



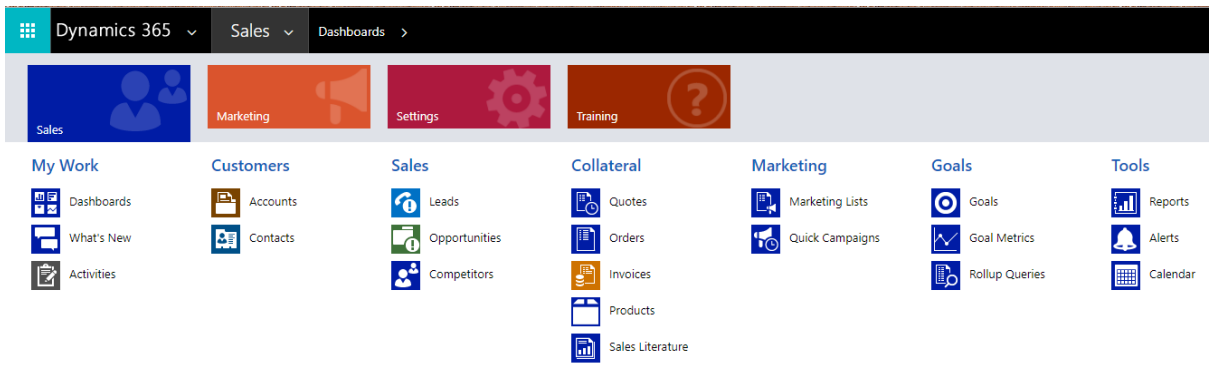
Chapter 1: Customize Application Navigation

Select which scenario fits you best:

Sales <input checked="" type="checkbox"/> Manage leads, close deals, and accomplish more. 	Customer service Resolve cases quickly and deliver amazing customer service. 
<input type="checkbox"/> None of these. Don't customize my organization.	

✓ Your current currency is US Dollar (USD,\$)  Change currency

Complete Setup



File | Save and Close | Export Solution | Translations | Publish All Customizations | Prepare Client Customizations | Actions | Help

Solution: Site Map Solution

Client Extensions

Solution Site Map Solution

- 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 Upda...
 - SLAs
 - Apps

Component Type Client Extension

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

✓	Display Name ↑	Name	Type	State	Customizable	Descrip	↻
✓	Sales App Site Map	SalesSiteMap	Client Extensions	Managed		XML data use	

1 - 1 of 1 (1 selected) Page 1

Status: Existing

Components Properties

Area
Drag a new area

Group
Drag a new group

Subarea
Drag a new subarea

Dynamics 365 Sales Dashboards

Sales Marketing Settings Training

My Work
Dashboards
Activities

Customers
Accounts
Contacts

Marketing
Leads
Marketing Lists
Campaigns
Quick Campaigns

Collateral
Products
Sales Literature

Tools
Reports
Alerts
Calendar

AREA			
General			
	Title	For specifying the display name for the Area in the base language.	
	Icon	For specifying the URL for the image used for the Icon. Size - 85 * 71 Pixel (width * height). An image can be selected from the list of web resources available in the solution.	
	ID	For specifying the unique identifier for the Area. The designer only allows a-z, A-Z, 0-9 and underscore.	
	Show Groups	Checkbox for specifying whether to Show/Hide all the Groups inside the Area including the Subarea within them.	
Advanced	More Titles		
		Locale (LCID)	For Specifying the Locale ID for the title.
		Title	For specifying the text.
	More Descriptions		
		Locale (LCID)	For specifying the Locale ID for the description.
		Description	For specifying the text for the description
URL			For specifying the URL for Dynamics 365 for Outlook Folder.

GROUP			
General			
	Title	For specifying the display name for the Area in the base language.	
	ID	For specifying the unique identifier for the Area. Valid values include a-z, A-Z, 0-9 and underscore.	
Advanced	More Titles		
		Locale (LCID)	For Specifying the Locale ID for the title.
		Title	For specifying the text.
	More Descriptions		
		Locale (LCID)	For specifying the Locale ID for the description.
		Description	For specifying the text for the description
URL			For specifying the URL for Dynamics 365 for Outlook Folder.
Set as Profile			This property is only applicable for Workplace Area. It is a Checkbox for specifying whether this group represents a user-selectable Profile for the Workplace.

SUBAREA		
General		
	Type	For specifying the Subarea type <ul style="list-style-type: none"> • Dashboard • Entity • Web resource • URL
	Entity	For specifying the Entity for the subarea. (Available for Type - Entity)
	URL	For specifying the URL to be shown when the subarea is clicked. For Type - URL, we can specify URL of a web page and for Type - Web Resource, we need to specify URL of a Web Resource. The field is disabled for Type – Entity.
	Default Dashboard	For specifying default Dashboard when Type is selected as Dashboard. Inside the Site Map XML, the designer adds the GUID of the dashboard selected for DefaultDashboard attribute of SubArea tag. We can also set an interactive dashboard as the default dashboard.
	Title	For specifying the display name for the Area in the base language.
	Icon	For specifying the URL for the image used for the Icon. Size - 32 * 32 Pixel. An image can be selected from the list of web resources available in the solution.
	ID	For specifying the unique identifier for the Subarea. Valid values a-z, A-Z, 0-9, and underscore(_).
	Parameter Passing	Checkbox for specifying whether to pass information about the organization and language context to the URL. Available only if Type is either Web resource or URL. The name of the corresponding tag in SiteMap XML is PassParams.

Advanced	Privileges	Defines whether to show or hide the Subarea based on privileges the user has through security roles assigned.	
		Entity	For specifying the name of the entity to check privileges for. We can specify more than one Entity.
		Miscellaneous	For specifying privileges not specific to an Entity. We can specify more than one Miscellaneous privileges. <ul style="list-style-type: none"> • Allow Quick Campaign • Create Entity • Import Customization • Learning Path • Use Internet Marketing
	More Titles		
		Locale (LCID)	For Specifying the Locale ID for the title.
		Title	For specifying the text.
	More Descriptions		
		Locale (LCID)	For specifying the Locale ID for the description.
		Description	For specifying the text for the description
	SKU's	For specifying which version of Dynamics 365 to display this subarea. <ul style="list-style-type: none"> • All • On-Premise • Live • SPLA 	

	Client	For specifying the client for the SubArea. It has the following valid values → All, Outlook, OutlookWorkstationClient, OutlookLaptopClient and Web. We can select more than one values.	
		Outlook Shortcut	For specifying the icon to be displayed in Dynamics 365 for Outlook.
		Offline Availability	For specifying whether the subarea should be available offline in Dynamics 365 for Outlook.

```

<SiteMapUniqueName>SalesSiteMap</SiteMapUniqueName>
<SiteMap IntroducedVersion="8.2.0.0">
  <Area Id="SFA4_324324" ResourceId="Area_Sales" DescriptionResourceId="Sales_Description" Icon="/_imgs/
sales_24x24.gif" ShowGroups="true" IntroducedVersion="7.0.0.0">
    <Group Id="MyWork" ResourceId="Group_MyWork" DescriptionResourceId="My_Work_Description"
IntroducedVersion="7.0.0.0" IsProfile="false" ToolTipResourceId="My_Work_ToolTip">
      <SubArea Id="nav_dashboards" ResourceId="Homepage_Dashboards" DescriptionResourceId="Dashboards_Description"
Icon="/_imgs/area/18_home.gif" Url="/workplace/home_dashboards.aspx"
DefaultDashboard="2701de60-8f2a-48a4-8262-4a35ca7441fa" IntroducedVersion="7.0.0.0"
GetStartedPanePath="Dashboards_Web_User_Visor.html"
GetStartedPanePathAdmin="Dashboards_Web_Admin_Visor.html"
GetStartedPanePathAdminOutlook="Dashboards_Outlook_Admin_Visor.html"
GetStartedPanePathOutlook="Dashboards_Outlook_User_Visor.html"
AvailableOffline="false" PassParams="false" />
      <SubArea Id="nav_personalwall" ResourceId="Whats_New_Label" DescriptionResourceId="Whats_New_Description"
Icon="/WebResources/msdyn/Images/Wall_16.png" Url="$webresource:msdyn/PersonalWall.htm?
data=HideUserProfile=0" IntroducedVersion="7.0.0.0" GetStartedPanePath="Dashboards_Web_User_Visor.html"
GetStartedPanePathAdmin="Dashboards_Web_Admin_Visor.html"
GetStartedPanePathAdminOutlook="Dashboards_Outlook_Admin_Visor.html"
GetStartedPanePathOutlook="Dashboards_Outlook_User_Visor.html" OutlookShortcutIcon="$webresource:msdyn/
Images/Wall_16.png" AvailableOffline="false" PassParams="false" />
      <SubArea Id="nav_activities" DescriptionResourceId="Activities_SubArea_Description" Icon="/_imgs/
imagestrips/transparent_spacer.gif" Url="/_root/homepage.aspx?etc=4200" IntroducedVersion="7.0.0.0"
GetStartedPanePath="Activities_Web_User_Visor.html"
GetStartedPanePathAdmin="Activities_Web_Admin_Visor.html"
GetStartedPanePathAdminOutlook="Activities_Outlook_Admin_Visor.html"
GetStartedPanePathOutlook="Activities_Outlook_User_Visor.html" Entity="activitypointer"
AvailableOffline="false" PassParams="false" />
    </Group>
  </Area>
</SiteMap>

```


Sitemap Designer Published

Sales App Site Map Save Save And Close Publish

+

Add Cut Copy Paste Close Delete

Dynamics 365

Sales Marketing Settings Training

Training Learning Path

Help Center Content Library

Components Properties

AREA

General

Title (1033)

Icon

ID *

Show Groups

Advanced

*Draft

Save Save And Close Publish

Components Properties

AREA

General

Title (1033)

Help

Icon

/_imgs/icn_help16.png

ID *

HLP

Show Groups

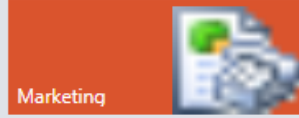
Advanced

Sitemap Designer

Sales App Site Map

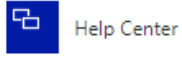
- + Add
- ✂ Cut
- 📄 Copy
- 📄 Paste ▼
- 📄 Clone
- 🗑 Delete

- Area
- Group
- Subarea



Training

Learning Path



Help Center



Content Library

Components

Properties

AREA

General

Title (1033)

New Area

Icon

AppDesigner.UseDefaultImage

ID *

NewArea_9fa56346

Show Groups

Advanced

More Titles

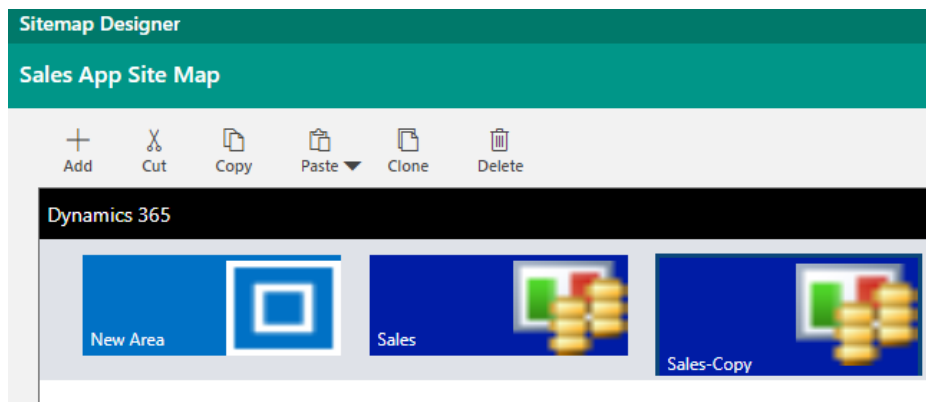
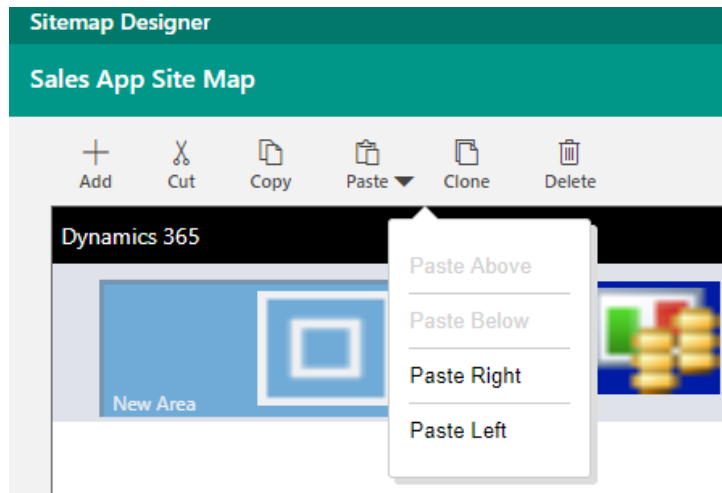
Locale (LCID)

Title

No Records to display

[More Descriptions](#)

URL



Sitemap Designer

Sales App Site Map

Add
 Cut
 Copy
 Paste
 Clone
 Delete

Dynamics 365 Delete the selected component.

New Area
 Sales
 Sales-Copy

Dynamics 365

Sales
 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
 Marketin
 Quick Ca

Dynamics 365

Marketing Settings Training Sales

Customers My Work Sales Collateral Marketing

- Accounts
- Contacts
- What's New
- Activities
- Dashboards
- Leads
- Opportunities
- Competitors
- Quotes
- Orders
- Invoices
- Products
- Sales Literature
- Market
- Quick C

*Draft

Save Save And Close Publish

Properties

Published

Save Save And Close Publish






Sitemap Designer Publish




Sales App Site Map Save Save And Close Publish



1 error messages: 0 warning messages found in the AppDesigner.App Hide Details ^ X





ERROR MESSAGE






There are errors in the Sales-Copy -> Sales -> New Subarea component. See the Properties pane for error detail.



New Area  **Sales**  **Sales-Copy**  **Marketing**  **Marketing** 

My Work  Dashboards  What's New  Activities

Customers  Accounts  Contacts

Sales  Leads  **New Subarea**  Opportunities  Competitors

Collateral  Quotes  Orders  Invoices  Products  Sales Literature

Marketing  Marketing Lists  Quick Campaigns

Components **Properties**

SUB AREA

General

Type

Select a type

Entity

Entity or URL is required.

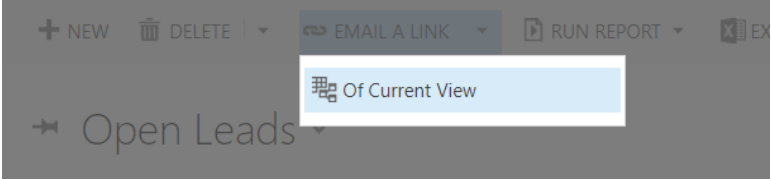
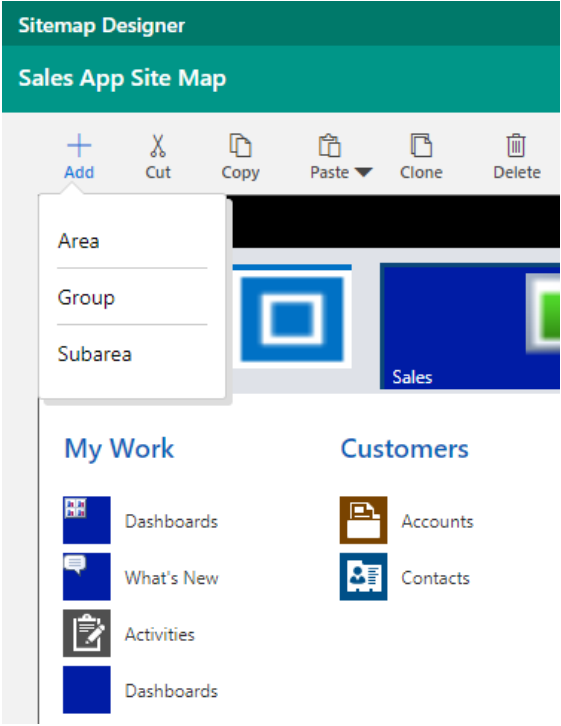
Select an entity

URL

Entity or URL is required.

Default Dashboard

Select a dashboard



Components

Properties

SUB AREA

General

Type

URL

Entity

Select an entity

URL *

/_root/homepage.aspx?etc=4&viewid={00000000-0000-000

Default Dashboard

Select a dashboard

Title (1033)

Open Leads

Icon

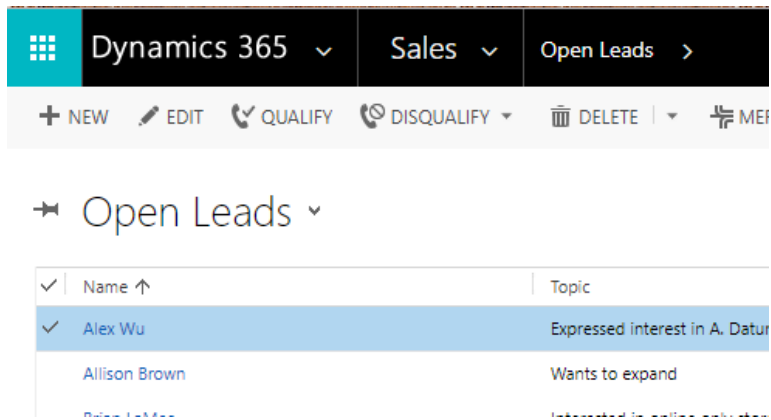
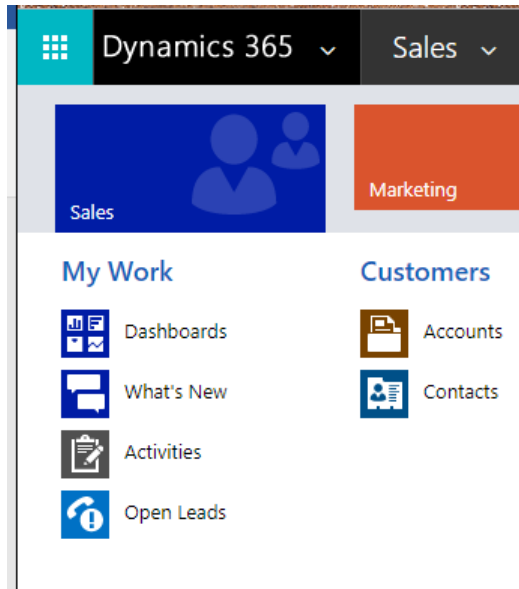
AppDesigner.UseDefaultImage

ID *

NewSubArea_0c73ab54

Parameter Passing

Advanced



Advanced

Privileges

Entity

Select an entity

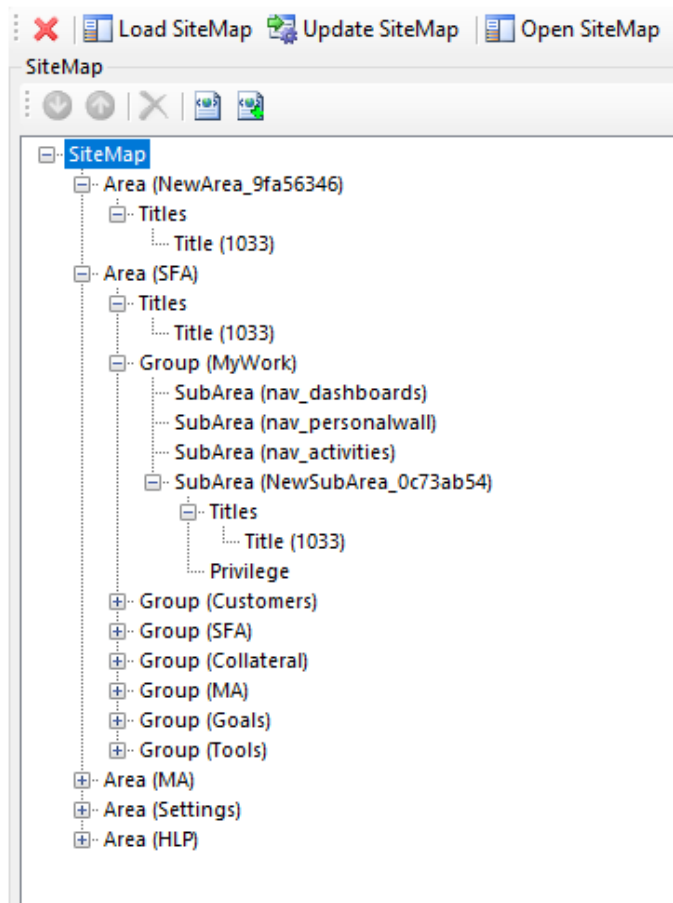
For entity : Lead

- All
- Create
- Write
- Append
- Share
- Read
- Delete
- AppendTo
- Assign



Security Role: Salesperson

	Details	Core Records	Marketing	Sales	Service	Business Mana
Feedback				○	●	○
Follow				○	●	
Import Source File				○	○	○
Interaction for Email					○	
Language				○	●	○
Lead				○	○	●
Mail Merge Template				○	○	○
Mobile Offline Profile				○	●	○

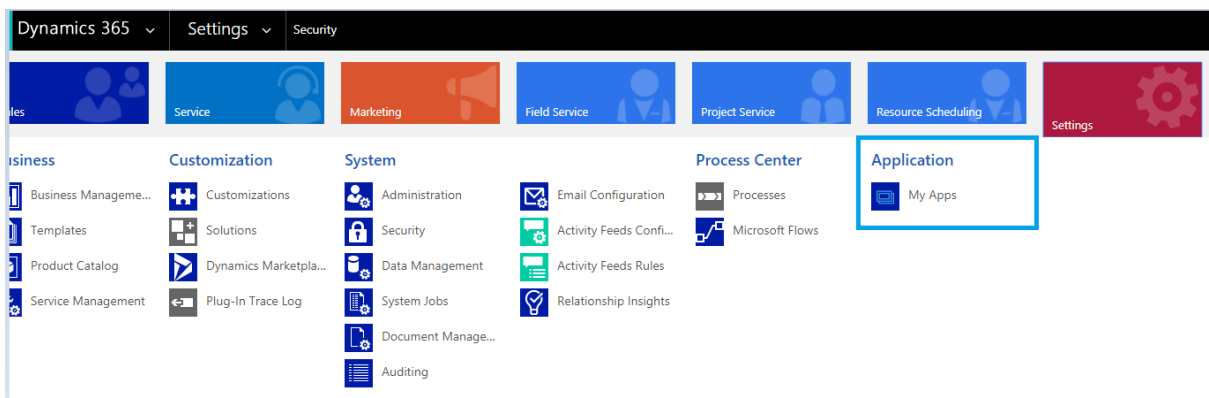
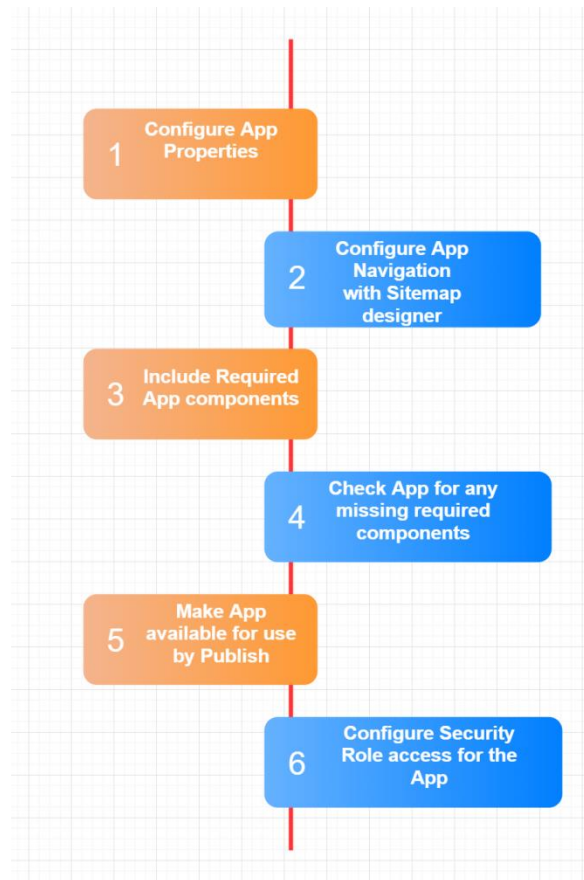


Chapter 2: Design Apps Using App Module Designer

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Bus
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
App	●	●	●	○	○	○			

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Bus
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
App	●	●	●	○	○	○			
App Config Master	○	○	○	○	○	○			
Attribute Map	○	●	○	○	○	○			
Custom Control	○		○	○	○				
Custom Control Default Config	○		○	○	○				
Custom Control Resource	○		○	○	○				
Customizations	○	●	●	○					

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Plug-in Assembly	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Plug-in Trace Log	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>				
Plug-in Type	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Process	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process Configuration	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Process Session	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Publisher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Relationship	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Image	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Sdk Message Processing Step Secure Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Service Endpoint	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Solution	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		



Dynamics 365 Settings My Apps

NEW ACTIVITY NEW RECORD IMPORT DATA

Search my apps... Create new App Refresh Filter


Published Apps (9)

- Dynamics 365 — custom**
Provides access to the full suite of capabilities, including administration
Microsoft Dynamics 365
25-12-2017
WEB
- Customer Service**
Empower agents to manage cases and allow service managers to set
Dynamics 365
WEB
- Customer Service Hub**
A focused, interactive experience for managing your customer service.
Default Publisher for d365book
12/16/2017
UNIFIED INTERFACE
- Field Resource Hub**
Field Service for Dynamics 365 brings the power of field service
Microsoft Dynamics
UNIFIED INTERFACE
- Field Service**
Manage all aspects of the end-to-end field service management cycle.
Microsoft Dynamics
WEB
- Project Resource Hub**
Project Resource Hub Module
Microsoft Dynamics
UNIFIED INTERFACE
- Project Service Automati...**
Engage customers and deliver billable projects on time and within
Microsoft Dynamics
WEB
- Sales**
Automate sales processes and monitor performance with this
Dynamics 365
WEB
- Sales Hub**
Modernize the sales experience with this mobile relationship
Microsoft Dynamics
UNIFIED INTERFACE

+ Create new App Refresh Filter

Apps Being Edited (0)


Create new App



[App Designer](#)

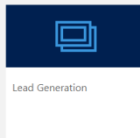

Create a New App

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

Name :*	<input type="text" value=""/>	 <p>App Tile:</p>
Unique Name :*	<input type="text" value="new_"/>	
Description:	<input type="text" value=""/>	
Icon:	<input checked="" type="checkbox"/> Use Default Image	
Client:	<input checked="" type="radio"/> Web <input type="radio"/> Unified Interface	
App URL Suffix:	<input type="text" value=""/>	
	<input type="checkbox"/> Use existing solution to create the App	
	<input type="checkbox"/> Choose a welcome page for the app	



Create a New App

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

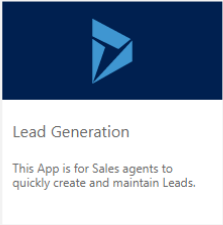
Name :*	<input type="text" value="Lead Generation"/>	 <p>App Tile:</p>
Unique Name :*	<input type="text" value="new_LeadGeneration"/>	
Description:	<input type="text" value=""/>	
Icon:	<input checked="" type="checkbox"/> Use Default Image	
Client:	<input checked="" type="radio"/> Web <input type="radio"/> Unified Interface	
App URL Suffix:	<input type="text" value="LeadGeneration"/>	
Web URL:	<input type="text" value="https://d365book.crm8.dynamics.com/Apps/LeadGeneration"/> 	
	<input type="checkbox"/> Use existing solution to create the App	
	<input type="checkbox"/> Choose a welcome page for the app	



Create a New App


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


Name :*	<input type="text" value="Lead Generation"/>	App Title:  Lead Generation This App is for Sales agents to quickly create and maintain Leads.
Unique Name :*	<input type="text" value="new_LeadGeneration"/>	
Description:	<input type="text" value="This App is for Sales agents to quickly create and maintain Leads"/>	
Icon:	<input checked="" type="checkbox"/> Use Default Image	
Client:	<input checked="" type="radio"/> Web <input type="radio"/> Unified Interface	
App URL Suffix:	<input type="text" value="LeadGeneration"/>	
Web URL:	https://d365book.crm8.dynamics.com/Apps/LeadGeneration 	
	<input type="checkbox"/> Use existing solution to create the App	
	<input type="checkbox"/> Choose a welcome page for the app	

Icon:	<input type="checkbox"/> Use Default Image	This quick
Client:	<input type="text" value="AppModule_Default_Icon.png"/>	
App URL Suffix:	<ul style="list-style-type: none">add.pngallocation.pngaltrowaltrow.pngAppModule_Default_Icon.pngApprovals_32Approvals_Web_32ar_left	
Web URL:		



Name :*	<input type="text" value="Lead Generation"/>	App Tile:  Lead Generation This App is for Sales agents to quickly create and maintain Leads.
Unique Name :*	<input type="text" value="new_LeadGeneration"/>	
Description:	<input type="text" value="This App is for Sales agents to quickly create and maintain Leads."/>	
Icon:	<input type="checkbox"/> Use Default Image <input type="text" value="Legacy_Crm_Icon.png"/>	



Site Map  Site Map 


Dashboards  Dashboards | All

Business Process Flows  Business Proces...

