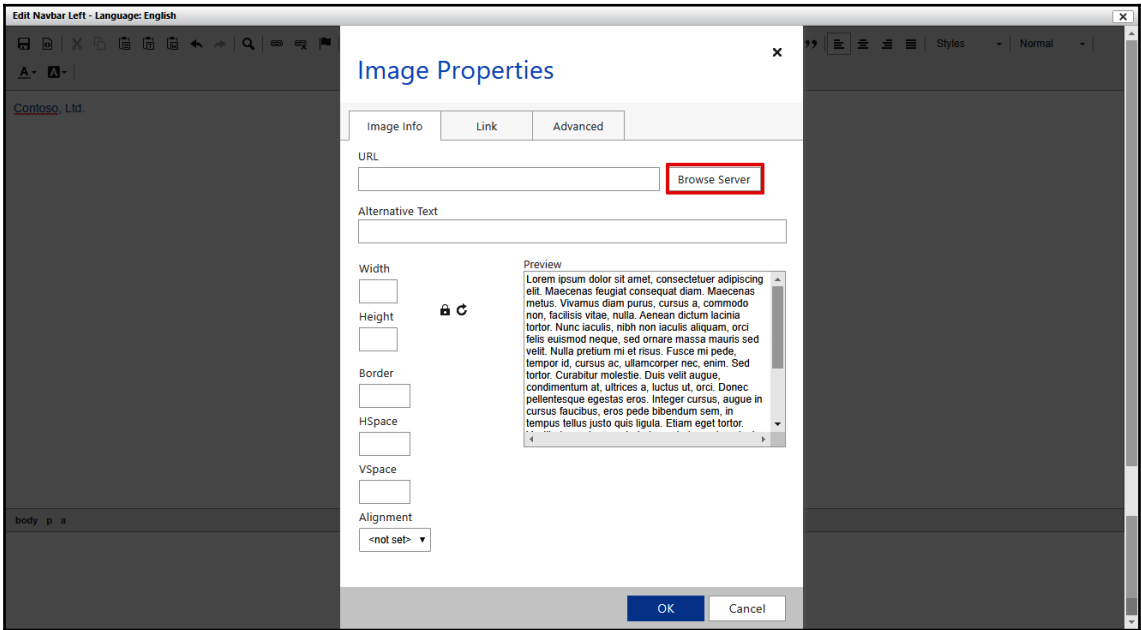
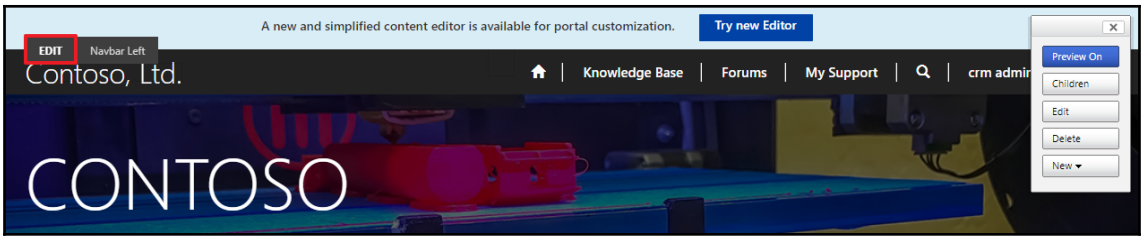
If you are a Global Administrator, click [here](#) to provide consent to your Dynamics 365 portals.

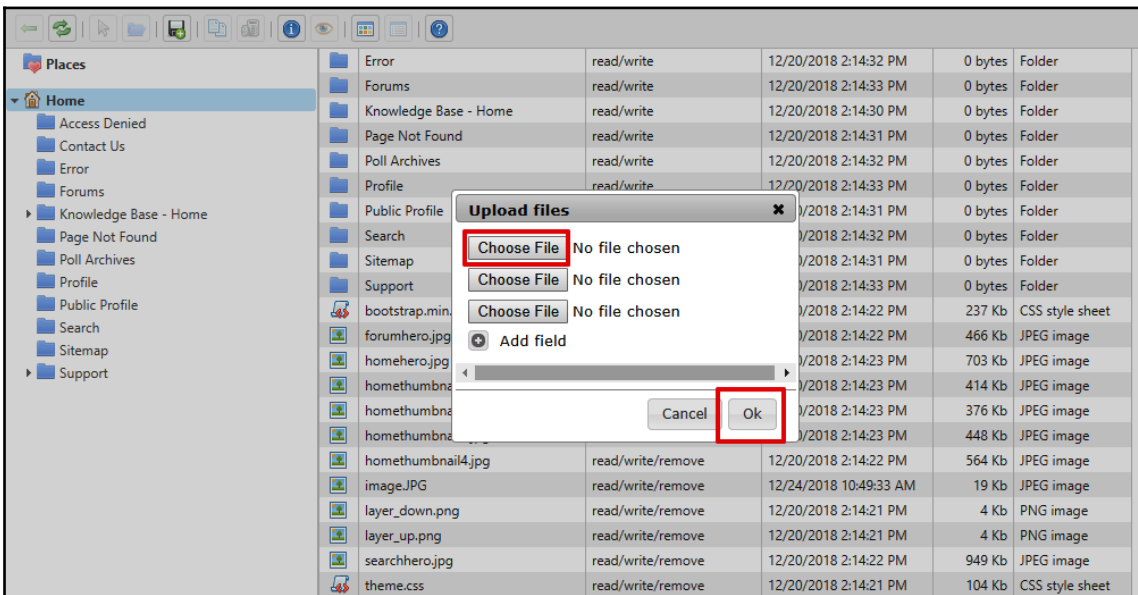
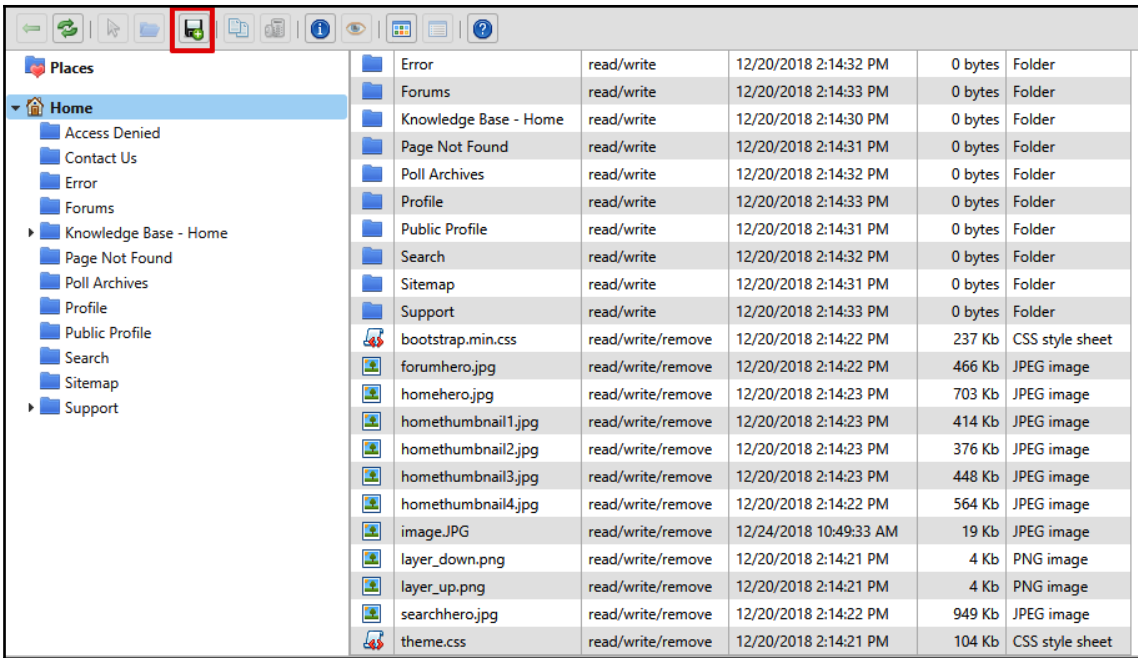
Contoso, Ltd. [Home](#) | [Knowledge Base](#) | [Forums](#) | [My Support](#) | [Search](#) | [Sign In](#)

CONTOSO

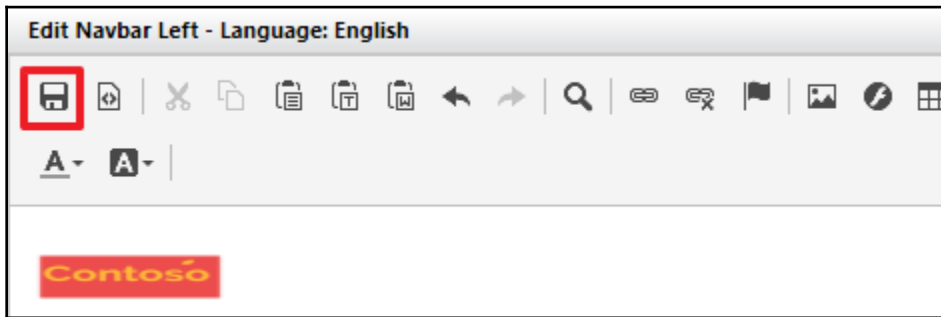
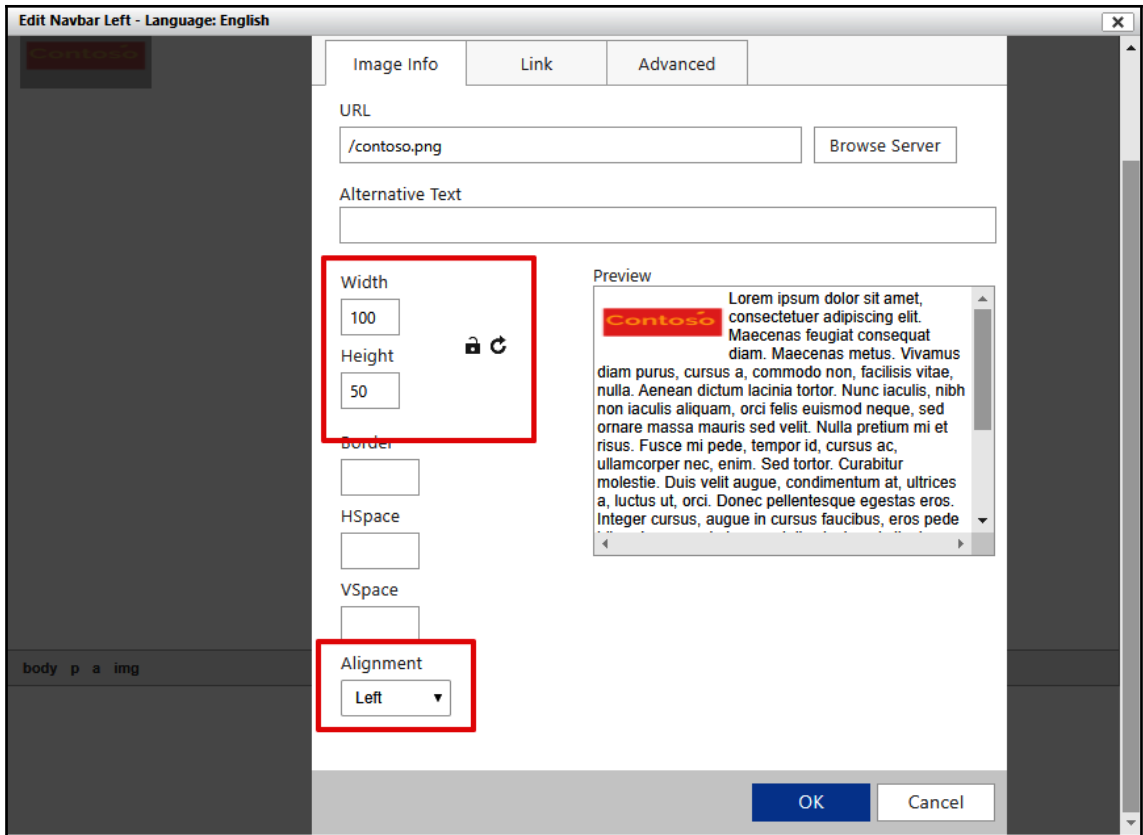
CUSTOMER SELF-SERVICE