▼ Entity View (1)

  Forms | All

 Views | 2 | 

 Charts

Components

Properties

▼ ARTIFACTS



Entities

Model and manage b...



Dashboards

Provide an insightful ...



Business Process Flow

Define a sequence of...



▼ ENTITY ASSETS



Forms

Define how users will...



Views

Create a list view of r...



Charts

Show data in a meani...



App Designer Last Saved on: 25-12-2017 18:40 *Draft

Lead Generation Save Save And Close Validate Publish

+

Add Edit Remove Search Canvas

▲ Configuration Missing

Site Map Site Map

Dashboards Dashboards All Business Process Flows Business Proces... All

Entity View (0)

Components Properties

▼ ARTIFACTS

- EntitiesModel and manage busin... >
- DashboardsProvide an insightful and ... >
- Business Process FlowDefine a sequence of step... >

▼ ENTITY ASSETS

- FormsDefine how users will see ... >
- ViewsCreate a list view of record... >
- ChartsShow data in a meaningful... >

Lead Generation

Save Save And Close Publish

- Add
- Cut
- Copy
- Paste
- Clone
- Delete

Dynamics 365



Lead Tracking

New Group



Leads

Components

Properties

Area
Drag a new area

Group
Drag a new group

Subarea
Drag a new subarea

App Designer Last Saved on :25-12-2017 13:10 *Draft

Lead Generation * Save Save And Close Validate Publish

+ Add Edit Remove Search Canvas

Site Map Site Map

Dashboards Dashboards All Business Process P

▼ Entity View (1)

Lead

 Forms All Views All

Compone... Properties

▼ ARTIFACTS

- Entities Model ...
- Dashb... Provide...
- Busine... Define ...

▼ ENTITY ASSETS

- Forms Define ...
- Views Create ...

App Designer Last Saved on :25-12-2017 13:10 *Draft

Lead Generation * Save Save And Close Validate Publish

+ Add ✎ Edit 🗑 Remove 🔍 Search Canvas

Site Map Site Map ↗

Dashboards Dashboards | All Business Process Flows Business Proces...

▼ Entity View (1)

Lead Forms | All Views | 2 | ▼ Charts

Components Properties

[← Back](#)

Select Views [Create New](#)


Lead ▼

▼ Public Views


- All Leads**
Shows all leads.
- All leads in current fiscal year
Display all the leads created in t...
- Campaign Leads
Displays Leads for the Campai...
- Closed Leads**
- Leads Being Followed
Leads being followed.
- Leads I Follow
Leads that you follow.
- Leads Opened Last Week

Dashboards Dashboards | All Business Process Flows Business Proces... | All

Select Business Pro... [Create New](#)

Search 

- Expired Process
This is the default proces...
- Invoice Process
- Lead to Opportunity Sal...**
This is the default proces...
- New Process
This is the default proces...
- Opportunity Sales Proc...
This is the default proces...
- Phone to Case Process
This is the default proces...
- Project Stages
- Purchase Order Busines...
- Translation Process
This is the default proces...
- Work Order Business Pr...

Business P... | 1 | 

Site Map Site Map

Dashboards Dashboards | All Business Process Flows Business P... | 1

▼ Entity View (3)

Lead	Forms | All	Views | 2 | ▾	Charts
Lead To O...	Forms | All	Views | All	Charts
Opportun...	Forms | All	Views | All	Charts

Last saved on 12/25/12 10:11

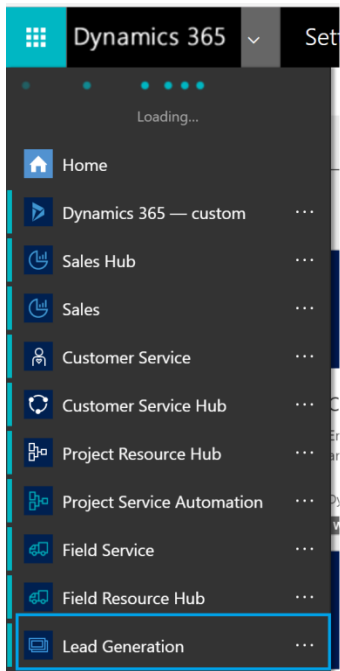
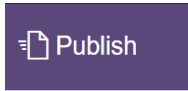
Save
Save And Close
Validate

⚠ 2 warning(s) found. Hide Details ^ ×

WARNING MESSAGE

Lead To Opportunity Sales Process doesn't reference a form or view. App users will see all forms and views.

Opportunity doesn't reference a form or view. App users will see all forms and views.













Dynamics 365 Settings My Apps

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

NEW ACTIVITY NEW RECORD IMPORT DATA

Search my apps... Create new App Refresh

Published Apps (10)

 <p>Dynamics 365 — custom</p> <p>Provides access to the full suite of capabilities, including administration</p> <p>Microsoft Dynamics 365 25-12-2017</p> <p>WEB</p>	 <p>Customer Service</p> <p>Empower agents to manage cases and allow service managers to set</p> <p>Dynamics 365</p> <p>WEB</p>	 <p>Customer Service Hub</p> <p>A focused, interactive experience for managing your customer service.</p> <p>Default Publisher for d365book 12/16/2017</p> <p>UNIFIED INTERFACE</p>	 <p>Field Resource Hub</p> <p>Field Service for Dynamics 365 brings the power of field service</p> <p>Microsoft Dynamics</p> <p>UNIFIED INTERFACE</p>	 <p>Field Service</p> <p>Manage all aspects of the end-to-end field service management cycle.</p> <p>Microsoft Dynamics</p> <p>WEB</p>
 <p>Lead Generation</p> <p>This App is for Sales agents to quickly create and maintain Leads.</p> <p>Default Publisher for d365book 25-12-2017</p> <p>WEB</p>	 <p>Project Resource Hub</p> <p>Project Resource Hub Module</p> <p>Microsoft Dynamics</p> <p>UNIFIED INTERFACE</p>	 <p>Project Service Automati...</p> <p>Engage customers and deliver billable projects on time and within</p> <p>Microsoft Dynamics</p> <p>WEB</p>	 <p>Sales</p> <p>Automate sales processes and monitor performance with this</p> <p>Dynamics 365</p> <p>WEB</p>	 <p>Sales Hub</p> <p>Modernize the sales experience with this mobile relationship</p> <p>Microsoft Dynamics</p> <p>UNIFIED INTERFACE</p>

Dynamics 365 Lead Tracking Leads

Lead Tracking

New Group

Leads

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

[All Leads](#)

System Views

- All Leads
- Closed Leads
- Create Personal View
- Save Filters as New View
- Save Filters to Current View

Topic	Owner	Status Reason	Created On	
Likes our products	Veronica Que...	New	16-12-2017 08:13	
Interested in online only store	Veronica Que...	New	16-12-2017 08:13	
Store is expanding - send new l...	Veronica Que...	New	16-12-2017 08:13	
Adrian Dumitrascu	Video Hardware Upgrade	David So (Sa...	Qualified	16-12-2017 08:13
Cat Francis	Interested in our newer offerings	Dan Jump (Sa...	New	21-01-2017 04:22
Cathan Cook	New store opened this year - f...	Spencer Low ...	New	21-01-2017 04:22
Doreen Dudley	Likes our products	Cheta Collier	New	21-01-2017 04:22

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Published Apps (10)

Dynamics 365 — custom

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25-12-2017

WEB

Customer Service

Empower agents to manage cases and allow service managers to set

Dynamics 365

WEB

Customer Service Hub

A focused, interactive experience for managing your customer service.

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12/16/2017

UNIFIED INTERFACE

Field Resource Hub

Field Service for Dynamics 365 brings the power of field service

Microsoft Dynamics

UNIFIED INTERFACE

Field Service

Manage all aspects of the end-to-end field service management cycle.

Microsoft Dynamics

WEB

Lead Generation

This App is for Sales agents to quickly create and maintain Leads.

Microsoft Dynamics

UNIFIED INTERFACE

Project Service Automati...

Manage customers and deliverable projects on time and within

Microsoft Dynamics

WEB

Sales

Automate sales processes and monitor performance with this

Dynamics 365

WEB

Sales Hub

Modernize the sales experience with this mobile relationship

Microsoft Dynamics

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Lead Generation

This App is for Sales agents to quickly create and maintain Leads.

- [OPEN IN APP DESIGNER](#)
- [MANAGE ROLES](#)

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Search my apps...

Published Apps (10)

Dynamics 365 — custom

Provides access to the full suite of capabilities, including administration

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25-12-2017

WEB

Project Resource Hub

Project Resource Hub Module

Microsoft Dynamics

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Project Service Automati...

Engage customers and deliver billable projects on time and within

Microsoft Dynamics

WEB

Sales

Automate sales processes and monitor performance with this

Dynamics 365

WEB

Sales Hub

Modernize t this mobile

Microsoft Dyn

UNIFIED INT

Manage Roles - Lead Generation

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 type="checkbox"/> Project Billing Administrator	d365book
<input type="checkbox"/> Project Manager	d365book
<input type="checkbox"/> Project Resource	d365book
<input type="checkbox"/> Project Service Automation a...	d365book
<input type="checkbox"/> Resource Manager	d365book
<input checked="" type="checkbox"/> Sales Manager	d365book
<input checked="" type="checkbox"/> Sales, Enterprise app access	d365book
<input checked="" type="checkbox"/> Salesperson	d365book
<input type="checkbox"/> Schedule Manager	d365book
<input type="checkbox"/> Scheduler	d365book
<input type="checkbox"/> Support User	d365book
<input checked="" type="checkbox"/> System Administrator	d365book
<input checked="" type="checkbox"/> System Customizer	d365book
<input type="checkbox"/> Vice President of Marketing	d365book
<input type="checkbox"/> Vice President of Sales	d365book

4 of 32 selected

[Save](#) [Cancel](#)

Dynamics 365 Settings My Apps
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NEW ACTIVITY NEW RECORD IMPORT DATA

Search my apps... Create new App

Published Apps (10)

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Lead Generation

This App is for Sales agents to quickly create and maintain Leads.

OPEN IN APP DESIGNER
MANAGE ROLES

Lead Generation Save Save And Close Validate Publish

Add Edit Remove Search Canvas

Site Map Site Map

Dashboards Dashboards All Business Process Flows Business P... 1

Entity View (3)

Lead	Forms	All	Views	2	Charts
Lead To O...	Forms	All	Views	All	Charts
Opportun...	Forms	All	Views	All	Charts

Components Properties

ARTIFACTS

- Entities: Model and manage b...
- Dashboards: Provide an insightful ...
- Business Process Flow: Define a sequence of...

ENTITY ASSETS

- Forms: Define how users will...
- Views: Create a list view of r...
- Charts: Show data in a meani...

Solution: Lead Generation

Information


Solution Lead Generation

- Information
- Components**
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Dialog Boxes
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Apps**
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources

Component Type: All

New Add Existing Delete Remove Publish Show Dependencies Add Required Components

Managed Properties

Display Name ↑	Name	Type	State	Customizable	Des ↻
 <p>There are no Solution Components to show in this view. To get started, create one or more</p>					

0 - 0 of 0 (0 selected) Page 1

Component Type: App

New Add Existing Delete Remove Show Dependencies Add Required Components

Display Name ↑	Name	Type	State	Customizable	Des ↻
----------------	------	------	-------	--------------	-------

Select solution components



Select one or more solution components

Component Type

<input type="checkbox"/>	Display Name ↑	Name	Type	State	Customizable	↻
<input type="checkbox"/>	Field Service	Field Service	App	Managed		M ▲
<input checked="" type="checkbox"/>	Lead Generation	Lead Generation	App	Unmanaged		Th
<input type="checkbox"/>	Project Resource Hub	Project Resource Hub	App	Managed		Pr
<input type="checkbox"/>	Project Service Automation	Project Service Autom...	App	Managed		Er
<input type="checkbox"/>	Sales	Sales	App	Managed		Au
<input type="checkbox"/>	Sales Hub	Sales Hub	App	Managed		M

1 - 10 of 10 (1 selected)

OK

Cancel

Missing Required Components

? X

The system detected that the selected components require other components currently not included in the solution. Do you want to add those components?

- Yes, include required components.
- No, do not include required components.

Missing Required Components

Display Name ↑	Name/Id	Component Type	Parent Entity	Managed
Lead Generation	Lead Generation	Site Map		Active Solution

◀ | ▶

⏪ Page 1 ⏩

OK

Cancel

Solution Lead Generation

- Information
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
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 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Apps**
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources

Component Type: App

| Display Name ↑ | Remove the component from the system and remove any references that unmanaged solutions may have to the component

<input checked="" type="checkbox"/>		Lead Generation	new_LeadGeneration	App	Unmanaged	This App
-------------------------------------	--	-----------------	--------------------	-----	-----------	----------

Confirm Deletion



Do you want to delete this App? You can't undo this action.

Delete

Cancel

Chapter 3: Define Processes Using Visual Process Designer

1.Process Stage

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

✓ Complete Final Propo... completed	✓ Send Thank You completed
✓ Present Final Proposal completed	✓ File De-brief completed
✓ Confirm Decision Date 15-12-2017	

2.Process Steps

Opportunity Sales Process (Active for 13 days, 11 hours) **Finish**

3.Stage Gating

1.Process Stage

✓ Qualify

2.Process Steps

✓ Send Thank You	completed
✓ File De-brief	completed

← **Finish** → ^

3.Stage Gating

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Plug-in Trace Log			●	●		●				
Plug-in Type			○	●	●	○				
Process			●	●	●	●	●	●	●	●
Process Configuration			●	●	●	○				
Process Session			●	●	●	○	●	●	●	●
Publisher			●	●	●	●				
Relationship			●	●	●	●				
Sdk Message			●	●	●	●				
Sdk Message Processing Step			○	●	○	○				
Sdk Message Processing Step Image			○	●	○	○				
Sdk Message Processing Step Secure Configuration			○	●	○	○				
Service Endpoint			○	●	○	○				
Solution			●	●	●	●	●			
System Application Metadata			●	●	●	●				
System Chart			●	●	●	●				
System Form			●	●	●	●				
System Job			○	●	●	○	●	●		○
Theme			●	●	●	●	●			
User Application Metadata			●	●	●	●				
View			●	●	●	●				

Activate Windows
Go to Settings to activate Windows.

Miscellaneous Privileges	
Activate Business Process Flows	●
Activate Real-time Processes	●
Execute Workflow Job	●
Import Customizations	●
Activate Business Rules	●
Configure Yammer	○
Export Customizations	●
ISV Extensions	●

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share		
App	●	●	●	○	○	○				
App Config Master	○	○	○	○	○	○				
Attribute Map	○	●	○	○	○	○				
Custom Control	○		○	○	○	○				
Custom Control Default Config	○		○	○	○	○				
Custom Control Resource	○		○	○	○	○				
Customizations	○	●	●	○						

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Plug-in Assembly	○	●	○	○				
Plug-in Trace Log	○	○		○				
Plug-in Type	○	●	○	○				
Process	○	●	○	○	○	●	○	○
Process Configuration	○	●	○	○				
Process Session	○	●	○	○	○	○	○	○
Publisher	○	○	○	○	○	○		
Relationship	○	●	○	○				
Sdk Message	○	●	○	○				
Sdk Message Processing Step	○	●	○	○				
Sdk Message Processing Step Image	○	●	○	○				
Sdk Message Processing Step Secure Configuration	○	○	○	○				
Service Endpoint	○	○	○	○				
Solution	○	●	○	○	○	○		

Business Process Flow

sample business process flow

Save Validate Save As Activate Order Process Flow Edit Security Roles ? Help

1 Case New Stage

2 Add 3 Delete 4 Snapshot 5 Connector

6 7 8

9

10 Global Workflow (0)

Components Properties

Search components...

Flow

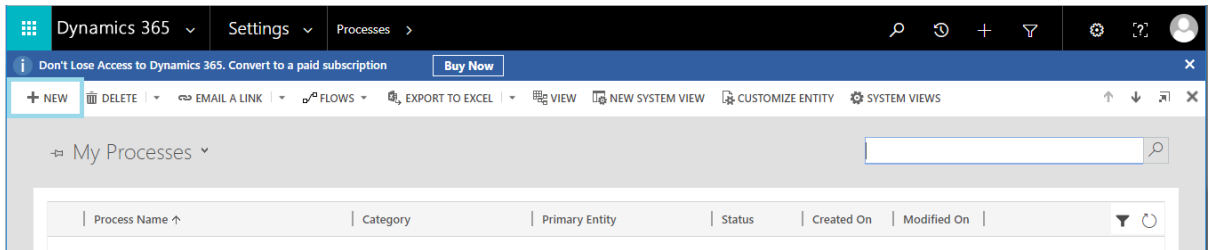
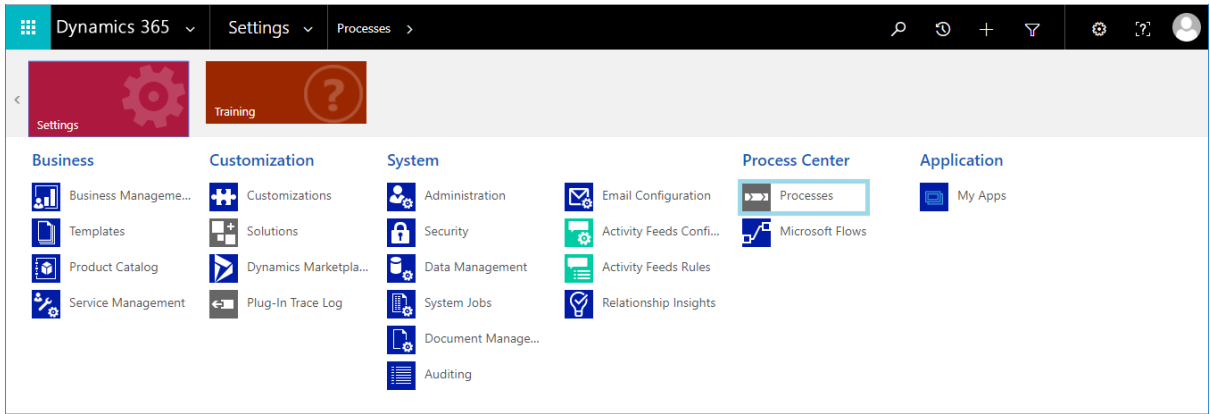
- Stage
- Condition

Composition

- Data Step
- Workflow
- Action Step

Activate Windows
Go to Settings to activate Windows

Status: Inactive



Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: * Entity: *

Type:

- New blank process
- New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owne
[Placeholder]		

The screenshot shows a workflow editor with a toolbar at the top containing icons for Add, Cut, Copy, Paste, Delete, Snapshot, and Connector. The main canvas displays two 'Case New Stage' components connected by a line. A right-hand panel is open to the 'Properties' tab, showing the following configuration:

- Stage**
 - Display Name:
 - Category:
- Entity**
 - Entity:
- Business rules for this stage's entity**
 - Relationship:

Buttons for 'Apply' and 'Discard' are visible at the bottom of the properties panel. A watermark 'Activate Windows' is present at the bottom of the screenshot.

Components Properties

Search components....

▲ Flow

- Stage
- Condition

▲ Composition

- Data Step
- Workflow

Activate Windows
Go to Settings to activate Windows

Components Properties

Data Step

Step Name
Find Customer

Data Field
Find Customer

Required

Sequence
1

Apply Discard

Activate Windows

Case New Stage

Case New Stage

Steps (1)

Data Step #1 New Step

Triggered Process (0)

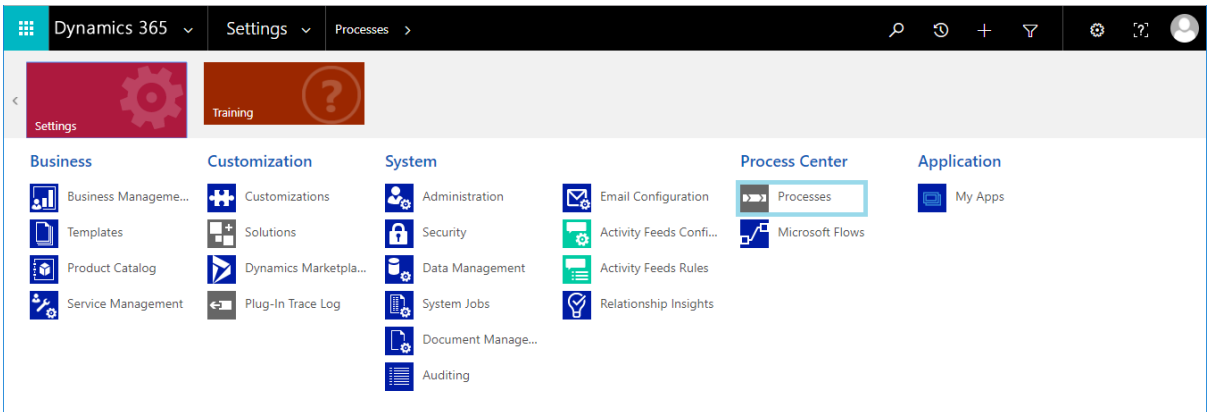
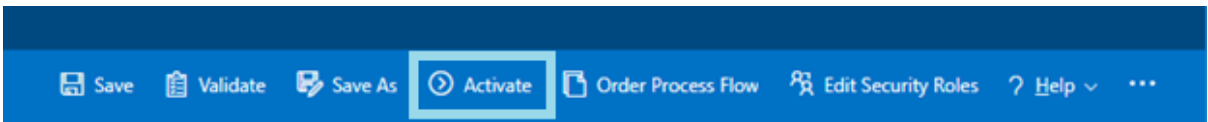
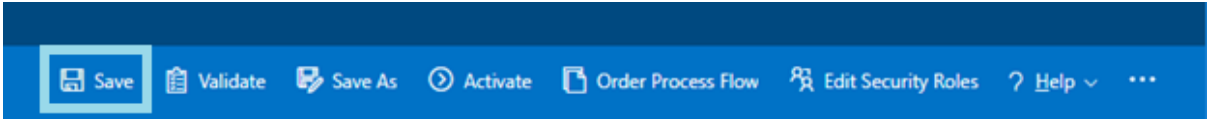
Minimap

Global Workflow (0)

The screenshot shows a workflow editor interface. The main workspace contains three steps: 'Case Identify', 'Condition Check Case Number', and 'Case Research'. The 'Condition Check Case Number' step is highlighted with a blue border. A 'Properties' panel is open on the right, showing the configuration for the selected step. The 'Display Name' is 'Check Case Number'. Under the 'Rules' section, 'Rule 1' is defined with the following settings: Field: Case Number, Operator: Contains data, and Condition Expression (Text View): (Case Number Contains data []). The 'Apply' button is highlighted in blue.

The screenshot shows the workflow editor with a more complex workflow. The 'Case Identify' step is expanded to show 'Steps (1)' and 'Workflow (1)'. The 'Workflow (1)' section contains a step named 'Workflow example for case.'. The 'Properties' panel on the right is open for this step, showing the following configuration: 'Display Name' is 'workflow example for case.', 'Entity' is 'Case', 'Trigger' is 'Stage Exit', and 'Workflows' is 'workflow example for case.'. The 'Apply' button is highlighted in blue.

The screenshot shows the application's bottom toolbar. The 'Validate' button, represented by a document icon with a checkmark, is highlighted with a blue border. Other buttons in the toolbar include 'Save', 'Save As', 'Activate', 'Order Process Flow', 'Edit Security Roles', and 'Help'.



Dynamics 365 Settings Processes

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NEW EDIT ACTIVATE DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK FLOWS

My Processes Search for records

	Process Name ↑	Category	Primary Entity	Status	Created On	Modified On
1	☑ Phone to case business process flow example	Business Process Flow	Case	Activated	27-12-2017 1...	30-12-2017 1...

Business Process Flow

Phone to case business process flow example Update Validate Save As Deactivate Order Process Flow Edit Security Roles Help

Add Cut Copy Paste Delete Snapshot Connector

Case Identify 1 Condition Check Case Number Case New Stage

Steps (1) Details

- Data Step #1 Case Type
- Workflow (1) 3
 - Workflow

Minimap Global Workflow (0)

Components Properties

Search components...

- Flow
 - Stage
 - Condition
- Composition
 - Data Step
 - Workflow 2
 - Action Step

Activate Windows
Go to Settings to activate Windows.