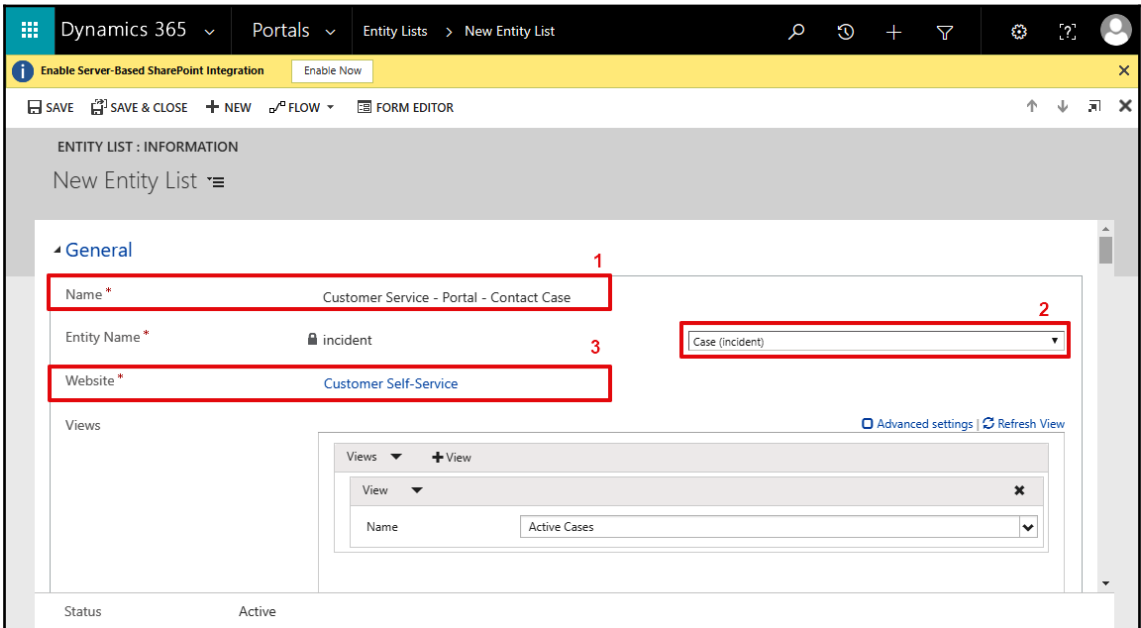
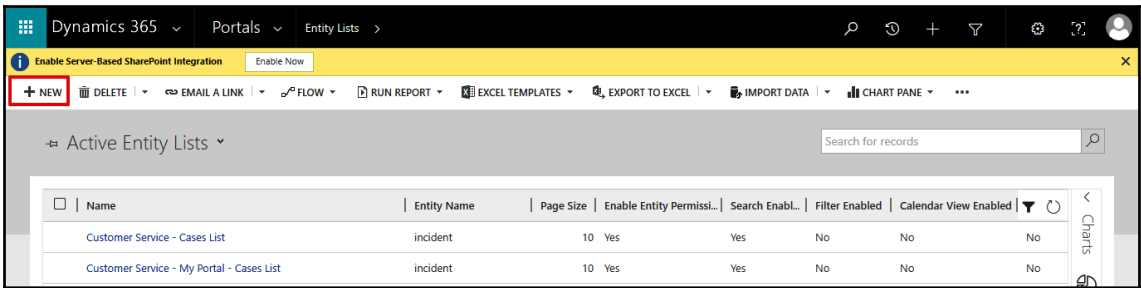
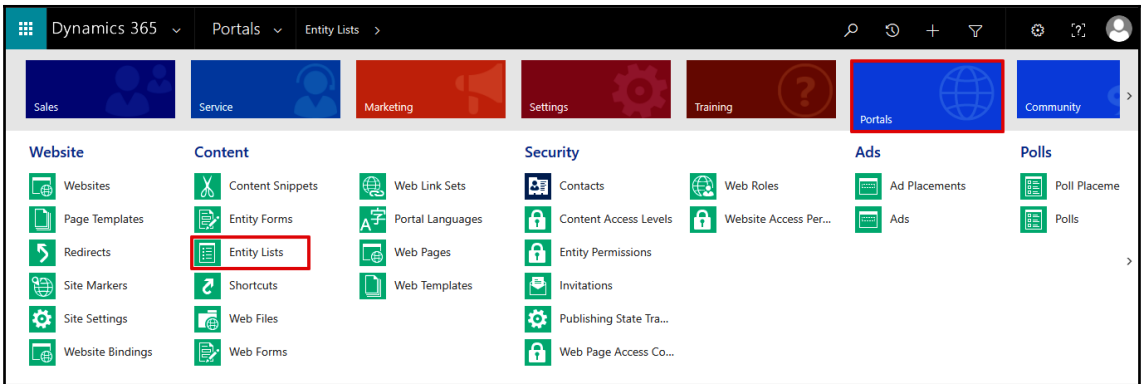


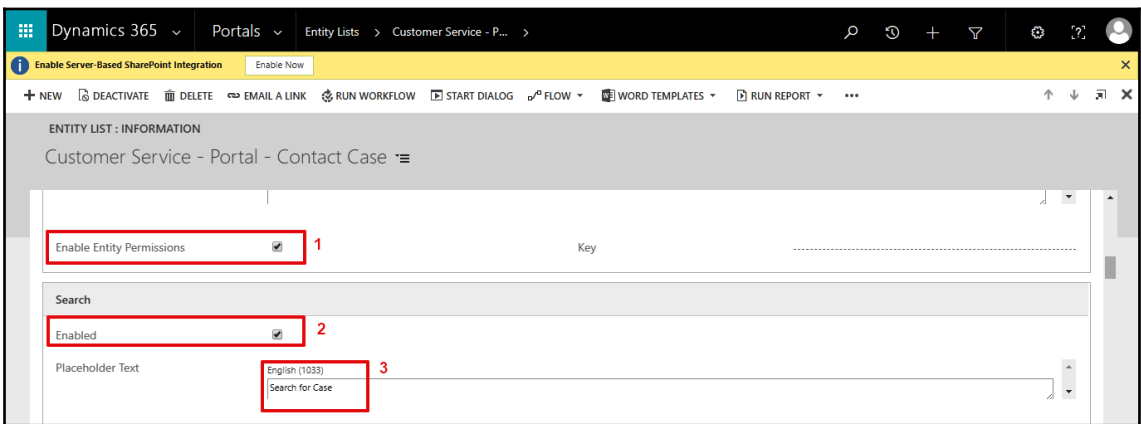
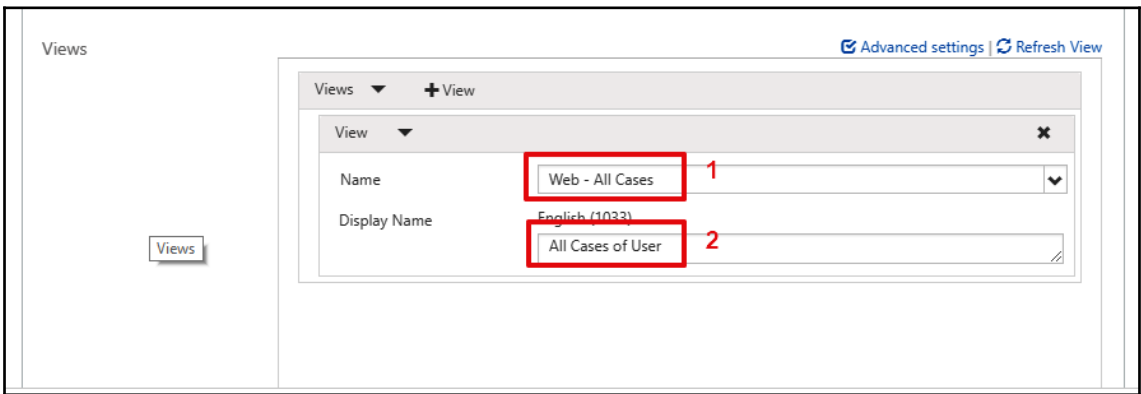
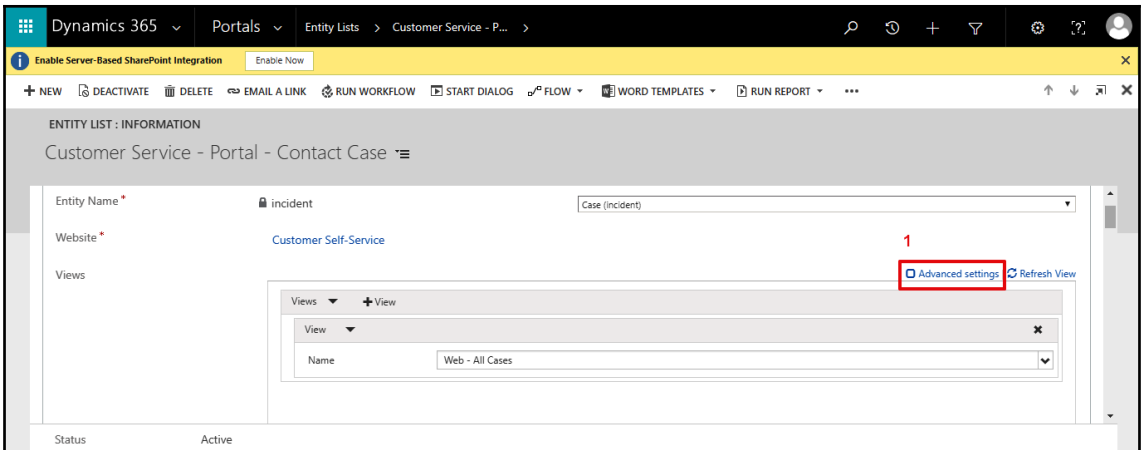




Places	Name	Permissions	Last Modified	Size	Type
Home	Forums	read/write	12/20/2018 2:14:33 PM	0 bytes	Folder
	Knowledge Base - Home	read/write	12/20/2018 2:14:30 PM	0 bytes	Folder
	Page Not Found	read/write	12/20/2018 2:14:31 PM	0 bytes	Folder
	Poll Archives	read/write	12/20/2018 2:14:32 PM	0 bytes	Folder
	Profile	read/write	12/20/2018 2:14:33 PM	0 bytes	Folder
	Public Profile	read/write	12/20/2018 2:14:31 PM	0 bytes	Folder
	Search	read/write	12/20/2018 2:14:32 PM	0 bytes	Folder
	Sitemap	read/write	12/20/2018 2:14:31 PM	0 bytes	Folder
	Support	read/write	12/20/2018 2:14:33 PM	0 bytes	Folder
	bootstrap.min.css	read/write/remove	12/20/2018 2:14:22 PM	237 Kb	CSS style sheet
	contoso.png	read/write/remove	12/24/2018 11:33:14 AM	3 Kb	PNG image
	forumhero.jpg	read/write/remove	12/20/2018 2:14:22 PM	466 Kb	JPEG image
	homehero.jpg	read/write/remove	12/20/2018 2:14:23 PM	703 Kb	JPEG image
	homethumbnail1.jpg	read/write/remove	12/20/2018 2:14:23 PM	414 Kb	JPEG image
	homethumbnail2.jpg	read/write/remove	12/20/2018 2:14:23 PM	376 Kb	JPEG image
	homethumbnail3.jpg	read/write/remove	12/20/2018 2:14:23 PM	448 Kb	JPEG image
	homethumbnail4.jpg	read/write/remove	12/20/2018 2:14:22 PM	564 Kb	JPEG image
	image.JPG	read/write/remove	12/24/2018 10:49:33 AM	19 Kb	JPEG image
	layer_down.png	read/write/remove	12/20/2018 2:14:21 PM	4 Kb	PNG image
	layer_up.png	read/write/remove	12/20/2018 2:14:21 PM	4 Kb	PNG image
	searchhero.jpg	read/write/remove	12/20/2018 2:14:22 PM	949 Kb	JPEG image
	theme.css	read/write/remove	12/20/2018 2:14:21 PM	104 Kb	CSS style sheet







ENTITY LIST : INFORMATION

Customer Service - Portal - Contact Case

Filter Conditions

Portal User Attribute	<input type="text" value="customerid"/>	<input type="text" value="Customer (customerid)"/>
Account Attribute	<input type="text" value="....."/>	<input type="text"/>
Website Attribute	<input type="text" value="....."/>	<input type="text" value="Not Applicable"/>

A new and simplified content editor is available

EDIT Primary Navigation Try new Editor

Home Knowledge Base Forums My Support Search crm admin

Preview On Children Edit

Edit Primary Navigation

- Home
- Knowledge Base
- Forums
- My Support

Save Cancel

Add a new link

Name (required)
Cases of User 1

Page
Customer Service - Support Home 2

External URL
/Cases of User 3

Description

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, link, unlink, search, and text color.

Publishing State (required)
Published

Image URL

Image Height

Image Width

Image Alternate Text

Display image only

Robots follow link

Open in new window

Disable page validation

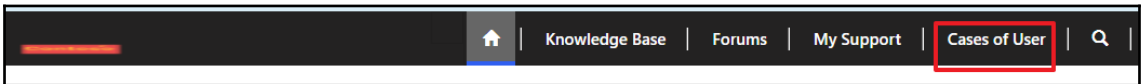
Display page child links

Save Cancel

Edit Primary Navigation

- Home
- Knowledge Base
- Forums
- My Support
- Cases of User

Save Cancel



Home > Page Not Found

Page Not Found

Sorry, but the page you were trying to view does not exist.