Components Properties

Workflow


Display Name

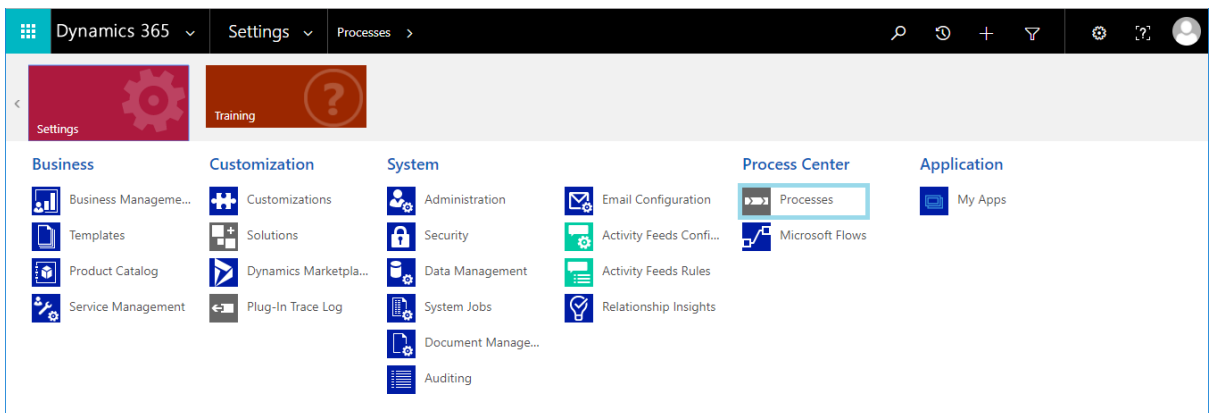
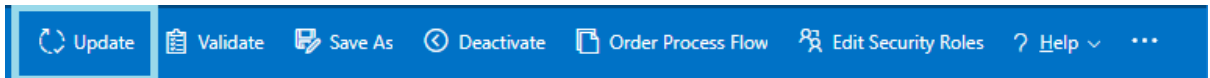
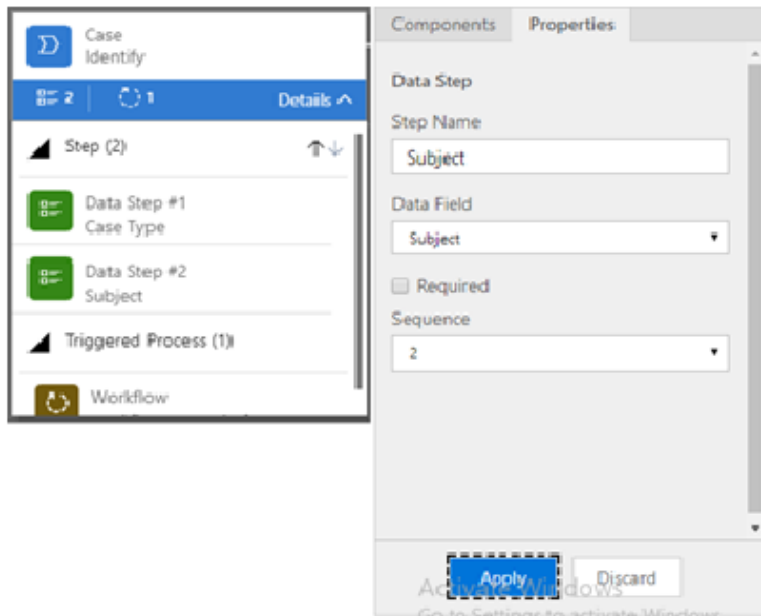
Entity

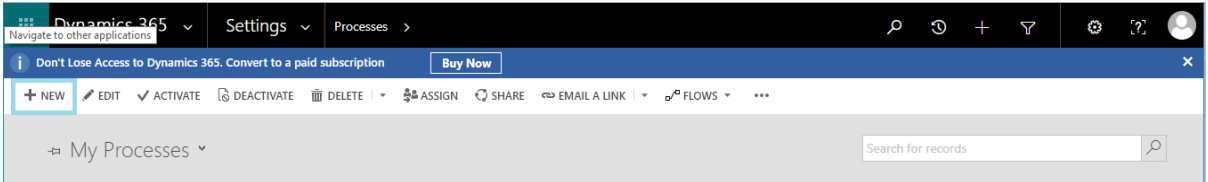
Trigger

Workflows [+ New](#)

Note: You can only use active, on-demand workflows created for the same entity as this stage.

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





Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

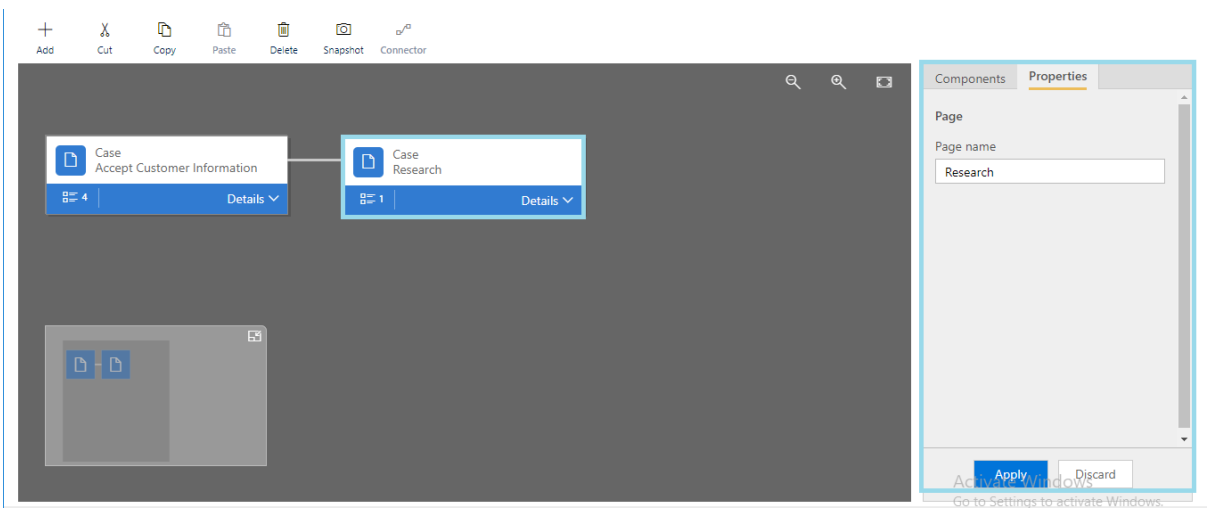
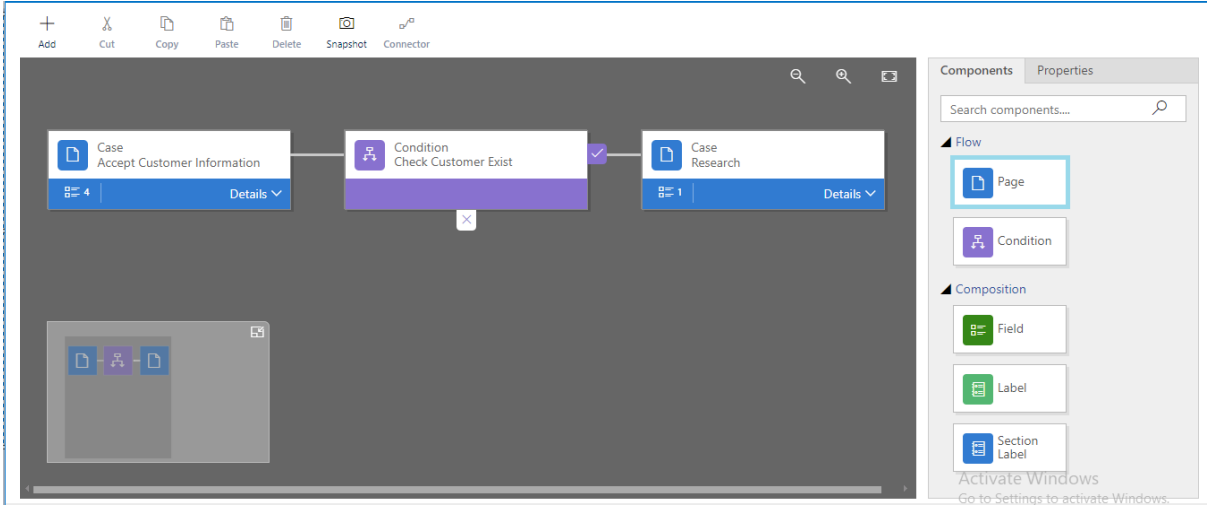
Process name: *

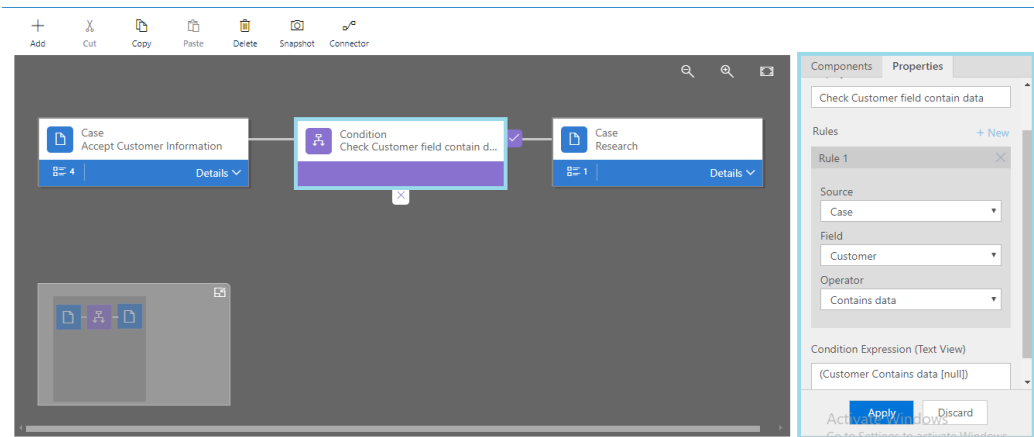
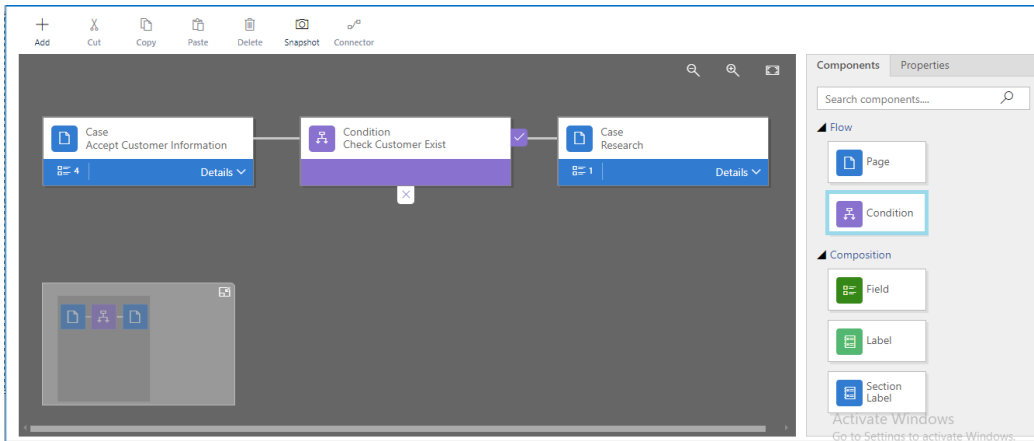
Category: * Entity: *

Business Process Type:
 Run process as a business flow (Classic)
 Run process as a task flow (Unified Interface only)

Name: *

OK Cancel





Components Properties

Search components....

▲ Flow

- Page
- Condition

▲ Composition

- Field
- Label
- Section Label

Activate Windows
Go to Settings to activate Windows.

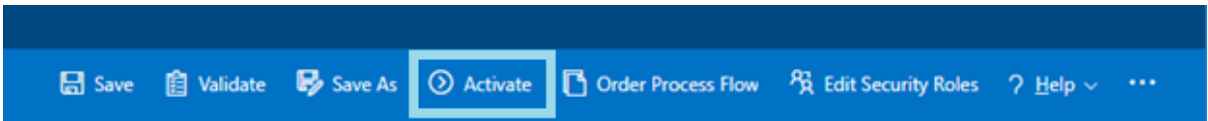
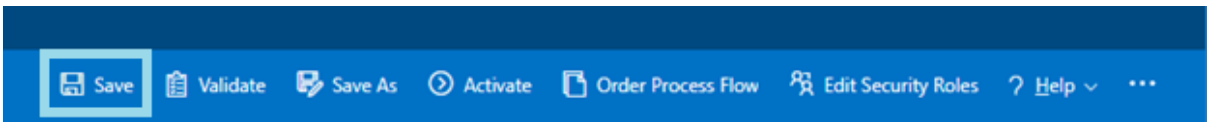
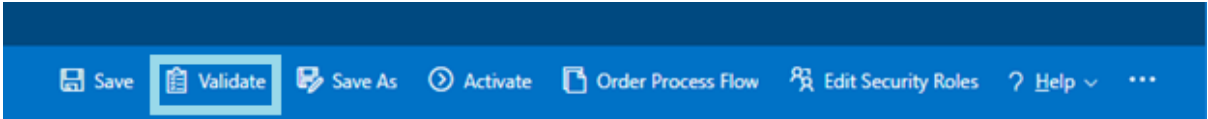
+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector

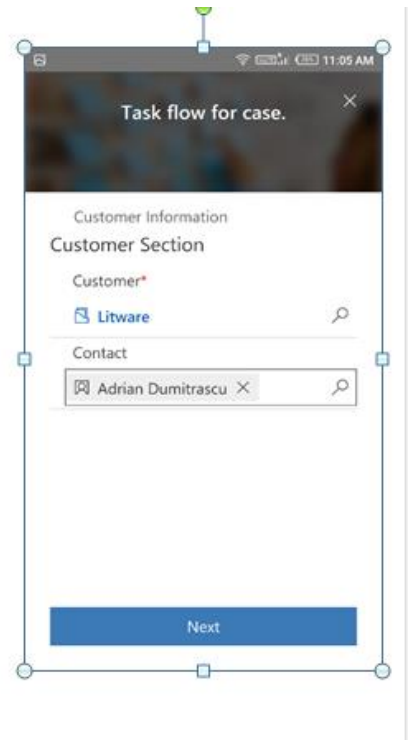
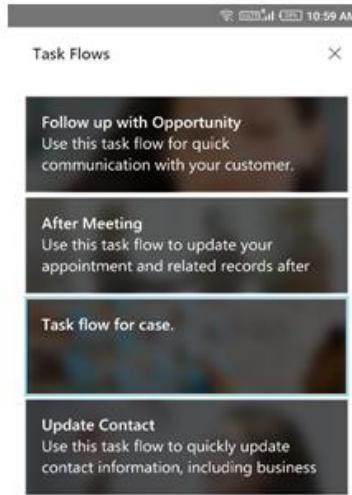
Case Accept Customer Information → Condition Check Customer field contain da... → Case Research

Field
 Field Name: Customer
 Source: Case
 Data Field: Customer
 Sequence: 2

Apply Discard

Activate Windows
Go to Settings to activate windows.





Chapter 4: Define Business Rules Using Business Rule Designer

BUSINESS RULE: Contact

CRM 2015 Business Rule - Contact

Click to add description

- └ IF...THEN
 - └ CONDITION
 - If **Marital Status** equals **"Married"**
 - └ ACTION
 - Set **Spouse/Partner Name** as **Business Required**
- └ ELSE
 - └ CONDITION
 - └ ACTION
 - Set **Spouse/Partner Name** as **Not Business Required**

- └ ACTION
 - +
 - └ DESCRIP
 -
- | |
|-----------------------|
| Show error message |
| Set field value |
| Set business required |
| Set visibility |
| Lock or unlock field |

+ Add action

- Show error message
- Set field value
- Set business required
- Set visibility
- Set default value**
- Lock or unlock field

IF...THEN

CONDITION

	Field	Operator	Type	Value
If	Business Process	Equals	Value With Stage	Lead to Opportunity St
	Active Stage	Equals	Value	<input checked="" type="checkbox"/> Develop <input type="checkbox"/> Propose <input type="checkbox"/> Close

✓ ✕

+ Add condition

ACTION

+ Add action

Business Rule: Account

New business rule ^

Save Validate Scope: Account ? Help

Business rule name: New business rule

Description: Click to add description

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

Condition New Condition

Business Rule (Text View)

```
IF
THEN
```

Components Properties

Search components...

Flow

- Condition

Actions

- Recommendation
- Lock/Unlock
- Show Error Message
- Set Field Value
- Set Default Value
- Set Business Required
- Set Visibility

Draft

Scope ?

- Entity
- All Forms
- Account for Inter
- Account - MoCa
- Information
- Account

Components


Properties


set 

- Set Field Value
- Set Default Value
- Set Business Required
- Set Visibility

 Set Field Value

 Set Default Value

 Set Business Required

 Set Visibility

SAVE VALIDATE

BUSINESS RULE: Opportunity

Enter Rule Name

Click to add description

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

Flow

- Add Condition
- Actions
- Add Recommendation
- Add Lock/Unlock
- Add Show Error Message
- Add Set Field Value
- Add Set Default Value
- Add Set Business Rule
- Add Set Visibility

Add a new condition to the process flow.

Components Properties

Condition

Display Name
New Condition

Entity
Opportunity

Rules [+ New](#)

Rule 1 ✕

Source
Entity

Field
Account

Operator
Equals

Type
Value

Value

Condition Expression (Text View)
(Account [undefined])

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

CONDITIONS		
Condition		
	Display Name	For specifying a label for the Condition.
	Entity	The field that displays the name of the Entity against which business rule is being written.
Rules	A collection of rules.	
	Source	For specifying the type for Condition <ul style="list-style-type: none"> • Entity • Business process
	Field	For specifying field type for Source Selected. For source type – Entity it displays all the attributes of that entity. <ul style="list-style-type: none"> • Account • Account Type • Account Close Date ... For source type – Business Process the available options are <ul style="list-style-type: none"> • Process Name • Stage Category
	Operator	
	For source type – Entity	Available values for operator are <ul style="list-style-type: none"> • Equals • Does not Equal • Contains • Does Not Contain • Begins With

Components Properties

Entity

Opportunity

Rules [+ New](#)

Rule 1 ✕

Source

Entity

Field

Account

Operator

Equals

Type

Value

Value

A. Datum

Rule 2 ✕

Source

Entity

Field

Account

Operator

Equals

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

Rule 2

Source
Entity

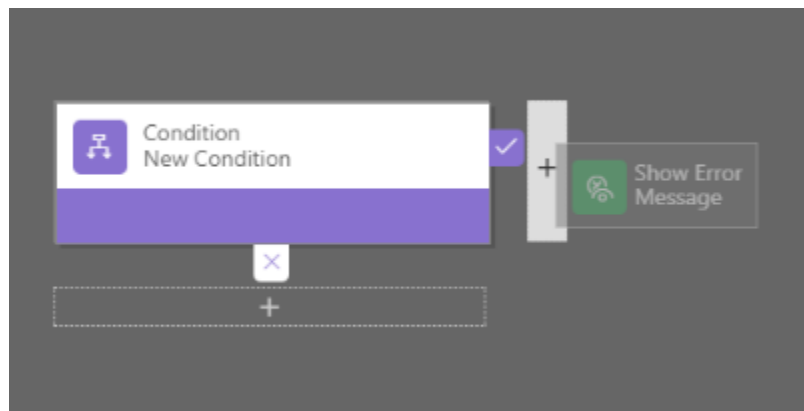
Field
Account Manager

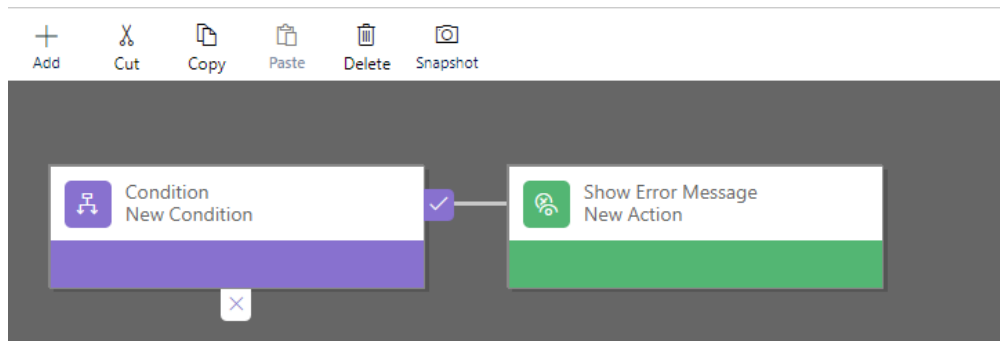
Operator
Contains data

Rule Logic
AND

Condition Expression (Text View)
(Account [A. Datum]) AND (Account Manager Contains data)

Apply Discard





Components Properties

Lock/Unlock

Display Name

New Action

Entity

Opportunity

Lock/Unlock

Field

Probability

Status

Lock

Lock

Unlock

Probability

Sales Stage

🔒 80

Propose

Components Properties

Show Error Message

Display Name

New Action

Entity

Opportunity

Error Message

Field

Probability

Message

This is sample error message

Description --

Probability  80

This is sample error message

Type

Value	▼
Value	
Field	
Formula	
Clear	

Components Properties

Set Field Value

Display Name

New Action

Entity

Opportunity

Field Value

Field

Est. Close Date	▼
-----------------	---

Type

Formula	▼
---------	---

Field

Created On	▼
------------	---

Operator

+	▼
---	---

Type

Value	▼
-------	---

Days

100

Components Properties

Set Business Required

Display Name
New Action

Entity
Opportunity

Business Required

Field
Probability

Status
Business Required
Business Required
Not Business Required

Components Properties

Set Visibility

Display Name
New Action

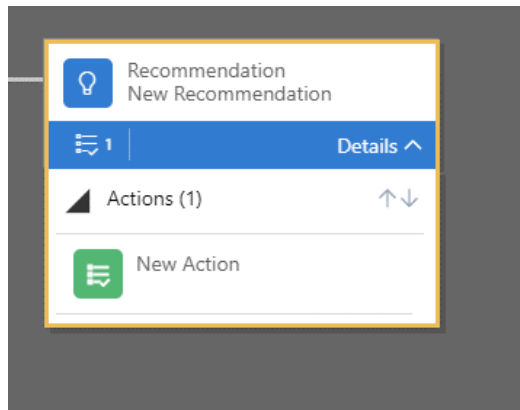
Entity
Opportunity

Visibility

Field
Probability

Visible
Yes
Yes
No

Recommendation		
	Recommendation Name	For specifying the name of the recommendation action.
	Entity	The field that displays the name of the Entity against which business rule is being written.
	Field	Specifies the field on which we want to set the recommendation.
	Recommendation Title	Specifies the title for the Recommendation dialog box.
	Recommendation Details	Specifies the description for the Recommendation inside the Recommendation dialog box.



Components Properties

Set Field Value

Display Name

New Action

Entity

Opportunity

Field Value

Field

Account

Type

Value

Value



Field

Working on solution: Test

Sales Stage of Opportunity

4 Common

- Information
- Business Rules

New Edit X Activate Deactivate Managed Properties Show Dependencies

Name ↑	Scope	Type	State	
--------	-------	------	-------	--

No Process records are available in this view.



0 - 0 of 0 (0 selected)

Page 1










Opportunity **Business Rules**

Solution Test

- Opportunity
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships
 - Messages
 - Business Rules**
 - Hierarchy Settings

New Edit X

Name ↑

o	 Body	 Header	 Business Rules	 Form Properties	 Preview	 Enable Security Roles	 Merge Forms
)	 Navigation			 Show Dependencies	 Managed Properties	
	Select			Form			Upgrade

The image shows a software interface with two main panels. On the left is a tree view containing a 'Section' with two 'Primary Contact' items and a 'CONTACTS' folder. On the right is a large empty workspace titled 'Business Rules Explorer'. A 'New Business Rule' button is located at the bottom right of the workspace.

Business Rules Explorer >

Section

- Primary Contact
- Primary Contact

CONTACTS

CONTACTS

New Business Rule

Components Properties

Display Name
Sales Stage Condition

Entity
Opportunity

Rules [+ New](#)

Rule 1 ✕

Source
Entity ▼

Field
Sales Stage ▼

Operator
Equals ▼

Type
Value ▼

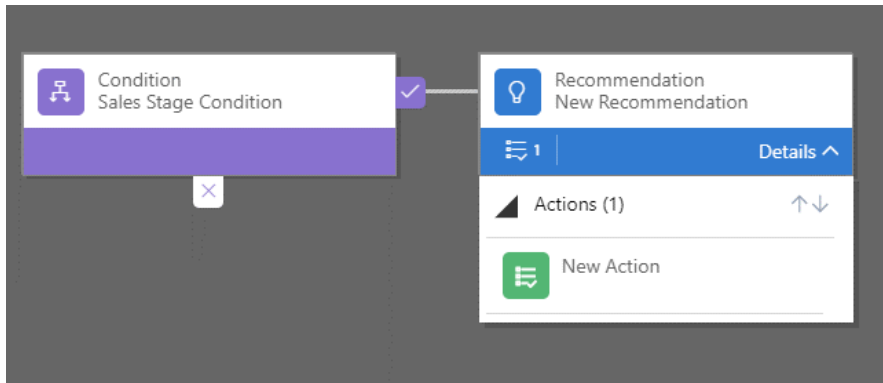
Value

- Qualify
- Develop
- Propose
- Close

Condition Expression (Text View)

(Sales Stage Equals [Propose])

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



Components Properties

Recommendation

Recommendation Name
New Recommendation

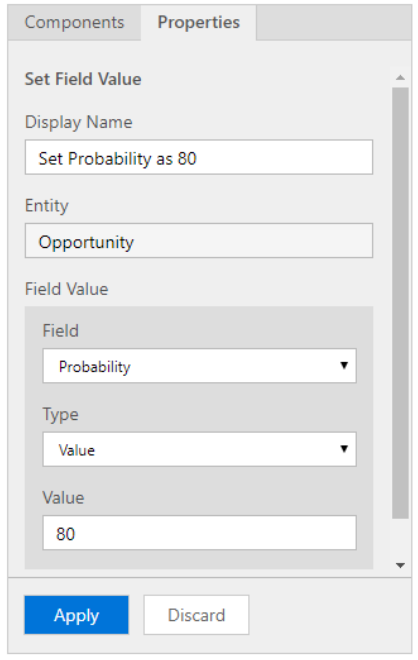
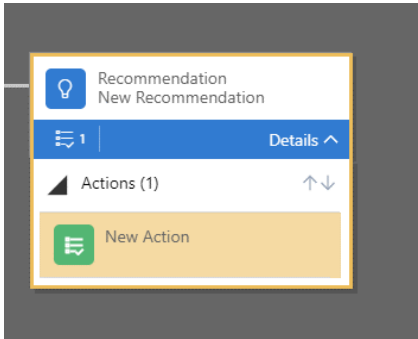
Entity
Opportunity

Field
Probability

Recommendation Title
Probability Recommendation

Recommendation Details
Set probability as 80 for Sales Stage - Proposed

Apply Discard



SAVE VALIDATE SAVE AS SAVE AND CLOSE ACTIVATE

BUSINESS RULE: Opportunity

Recommendation for Sales Stage

Recommend Probability to be 80 for Sales Stage - Proposed

Add Cut Copy Paste Delete Snapshot

Condition Sales Stage Condition

Recommendation New Recommendation

1 Details

Business Rule (Text View)

“
Sales Stage equals "Propose"
THEN
Show Recommendation "New Recommendation" on Probability
Recommendation Title "Probability Recommendation"
Recommendation Details "Set probability as 80 for Sales Stage - Proposed"
Set Probability to 80

Draft

SAVE VALIDATE SAVE AS SAVE AND CLOSE ACTIVATE

BUSINESS RULE: Opportunity

Recommendation for Sales Stage

Recommend Probability to be 80 for Sales Stage - Proposed

Validation successful.