It looks like this was the result of either:

- a mistyped address
- an out-of-date link

Preview On

Children

Edit

Delete

New ▾

Edit Page Not Found [X]

General | Language Content | Options | Publishing

Name (required)
Cases of User

Parent Page (required)
Customer Service - Support Home

Partial URL (required)
Cases of User

Page Template (required)
Customer Service - Support Home

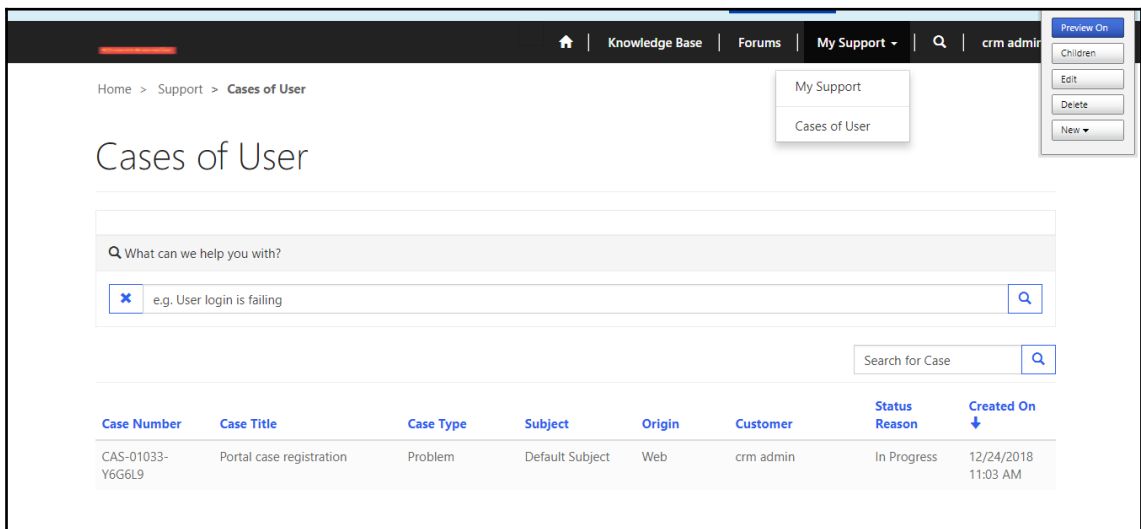
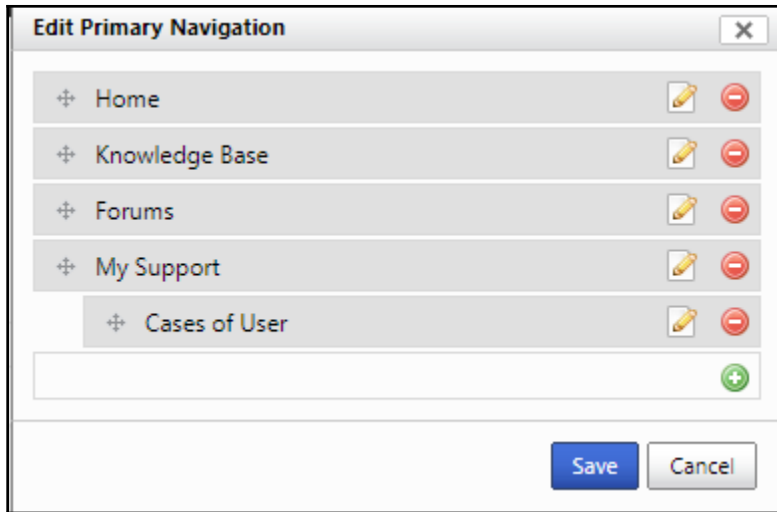
Web Form

Entity Form

Entity List
Customer Service - Portal - Contact Case

Language

Save Cancel



Support

Q What can we help you with?

My Open Cases ▾

Search

Open a New Case

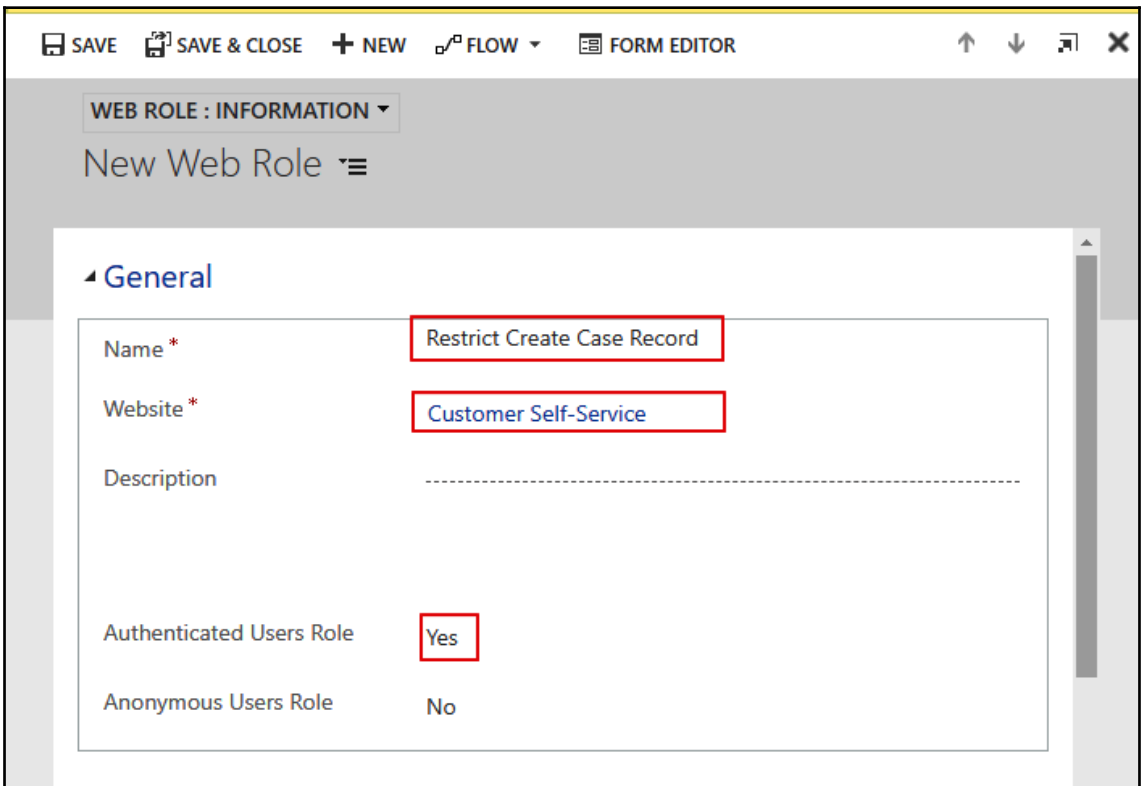
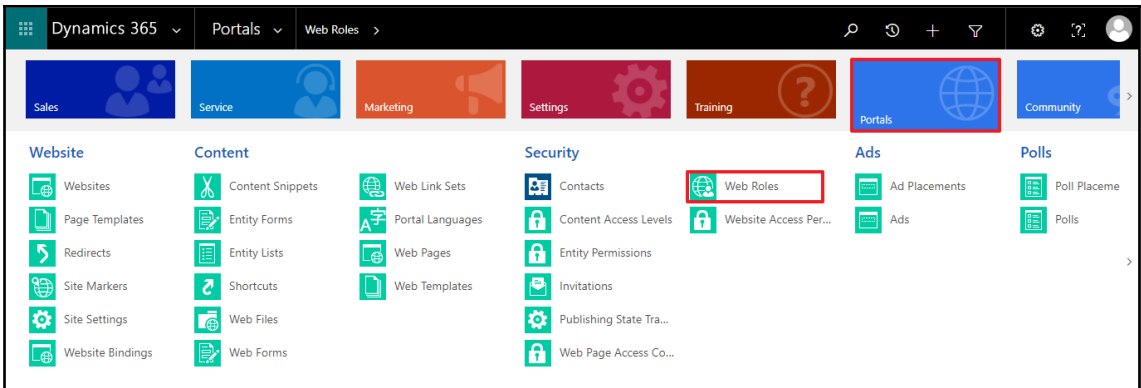
Case Number	Case Title	Case Type	Subject	Origin	Customer	Status Reason	Created On
CAS-01028-V9H9H7	Service requested (sample)	Request	Maintenance	Web	Jim Glynn (sample)	In Progress	12/24/2018 12:00 AM
CAS-01030-T5W8G9	Shipment question (sample)	Question	Query	Phone	Coho Winery (sample)	In Progress	12/23/2018 4:00 PM
CAS-01022-N1R8T6	Product question (sample)	Question	Query	Email	Jim Glynn (sample)	In Progress	12/18/2018 10:00 AM
CAS-01021-J7K2W8	Product information required (sample)	Request	Products	Web	Coho Winery (sample)	In Progress	12/18/2018 8:00 AM

Cases of User

Q What can we help you with?

Search for Case

Case Number	Case Title	Case Type	Subject	Origin	Customer	Status Reason	Created On
CAS-01028-V9H9H7	Service requested (sample)	Request	Maintenance	Web	Jim Glynn (sample)	In Progress	12/24/2018 12:00 AM
CAS-01022-N1R8T6	Product question (sample)	Question	Query	Email	Jim Glynn (sample)	In Progress	12/18/2018 10:00 AM



Dynamics 365 | Portals | Web Roles > Restrict Create Case ...

Common

- Audit History
- Entity Permissions**
- Invitations
- Accounts
- Contacts
- Forum Access Permi...

Process Sessions

- Publishing State Tra...
- Users
- Web Page Access Co...
- Website Access Per...
- Background Processes
- Real-time Processes

Anonymous Users Role	No
----------------------	----

WEB ROLE : INFORMATION

Restrict Create Case Record

Entity Permission Associated View

ADD EXISTING ENTITY PE... | BULK DELETE | CHART PANE | RUN REPORT | EXCEL TEMPLATES | EXPORT ENTITY PERMIS...

Name	Entity Name	Scope	Read	Write	Create	Delete	Append	Append To	Contact Relationship	Account Rela

WEB ROLE : INFORMATION ▾

Restrict Create Case Record ▾

⚙️ -- Customer service - customer is contact incident	Contact
⚙️ Category Global Permission category	Global
⚙️ Customer Service - Account of the Contact account	Contact
⚙️ Customer Service - Activity Pointer on Case where account of the contact is customer activitypointer	Parent
⚙️ Customer Service - Activity Pointer on Case where contact is customer activitypointer	Parent
⚙️ Customer Service - Activity Pointer where account of the contact is customer activitypointer	Account
⚙️ Customer Service - Activity Pointer where contact is customer activitypointer	Contact

10 results + New

NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG FLOW WORD TEMPLATES RUN REPORT ...

ENTITY PERMISSION : INFORMATION

Restrict Create Case Permission ▾

General

Name * Restrict Create Case Permission

Entity Name * incident Case (incident)

Website * Customer Self-Service

Scope * Contact

Contact Scope

Contact Relationship * contact_as_responsible_contact contact_as_responsible_contact

Privileges

Read	<input checked="" type="checkbox"/>	Write	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>	Delete	<input checked="" type="checkbox"/>
Append	<input checked="" type="checkbox"/>	Append To	<input checked="" type="checkbox"/>

CONTACT : PORTAL CONTACT ▾

Maria Campbell (sample) ☰

E-mail: someone_d@example.co | Preferred Method of Contact: Any | Owner: CRM Admin

Web Roles

Name ↑	Website
Restrict Create Case Record	Customer Self-Service

Home > Access Denied

Access Denied

We are sorry, you do not have permission to view the requested content.

Dynamics 365 ▾ | Portals ▾ | Entity Forms > Customer Service - C... >

Sales | Service | Marketing | Settings | Training | **Portals** | Community

Website

- Websites
- Page Templates
- Redirects
- Site Markers
- Site Settings
- Website Bindings

Content

- Content Snippets
- Entity Forms**
- Entity Lists
- Shortcuts
- Web Files
- Web Forms

Web Link Sets

- Web Link Sets
- Portal Languages
- Web Pages
- Web Templates

Security

- Contacts
- Content Access Levels
- Entity Permissions
- Invitations
- Publishing State Tra...
- Web Page Access Co...

Web Roles

- Web Roles
- Website Access Per...

Ads

- Ad Placements
- Ads

Polls

- Poll Placeme
- Polls

Dynamics 365 ▾ | Portals ▾ | Entity Forms >

You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

+ NEW | DELETE | EMAIL A LINK | FLOW | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA | CHART PANE

Active Entity Forms

Name	Entity Name ↑	Mode	Form Name	Tab Name	Entity Source Type	Record ID Query Strin...
Customer Service - Create Case	incident	insert	Web - Create Case	General		Redirect
Customer Service - Edit Case	incident	Edit	Web - Edit Case		Query String	id
Contact Us	lead	insert	Contact Us Personal ...			Display
Product List Details	product	ReadOnly	Product		Query String	id

ENTITY FORM : INFORMATION

Customer Service - Create Case

Entity Form Metadata

Entity Form	Type	Attribute Logical Name	Section Name	Tab Name	Subgrid Name	Control Style	Group Name	CSS C
Customer Service - Create Case	Attribute	caseorigincode						
Customer Service - Create Case	Attribute	customerid						
Customer Service - Create Case	Attribute	title						case-

Dynamics 365 | New Entity Form Me...

SAVE SAVE & CLOSE + NEW FLOW FORM EDITOR

ENTITY FORM METADATA : INFORMATION

New Entity Form Metadata

General

Entity Form * Customer Service - Create Case

Type * Attribute

Attribute Logical Name * productid Product (productid)

Label

English (1033)

Dynamics 365 | Portals | Site Settings > CustomerSupport/C...

Sales Service Marketing Settings Training Portals Community

Website Content Security Ads Polls

- Website Bindings
- Website Settings
- Website Templates
- Website Redirections
- Website Site Markers
- Website Bindings
- Content Snippets
- Entity Forms
- Entity Lists
- Shortcuts
- Web Files
- Web Forms
- Web Link Sets
- Portal Languages
- Web Pages
- Web Templates
- Contacts
- Content Access Levels
- Entity Permissions
- Invitations
- Publishing State Tra...
- Web Page Access Co...
- Web Roles
- Website Access Per...
- Ad Placements
- Ads
- Poll Placeme
- Polls

Dynamics 365 | Portals | Site Settings

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

Active Site Settings

Name	Value	Website
Authentication/Registration/TermsAgreementEn...	false	Customer Self-Service
Authentication/Registration/TermsPublicationDate		Customer Self-Service
CustomerSupport/CaseEntitlementEnabled	true	Customer Self-Service
CustomerSupport/DisplayAllUserActivitiesOnTim...	false	Customer Self-Service
DisableValidationWebTemplate	false	Customer Self-Service
Footer/OutputCache/Enabled	True	Customer Self-Service

Dynamics 365 | Portals | Site Settings | CustomerSupport/C...