BUSINESS RULE: Opportunity

Recommendation for Sales Stage

Recommend Probability to be 80 for Sales Stage - Proposed

❌ Validation Failed ! 1 errors found in the process

OPPORTUNITY ▾

Home PC ☰

Qualify (Active for 48 days, 6 hours) ▶

- ✓ Identify Contact [Adrian Dumitrascu](#)
- ✓ Identify Account [Adventure Works](#)
- ✓ Purchase Timeframe [This Quarter](#)

Currency *	US Dollar
Forecast	--
Add to Forecast	<input type="checkbox"/>
Description	--
Probability	20
Sales Stage	Propose

Description --

Probability ⓘ 20

Probability Recommendation

Set probability as 80 for Sales Stage - Proposed

[Apply](#) [Dismiss](#)

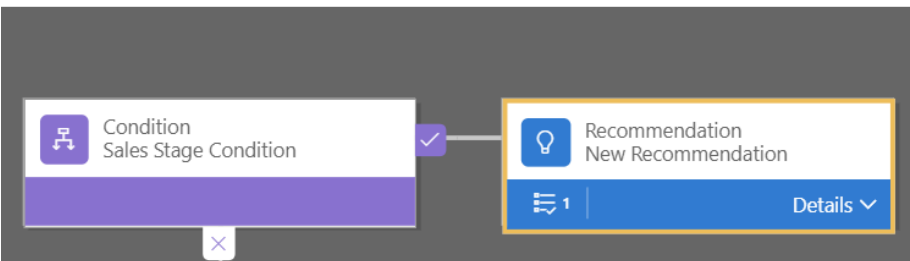
Add to Forecast

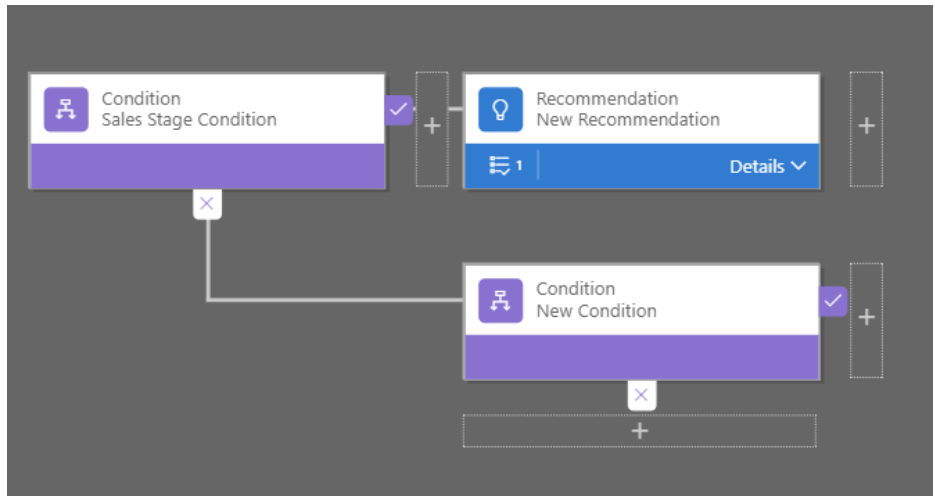
Description --




Probability ⓘ 80

Sales Stage **Propose**

- Add
- Cut
- Copy
- Paste
- Delete
- Snapshot





Paste Delete Snapshot

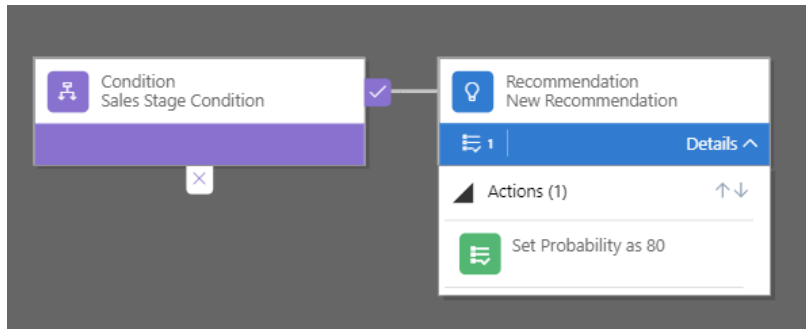


Recommendation for Sales Stage

Recommend Probability to be 80 for Sales Stage - Proposed

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

The screenshot shows a software interface with a canvas. On the left, there is a diagram with a purple icon, four blue lightbulb icons, and three green icons (a padlock, a list, and another padlock). In the center, there is a button labeled "Lock/Unlock New Action" with a green padlock icon. At the bottom, there is a panel labeled "Business Rule (Text View)".



Business Rule (Text View)

IF Sales Stage equals "Propose"

THEN

- Show Recommendation "New Recommendation" on Probability
- Recommendation Title "Probability Recommendation"
- Recommendation Details "Set probability as 80 for Sales Stage - Proposed"
- Set Probability to 80

Chapter 5: Creating Custom Business Apps

Functions	Data Source				
	Common Data Service	SharePoint	SQL Server	Dynamics 365	Salesforce
Average	No	No	Yes	No	No
Filter	Yes	Yes	Yes	Yes	Yes
LookUp	Yes	Yes	Yes	Yes	Yes
Max	No	No	Yes	No	No
Min	No	No	Yes	No	No
Search	Yes(Onlu Support String)	No	Yes	Yes	Yes
Sort	Yes	Yes	Yes	Yes	Yes
SortByColumns	Yes	Yes	Yes	Yes	Yes
Sum	No	No	Yes	No	No

	Common Data Service	SharePoint	SQL Server	Dynamics 365	Salesforce
Not	Yes	No	Yes	Yes	Yes
IsBlank	No	No	Yes	Yes	No
TrimEnds	No	No	Yes	No	No
Len	No	No	Yes	No	No
+, -	No	No	Yes	No	No
<, <=, =, >, >=	Yes	Yes (only =)	Yes	Yes	Yes
And (&&), Or (||), Not (!)	Yes(Operators only)	Yes (except Not (!))	Yes	Yes	Yes
In	No	No	Yes	No	Yes
StartsWith	No	Yes	No	No	No

Office 365

Good evening

Search online documents

Install Office apps

Apps

- Mail
- OneDrive
- Word
- Excel
- PowerPoint
- OneNote
- SharePoint
- Teams
- Yammer
- Dynamics 365
- Flow
- Admin
- Security & Compliance

Explore all your apps →

PowerApps


Environment: Temp (default)

Build business apps, fast


Create apps that connect to your data and work across web and mobile.
Learn about PowerApps

Make apps like these

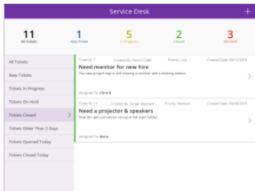
All Office Search



Start from blank



Start from data




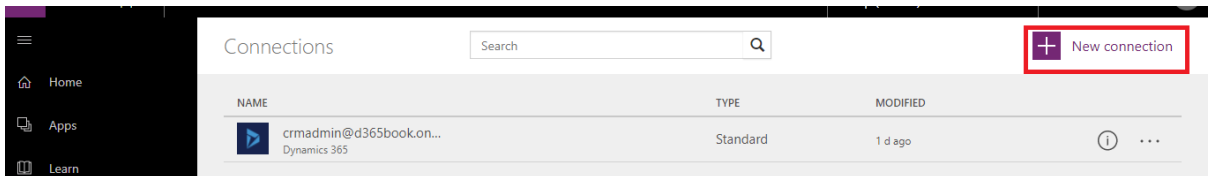
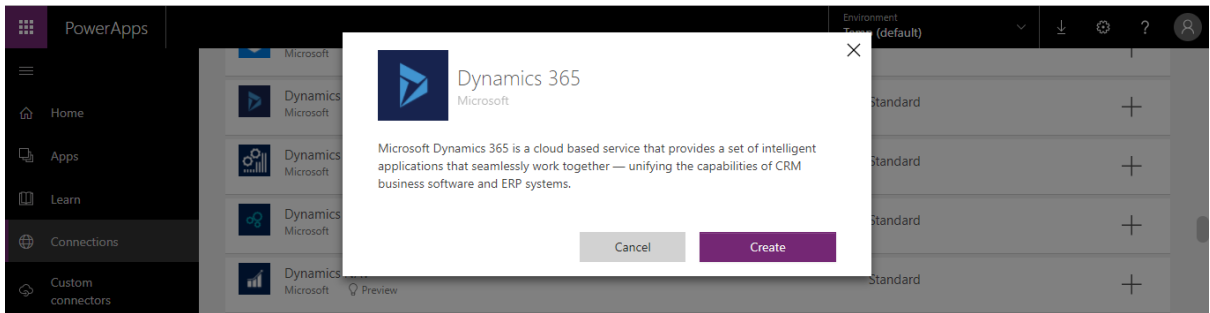
Service Desk

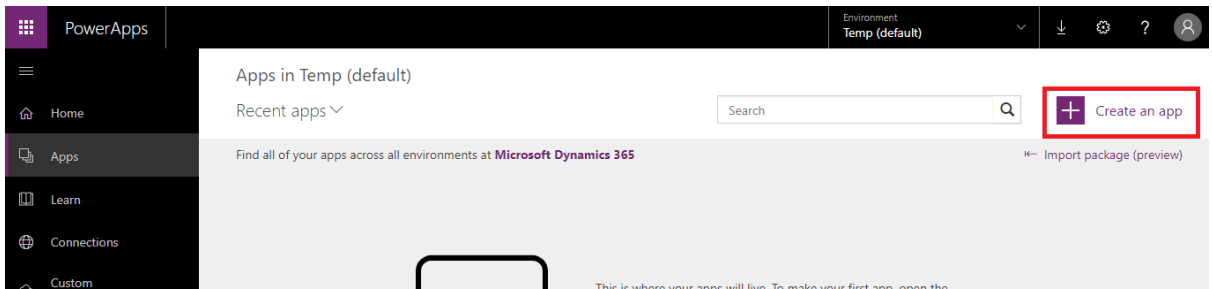
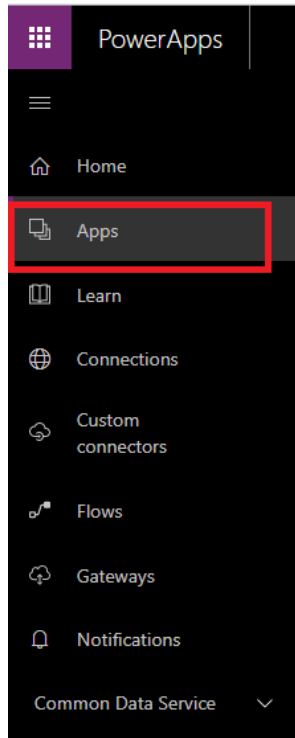
Connections

Search

New connection

NAME	TYPE	MODIFIED
 crmadmin@d365book.on... Dynamics 365	Standard	1 d ago





Deepesh Somani | Temp (default)

Create an app in Temp (default)

Start with your data

- Common Data Service (Premium) - Phone layout
- Dynamics 365 - Phone layout**
- OneDrive for Business - Phone layout
- SharePoint - Phone layout
- Salesforce (Premium) - Phone layout

Start with a blank canvas or a template

- Blank app: Customize a blank app to fit your needs. (Phone layout, Tablet layout)
- App templates: Get a jumpstart with predesigned templates. (Phone layout, Tablet layout)

Activate Windows
Go to Settings to activate Windows.

Deepesh Somani | Temp (default)

Connections

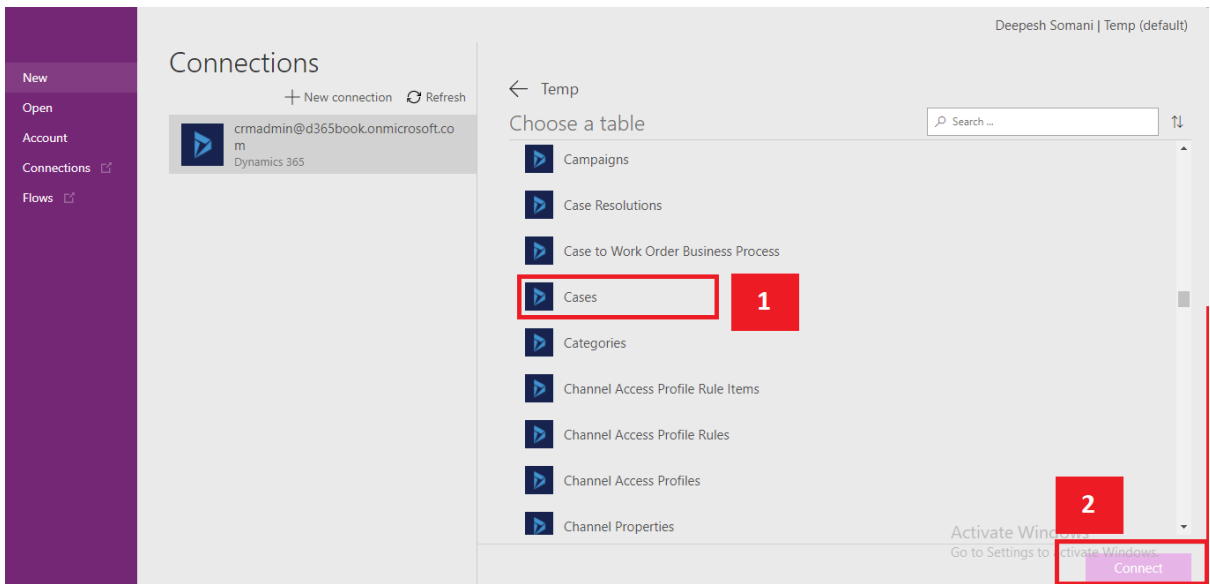
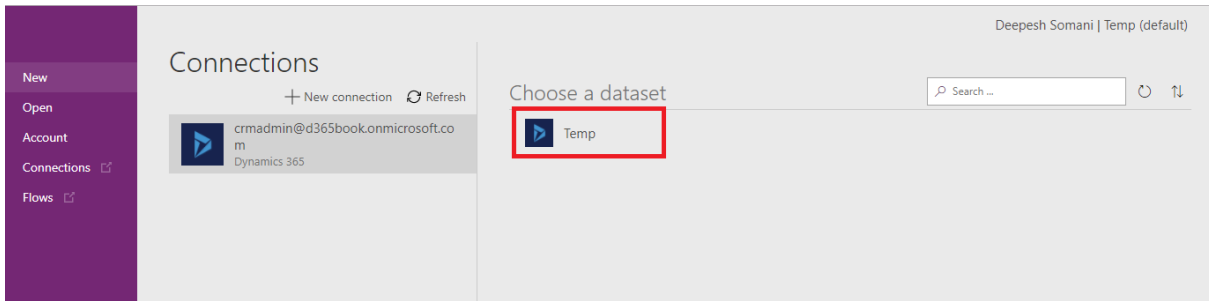
+ New connection Refresh

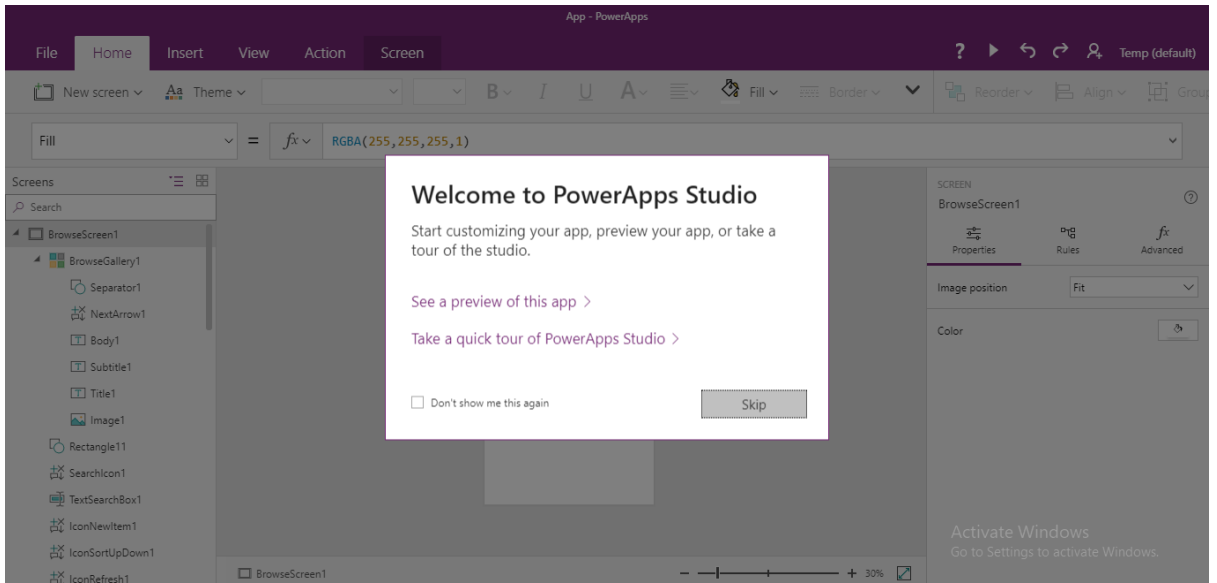
- crmadmin@d365book.onmicrosoft.com - Dynamics 365**

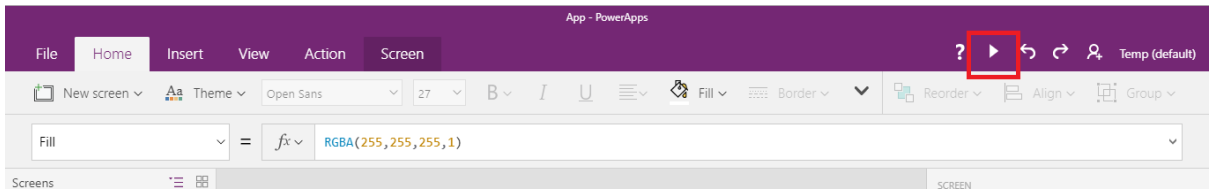
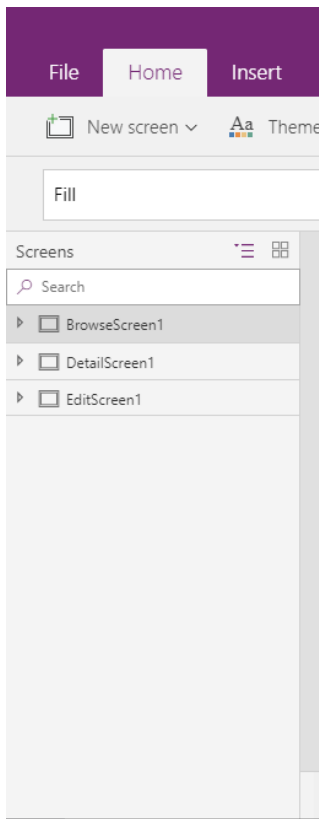
Choose a dataset

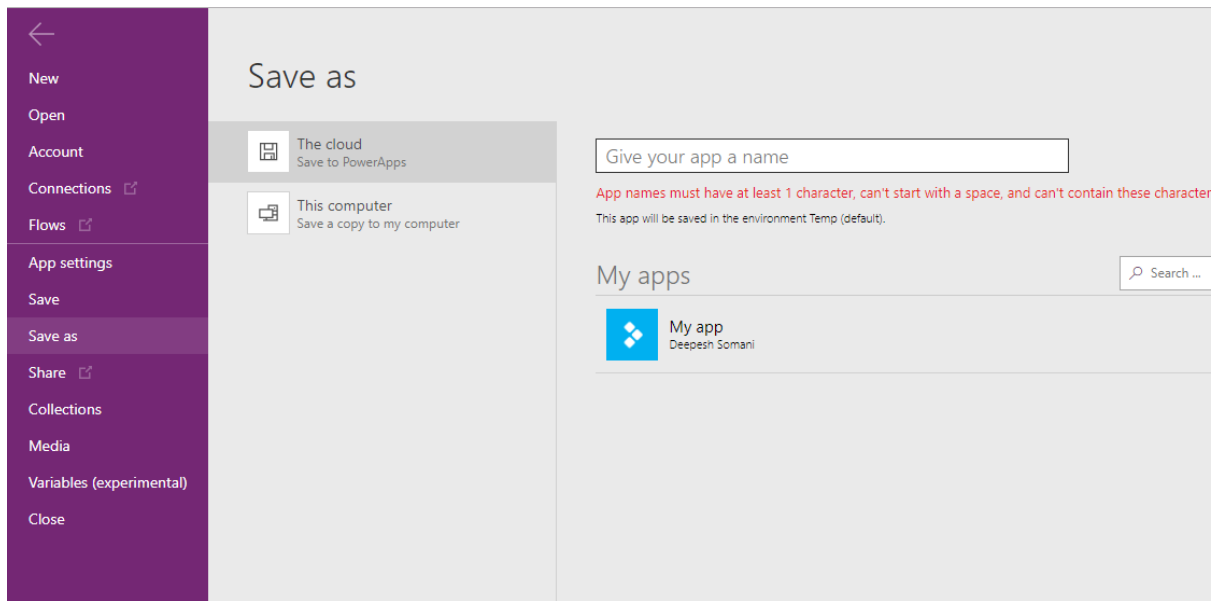
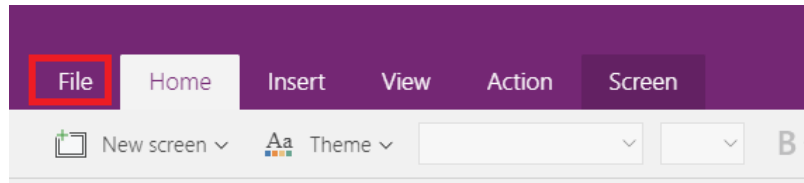
Search ...

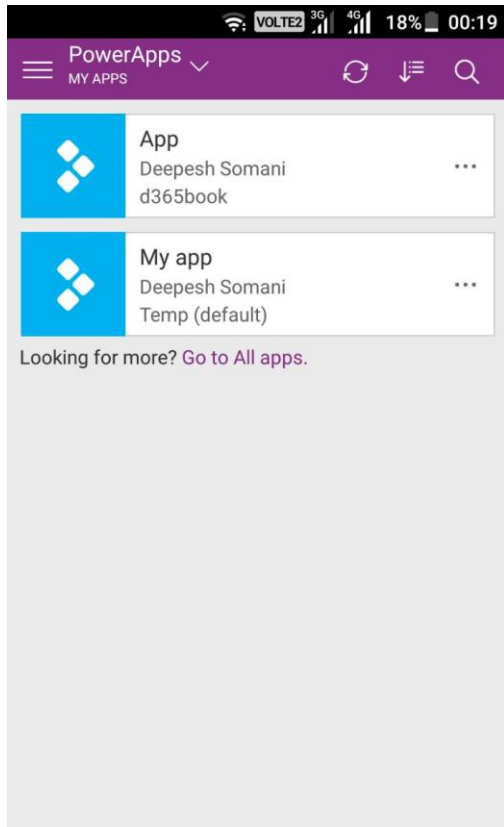
- Temp









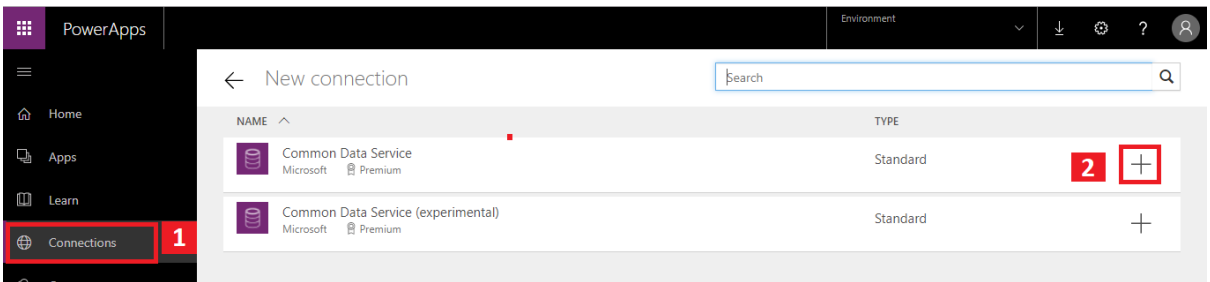
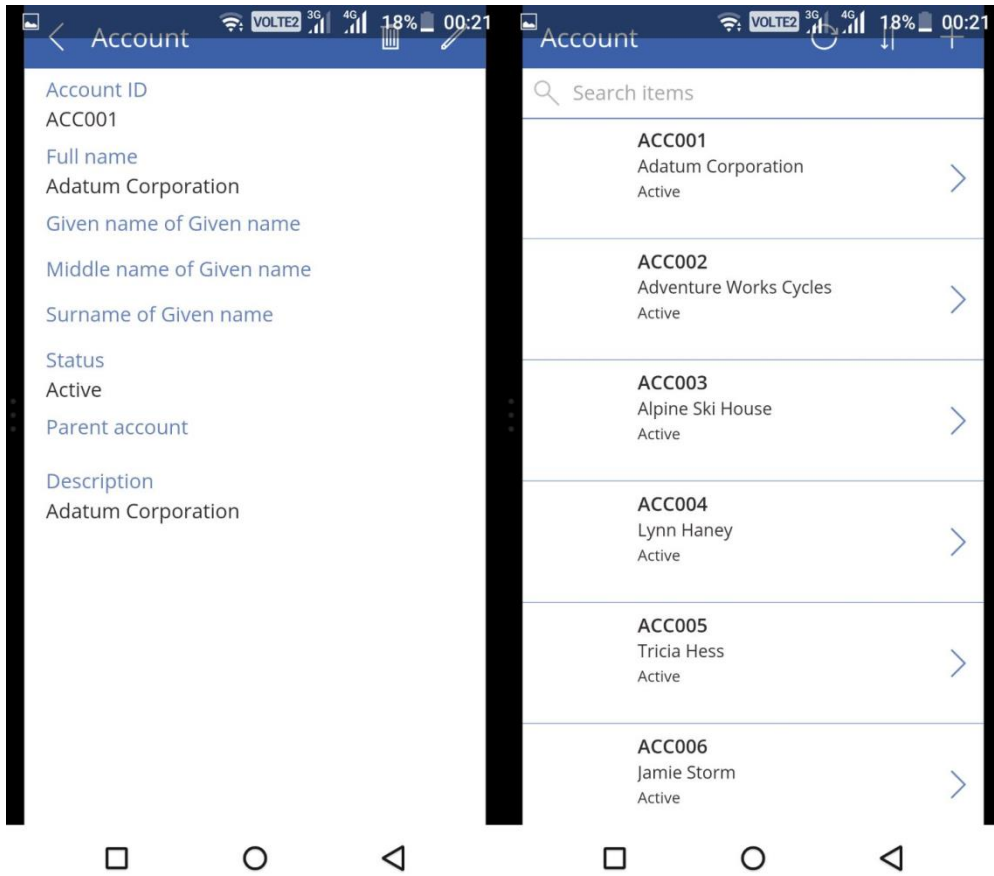



PowerApps
MY APPS

App
Deepesh Somani
d365book

My app
Deepesh Somani
Temp (default)

Looking for more? [Go to All apps.](#)





Common Data Service

Microsoft Premium






Provides access to the org-based database on the Microsoft Common Data Service

Cancel Create



Deepesh Somani | d365book

Create an app in d365book

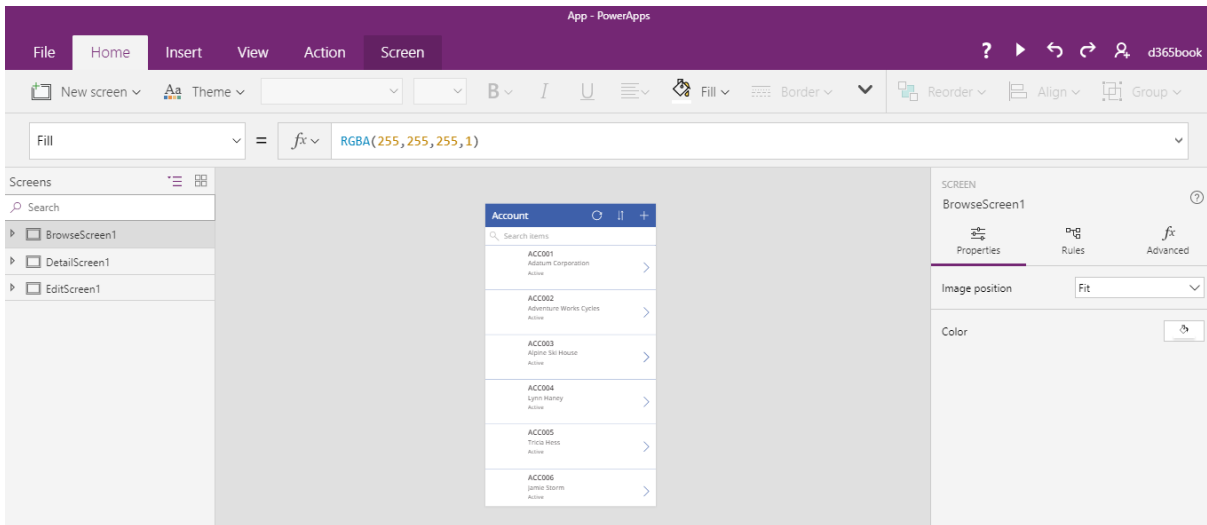
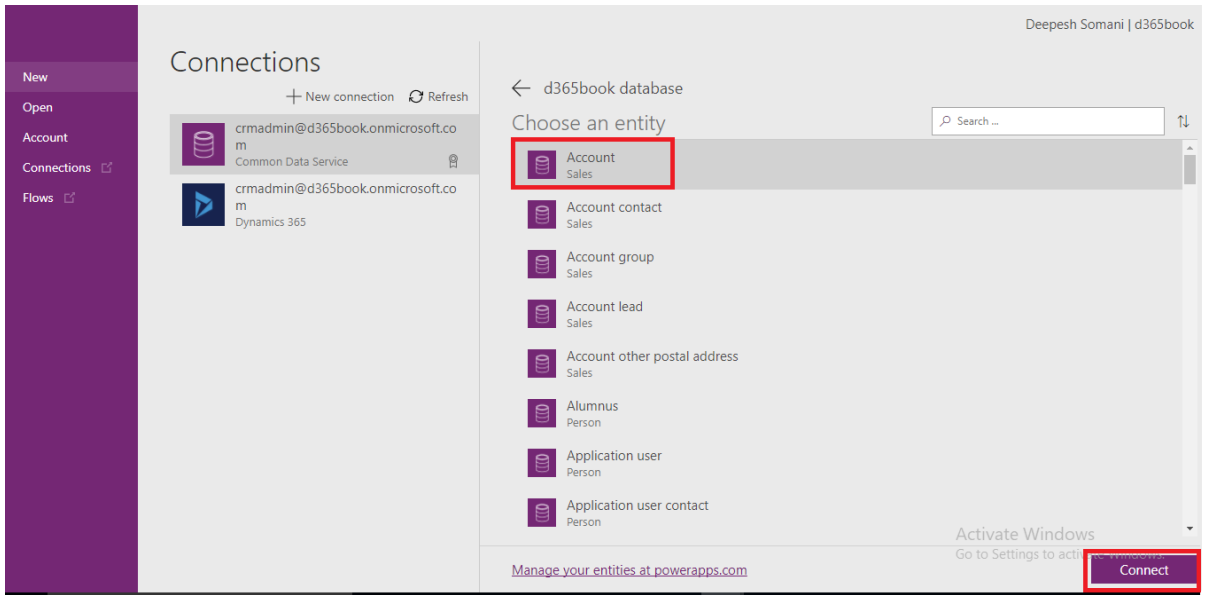
Start with your data

 <p>Common Data Service Premium</p> <p>Phone layout</p>	 <p>Dynamics 365</p> <p>Phone layout</p>	 <p>OneDrive for Business</p> <p>Phone layout</p>	 <p>SharePoint</p> <p>Phone layout</p>	 <p>Salesforce Premium</p> <p>Phone layout</p>
---	--	---	---	--

Start with a blank canvas or a template

 <p>Blank app</p> <p>Customize a blank app to fit your needs.</p> <p>Phone layout</p> <p>Tablet layout</p>	 <p>App templates</p> <p>Get a jumpstart with predesigned templates.</p> <p>Phone layout</p> <p>Tablet layout</p>
---	--

Activate Windows
Go to Settings to activate Windows.