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

SITE SETTING : INFORMATION

CustomerSupport/CaseEntitlementEnabled

General

Name * CustomerSupport/CaseEntitlementEnabled

Website * Customer Self-Service

Value true

Description

Open a New Case

Title *

Customer *

Contact

—

Product

Entitlement

Case Type

Subject

Dynamics 365 | Portals | Entity Forms > Customer Service - C... >

Sales | Service | Marketing | Settings | Training | **Portals** | Community

Website

- Websites
- Page Templates
- Redirects
- Site Markers
- Site Settings
- Website Bindings

Content

- Content Snippets
- Entity Forms**
- Entity Lists
- Shortcuts
- Web Files
- Web Forms

Web Link Sets

- Web Link Sets
- Portal Languages
- Web Pages
- Web Templates

Security

- Contacts
- Content Access Levels
- Entity Permissions
- Invitations
- Publishing State Tra...
- Web Page Access Co...

Web Roles

- Web Roles
- Website Access Per...

Ads

- Ad Placements
- Ads

Polls

- Poll Placeme
- Polls

Dynamics 365 Portals Entity Forms

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

Active Entity Forms

Name	Entity Name	Mode	Form Name	Tab Name	Entity Source Type	Record ID Query Strin.	Record ID Query Strin.
Customer Service - Create Case	incident	insert	Web - Create Case	General			Redirect
Customer Service - Edit Case	incident	Edit	Web - Edit Case		Query String	id	Display
Contact Us	lead	insert	Contact Us Personal ...				Display
Product List Details	product	ReadOnly	Product		Query String	id	Redirect

ENTITY FORM : INFORMATION

Customer Service - Create Case

Entity Form Metadata

Entity Form	Type	Attribute Logical Name	Section Name	Tab Name	Subgrid Name	Control Style	Group Name	CSS C
Customer Service - Create Case	Attribute	caseorigincode						
Customer Service - Create Case	Attribute	customerid						
Customer Service - Create Case	Attribute	title						case-

ENTITY FORM : INFORMATION

Customer Service - Create Case

Entity Form Metadata

Entity Form	Type	Attribute Logical Name	Section Name	Tab Name	Subgrid Name	Control Style	Group Name	CSS Class	Field
Customer Service - C...	Attribute	productid							No
Customer Service - C...	Attribute	caseorigincode							No
Customer Service - C...	Attribute	customerid							No
Customer Service - C...	Attribute	title						case-defecti...	No

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG FLOW WORD TEMPLATES RUN REPORT ... ↑ ↓ ↻ ✕

ENTITY FORM METADATA : INFORMATION

New Entity Form Metadata

Add Description No

Validation

Validation Error Message

Regular Expression

Regular Expression Validation Error Message

Field is Required

Required Field Validation Error

Status Active

Open a New Case

Title *

Customer * ✕ 🔍

Product * 🔍

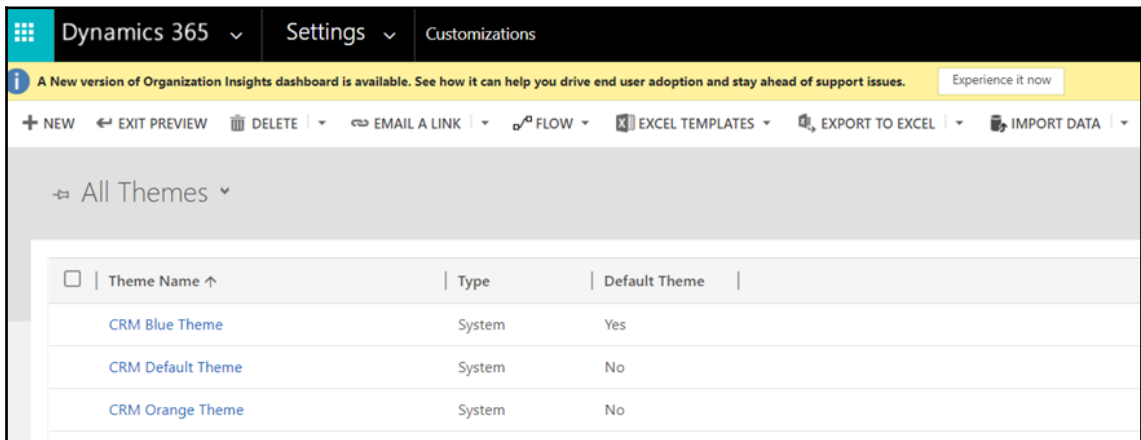
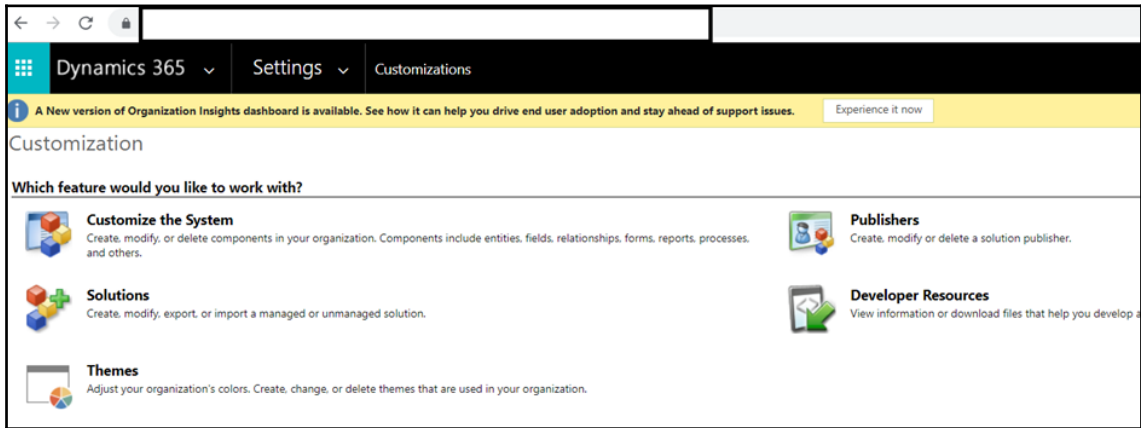
Case Type

Contact —

Entitlement 🔍

Subject

Chapter 14: Configuration Enhancements in Dynamics 365



Dynamics 365 Settings Customizations

A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues. Experience it now

NEW PREVIEW EXIT PREVIEW PUBLISH THEME EDIT DELETE CLONE EMAIL A LINK FLOW

All Themes

<input type="checkbox"/>	Theme Name ↑	Type	Default Theme
	CRM Blue Theme	System	Yes
<input checked="" type="checkbox"/>	CRM Default Theme	System	No
	CRM Orange Theme	System	No

Dynamics 365 Settings Customizations

A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues. Experience it now

NEW DELETE EMAIL A LINK FLOW EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA

All Themes

<input type="checkbox"/>	Theme Name ↑	Type	Default Theme
	Copy of CRM Default Theme	Custom	No
	CRM Blue Theme	System	Yes
	CRM Default Theme	System	No
	CRM Orange Theme	System	No

THEME

Acme Ltd Theme ☰

Theme Name

Theme Name *

Acme Ltd Theme

Navigation Bar

Logo

--

Logo Tooltip

Microsoft Dynamics 365

Navigation Bar Fill Color

#000000



Navigation Bar Shelf Fill Color

#FFFFFF



Title Text Color

#1160B7



Main Color

#3879B7



Accent Color

#E83D0F



Theme Name

Theme Name *

Navigation Bar

Logo

Logo Tooltip

Navigation Bar Fill Color

Navigation Bar Shelf Fill Color

Title Text Color

Main Color

Accent Color

msdyncrm_/libs/ckeditor/plugins/link/... anchor.png

msdyn_/Images/16_Yammer_disable.p... 16_Yammer_disa... 1,033

msdyn_/Images/16_Yammer_enable.png 16_Yammer_ena... 1,033

msdyn_/Images/32_Yammer_disable.p... 32_Yammer_disa... 1,033

msdyn_/Images/32_Yammer_enable.png 32_Yammer_ena... 1,033

msdyn_/Images/actionsArrow.png actionsArrow.png 1,033

msdyn_/Images/actions_bg_hover.png actions_bg_hov... 1,033

10 results + New

THEME

Acme Ltd Theme 

Navigation Bar

Logo	new_logo	
Logo Tooltip	Acme Ltd	
Navigation Bar Fill Color	#1160B7	
Navigation Bar Shelf Fill Color	#FFFFFF	
Title Text Color	#1160B7	
Main Color	#3B79B7	
Accent Color	#E83D0F	











UI Elements

Link and Button Text Color	#E83D0F	
----------------------------	---------	---

+ NEW 🗑️ DELETE **🔍 PREVIEW** 📄 PUBLISH THEME 📄 CLONE 📧 EMAIL A LINK 📄 WORD TEMPLATES ▾

THEME

Acme Ltd Theme ▾

Link and Button Text Color	#E83D0F	
Selected Link Color	#F8FAFC	
Hover Link Color	#E7EFF7	
Legacy Accent Color	#358717	
Default Entity Color	#666666	
Default Custom Entity Color	#00CCA3	
Control Hover Fill Color	#FFFFFF	
Control Hover Border Color	#BDC3C7	
Page Header Fill Color	#00CCA3	
Panel Header Fill Color	#00CCA3	

LOGO
Settings
Customizations Acme Ltd Theme

i A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues.
Experience it now

+ NEW
DELETE
PREVIEW
EXIT PREVIEW
PUBLISH THEME
CLONE
EMAIL A LINK
WORD TEMPLATES

THEME

Acme Ltd Theme ☰

Theme Name

Theme Name* Acme Ltd Theme











Navigation Bar

Logo	new_logo	
Logo Tooltip	Acme Ltd	
Navigation Bar Fill Color	#1160B7	<div style="width: 20px; height: 10px; background-color: #0070C0; border: 1px solid #ccc;"></div>
Navigation Bar Shelf Fill Color	#FFFFFF	<div style="width: 20px; height: 10px; background-color: #FFFFFF; border: 1px solid #ccc;"></div>
Title Text Color	#1160B7	<div style="width: 20px; height: 10px; background-color: #0070C0; border: 1px solid #ccc;"></div>
Main Color	#3B79B7	<div style="width: 20px; height: 10px; background-color: #3B79B7; border: 1px solid #ccc;"></div>

[+ NEW](#)
[🗑️ DELETE](#)
[🔍 PREVIEW](#)
[⬅️ EXIT PREVIEW](#)
[📄 PUBLISH THEME](#)
[📄 CLONE](#)
[📧 EMAIL A LINK](#)
[📄 WORD TEMPLATES ▾](#)

THEME

Acme Ltd Theme ▾

Link and Button Text Color	#E83D0F	
Selected Link Color	#F8FAFC	
Hover Link Color	#E7EFF7	
Legacy Accent Color	#358717	
Default Entity Color	#666666	
Default Custom Entity Color	#00CCA3	
Control Hover Fill Color	#FFFFFF	
Control Hover Border Color	#BDC3C7	
Page Header Fill Color	#00CCA3	
Panel Header Fill Color	#00CCA3	












Custom

[Dynamics 365 ▾](#)
[Settings ▾](#)
[Administration](#)

📌 A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues.
[Experience it now](#)

Administration

Which feature would you like to work with?

 <p>Announcements Create, edit, and delete announcements that appear in the Workplace area.</p>	 <p>Auto-Numbering Specify the prefix numbers for contracts, cases, quotes, orders, articles, invoices, and campaign cases, quotes, orders, and invoices.</p>
 <p>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 365 for Outlook options. Manage report categories.</p>	 <p>Languages Add or remove support for additional languages.</p>
 <p>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.</p>	 <p>System Notifications View important system messages such as scheduled outage notifications.</p>
 <p>Resources In Use View details about your organization's use of storage, custom entities, and workflows and dialogs.</p>	 <p>Yammer Configuration Connect Microsoft Dynamics 365 to your enterprise Yammer network</p>
 <p>Data Performance Review, analyze, and optimize the data access performance of components in your organization.</p>	 <p>Microsoft Social Engagement Configuration Connect Microsoft Dynamics 365 to Microsoft Social Engagement for Social Insights</p>
 <p>Virtual Entity Data Sources Add, edit, or delete connection information for external data sources used by virtual entities in the system.</p>	

System Settings

Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization

Allow text wrapping in form fields labels and values Yes No

Select the default save option for forms
Enable auto save on all forms Yes No

Set Skype for Business Options
Enable presence for the system Yes No

Set the full-name format
Name Format: First Name Last Name

Set the currency precision that is used for pricing throughout the system
Pricing Decimal Precision: 2

Set whether reassigned records are shared with the original owner
Share reassigned records with original owner Yes No

Set blocked file extensions for attachments
ade;adp;app;asa;ash;asm;casp;bas;bat;cdx;cer;chm;class;cmd;com;config;cp1;crt;cs;dll;exe;fpx;hlp;hta;httr;htv;ida;idc;idq;inf;ins;isp;its;jar;js;se;ks;link;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mda;mdb;mde;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msim;sp;mst;opd;pcd;pdf;prf;prg;printer;pst;reg;rem;scf;scr;ctshb;shs;shst;shstml;soap;istm;tm;url;vb;vbe;vbs;vsmacros;vss;vst;vsw;w;wsc;wsf;wsh