Account



 Search items

ACC001

Adatum Corporation
Active



ACC002

Adventure Works Cycles
Active



ACC003

Alpine Ski House
Active



ACC004

Lynn Haney
Active



ACC005

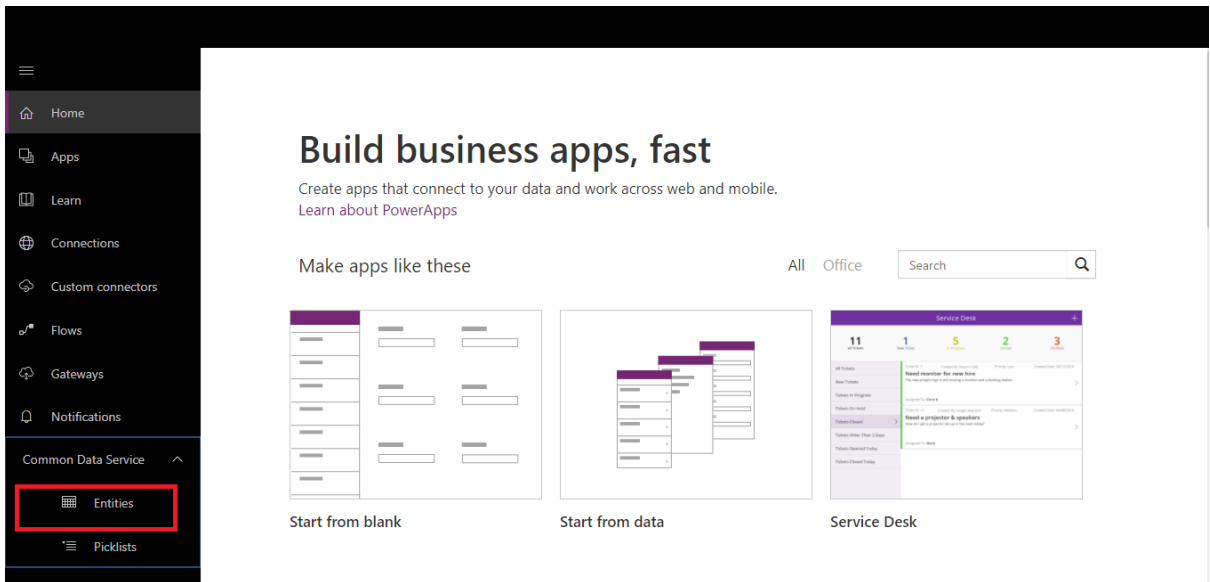
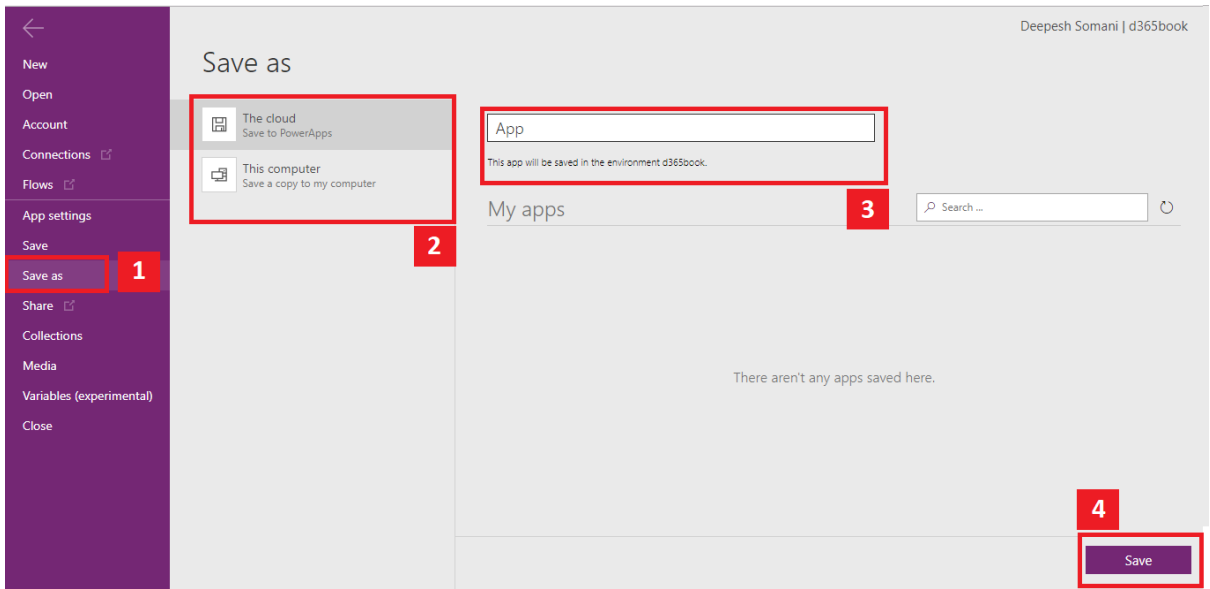
Tricia Hess
Active



ACC006

Jamie Storm
Active





New entity

Name *

Display name *

Description

Cancel Next

PowerApps Environment: d365book

← Agent Type: Custom Categories: Custom Search Add field Settings Delete

Fields • Keys • Relationships • Field groups

DISPLAY NAME	DATA TYPE	TYPE	UNIQ...	REQU...	SEAR...
Primary Id	AutoNumber	Custom	✓		...
Created by user	Text	Standard			...
Last modified by user	Text	Standard			...
Created on date time	DateTime	Standard			...
Last modified date time	DateTime	Standard			...

Save Entity

PowerApps Environment: d365book

Agent
Type: Custom Categories: Custom

Fields • Keys • Relationships • Field groups

DISPLAY NAME	DATA TYPE	TYPE
Primary Id	AutoNumber	Custom
Created by user	Text	Standard
Last modified by user	Text	Standard
Created on date time	DateTime	Standard
Last modified date time	DateTime	Standard

New field

The display name field is mandatory

Name *

Type *

Description

Unique

Required

Searchable

Cancel Add field

PowerApps Environment: d365book

Agent
Type: Custom Categories: Custom

Fields • Keys • Relationships • Field groups

RELATED ENTITY	DISPLAY NAME	TYPE
No results		

New relationship

Related entity *

Display name *

The display name field is mandatory

Name *

Description

Relation type *

Lookup

Cancel Add relationship

PowerApps Environment: d365book

Agent

Type: Custom Categories: Custom


Fields • Keys • Relationships • Field groups

DISPLAY NAME	NAME	NO. OF FIELDS	TYPE
Default create	DefaultCreate	0	Standard
Default list	DefaultList	0	Standard
Default details	DefaultDetails	0	Standard
Default card	DefaultCard	0	Standard
Default lookup	DefaultLookup	0	Standard
Default report	DefaultReport	0	Standard

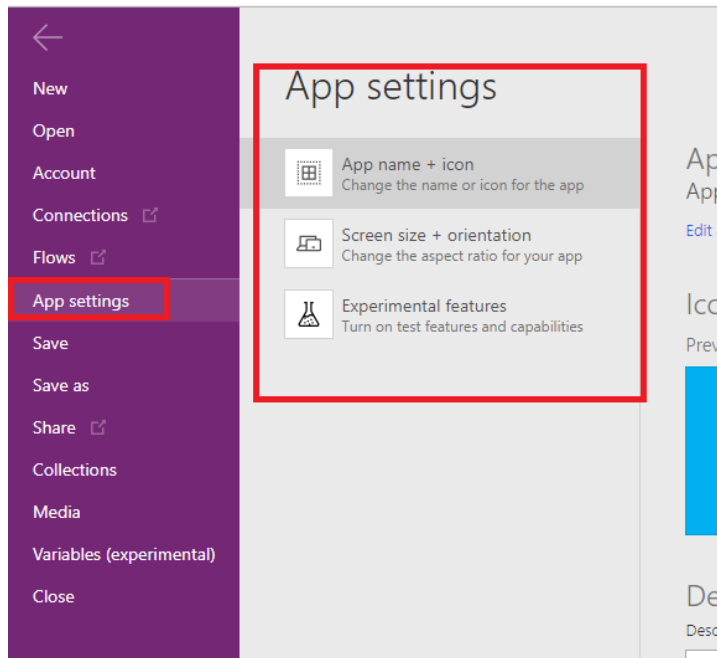
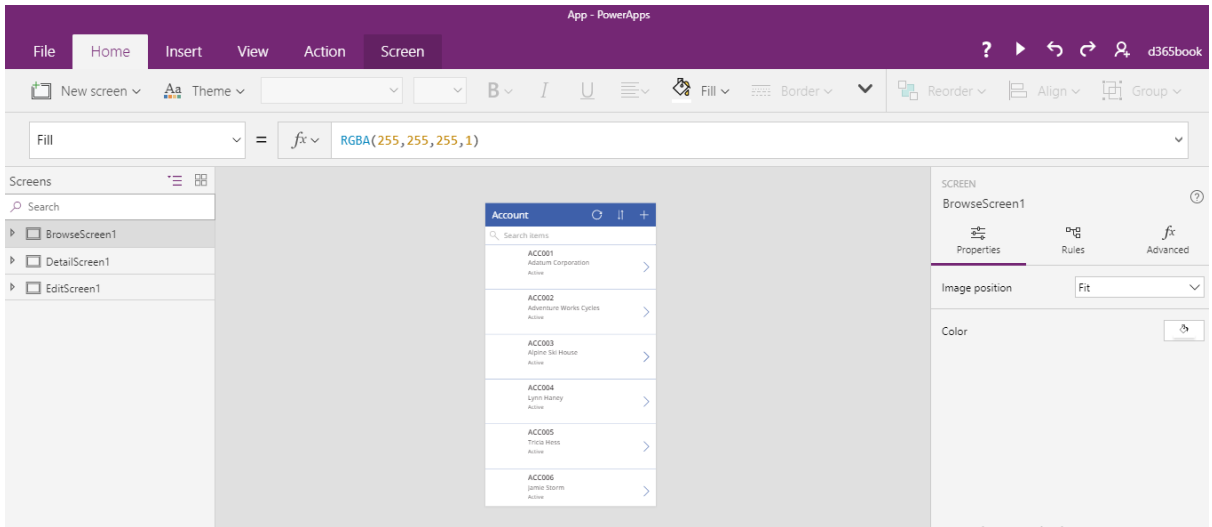
Save Entity

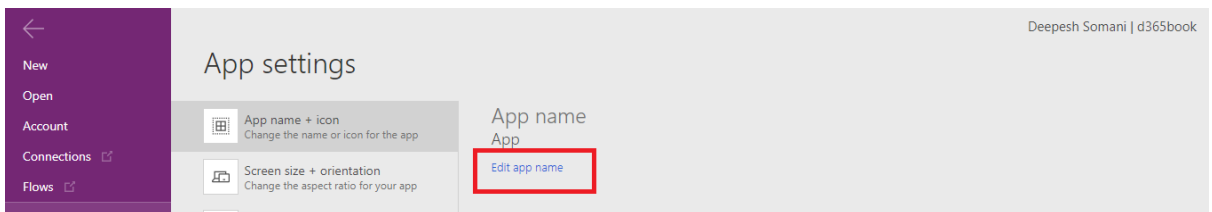
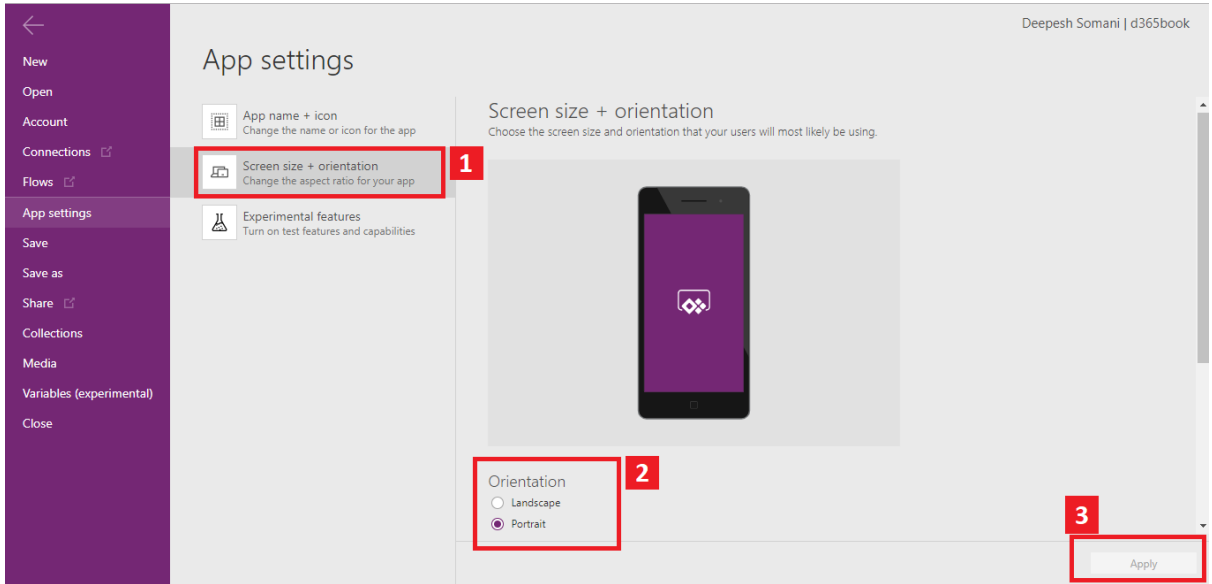
PowerApps Environment: d365book

Find all of your apps across all environments at **Microsoft Dynamics 365** Import package (preview)

NAME	PERMISSIONS	MODIFIED	MODIFIED BY
 App by You	Owner	10 h ago	You

- Open
- Edit in Studio (Windows)
- Edit on the web**
- Settings
- Analytics (preview)
- Share
- Delete
- Details
- Export package (preview)






PowerApps Environment d365book

App Created: 01/05/2018 Modified: 01/06/2018

Play Edit Delete Export package (preview)

Details Share Versions Settings Analytics (preview)

App name
App 

AppSource settings
Showing settings for version Latest draft

Description
Describe what people can do with this app. This will appear with your app in your org's AppSource gallery. [Learn about AppSource.](#)

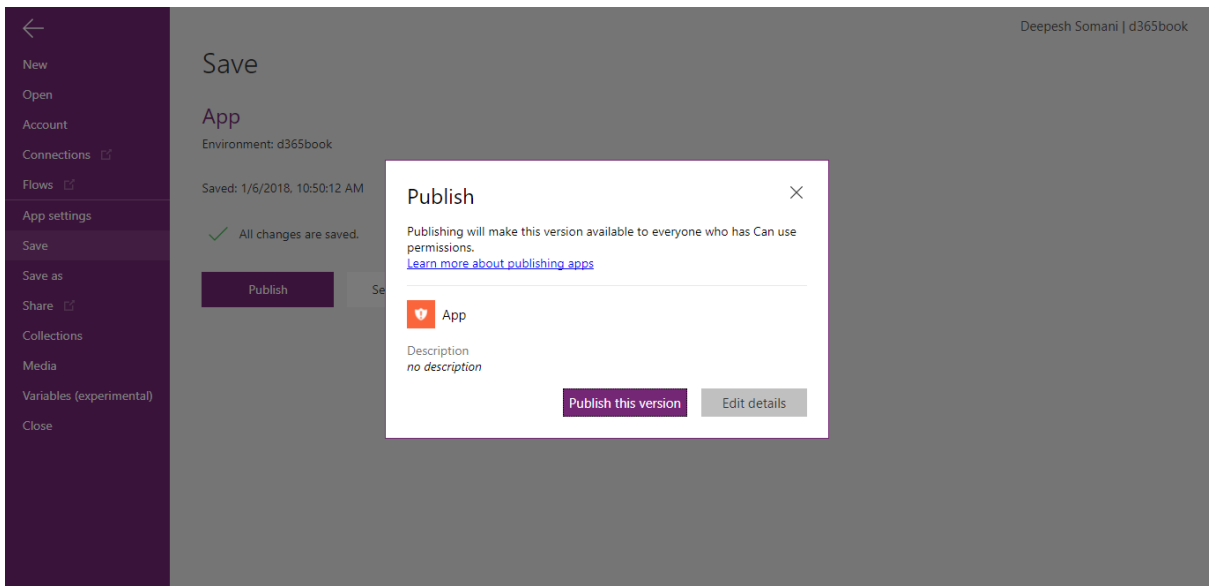
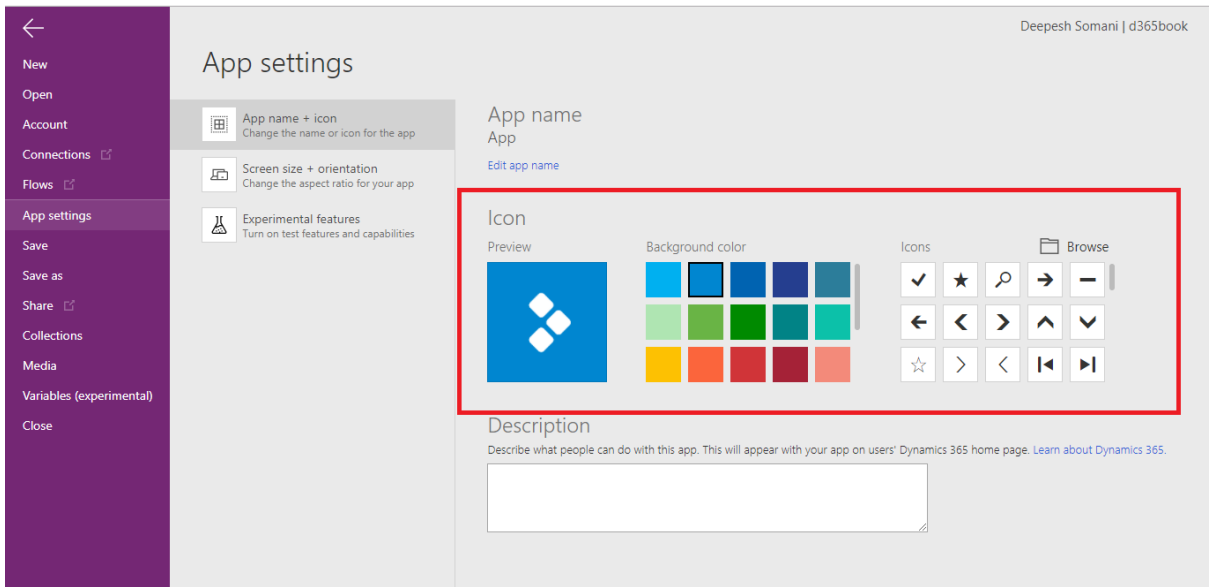
Categories
Choose up to two categories for your app to appear under in AppSource.
 Analytics

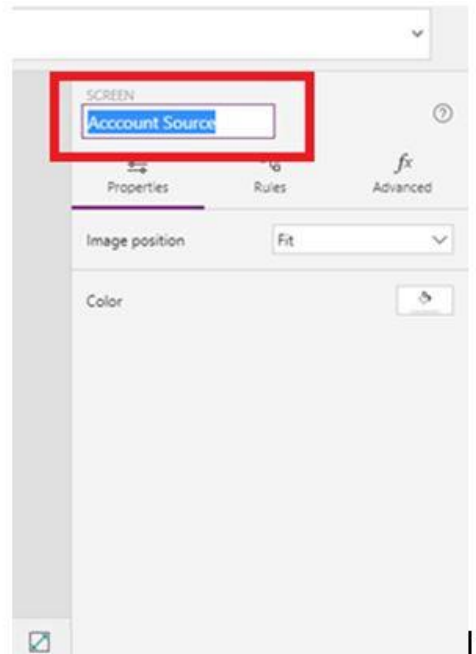
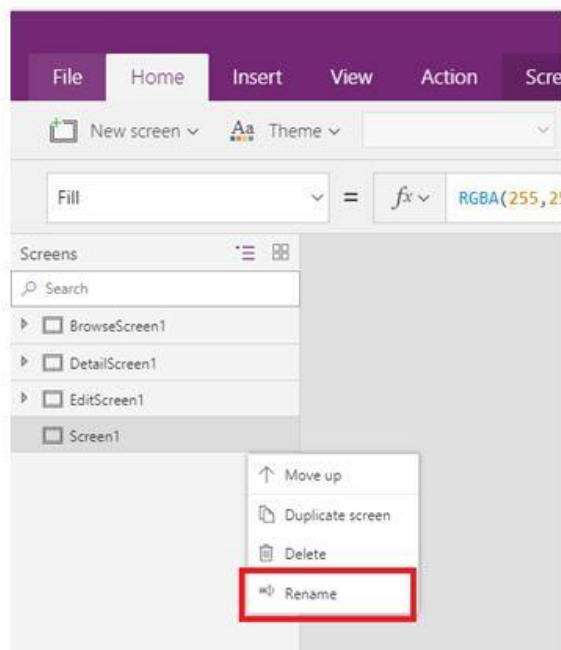
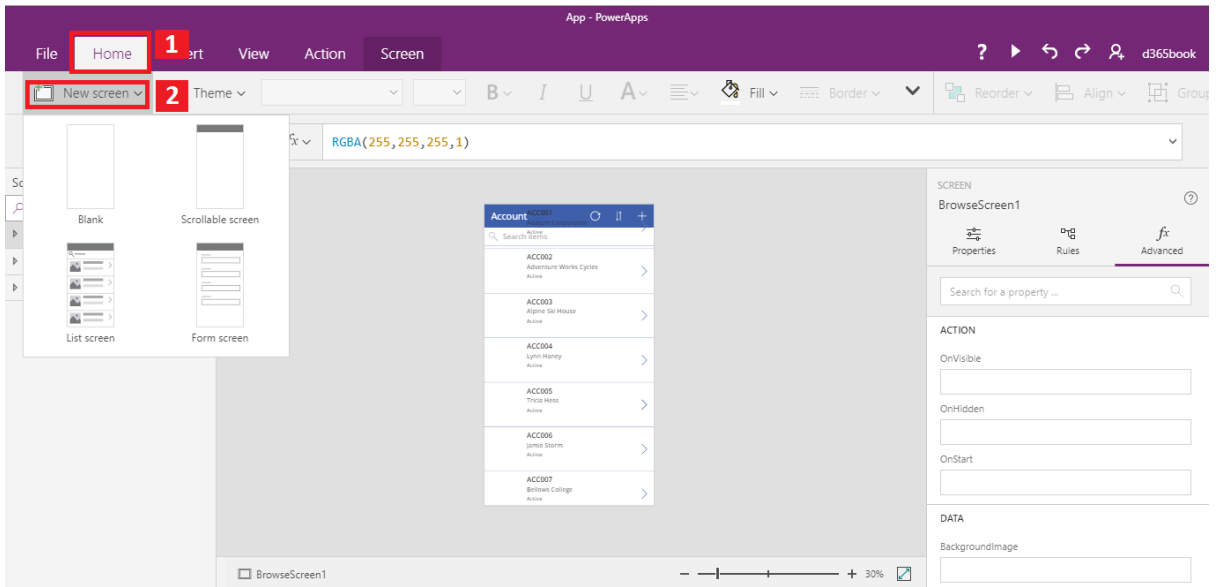
Change app name