Set the currency display option

OK Cancel

General | Formats | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals

Allow text wrapping in form fields labels and values Yes No

Select the default save option for forms
Enable auto save on all forms Yes No

Set the full-name format
Name Format: First Name Last Name

Set the currency precision that is used for pricing throughout the system
Pricing Decimal Precision

Set whether reassigned records are shared with the original owner
Share reassigned records with original owner

Set blocked file extensions for attachments
ade;adp;app;asa;ash;asm;casp;bas;bat;cdx;cer;chm;class;cmd;com;config;cp1;crt;cs;dll;exe;fpx;hlp;hta;httr;htv;ida;idc;idq;inf;ins;isp;its;jar;js;se;ks;link;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mda;mdb;mde;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msim;sp;mst;opd;pcd;pdf;prf;prg;printer;pst;reg;rem;scf;scr;ctshb;shs;shst;shstml;soap;istm;tm;url;vb;vbe;vbs;vsmacros;vss;vst;vsw;w;wsc;wsf;wsh

First Name Last Name

Last Name, First Name

First Name Last Name

Last Name, First Name Middle Initial

First Name Middle Initial Last Name

Last Name, First Name Middle Name

First Name Middle Name Last Name

Set the currency precision that is used for pricing throughout the system

Pricing Decimal Precision

2

0

1

2

3

Set whether reassigned records are shared with the original owner

Share reassigned records with original owner

Set blocked file extensions for attachments

ade;adp;app;asa;ash;casmxcasp;bas;bat;cdx;cer;chm;class;cmd;com;config;cpl;crt;csht;dll;exe;fxp;hlp;hta;htr;htw;idc;idq;inf;ins;isp;its;jar;js;json;ksht;lnk;mad;maf;mam;maq;mar;mas;mat;mba;mbd;mbm;mbp;mbt;mbz;mda;mdb;mdc;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxaml;msi;msp;mst;mp;url;vbe;vbs;vsmacros;vss;vst;vsw;ws;wsc;wsf;wsh

Set blocked file extensions for attachments

ade;adp;app;asa;ash;casmxcasp;bas;bat;cdx;cer;chm;class;cmd;com;config;cpl;crt;csht;dll;exe;fxp;hlp;hta;htr;htw;ida;idc;idq;inf;ins;isp;its;jar;js;json;ksht;lnk;mad;maf;mam;maq;mar;mas;mat;mba;mbd;mbm;mbp;mbt;mbz;mda;mdb;mdc;mdt;mdw;mdz;msc;msh;msh1;msh1xml;msh2;msh2xml;mshxaml;msi;msp;mst;ops;pcd;pdf;prf;prg;printer;pst;reg;rem;scf;scr;scst;shb;shs;shst;shhtml;soap;st;tm;url;vbe;vbs;vsmacros;vss;vst;vsw;ws;wsc;wsf;wsh

Set session timeout

Session timeout settings

Set custom Use default

Enter maximum session length

1,440 minutes (default : 1440 minutes)

How long before the session expires do you want to show a timeout warning?

20 minutes (default : 20 minutes)

System Settings

Set system-level settings for Microsoft Dynamics 365.

? X

General Formats Auditing Email Marketing Customization Outlook Reporting Calendar Goals Sales Service Synchronization

Organizational Standards and Formats

Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

Current Format

English (Australia) Customize...

Format Preview

Number	123,456,789.00
Currency	\$123,456,789.00
Time	8:26 AM
Short Date	16/02/2019
Long Date	Saturday, 16 February 2019

System Settings ? X
 Set system-level settings for Microsoft Dynamics 365.

General | **Formats** | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization

Audit Settings

- Start Auditing
- Audit user access
- Start Read Auditing View these logs in the Office 365 Security & Compliance Center. [Learn more](#)

Enable Auditing in the following areas

- Common Entities
- Sales Entities
- Marketing Entities
- Customer Service Entities

For a complete list of Entities and their Audit states visit [Entity and Field Audit Settings](#).

System Settings ? X
 Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | **Email** | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization

Configure email processing

Select how you want your email processed. If you select server-side synchronization, but are currently using the Microsoft Dynamics 365 Email Router, the Email Router will be blocked for email processing. We recommend that you disable the Email Router before selecting server-side synchronization.

Process Email Using Server-Side Synchronization ▼

Configure default synchronization method

The selected settings will be applied to mailboxes of all newly created users and queues

- Server Profile Server-Side Synchronization
- Incoming Email Microsoft Dynamics 365 Email Router
- Outgoing Email Server-Side Synchronization or Email Router ▼
- Appointments, Contacts, and Tasks Server-Side Synchronization or Email Router ▼

Email processing for unapproved user and queues Microsoft Dynamics 365 for Outlook ▼

System Settings

Set system-level settings for Microsoft Dynamics 365.

General | **Formats** | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization

Organizational Standards and Formats

Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

Current Format

English (United States) Customize...

Format Preview

Number	123,456,789.00
Currency	\$123,456,789.00
Time	8:26 AM
Short Date	2/16/2019
Long Date	Saturday, February 16, 2019

System Settings

Set system-level settings for Microsoft Dynamics 365.


General | **Formats** | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization

Audit Settings

- Start Auditing
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- Start Read Auditing View these logs in the Office 365 Security & Compliance Center. [Learn more](#)

Enable Auditing in the following areas

- Common Entities
- Sales Entities
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 For a complete list of Entities and their Audit states visit [Entity and Field Audit Settings](#).

System Settings ? X

Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization

Allow text wrapping in form fields labels and values Yes No

Select the default save option for forms

Enable auto save on all forms Yes No

Set Skype for Business Options

Enable presence for the system Yes No

Set the full-name format

Name Format First Name Last Name ▼

Set the currency precision that is used for pricing throughout the system

Pricing Decimal Precision 4 ▼

Set whether reassigned records are shared with the original owner

Share reassigned records with original owner Yes No

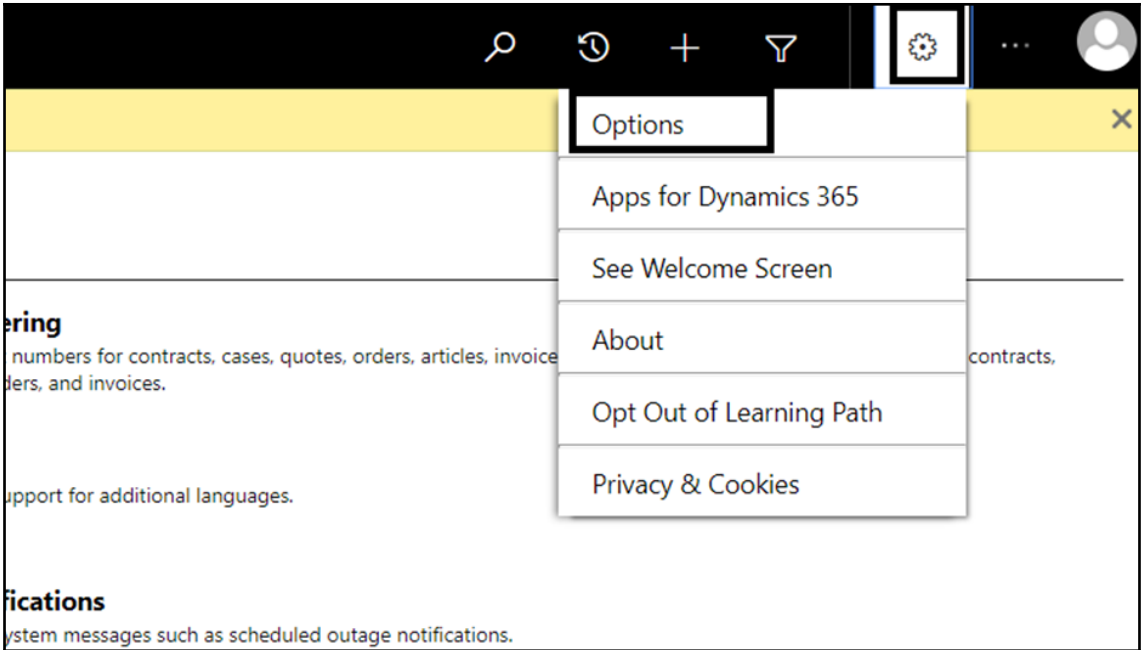
Set blocked file extensions for attachments

;ade;adp;app;asa;ash;asmx;asp;bas;bat;cd;ccer;chm;class;cmd;com;config;cpl;crt;cs;dll;exe;fxp;hlp;hta;httr;htwida;id;cid;qin;fins;isp;its;jar;js;jse;ksh;lnk;mad;maf;mag;mam;maq;mar;mas;mat;mau;mav;maw;mda;mdb;mdc;mdt;mdw;mdz;mssc;msh;msh1;msh1xml;msh2;msh2xml;mshxml;msi;mstp;mstops;pcd;pif;prf;prg;printer;pst;reg;rem;scf;scr;ct;shb;shs;shtm;shhtml;soap;stm;t;mp;url;vb;vbe;vbs;vsmacros;vss;vst;vsw;wsw;wsc;wsf;wsh

Set the currency display option

Display currencies by using Currency symbol ▼

OK
Cancel



Set Personal Options

? X

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane <Default based on user role> Default Tab <Default based on user role>

Set the number of records shown per page in any list of records

Records Per Page 50

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Set the time zone you are in

Time Zone (GMT+10:00) Canberra, Melbourne, Sydney

Select a default currency

Currency

Support high contrast settings

Select this option if you are using the High Contrast settings in your browser or operating system.

Enable high contrast

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and

General	Synchronization	Activities	Formats	Email Templates	Email Signatures	Email
Select your home page and settings for Get Started panes						
Default Pane	<Default based on user role>					Default Tab
Set the number of records	<Default based on user role>					
Records Per Page	Sales					
Select the default mode	Service					
Advanced Find Mode	Marketing					
Set the time zone you are in	Training					
Time Zone	Settings					
	(GMT+10:00) Canberra, Melbourne, Sydney					

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and

General	Synchronization	Activities	Formats	Email Templates	Email Signatures
---------	-----------------	------------	---------	-----------------	------------------

Select your home page and settings for Get Started panes

Default Pane Default

Set the number of records shown per page in any list of records

Records Per Page

Select the default mode

Advanced Find Mode

Set the time zone you are in

Time Zone

Set Personal Options
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General | Synchronization | **Email**

Select your home page

Default Pane

Set the number of records

Records Per Page

Select the default mode

Advanced Find Mode

Set the time zone you are in

Time Zone

- (GMT+08:00) Perth
- (GMT+08:00) Irkutsk
- (GMT+08:00) Ulaanbaatar
- (GMT+08:30) Pyongyang
- (GMT+08:45) Eucla
- (GMT+09:00) Seoul
- (GMT+09:00) Osaka, Sapporo, Tokyo
- (GMT+09:00) Yakutsk
- (GMT+09:00) Chita
- (GMT+09:30) Darwin
- (GMT+09:30) Adelaide
- (GMT+10:00) Canberra, Melbourne, Sydney**
- (GMT+10:00) Canberra, Melbourne, Sydney

Default Tab

Set Personal Options ? x

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General | Synchronization | Activities | Formats | Email Templates | Email Signatures | Email | Privacy | Languages

Default view

Default Calendar:

Set your default work hours

Start Time: End Time:

Set Personal Options ? X

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General | Synchronization | Activities | Formats | Email Templates | **Email Signatures** | Email | Privacy | Languages

Create and modify personal email signatures

New | Delete | More Actions ▾

Title ↑	Viewable By	Language	

File | Save | Save and Close | Delete | Set as Default Help ▾

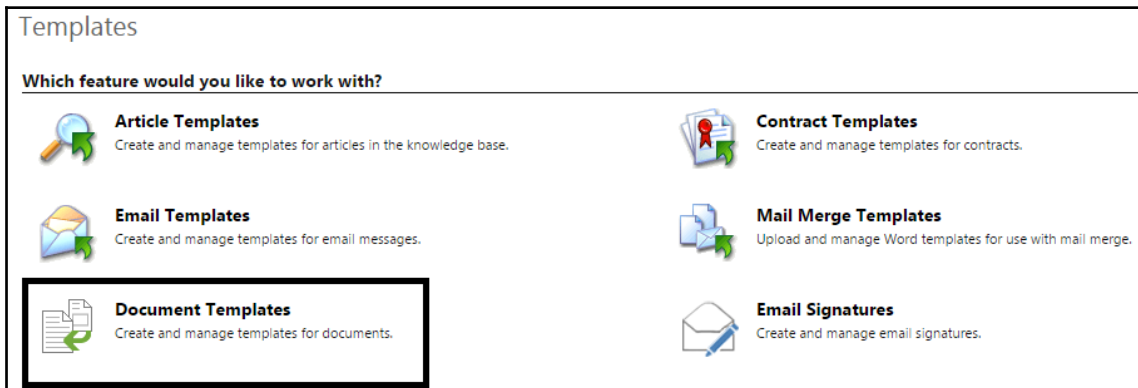
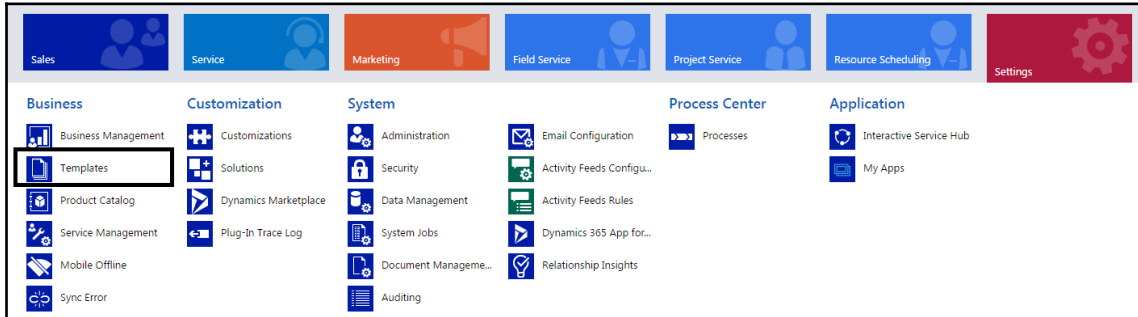
Email Signature: New Email Signature

Details

Owner * Language * English ▾

Title *

Chapter 15: Analytics with Dynamics 365 (Word and Excel Templates)



[+ NEW](#)
[📄 UPLOAD TEMPLATE](#)
[🗑️ DELETE](#)
[⚙️ FLOWS](#)

Available Templates View

<input type="checkbox"/>	Type ↑	Name ↑	Status	Modified On	Modified By	Description
	Microsoft Excel	Campaign Overview	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Excel	Case SLA Status	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Excel	Case Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Excel	Pipeline Management	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Account Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Campaign Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Case Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Invoice	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Invoice Summary	Activated	25-06-2018 01:14	SYSTEM	

[+ NEW](#)
[📄 UPLOAD TEMPLATE](#)
[🗑️ DELETE](#)
[⚙️ FLOWS](#)

Available Templates View

Create template from Dynamics...