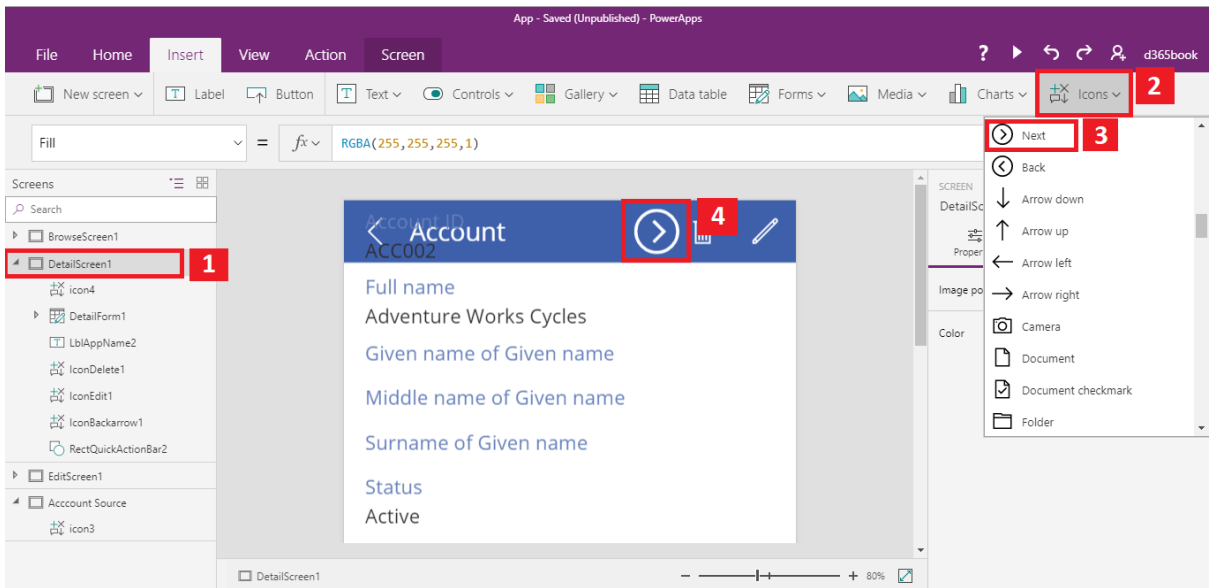
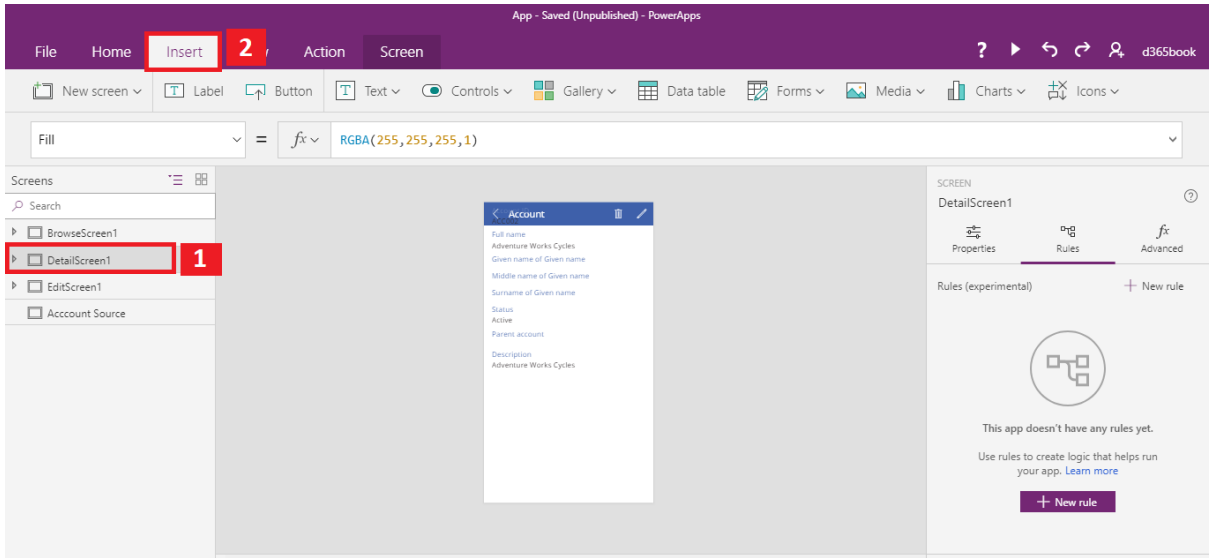
New App name

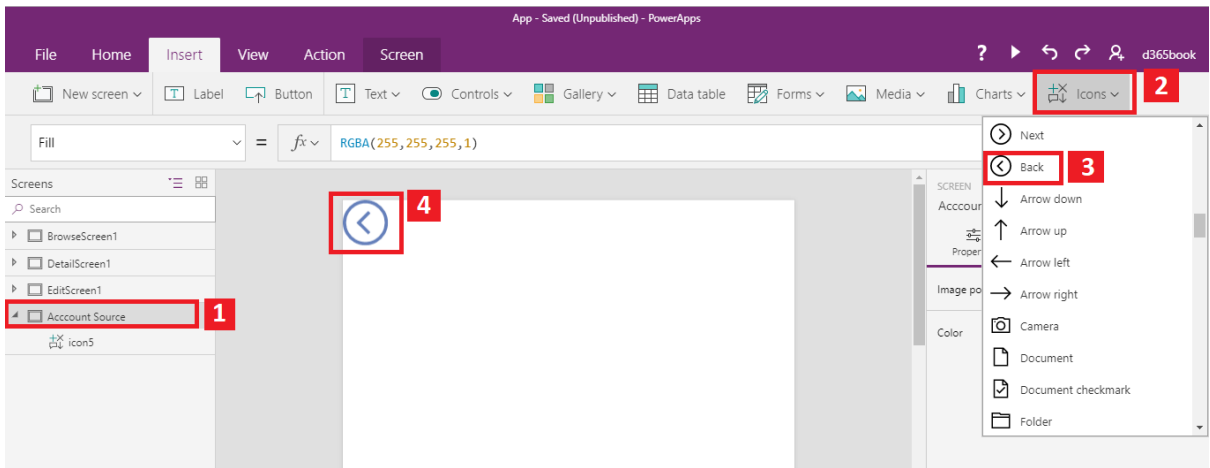
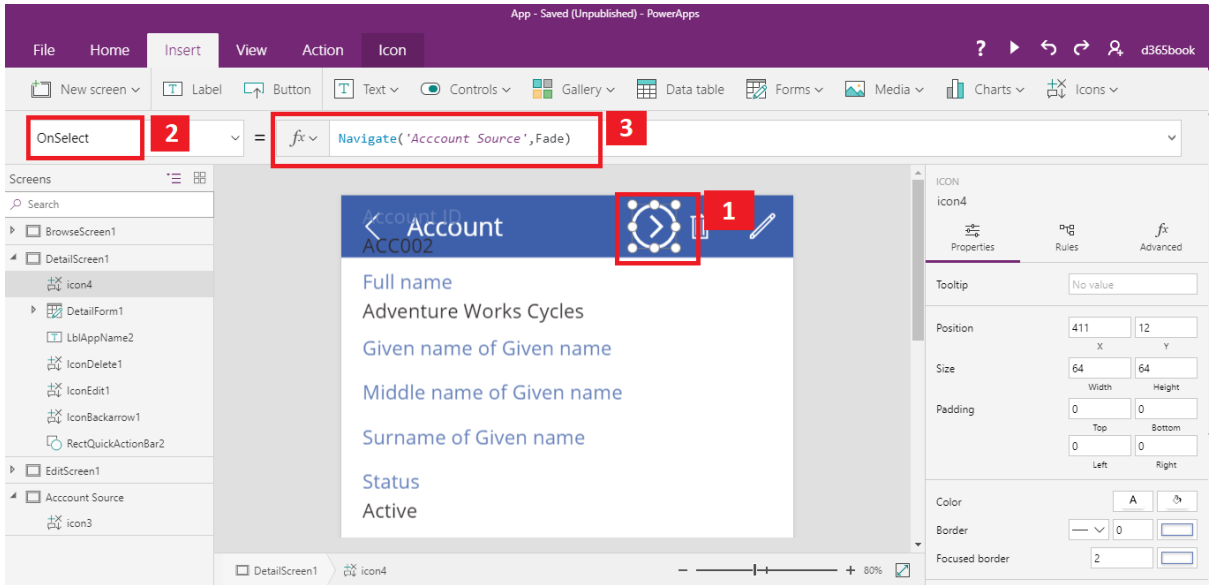
This will also change the name of the published version of your app.

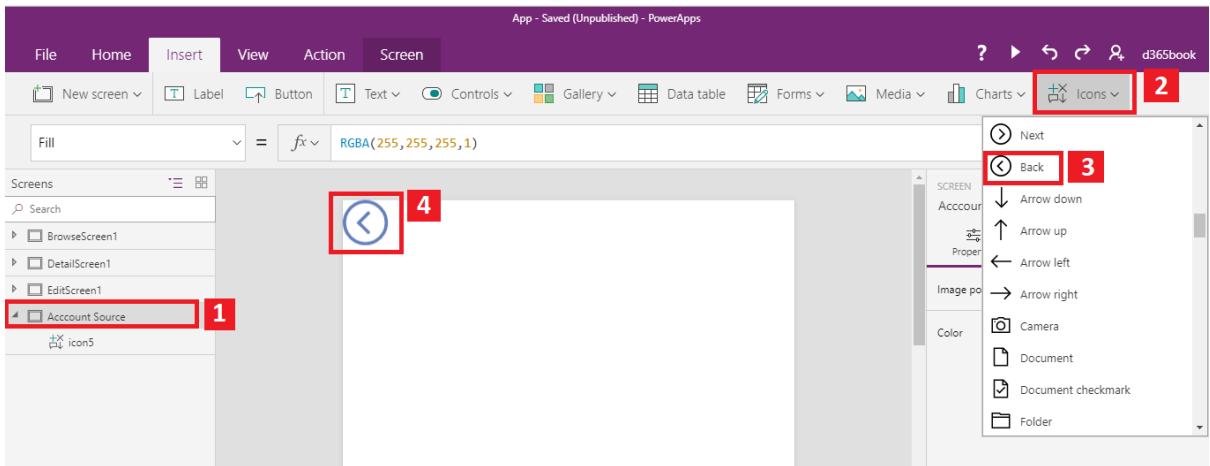
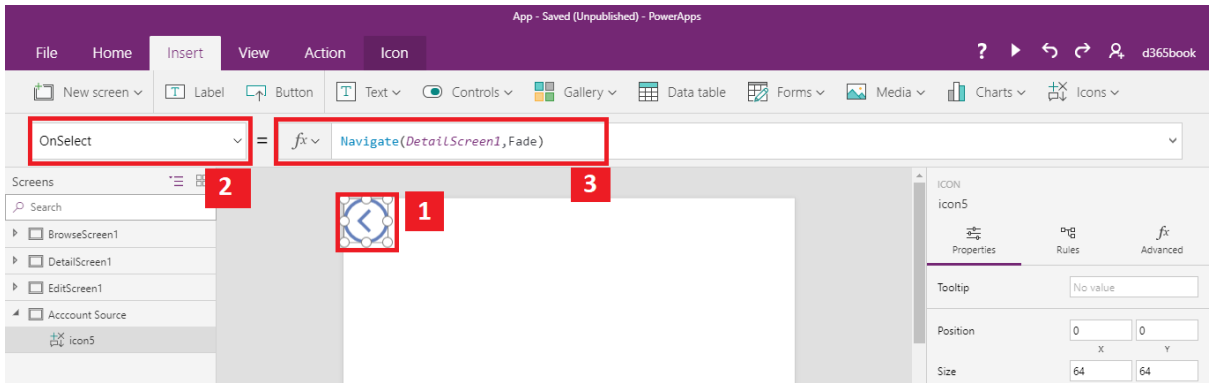
Save changes Cancel

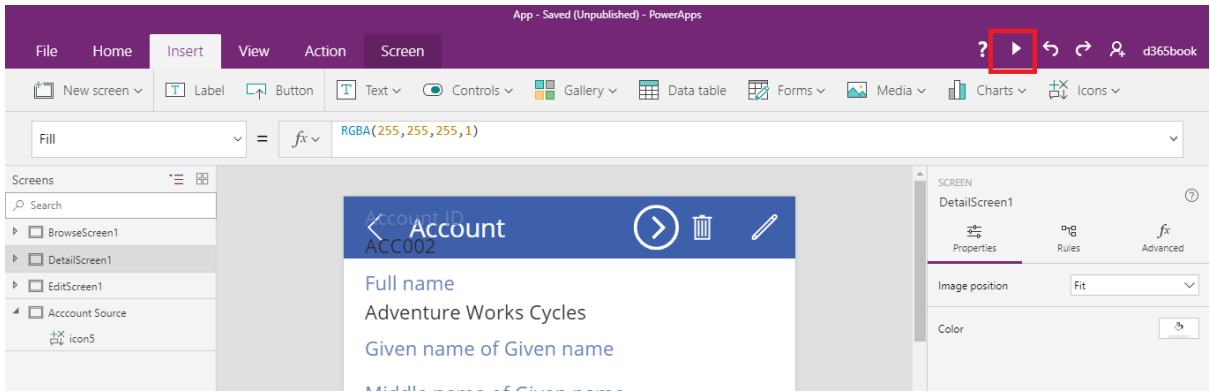
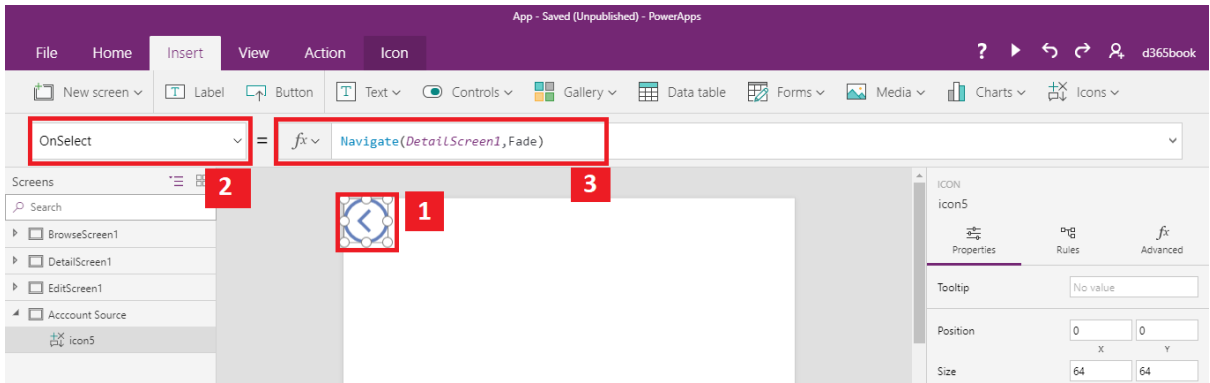


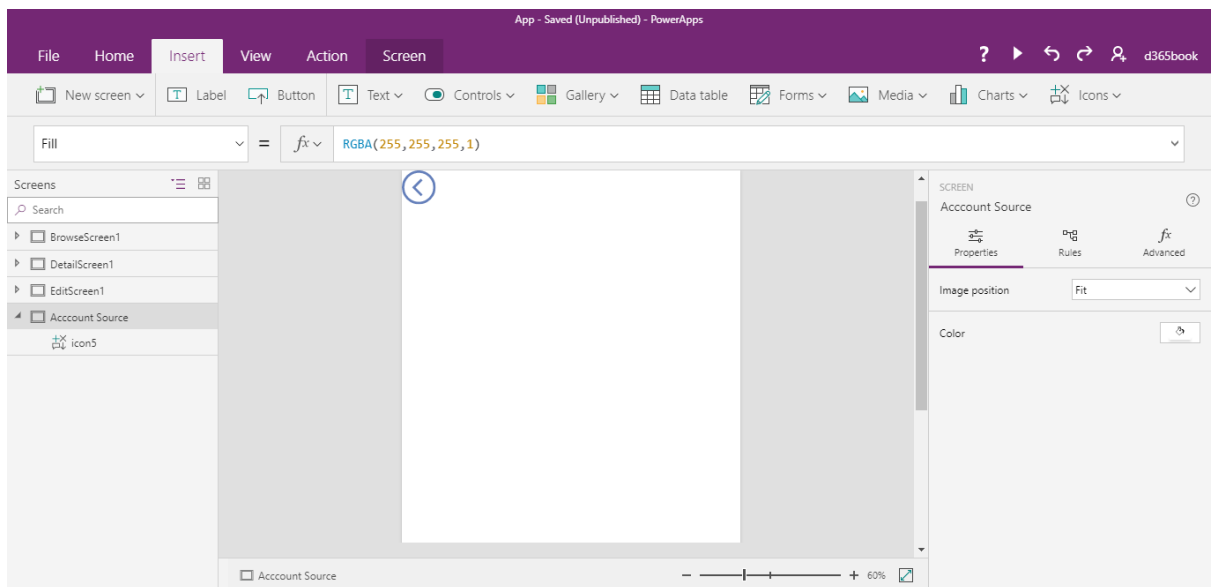
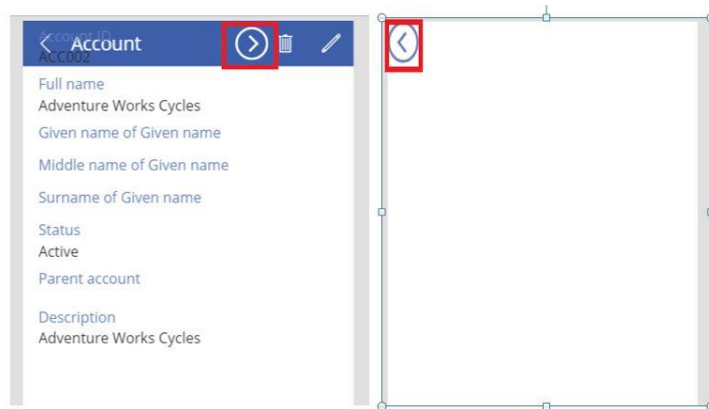


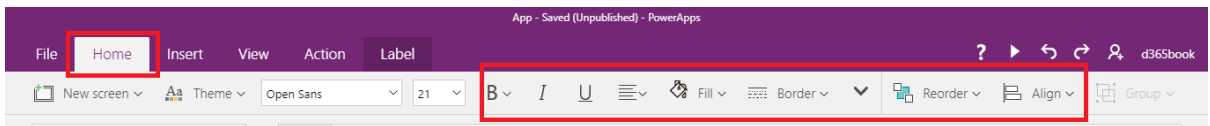
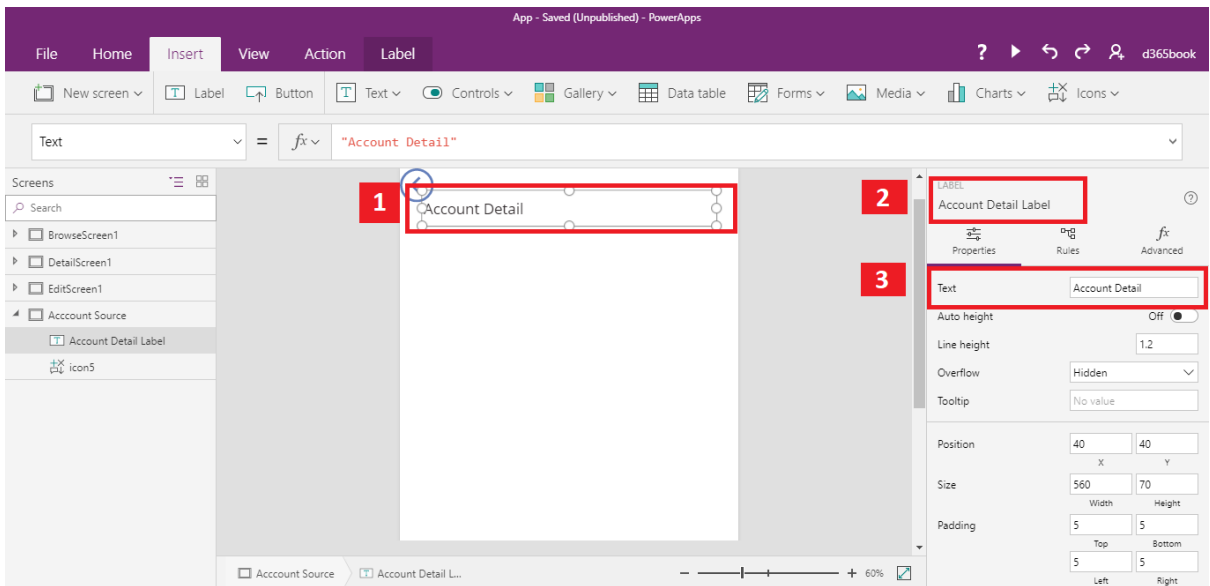
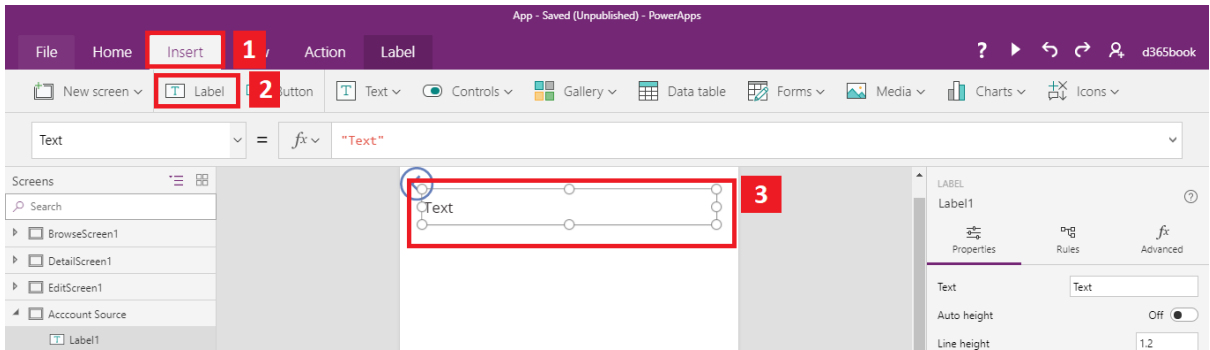


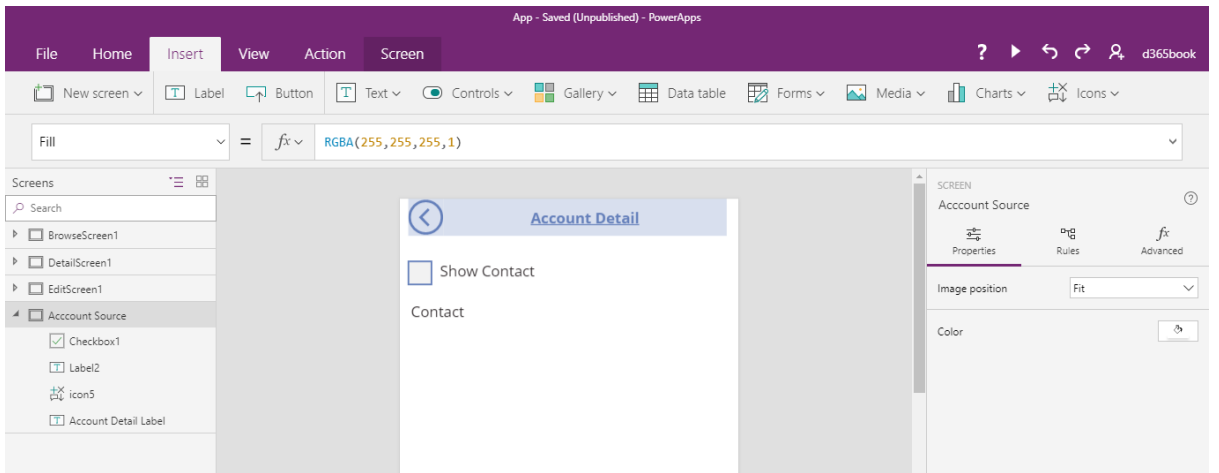
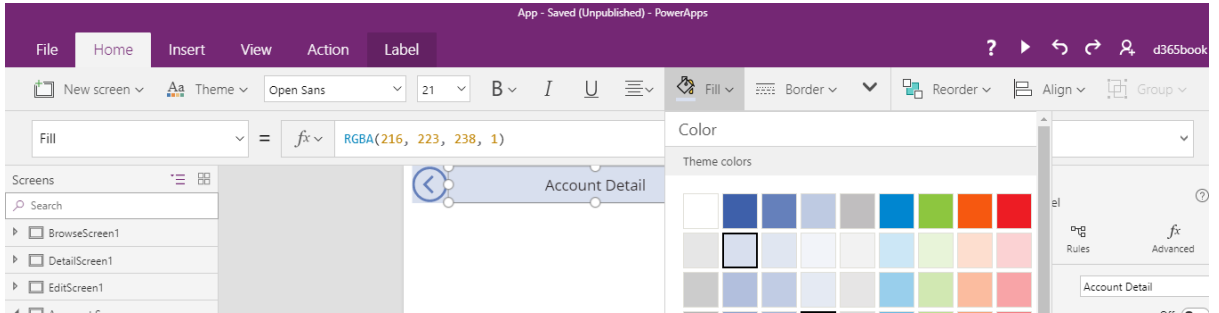


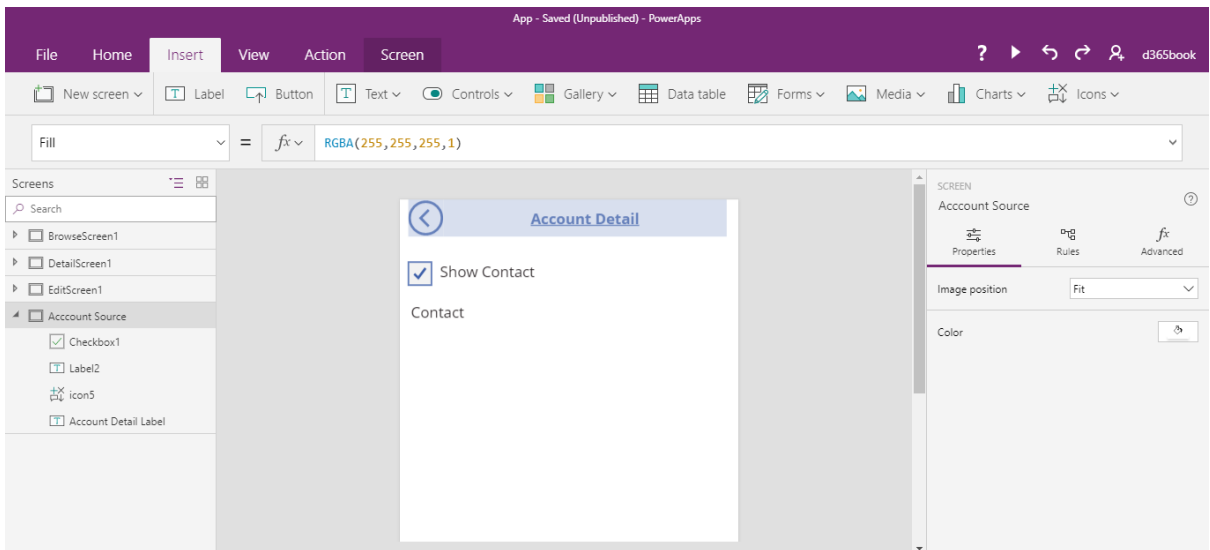
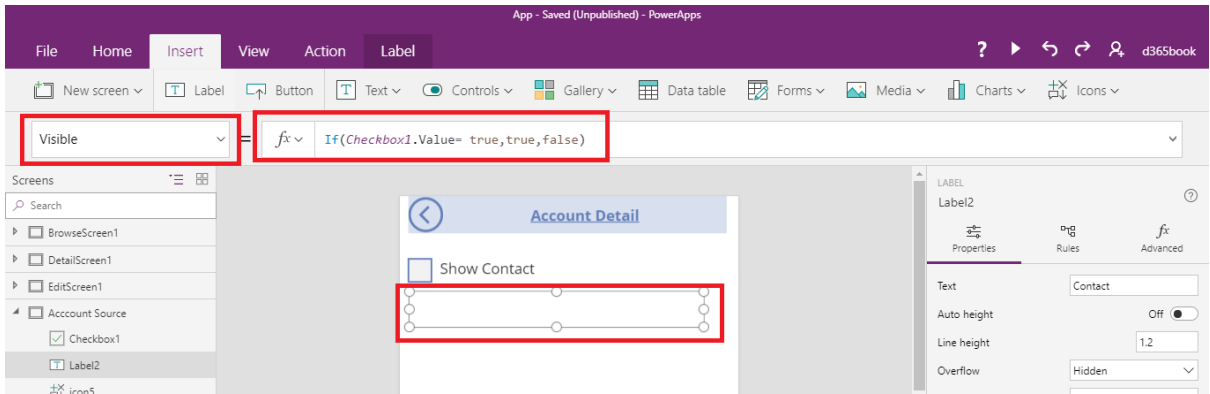