Select a template to create:

Excel Template

Word Template

Select data:

Filter by entity:

Upload
Select Entity

<input type="checkbox"/>	Type ↑	Name ↑	Status	Modified On	Modified By	Description
	Microsoft Excel	Campaign Overview	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Excel	Case SLA Status	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Excel	Case Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Excel	Pipeline Management	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Account Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Campaign Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Case Summary	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Invoice	Activated	25-06-2018 01:14	SYSTEM	
	Microsoft Word	Invoice Summary	Activated	25-06-2018 01:14	SYSTEM	

NEW UPLOAD

Select Entity

Account

This feature has requirements and considerations you need to understand to successfully create a template. Before you proceed, see [Using Word templates in Dynamics 365](#).

1:N Relationship

Entity Name	Schema Name
Activity	Account_ActivityPoint
Note	Account_Annotation
Appointment	Account_Appointment
System Job	Account_AsyncOperat
Bookable Res...	account_bookableres
Campaign Re...	account_CampaignRe
Connection	account_connections
Connection	account_connections

N:1 Relationship

Entity Name	Schema Name
Lead	account_originating_lead
Account	account_parent_account
Contact	account_primary_contact
Business Unit	business_unit_accounts
Facility/Equip...	equipment_accounts
User	lk_accountbase_created
User	lk_accountbase_created
User	lk_accountbase_modifie

N:N Relationship

Entity Name	Schema Name
Lead	accountleads_association
Marketing List	listaccount_association
Group	mdl_mdl_group_account

[Download Template](#)

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS

ACCOUNT A. Datum Corporation (sample) Annual Revenue ₹10,000.00

Owner: crm admin

Summary

ACCOUNT INFORMATION

Account Name: A. Datum Corporation (sample)

Phone: 555-0158

Fax:

Website: <http://www.adatum.com/>

Parent Account:

Ticker Symbol:

ADDRESS

POSTS ASSISTANT ACTIVITIES NOTE

Enter post here

All posts Auto posts User posts

Required Service (sample)
Case: Created by crm admin for Account A. Datum Corporation (sample). On Required Service (sample)'s wall Today 17:19

Operating manual required (sample)
Case: Created by crm admin for Account A. Datum Corporation (sample). On Operating manual required (sample)'s wall

No Contacts found for this Account. Select Add (+).

- Share
- Share Secured Fields
- Follow
- Run Workflow
- Start Dialog
- Flows
- Word Templates
 - Create Word Template
 - Create Word Template
 - Word Templates
- Other Activities
- Relationship
 - Account Summary

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS ...

ACCOUNT A. Datum Corporation (sample) Annual Revenue Number of Employees 6,200

Summary

ACCOUNT INFORMATION

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

ADDRESS

Create template from Dynamics...

Select a template to create:

Excel Template Word Template

Select data:

Filter by entity Account

On Required Service (sample)'s wall Today 17:19
 Operating manual required (sample)
 Case: Created by crm admin for Account A. Datum Corporation (sample).
 On Operating manual required (sample)'s wall Today 17:19

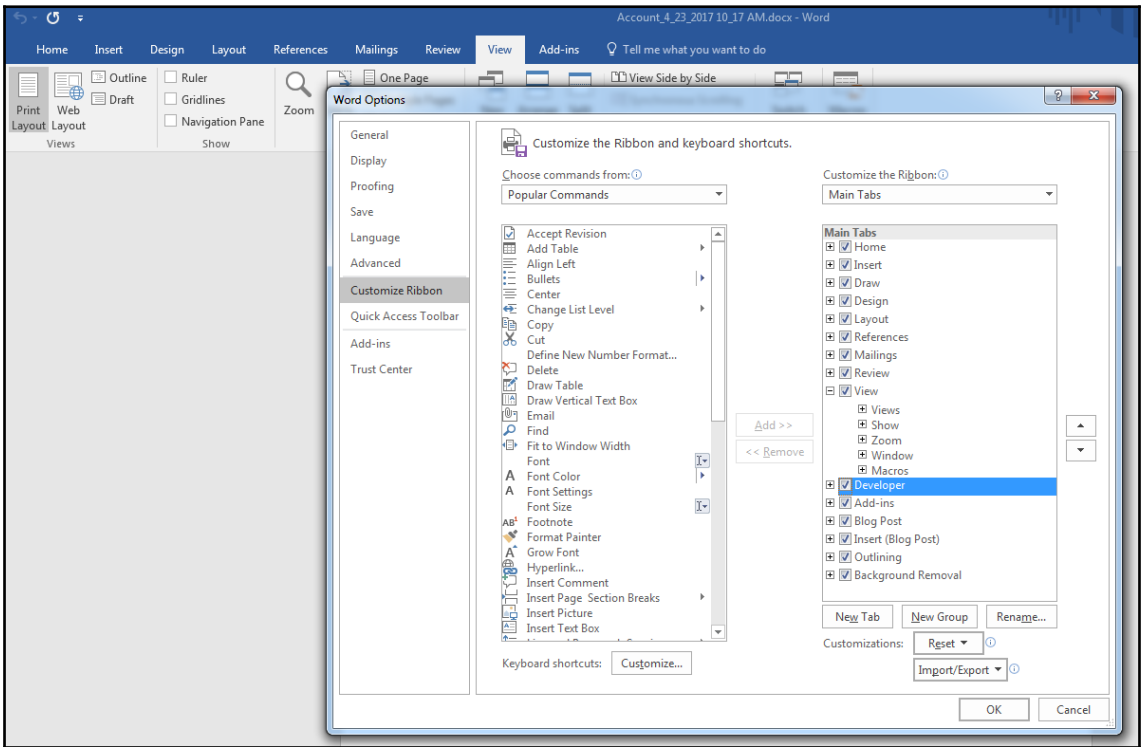
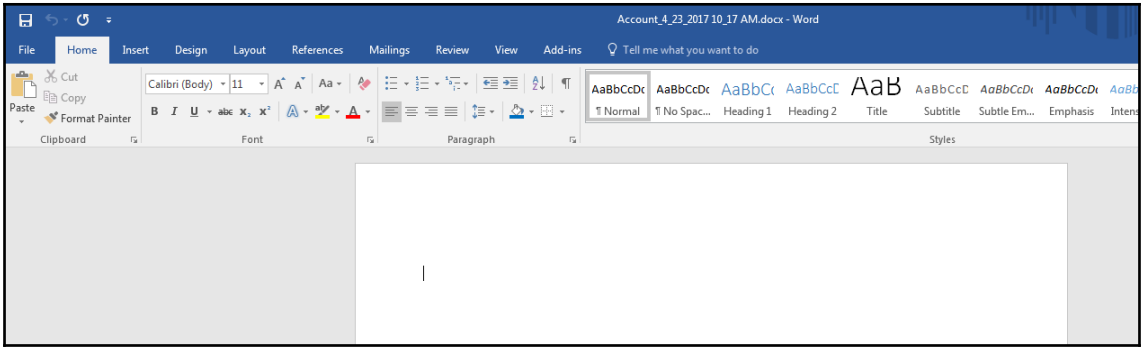
+ NEW EDIT ACTIVATE DEACTIVATE DELETE MERGE SEND DIRECT EMAIL ADD TO MARKETING LIST ASSIGN ...

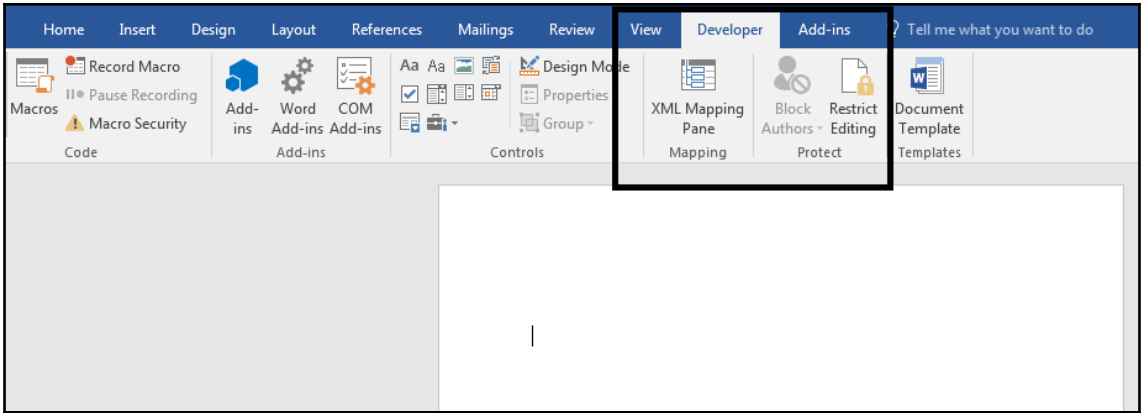
Active Accounts

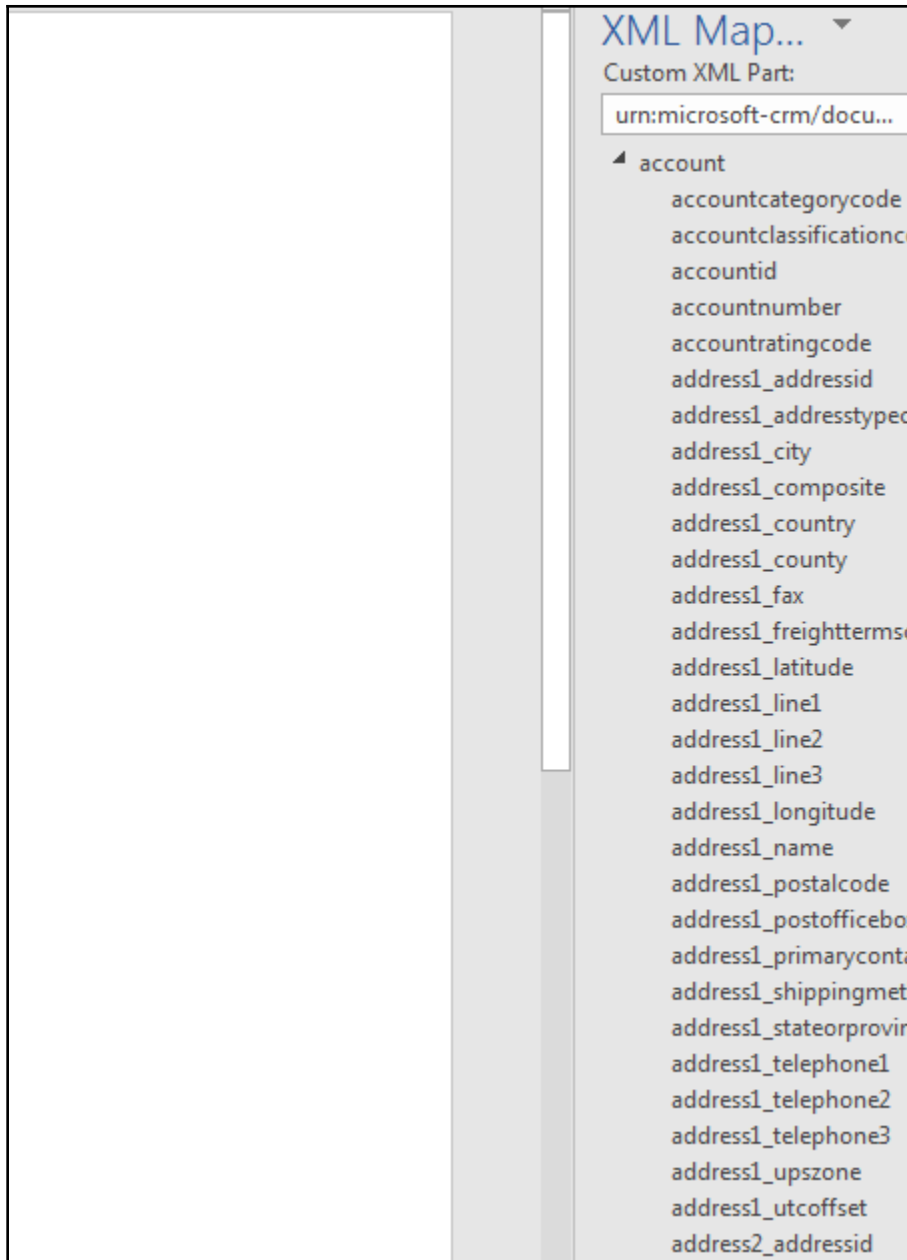
	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contac...)
<input checked="" type="checkbox"/>	A. Datum Corporation (sample)	555-0158	Redmond		
<input type="checkbox"/>	Adventure Works (sample)	555-0152	Santa Cruz		
<input type="checkbox"/>	Alpine Ski House (sample)	555-0157	Missoula		
<input type="checkbox"/>	Blue Yonder Airlines (sample)	555-0154	Los Angeles		
<input type="checkbox"/>	City Power & Light (sample)	555-0155	Redmond		
<input type="checkbox"/>	Coho Winery (sample)	555-0159	Phoenix		
<input type="checkbox"/>	Contoso	8921485485			
<input type="checkbox"/>	Contoso Pharmaceuticals (sample)	555-0156	Redmond		
<input type="checkbox"/>	Fabrikam Inc.	7548659621			

1 - 12 of 12 (1 selected) All # A B C D E F G H I J K L M N O P Q R S T U

- Share
- Email a Link
- Follow
- Unfollow
- Run Workflow
- Start Dialog
- Flows
- Run Report
- Excel Templates
- Word Templates
 - Create Word Template
 - Create Word Template
 - Word Templates
 - Account Summary
- Export to Excel
- Import Data
- Chart Pane
- Quick Campaign
- Relationship
- View
- New System View
- Customize Entity







✖ The picture can't be displayed.