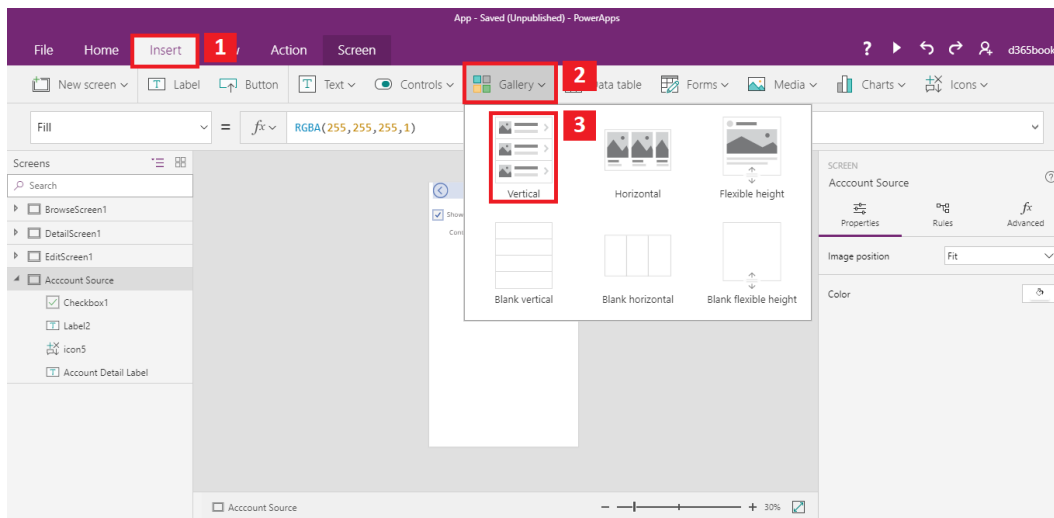
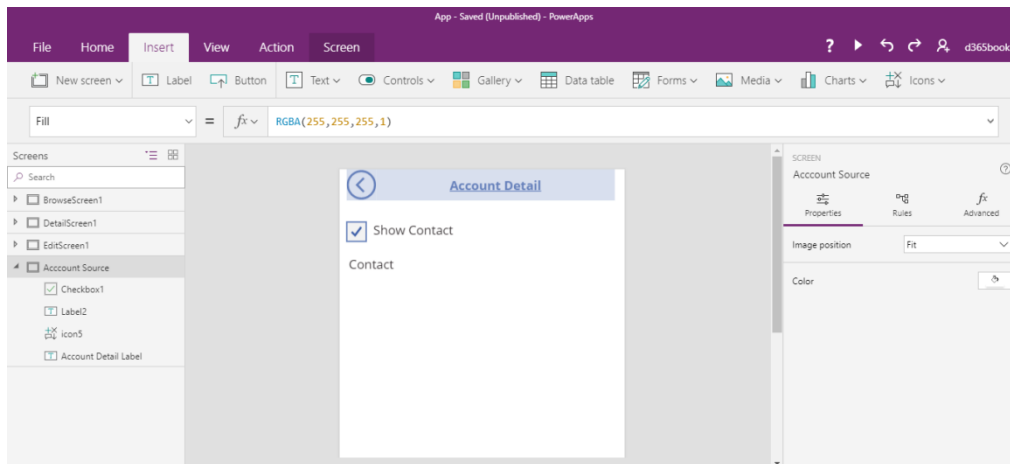


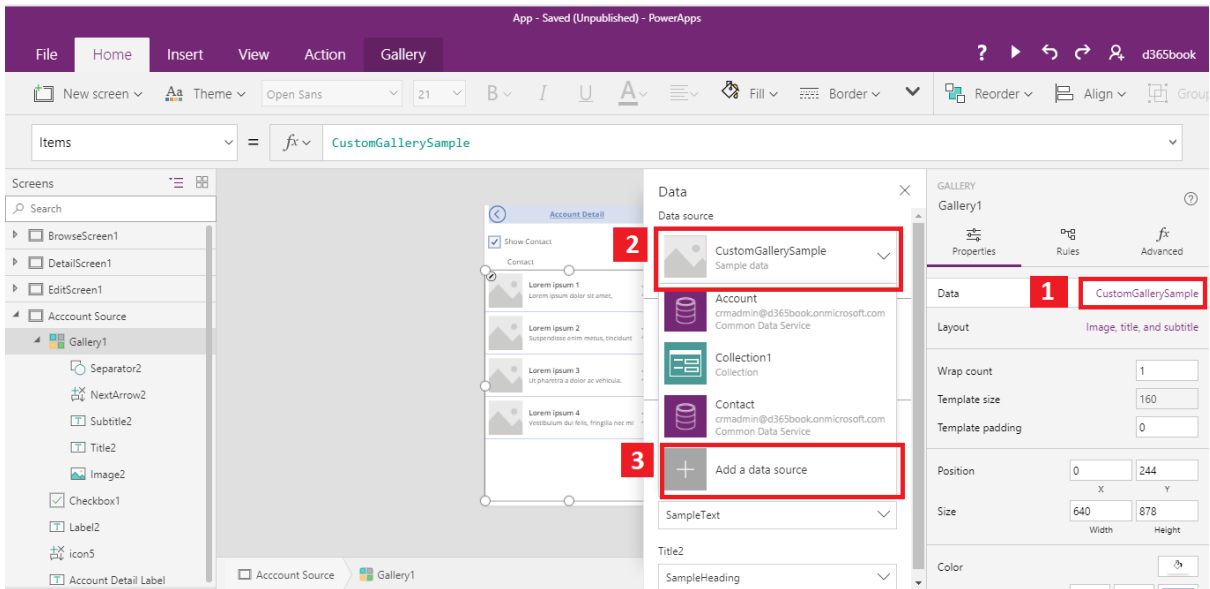
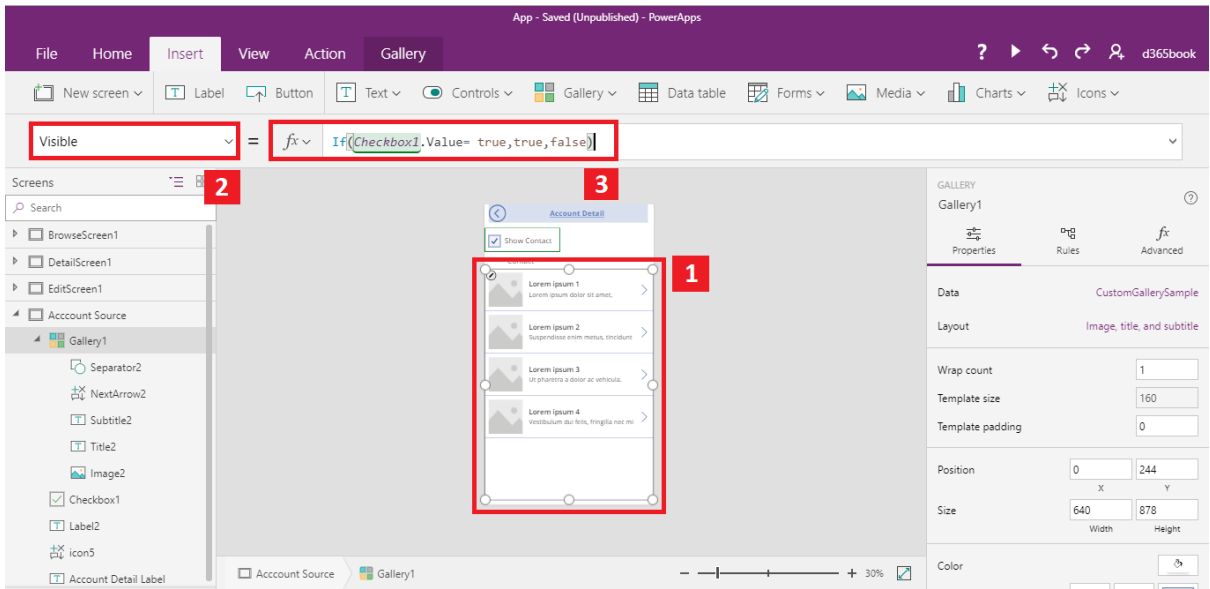


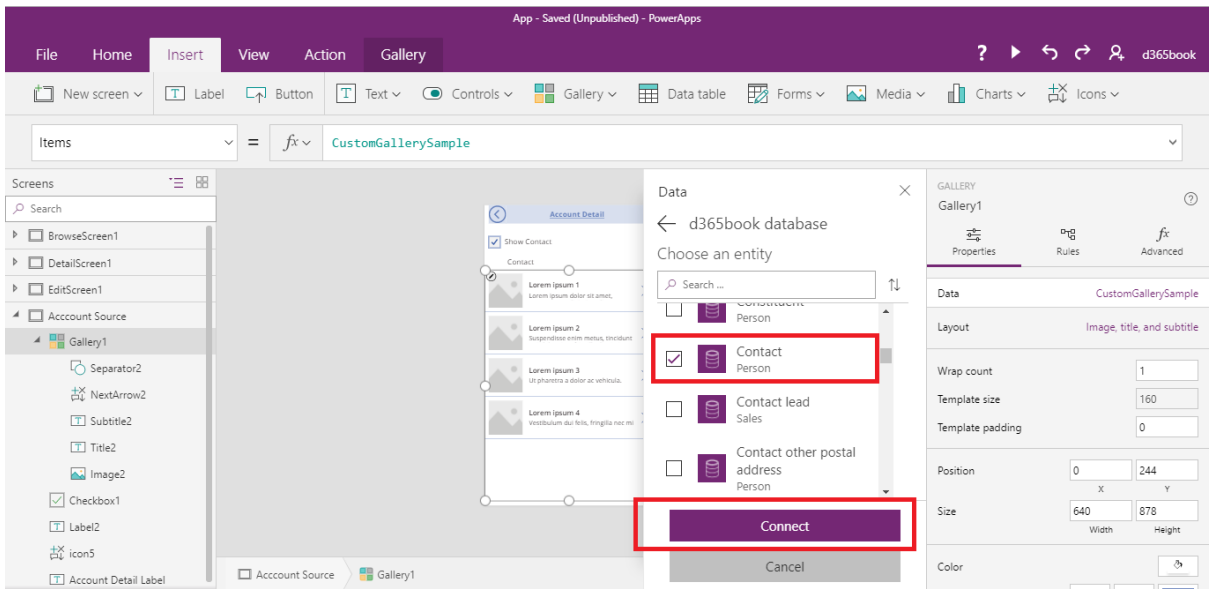
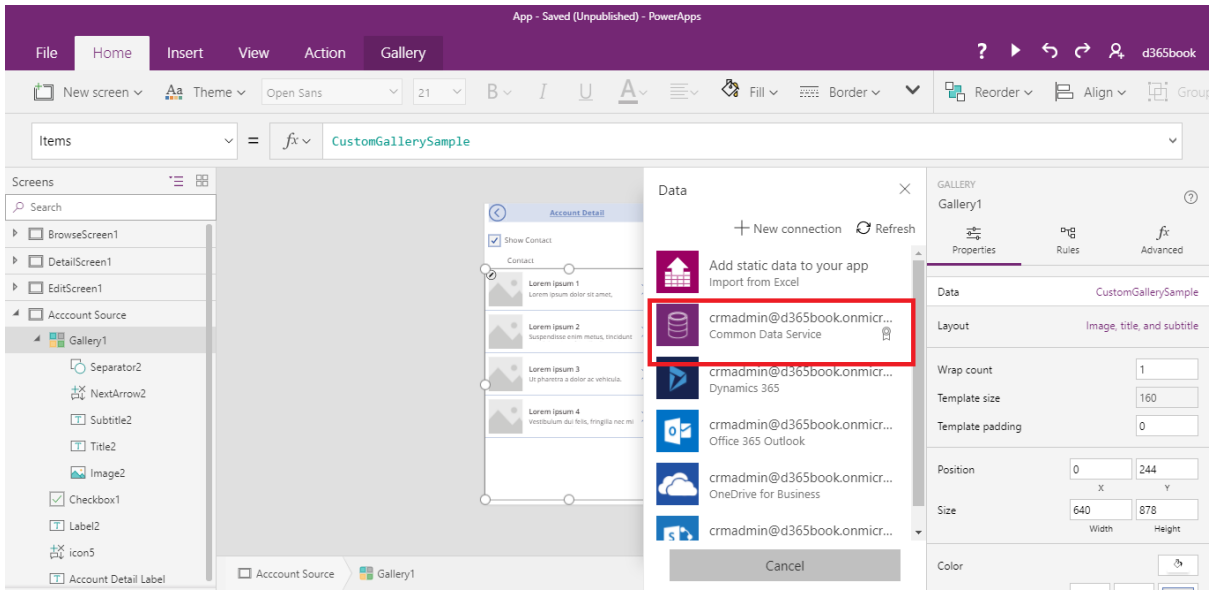


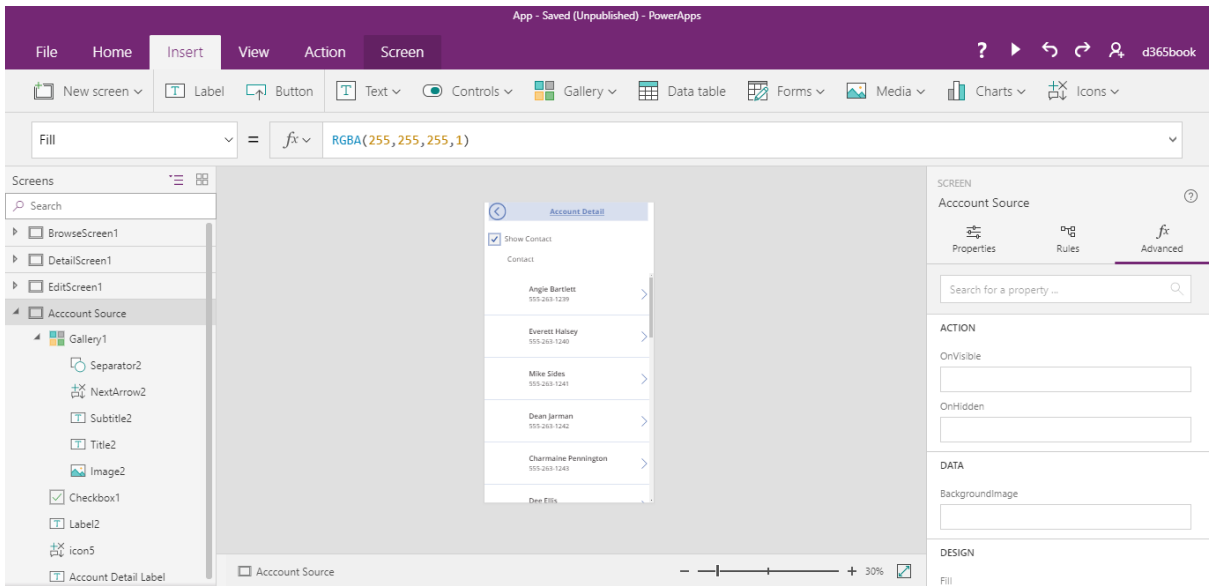
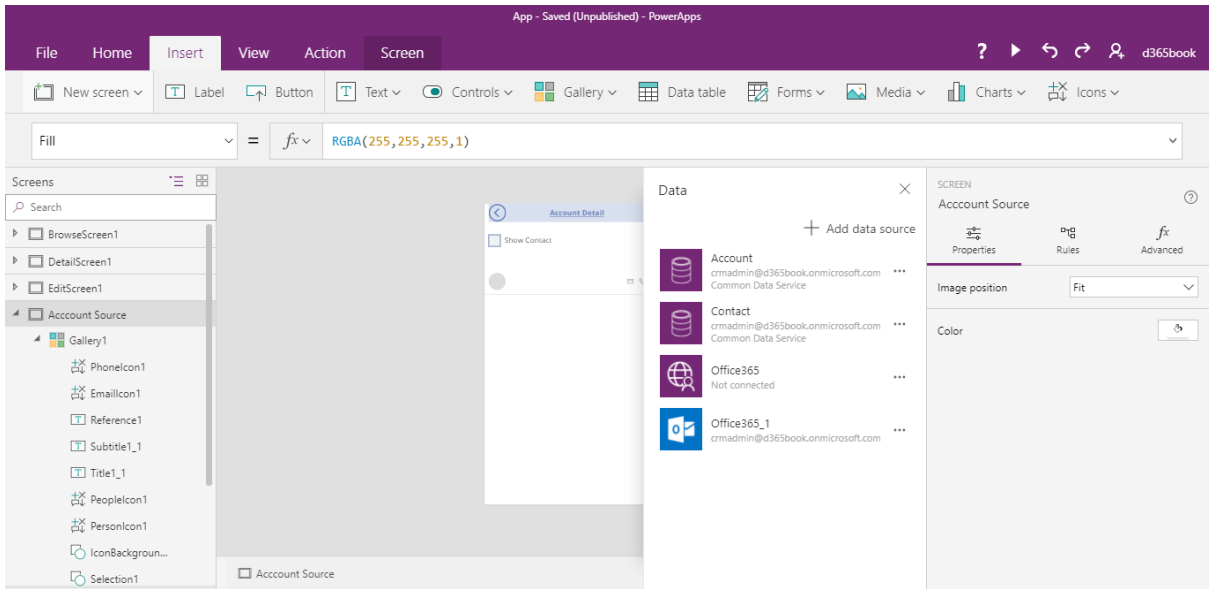






























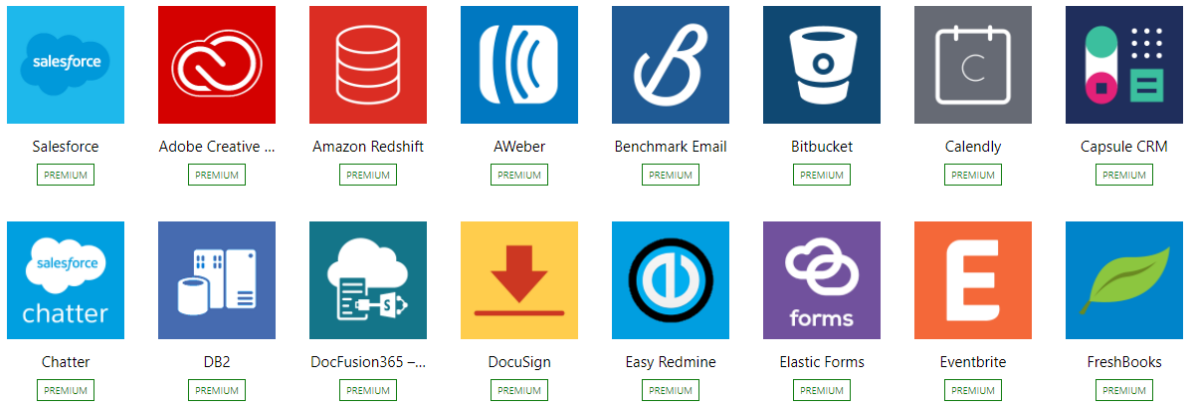


Chapter 6: Automate Business Processes Using Microsoft Flow

Microsoft | [Flow](#) | [Templates](#) | [Connectors](#) | [Learn](#) | | [Sign in](#) | [Sign up free](#)

Showing sorted by

















 Save Office 365 email attachments to OneDrive for Business  By Microsoft Used 91030 times	 Send myself a reminder in 10 minutes   By Microsoft Used 70451 times	 Get a push notification when you receive an email from your boss   By Microsoft Used 63566 times	 Get today's weather forecast for my current location   By Microsoft Used 37929 times
 Save Outlook.com email attachments to your OneDrive  By Waleed Ahmed Used 31485 times	 Get a push notification with updates from the Flow blog  By Microsoft Used 28197 times	 PowerApps button  By Microsoft Used 15438 times	 Send a customized email when a new SharePoint list item is added   By Microsoft Used 13268 times



Microsoft Flow for Dynamics 365 Plan	Microsoft Flow Plan 2
<ul style="list-style-type: none"> • Dynamics 365 Enterprise Sales • Dynamics 365 Enterprise Field Service • Dynamics 365 Enterprise Marketing • Dynamics 365 Enterprise Customer Service • Dynamics 365 Enterprise Project Service Automation • Dynamics 365 Enterprise Operations • Dynamics 365 Business Edition Financials 	<ul style="list-style-type: none"> • Dynamics 365 Enterprise, Plan 1 • Dynamics 365 Enterprise, Plan 1 • Dynamics 365 Business Edition Plan.







← Dynamics 365

Triggers (8) Actions (18)


-  Dynamics 365 - When a record is selected 
-  Dynamics 365 - When a record is created 
-  Dynamics 365 - When a record is deleted 
-  Dynamics 365 - When a record is updated 
-  Dynamics 365 for Financials - When a record is created 
-  Dynamics 365 for Financials - When a record is modified 
-  Dynamics 365 for Financials - When a sales document approval is requested 
-  Dynamics 365 for Operations - When an entity is added or updated 

← Search all triggers


Triggers (6) Actions (9)


-  Dynamics 365 - When a record is created i
-  Dynamics 365 - When a record is created (Preview) i
-  Dynamics 365 - When a record is created or updated (Preview) i
-  Dynamics 365 - When a record is deleted i
-  Dynamics 365 - When a record is selected i
-  Dynamics 365 - When a record is updated i

TELL US WHAT YOU NEED





 Help us decide which connectors and triggers to add next with [UserVoice](#)






Condition ...

 Input x is equal to Test i

[Add dynamic content](#) 

[Edit in advanced mode](#) [Collapse condition](#)

<p> If yes</p> <p> Add an action More</p>	<p> If no</p> <p> Add an action More</p>
--	---

-  Add a condition
-  Add a switch case
-  Add an apply to each
-  Add a do until
-  Add a scope

Switch
...



*On

Case
...

*Equals

Apply to each
...

*Select an output from previous steps

 Add an action
 Add a condition
... More

Default
+



If no case contains a matching value

Do until
...

is equal to

[Edit in advanced mode](#)

[Change limits](#) ▾

 Add an action
 Add a condition
... More

Triggers (4)		
		<ul style="list-style-type: none"> • When a record is selected • When a record is created • Delete a record is deleted • When a record is updated
Required Parameters	Organization Name	Specifies the name of the organization to be connected.
	Entity Name	Specifies the name of the entity.

ACTIONS (5)		
<ul style="list-style-type: none"> • Create a new record 		
Required Parameters	Organization Name	Specifies the name of the organization to be connected.
	Entity Name	Specifies the name of the entity.
	Record Item	Specifies the record to be created.
<ul style="list-style-type: none"> • Delete a record • Get record 		
Required Parameters	Organization Name	Specifies the name of the organization to be connected.
	Entity Name	Specifies the name of the entity.
	Item Identifier	Specifies the identifier for the record to be deleted.
<ul style="list-style-type: none"> • List Records 		
Required Parameters	Organization Name	Specifies the name of the organization to be connected.
	Entity Name	Specifies the name of the entity.
Optional Parameters	Filter Query	Specifies the OData filter for the records to be retrieved.
	Order By	Specifies OData order by for the records returned.
	Top Count	Specifies the total number of records to be retrieved.
	Expand Query	Specifies if the related entities to be included. Default is none.
<ul style="list-style-type: none"> • Update a record 		
Required Parameters	Organization Name	Specifies the name of the organization to be connected.
	Entity Name	Specifies the name of the entity.
	Record Identifier	Specifies the identifier for the record to be updated.
	Record Item	Specifies the record to be updated.

Dynamics 365 Sales Accounts

NEW DELETE EMAIL A LINK FLOWS RUN REPORT

My Active Accounts

- Manage
 - Create a flow
 - See your flows

Dynamics 365 Sales Accounts Alpine Ski House

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

ACCOUNT Alpine Ski House Annual Revenue \$483,000,000.00

Summary

ACCOUNT INFORMATION

Account Name	Alpine Ski House
Phone	+43-1-12345-0
Fax	+43-1-12345-0

POSTS ASSISTANT

Enter post here

POST

- Geo Code
- Share
- Share Secured Fields
- Follow
- Run Workflow
- Start Dialog
- Flows
 - Manage
 - Create a flow
 - See your flows
- Word Templates
- Run Report
- Other Activities
- Relationship

Flow name My Dynamics 365 Lead Flow

✓ Create flow

✕ Close

Search: Dynamics 365

Connectors [See more](#)

- Dynamics 365
- Dynamics 365 for
- Dynamics 365 for

Triggers (8) [Actions \(18\)](#) [See more](#)

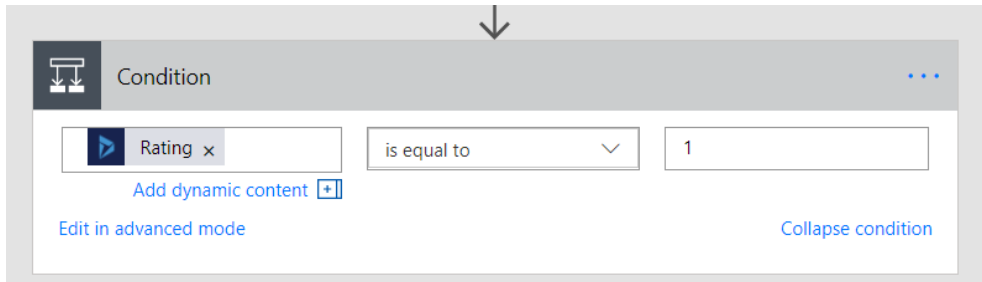
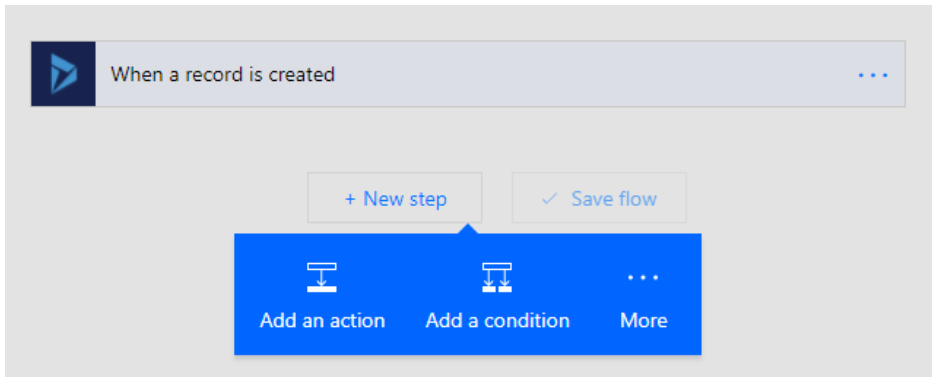
- Dynamics 365 - When a record is selected ⓘ
- Dynamics 365 - When a record is created ⓘ
- Dynamics 365 - When a record is deleted ⓘ
- Dynamics 365 - When a record is updated ⓘ
- Dynamics 365 for Financials - When a record is created ⓘ
- Dynamics 365 for Financials - When a record is modified ⓘ
- Dynamics 365 for Financials - When a sales document approval is requested ⓘ
- Dynamics 365 for Operations - When an entity is added or updated ⓘ

When a record is created ⋮

* Organization Name ▼

* Entity Name ▼

[+ New step](#) [✓ Save flow](#)



Dynamic content Expression

Search dynamic content

When a record is created See more

- Last Name**
Type the last name of the primary contact for the lead to ma...
- List of Items**
List of Items
- Topic**
Type a subject or descriptive name, such as the expected ord...
- value**
List of Items

When a record is created ...

↓

Condition ...

Rating x is equal to 1

[Add dynamic content](#) [Edit in advanced mode](#) [Collapse condition](#)

If yes ... [Add an action](#)


If no [Add an action](#)

✓ If yes


Choose an action

Excel Insert

Connectors [See more](#)

 Excel

Triggers (0) **Actions (1)** [See more](#)

 Excel - Insert row ⓘ

TELL US WHAT YOU NEED

😊 Help us decide which connectors and triggers to add next with [UserVoice](#)

[Cancel](#)

Excel Online OneDrive ▶ CRM Leads

FILE HOME INSERT DATA REVIEW VIEW Tell me what you want to do EDIT IN EXCEL

Undo Paste Copy Format Painter Clipboard


Calibri 11 A⁺ A⁻ B I U D abc Font

Alignment Wrap Text Merge & Center

	A	B	C	D	E	F
1	Topic	Name	Business Phone	Email	Company	Website
2						
3						
4						

✓ If yes


+

 Insert row i ...