Account number Accountnumber

Account name Name

Do not Contact

Account Category Accountcategorycode

Account Classification Code accountclassificationcode

Created Date createdon

Custom XML Part:

urn:microsoft-crm/docu...

- address2_line3
- address2_longitude
- address2_name
- address2_postalcode
- address2_postofficebo
- address2_primaryconta
- address2_shippingmet
- address2_stateorprovir
- address2_telephone1
- address2_telephone2
- address2_telephone3
- address2_upszone
- address2_utcoffset
- aging30
- aging30_base
- aging60
- aging60_base
- aging90
- aging90_base
- businesstypecode
- createdby
- createdbydsc
- createdbyexternalparty
- createdbyexternalparty
- createdbyexternalparty
- createdbyname

The screenshot shows the Microsoft Word ribbon in Design Mode. The ribbon includes the following groups: Visual Basic, Macros, Record Macro, Pause Recording, Macro Security, Add-ins, Word Add-ins, COM Add-ins, Properties, Group, XML Mapping Pane, Mapping, Block Authors, Restrict Editing, Protect, and Document Template. The main content area contains a form with the following fields:

- The picture can't be displayed.
- Account number Accountnumber
- Account name Name
- Do not Contact
- Account Category Accountcategorycode
- Account Classification Code accountclassificationcode
- Created Date createdon

Account number Accountnumber

Account name Name

Do not Contact

Account Category Accountcategorycode

Account Classification Code accountclassificationcode

Created Date createdon

Enter any content that you want to repeat, including other content controls. You can also insert this control around table rows in order to repeat parts of a table.

XML Map...
Custom XML Part:
urn:microsoft-crm/docu...

- stageid
- statecode
- statuscode
- stockexchange
- telephone1
- telephone2
- telephone3
- territorycode
- territoryid
- territoryiddsc
- territoryidname
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- utconversiontimezon
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- Account_ActivityPoint
- Account_Annotation
- Account_Appointment
- Account_AsyncOperat
- account_bookablereso
- account_connections1
- account_connections2
- account_customer_op

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[🗑️ DELETE](#)
[⌵](#)
[🔄 FLOWS](#)

Available Templates View ▾


<input type="checkbox"/>	Type ↑	Name ↑	Status	Modified On	Modified By
	Microsoft Excel	Campaign Overview	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Excel	Case SLA Status	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Excel	Case Summary	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Excel	Pipeline Management	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Word	Account Summary	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Word	Campaign Summary	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Word	Case Summary	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Word	Invoice	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Word	Invoice Summary	Activated	25-06-2018 01:14	SYSTEM

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Available Templates View ▾

Search for records

Upload Template ✕



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?
Cancel

<input type="checkbox"/>	Type ↑	Name ↑	Status	Modified On	Modified By
	Microsoft Excel	Campaign Overview			
	Microsoft Excel	Case SLA Status			
	Microsoft Excel	Case Summary			
	Microsoft Excel	Pipeline Management			
	Microsoft Word	Account Summary			
	Microsoft Word	Campaign Summary			
	Microsoft Word	Case Summary			
	Microsoft Word	Invoice	Activated	25-06-2018 01:14	SYSTEM
	Microsoft Word	Invoice Summary	Activated	25-06-2018 01:14	SYSTEM

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Available Templates View

Type	Name			
Microsoft Excel	Campaign Overview			
Microsoft Excel	Case SLA Status			
Microsoft Excel	Case Summary			
Microsoft Excel	Pipeline Management			
Microsoft Word	Account Summary			
Microsoft Word	Campaign Summary			
Microsoft Word	Case Summary			
Microsoft Word	Invoice	Activated	25-06-2018 01:14	SYSTEM
Microsoft Word	Invoice Summary	Activated	25-06-2018 01:14	SYSTEM








Upload Template

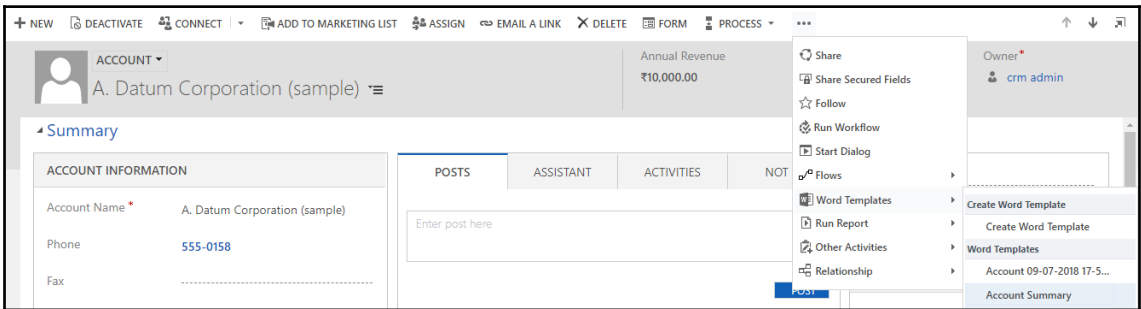
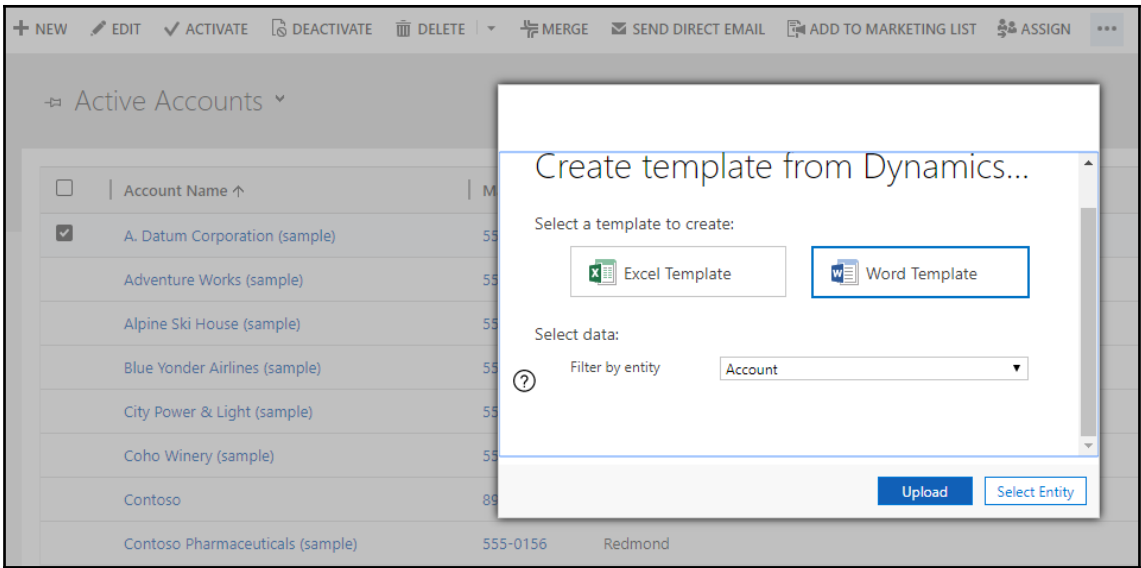
Drag a file here or [browse](#) to upload a file.

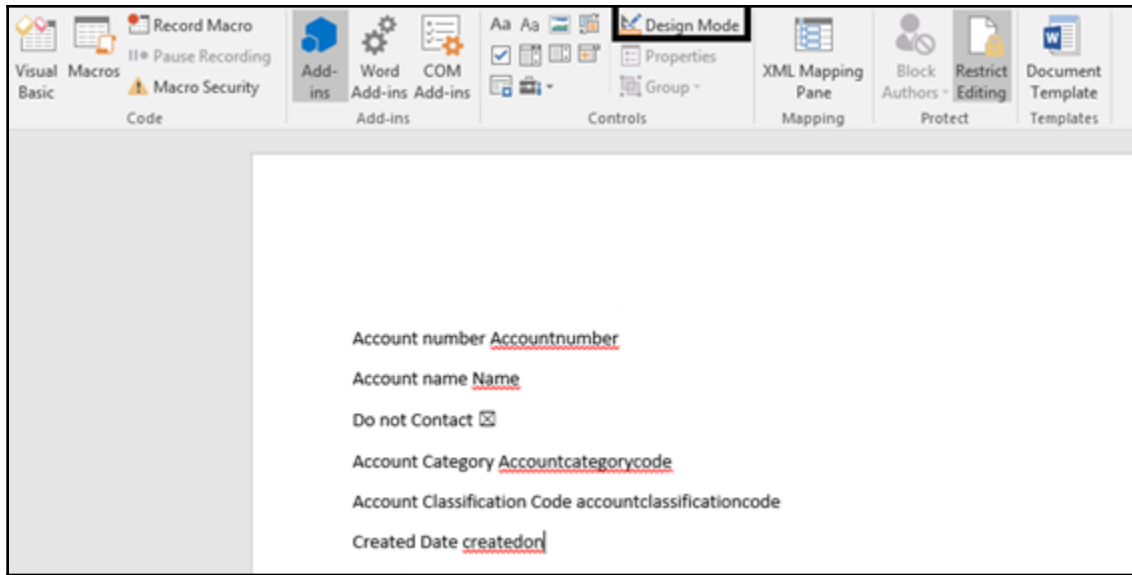
Account 09-07-2018 17-55-24.docx

DOCUMENT TEMPLATE : INFORMATION

Account 09-07-2018 17-55-24 

Status	 Activated
Name *	Account 09-07-2018 17-55-24
Description	--
Type *	 Microsoft Word
Modified On	 09-07-2018 18:42
Modified By	 crm admin
Associated Entity Type Code	 Account
Created By	 crm admin
Created On	 09-07-2018 18:42
Language *	English



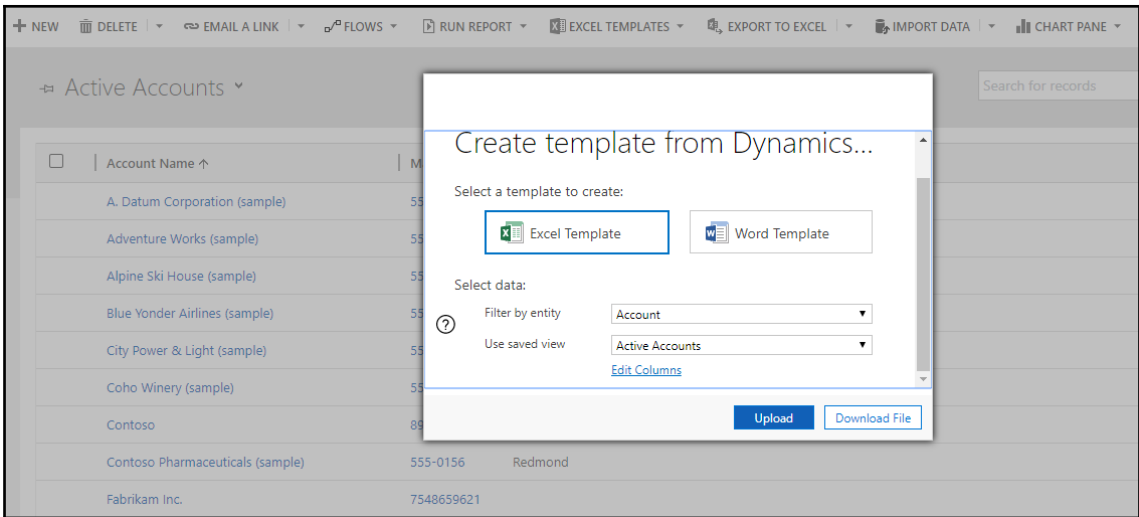


NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Active Accounts Search for records

<input type="checkbox"/>	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contac...]
	A. Datum Corporation (sample)	555-0158	Redmond		
	Adventure Works (sample)	555-0152	Santa Cruz		
	Alpine Ski House (sample)	555-0157	Missoula		
	Blue Yonder Airlines (sample)	555-0154	Los Angeles		
	City Power & Light (sample)	555-0155	Redmond		
	Coho Winery (sample)	555-0159	Phoenix		
	Contoso	8921485485			
	Contoso Pharmaceuticals (sample)	555-0156	Redmond		
	Fabrikam Inc.	7548659621			

Charts



Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact) (Contact)
A. Datum	+86-23-4444-01	Guangzhou	Vincent Lauriant	vlauriant@adatum.com
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
Active Transport Inc.	465-555-0156	Bellevue	Roland Roybal	someone@example.com
Adventure Works	+27-264-123456	Johannesburg	Adrian Dumitrascu	Adrian@adventure-works.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook	Cathan@alpineskihouse.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Alpine Ski Shop	138-555-0118	Seattle	Romeo Gooding	
Bellows College	425-485-7548	Bothell		
Bellows Hospital	425-644-7824	Seattle		
Best For You Organics Company	425-556-9533	Bellevue		
Best o' Sales		Barcelona		
Blue Yonder Airlines	555-0135	Sydney	Brian LaMee	brian@blueyonderairlines.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
Brakes and Gears	237-555-0128	Tooele	Hallie Jacobs	
Catalog Store	984-555-0148	Zeeland	Joni Hernandez	
Central Discount Store	191-555-0112	Kent	Tracie Blevins	
Certified Bicycle Supply	680-555-0118	Lynnwood	Leland Fusco	
Chic Department Stores	425-555-0117	Irving	Hector Clausen	
City Power & Light	+1-785-555-1333	Los Angeles	Walter Harp	walter@cpancl.com
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Closeout Boutique	500-555-0172	Seattle	Amos Conger	

Function Arguments dialog box for the CONCAT function. The dialog shows two text inputs: Text1 and Text2, both set to empty. The formula result is displayed as an empty string.

Account Name	Main Phone	Address 1: C	Primary Contact	Email (Primary Contact) (Contact)	Address City and Phone
A. Datum	+86-23-4444-0100	Guangzhou	Vincent Lauriant	vlauriant@adatum.com	=CONCAT()
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com	
Active Transport Inc.	465-555-0156	Bellevue	Roland Roybal	someone@example.com	
Adventure Works	+27-264-1234567				
Adventure Works (sample)	555-0152				
Alpine Ski House	+43-1-12345-0				
Alpine Ski House (sample)	555-0157				
Alpine Ski Shop	138-555-0118				
Bellows College	425-485-7548				
Bellows Hospital	425-644-7824				
Best For You Organics Company	425-556-9533				
Best o' Sales					
Blue Yonder Airlines	555-0135				
Blue Yonder Airlines (sample)	555-0154				
Brakes and Gears	237-555-0128				
Catalog Store	984-555-0148				
Central Discount Store	191-555-0112				
Certified Bicycle Supply	680-555-0118				
Chic Department Stores	425-555-0117				
City Power & Light	+1-785-555-1333				
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sam	someone_f@example.com	

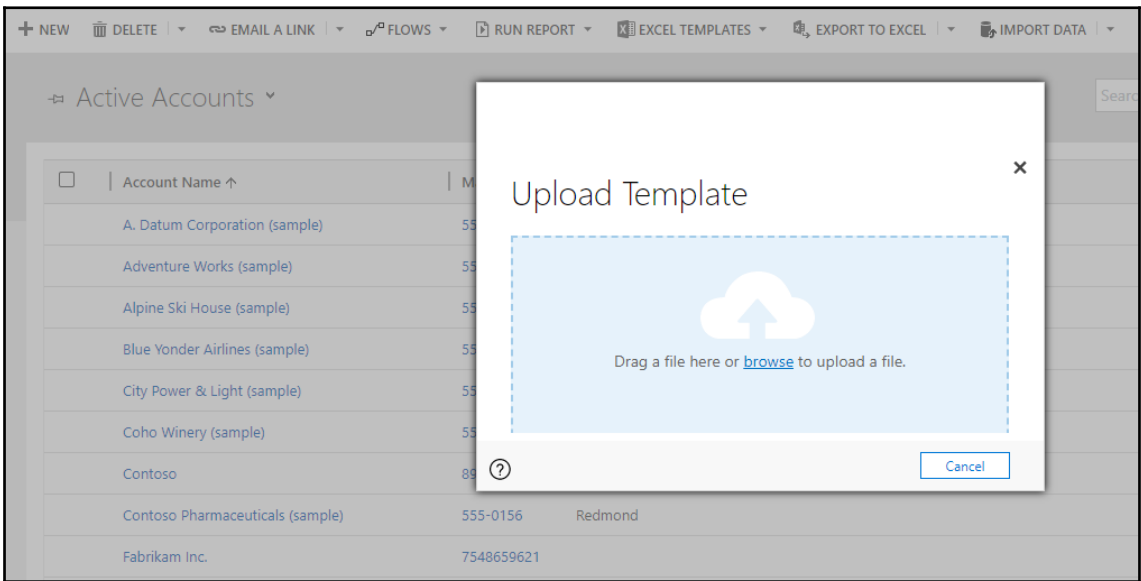
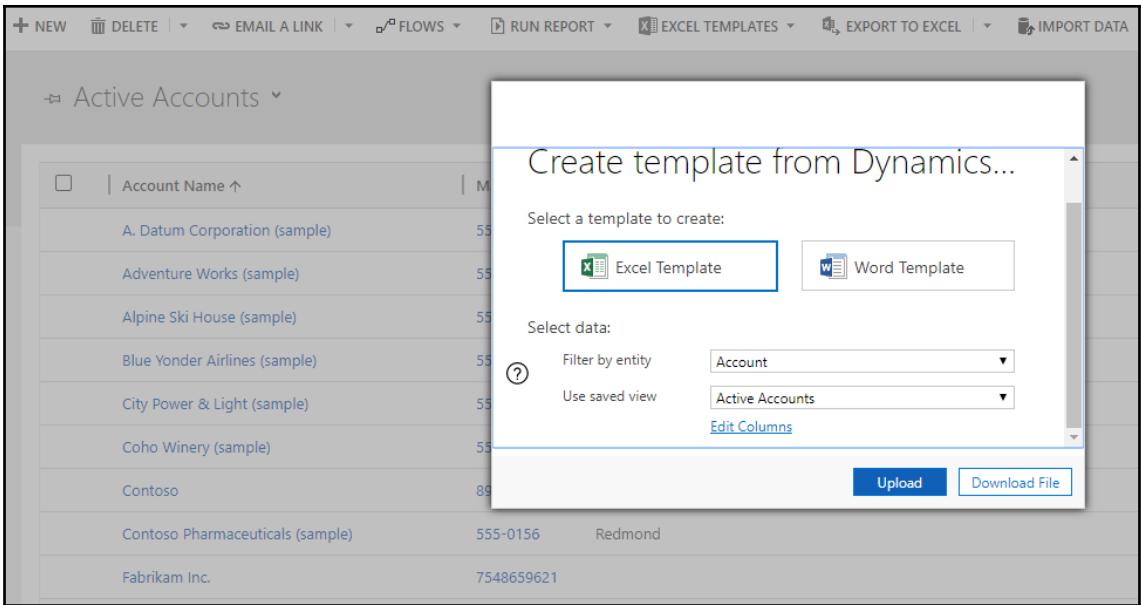
Function Arguments dialog box for the CONCAT function. The dialog shows three text inputs: Text1 (E2), Text2 (F2), and Text3 (empty). The formula result is displayed as "+86-23-4444-0100Guangzhou".

Account Name	Main Phone	Address 1: C	Primary Contact	Email (Primary Contact) (Contact)	=CONCAT(E2,F2)
A. Datum	+86-23-4444-0100	Guangzhou	Vincent Lauriant	vlauriant@adatum.com	+86-23-4444-0100Guangzhou
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com	555-0158Redmond
Active Transport Inc.	465-555-0156	Bellevue	Roland Roybal	someone@example.com	465-555-0156Bellevue
Adventure Works	+27-264-1234567				+27-264-1234567Johannesburg
Adventure Works (sample)	555-0152				555-0152Santa Cruz
Alpine Ski House	+43-1-12345-0				+43-1-12345-0Vienna
Alpine Ski House (sample)	555-0157				555-0157Missoula
Alpine Ski Shop	138-555-0118				138-555-0118Seattle
Bellows College	425-485-7548				425-485-7548Bothell
Bellows Hospital	425-644-7824				425-644-7824Seattle
Best For You Organics Company	425-556-9533				425-556-9533Bellevue
Best o' Sales					Barcelona
Blue Yonder Airlines	555-0135				555-0135Sydney
Blue Yonder Airlines (sample)	555-0154				555-0154Los Angeles
Brakes and Gears	237-555-0128				237-555-0128Tooele
Catalog Store	984-555-0148				984-555-0148Zeeland
Central Discount Store	191-555-0112				191-555-0112Kent
Certified Bicycle Supply	680-555-0118				680-555-0118Lynnwood
Chic Department Stores	425-555-0117				425-555-0117Irving
City Power & Light	+1-785-555-1333				+1-785-555-1333Los Angeles

	D	E	F	G	H	I
1	Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact) (Contact)	Address City and Phone
2	A. Datum	+86-23-4444-0100	Guangzhou	Vincent Lauriant	vlauriant@adatum.com	+86-23-4444-0100Guangzhou
3	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com	555-0158Redmond
4	Active Transport Inc.	465-555-0156	Bellevue	Roland Roybal	someone@example.com	465-555-0156Bellevue
5	Adventure Works	+27-264-1234567	Johannesburg	Adrian Dumitrascu	Adrian@adventure-works.com	+27-264-1234567Johannesburg
6	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com	555-0152Santa Cruz
7	Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook	Cathan@alpineskihouse.com	+43-1-12345-0Vienna
8	Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com	555-0157Missoula
9	Alpine Ski Shop	138-555-0118	Seattle	Romeo Gooding		138-555-0118Seattle








Active Accounts

	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contac...)
	A. Datum Corporation (sample)	555-0158	Redmond		
	Adventure Works (sample)	555-0152	Santa Cruz		
	Alpine Ski House (sample)	555-0157	Missoula		
	Blue Yonder Airlines (sample)	555-0154	Los Angeles		
	City Power & Light (sample)	555-0155	Redmond		
	Coho Winery (sample)	555-0159	Phoenix		
	Contoso	8921485485			
	Contoso Pharmaceuticals (sample)	555-0156	Redmond		
	Fabrikam Inc.	7548659621			



PERSONAL DOCUMENT TEMPLATE : INFORMATION

Active Accounts 09-07-2018 18-53-46 

Status	 Activated
Name *	Active Accounts 09-07-2018 18-53-46
Description	--
Modified On	 09-07-2018 19:00
Created By	 crm admin
Created On	 09-07-2018 19:00
Modified By	 crm admin
Type *	 Microsoft Excel
Associated Entity Type Code	 Account
Language *	English

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My Active Accounts

Search for records

Account Name	Main Phone	Address	City	Primary Contact
A. Datum Corporation (sample)	555-0158	Redmond		
Adventure Works (sample)	555-0152	Santa Cruz		
Alpine Ski House (sample)	555-0157	Missoula		
Blue Yonder Airlines (sample)	555-0154	Los Angeles		
City Power & Light (sample)	555-0155	Redmond		
Coho Winery (sample)	555-0159	Phoenix		
Contoso	8921485485			
Contoso Pharmaceuticals (sample)	555-0156	Redmond		
Fabrikam Inc.	7548659621			

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Undo | Clipboard | Font | Alignment | Number | Tables | Cells | Editing

Account Name	Main Phone	Address 1: Cr	Primary Contact	Email (Primary Contad	I	J	K	L	N
3 Ap									
4 BMW									
5 Chevrolet									
6 Ducati									

My Active Accounts

<input type="checkbox"/>	Type ↑	Name ↑	Status	Modified On	Modified By	Description
<input type="checkbox"/>	Microsoft Excel	Campaign Overview	Activated	25-06-2018 01:14	SYSTEM	
<input type="checkbox"/>	Microsoft Excel	Case SLA Status	Activated	25-06-2018 01:14	SYSTEM	
<input type="checkbox"/>	Microsoft Excel	Case Summary	Activated	25-06-2018 01:14	SYSTEM	
<input type="checkbox"/>	Microsoft Excel	Pipeline Management	Activated	25-06-2018 01:14	SYSTEM	
<input checked="" type="checkbox"/>	Microsoft Word	Account 09-07-2018 17-55-24	Activated	09-07-2018 18:42	crm_admin	
<input type="checkbox"/>	Microsoft Word	Account Summary	Activated	25-06-2018 01:14	SYSTEM	
<input type="checkbox"/>	Microsoft Word	Campaign Summary	Activated	25-06-2018 01:14	SYSTEM	
<input type="checkbox"/>	Microsoft Word	Case Summary	Activated	25-06-2018 01:14	SYSTEM	
<input type="checkbox"/>	Microsoft Word	Invoice	Activated	25-06-2018 01:14	SYSTEM	

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Enable Security Roles: Account 09-07-2018 17-55... ? x

Only users with the selected roles will be able to use this template.

Enable for everyone
 Enable only for the selected security roles

<input checked="" type="checkbox"/>	Name	Business Unit
<input checked="" type="checkbox"/>	Activity Feeds	dynamisitydemo41
<input checked="" type="checkbox"/>	CEO-Business Manager	dynamisitydemo41
<input checked="" type="checkbox"/>	Common Data Service User	dynamisitydemo41
<input checked="" type="checkbox"/>	CSR Manager	dynamisitydemo41

1 - 19 of 19 (19 selected)

OK Cancel