* File name	<input type="text" value="/CRM%20Leads/CRM Lead Records.xlsx"/>	<input type="checkbox"/>
* Table name	<input type="text" value="Leads"/>	▼
Topic	<input type="text" value="Topic"/>	×
Name	<input type="text" value="Last Name"/>	×
Business_x0020_Phone_x0020_	<input type="text" value="Business Phone"/>	×
Email	<input type="text" value="Email"/>	×
Company	<input type="text" value="Company Name"/>	×
Website	<input type="text" value="Website"/>	×


Wunderlist Create a task

Connectors [See more](#)

 Wunderlist

Triggers (1) **Actions (4)** [See more](#)

-  Wunderlist - Create a list (i)
-  Wunderlist - Create a note (i)
-  Wunderlist - Create a subtask (i)
-  Wunderlist - Create a task (i)

 Create a task (i) ...


* List Id

* Title



[Show advanced options](#) ▾


Notifications

Connectors [See more](#)

 Notifications

Triggers (0) **Actions (2)** [See more](#)

-  Notifications - Send me a mobile notification [i](#)
-  Notifications - Send me an email notification [i](#)

 Send me a mobile notification [...](#)

* Text Topic x"/>

Link Lead x %7d&pagetype=entityrecord"/> [Add dynamic content +|](#)

Link label



Robin Counts (sample) ☰

Qualify (Active) ▶

Summary

CONTACT

Topic *	Likes our products (sample)
Name *	Robin Counts (sample)
Job Title	Purchasing Assistant
Business Phone	555-0125
Mobile Phone	--
Email	someone18@example.com
Rating	Hot

COMPANY

Company +	Consolidated Messenger
Website	http://www.consolidatedmessenger.com/

☰
Flow
My flows
Approvals
Templates
Connectors
Learn
Search templates ...
🔍

My flows Team flows

Name



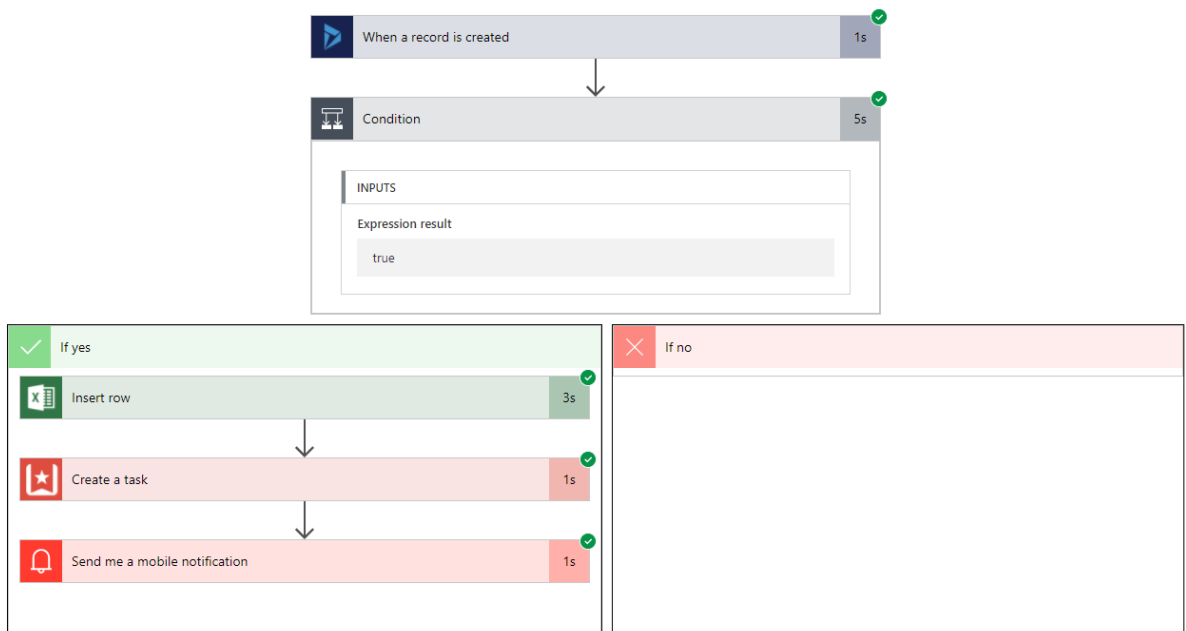
My Dynamics 365 Lead Flow

← Flow runs for My Dynamics 365 Lead Flow

Download CSV

All runs

Status	Start time	Duration	
Succeeded	4 minutes ago	4 seconds	>



Topic	Name	Business Ph	Email	Company	Website	PowerAppsd_
Likes our products (sample)	Counts (sample)	555-0125	someone1@example.com	Consolidated Messenger	http://www.consolidatedmessenger.com/	6zaxJ4RNKc4

Inbox

Nishant Rana

Inbox 1

+ Add a to-do...

Follow up - Likes our products (sample) Email - [someone18@example.com](mailto:someonel8@example.com) Business Phone - 555-0125 ☆

Notification

My Dynamics 365 Lead Flow





New Lead Created - Likes our products (sample)

17m ago

[Open Lead Record](#)

Activity Browse Buttons Flows Account

My flows **Team flows** + Create from blank 📄 Create from template ⬇ Import

Name	Last modified	On	⋮
 My Dynamics 365 Lead Flow	2 minutes ago	<input checked="" type="checkbox"/> On	  

Invite another owner: My Dynamics 365 Lead Flow


← My Dynamics 365 Lead Flow ✎ Edit

Owners
 Adding another owner allows others to edit, update and delete this flow. All owners can also access the run history and add or remove other owners. [Learn more](#)




Add another owner

test

Test User
 testuser@...onmicrosoft.com

 ...@...onmicrosoft.com

Triggers (1) **Actions (3)**

-  Office 365 Outlook - Send approval email
-  Approvals - Start an approval
-  Outlook.com - Send approval email

 Dynamics 365 - List records



Recurrence



* Frequency

Minute



* Interval

5

Time zone

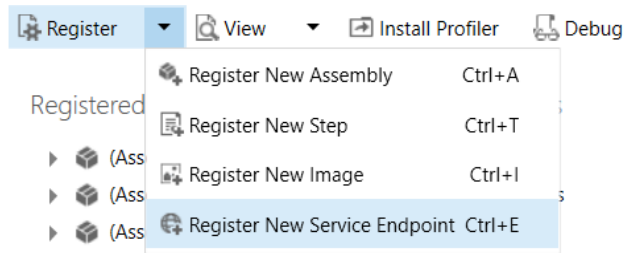
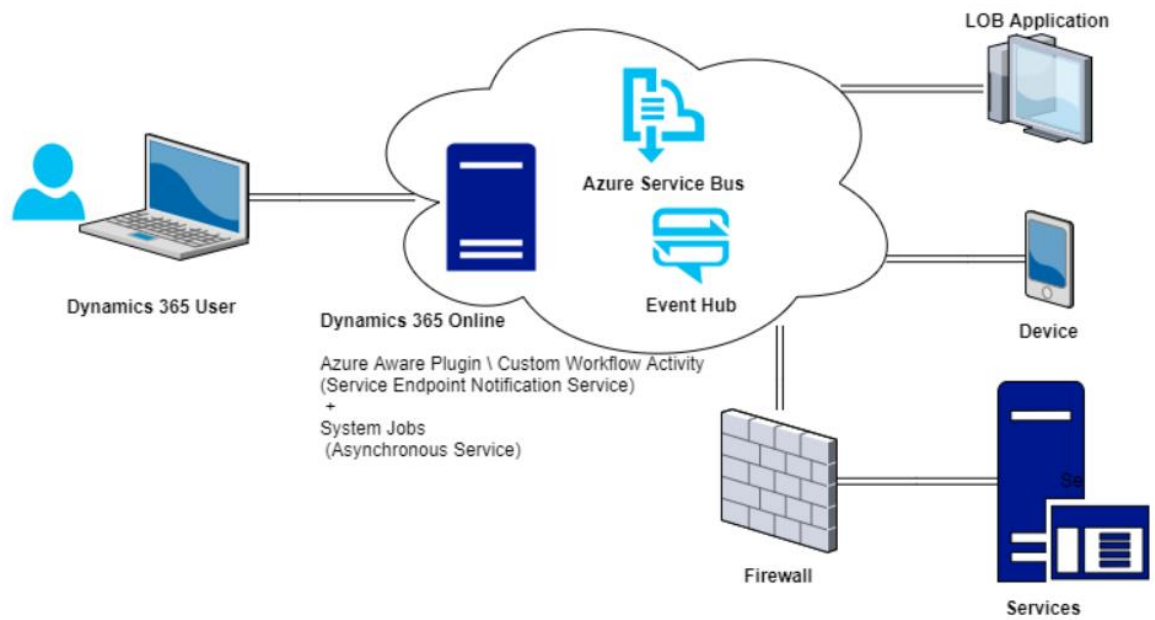


Start time

Example: 2017-03-24T15:00:00Z

[Hide advanced options](#) ^

Chapter 8: Leverage Azure Extensions in Dynamics 365 365



Let's Start with the connection string from the Azure Service Bus Portal...

×

I don't have a connection string...

Create namespace

Service Bus

* Name
Dynamics365SampleServiceBus ✓
.servicebus.windows.net

* Pricing tier
Standard >

* Subscription
NishantAzureSubscription ▼

* Resource group ⓘ
 Create new Use existing
Dynamics365SampleResourceGroup ✓

* Location
East Asia ▼

Pin to dashboard

[Create](#) [Automation options](#)



[+ Queue](#) [+ Topic](#) [Delete](#) [Convert](#)

Create queue

Dynamics365SampleServiceBus

* Name

✓

Max size

▼

Message time to live (default)

✓ ▼

Lock duration

▼

- Move expired messages to the dead-letter subqueue
- Enable duplicate detection
- Enable sessions
- Enable partitioning

[Create](#)

Search (Ctrl+I)

Overview

Diagnose and solve problems

SETTINGS

Shared access policies

Properties

Locks

Automation script

SUPPORT + TROUBLESHOOTING

New support request

+ Add

Search to filter items

POLICY

no policies have been se

* Policy name

Dynamics365SASPolicy

Manage

Send

Listen

Create

X

Let's Start with the connection string from the Azure Service Bus Portal...

Endpoint=sb://
dynamics365sampleservicebus.servicebus.windows.net;/SharedAccessKeyName=Dynamics365SASPolic
EPHWSr4=;EntityPath=dynamics365sa
mplequeue

I don't have a connection string...

Next Cancel

X

Service Endpoint Registration

Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	dynamics365samplequeue dynamics365sampl
Namespace Address	sb://dynamics365sampleservicebus.servicebus
Designation Type	Queue v
Queue Name	dynamics365samplequeue
Message Format	.NETBinary v
Authorization Type	SASKey v
SAS Key Name	Dynamics365SASPolicy
SAS Key	.....
User Information Sent	None v
Description	<div style="border: 1px solid gray; height: 20px; width: 100%;"></div> ▲ ▼

Save Cancel

Register New Step

General Configuration Information

Message	<input type="text" value="Create"/>
Primary Entity	<input type="text" value="lead"/>
Secondary Entity	<input type="text"/>
Filtering Attributes	<input type="text" value="Message does not support Filtered Attributes"/>
Event Handler	<input type="text" value="(ServiceEndpoint) dynamics365samplequeue dynamics365sar"/> ▾
Step Name	<input type="text" value="dynamics365samplequeue dynamics365sampleservicebus: Create"/>
Run in User's Context	<input type="text" value="Calling User"/> ▾
Execution Order	<input type="text" value="1"/>
Description	<input type="text" value="dynamics365samplequeue dynamics365sampleservicebus: Create"/>

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



LEAD ▾

Nishant Rana ☰

Qualify (Active)

Existing Contact? [click to enter](#)

Existing Account? [click to enter](#)

Purchase Timeframe [click to enter](#)

Summary

CONTACT

Topic* **Sample Lead**

Name* **Nishant Rana**

System Jobs

Entity: All ▾

View: All System Jobs ▾

📄 🗉 ✕ More Actions ▾

✓	System Job Type	System Job Name	Regarding	Status Reason	Owner	Started On ↓
✓	System Event	dynamics365samplequeue dynamics365sampleservice...	Nishant Rana	Succeeded	Nishant Rana	9/22/2017 12:56 PM

Namespace
Dynamics365SampleServiceBus

ACTIVE MESSAGE COUNT
1 MESSAGES

SCHEDULED MESSAGE COUNT
0 MESSAGES

DEAD-LETTER MESSAGE COUNT
0 MESSAGES

TRANSFER MESSAGE COUNT
0 MESSAGES

TRANSFER DEAD-LETTER MESSAGE COUNT
0 MESSAGES

```
Press [Enter] to retrieve a message from the queue.  
Waiting for a message from the queue..  
Entity Name = lead, Message Name = Create, Lead's Topic = Sample Lead  
Press [Enter] to retrieve a message from the queue.  
Waiting for a message from the queue..
```

Create topic

Dynamics365SampleServiceBus



* Name

Dynamics365Topic



Max size

1 GB



Message time to live (default)

14



days



Enable duplicate detection

Enable partitioning

Create

Service Endpoint Registration x

Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	Dynamics365Topic dynamics365sampleservice
NameSpace Address	sb://dynamics365sampleservicebus.servicebus
Designation Type	Topic v
Topic Name	Dynamics365Topic
Message Format	.NETBinary v
Authorization Type	SASKey v
SAS Key Name	Dynamics365Policy
SAS Key	.....
User Information Sent	None v
Description	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> ^ v

Create subscription

dynamics365topic



* Name

Dynamics365Subscription ✓

Message time to live (default)

14 days ▼

Lock duration

30 ✓ seconds ▼

max delivery count

10

- Move expired messages to the dead-letter subqueue
- Move messages that cause filter evaluation exceptions to the dead-letter subqueue
- Enable sessions

Create

 LEAD ▾
Nishant Rana ☰



Qualify (Active)

Existing Contact? [click to enter](#)
Existing Account? [click to enter](#)
Purchase Timeframe [click to enter](#)

Summary

CONTACT

Topic* Sample Topic Lead
Name* Nishant Rana

NAME	STATUS	MESSAGE COUNT
 Dynamics365Subscription	Active	1
 Dynamics365Subscription1	Active	1

```
Press [Enter] to retrieve a message from the topic.  
Waiting for a message from the topic...  
Entity Name = lead, Message Name = Create, Lead's Topic = Sample Topic Lead  
Press [Enter] to retrieve a message from the topic.
```

Service Endpoint Registration

Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	MyPath dynamics365sampleservicebus
NameSpace Address	https://dynamics365sampleservicebus.servicebus.windows.net/
Designation Type	OneWay
Path	MyPath
Authorization Type	SASKey
SAS Key Name	Dynamics365SharedAccessKey
SAS Key	.....
Description	

Save

Cancel

Details

Message

There was no endpoint listening at https://dynamics365sampleservicebus.servicebus.windows.net/ that could accept the message. This is often caused by an incorrect address or SOAP action. See InnerException, if present, for more details.

Service Endpoint Registration

Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	MyPathTwoWay dynamics365sampleservicebu
NameSpace Address	https://dynamics365sampleservicebus.servicebu
Designation Type	TwoWay
Path	MyPathTwoWay
Authorization Type	SASKey
SAS Key Name	Dynamics365SharedAccessKey
SAS Key	.....
Description	

(ServiceEndpoint) MyPathTwoWay dynamics365sampleservicebus

Properties		Details	
Name	MyPathTwoWay dynamics365sampleservicebus	NamespaceAddress	https://dynamics365sampleservicebus.servicebus.windows.net/
NamespaceFormat	Address	Path	MyPathTwoWay
SASKey	+MibFAKofsBKZasizG8BPSHocYCaobooqTy5zxHXz1w=	SASKeyName	Dynamics365SharedAccessKey
SASToken		ServiceEndpointId	24288cab-10c6-e711-a951-000d3a34a0aa
SolutionNamespace	dynamics365sampleservicebus		

ServiceEndpointId

PLUG-IN TRACE LOG : INFORMATION

AzureSample.AzureAwarePlugin

▸ Configuration

▾ Execution

Performance

Execution Start Time 9/23/2017 9:43 AM
Message Block Response = Message Processed

Service Endpoint Registration

Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	MyPathTwoWay dynamics365sampleservicebu
NameSpace Address	https://dynamics365sampleservicebus.servicet
Designation Type	Rest
Path	MyPathTwoWayRest
Authorization Type	SASKey
SAS Key Name	RootManageSharedAccessKey
SAS Key	.....
Description	

Save Cancel

PLUG-IN TRACE LOG : INFORMATION

AzureSample.AzureAwarePlugin ☰

Context

Depth 1
Correlation Id 52cf6acb-5a50-4d2e-828f-ba491b868f54

Execution

Performance

Execution Start Time 9/23/2017 11:09 AM
Message Block Response = Message Processed by Rest Listener

Service Endpoint Registration

Configure a connection to Azure Service Bus to which plug-in events can be sent.

Name	dynamicseventhub dynamics365eventhub
NameSpace Address	sb://dynamics365eventhub.servicebus.window
Designation Type	EventHub
EventHub Name	dynamicseventhub
Message Format	JSON
Authorization Type	SASKey
SAS Key Name	EventHubSASPolicy
SAS Key	.....
User Information Sent	None
Description	

```

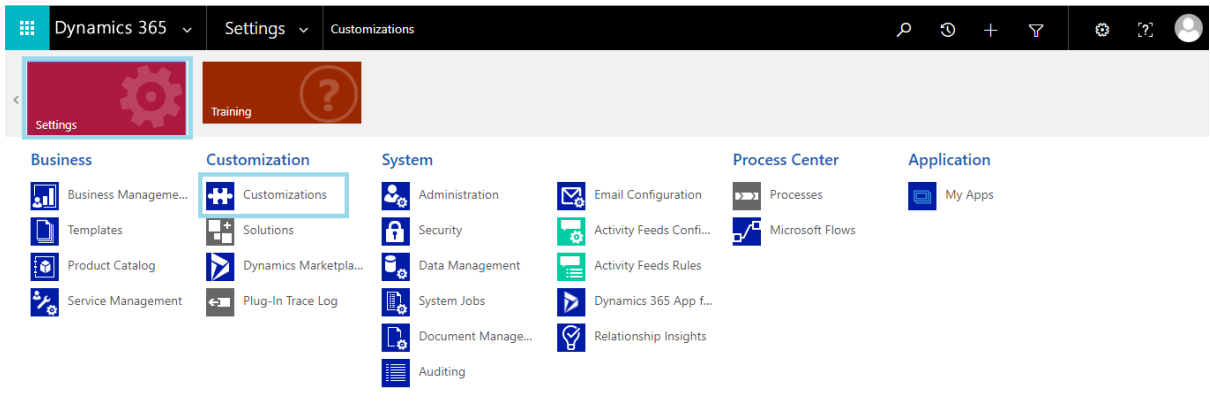
Press [Enter] to retrieve a message from the Event Hub.
Waiting for a message from the eventhub...
JSON Output{"BusinessUnitId":"3533cccb-0cb4-e711-a82c-000d3a33a7cb","CorrelationId":"e7980cb5-2c9b
-4683-be09-5f2489f4e444","Depth":1,"InitiatingUserId":"4457e7b8-7196-4e33-83a8-0590869db0fa","Inpu
tParameters":[{"key":"Target","value":{"__type":"Entity:http://schemas.microsoft.com/xrm/2011\
/Contracts","Attributes":[{"key":"confirminterest","value":false},{"key":"statecode","value":{"__t
ype":"OptionSetValue:http://schemas.microsoft.com/xrm/2011/Contracts","Value":0}},{"key":"add
ress2_shippingmethodcode","value":{"__type":"OptionSetValue:http://schemas.microsoft.com/xrm/2
011/Contracts","Value":1}},{"key":"isprivate","value":false},{"key":"followemail","value":true},{
"key":"msdyn_ordertype","value":{"__type":"OptionSetValue:http://schemas.microsoft.com/xrm/201

```

Chapter 9: Using Editable Grids in Apps

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
App	●	●	●	○	○	○		
App Config Master	○	○	○	○				
Attribute Map	○	●	○	○	○	○		
Custom Control	○		○	○				
Custom Control Default Config	○		○	○				
Custom Control Resource	○		○	○				
Customizations	○	●	●	○				

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Plug-in Assembly	○	●	○	○				
Plug-in Trace Log	○	○		○				
Plug-in Type	○	●	○	○				
Process	⚠	●	⚠	⚠	⚠	●	⚠	⚠
Process Configuration	○	●	○	○				
Process Session	⚠	●	⚠	⚠	⚠	⚠	⚠	⚠
Publisher	○	○	○	○	○	○		
Relationship	○	●	○	○				
Sdk Message	○	●	○	○				
Sdk Message Processing Step	○	●	○	○				
Sdk Message Processing Step Image	○	●	○	○				
Sdk Message Processing Step Secure Configuration	○	○	○	○				
Service Endpoint	○	○	○	○				
Solution	○	●	○	○	○	○		



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.



Solutions

Create, modify, export, or import a managed or unmanaged solution.



Themes

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

Account Information

Solution Default Solution

Entities

- Account
- Account KPI Item
- Action Call
- Action Call Workflow
- Activity
- Activity Analysis Cle...

General Primary Field Controls

Entity Definition

Display Name* Account

Plural Name* Accounts

Name* account

Virtual Entity

Data Source [None]

Ownership* User or Team

Account Information

Solution Default Solution

Entities

- Account
- Account KPI Item
- Action Call
- Action Call Workflow
- Activity
- Activity Analysis Cle...
- Ad
- Ad Placement
- Address
- Advertisement
- Agent Script Answer

General Primary Field Controls 1

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

2

Add Control

Select a custom control from the field.

Calendar Control

CC_MailAppListControl

Editable Grid

Read Only Grid

Editable Grid

Modes: Edit + Read

Types: Grid

Grid

NAME	UNIT	UNIT	UNIT	UNIT	UNIT
...
...
...
...
...
...
...
...
...

Add

General Primary Field Controls Events

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

Add Control...

Editable Grid

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

File | Show Dependencies | Publish | Managed Properties | He

1 Account

2

Information

Solution Default Solution

Entities

- Account
- Account KPI Item
- Action Call
- Action Call Workflow
- Activity
- Activity Analysis Cle...
- Ad
- Ad Placement

General Primary Field Controls Events

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

Add Control...

Dynamics 365 Sales Accounts

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

NEW EDIT ACTIVATE DEACTIVATE DELETE MERGE SHOW AS GEO CODE SEND DIRECT EMAIL

All Accounts Search for records

Group By: (no grouping)

Account Name	Main P...	Addre...	Primary Contact	Email (Primary...	Status
<input checked="" type="checkbox"/> A. Datum	+86-23-44...	Guangzhou	Vincent Lauriant	vincent@adatu...	Active
Adventure Works	+27-264-1...	Johannesb...	Adrian Dumitrascu	Adrian@adventure...	Active

Dynamics 365 Settings Customizations

Settings Training

Business Customization System Process Center Application

- Business Management
- Templates
- Product Catalog
- Service Management
- Customizations
- Solutions
- Dynamics Marketpla...
- Plug-In Trace Log
- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing
- Email Configuration
- Activity Feeds Confi...
- Activity Feeds Rules
- Dynamics 365 App f...
- Relationship Insights
- Processes
- Microsoft Flows
- My Apps



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.



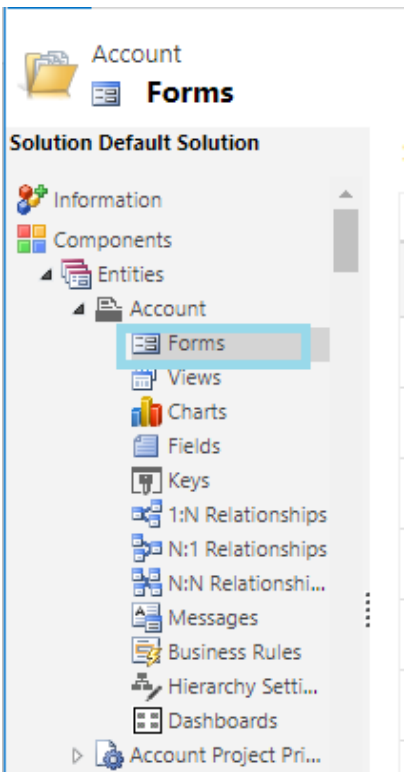
Solutions

Create, modify, export, or import a managed or unmanaged solution.



Themes

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



Account

Forms

Solution Default Solution

- Information
- Components
 - Entities
 - Account
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationshi...
 - Messages
 - Business Rules
 - Hierarchy Setti...
 - Dashboards
 - Account Project Pri...
 - Activity
 - Actual
 - Actual Data Export (...)
 - Address
 - Agreement
 - Agreement Bookin...

System Forms **Active Forms** ▾

Name	Form State	Form Type ↑	State	Customizable	Version	
Account Card form	Active	Card	Managed	True	8.0.0.0	
Account for Interactive experie...	Active	Main	Managed	True	8.0.0.0	
Account - Mobile	Active	Main	Managed	True	6.1.0.0	
Account	Active	Main	Managed	True	5.0.0.0	
Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0	
Account Summary Card	Active	Quick View F...	Managed	True	3.1.0.3	
Account Hierarchy Tile Form	Active	Quick View F...	Managed	True	7.0.0.0	
Social Profiles	Active	Quick View F...	Managed	True	6.1.0.0	

1 - 11 of 11 (0 selected)

FILE HOME INSERT

Save Save As Save and Close Publish Save

Change Properties Remove Edit

Undo Redo

Header Footer Navigation Select

Business Rules Form Properties Preview Form

Enable Security Roles Show Dependencies Managed Properties

Merge Forms Upgrade

- Account
 - Summary
 - Project Price Lists
 - Details
 - Field Service
 - Scheduling

- Common
 - Activities
 - Social Profiles
 - Contacts
 - Connections
 - Audit History
 - Actuals
 - Resource Preferences
 - Opportunity Lines
 - Quotes
 - Quote Lines
 - Orders
 - Entitlements
- Project Service
 - Opportunities
 - Projects

Solution: Default Solution

Form: Account

PRODUCT PRICE LIST

ADDRESS

Address 1

Map View

Primary Contact

Primary Contact

CONTACTS

CONTACTS

2

1

Activ
Go to

Set Properties

? X

Set the List or Chart properties.

The screenshot shows a dialog box titled "Set Properties" with a subtitle "Set the List or Chart properties." The dialog has three tabs: "Display", "Formatting", and "Controls". The "Controls" tab is selected and highlighted with a blue box containing the number "1". Below the tabs, there is a section titled "Control" with three radio buttons labeled "Web", "Phone", and "Tablet". The "Web" radio button is selected. Below this, there is a list of controls with one entry: "Read-only Grid (default)". Below the list is a button labeled "Add Control..." which is highlighted with a blue box containing the number "2". Below the button is a large empty rectangular area with the text "Select or add a custom control to see its configuration." At the bottom of the dialog are two buttons: "OK" and "Cancel".

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

[Add Control...](#)

Select or add a custom control to see its configuration.

OK Cancel

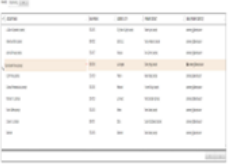
Add Control

Select a custom control from the field.

- Calendar Control
- CC_MailAppListControl
- Editable Grid**
- Read Only Grid

Editable Grid

Modes: Edit + Read
Types: Grid



Add

Microsoft | Dynamics 365

FILE HOME INSERT

Save Save As Save and Close Publish

Change Properties Remove Undo Redo

Body Header Footer Navigation

Business Rules Form Properties Preview

Enable Security Roles Show Dependencies Managed Properties Merge Forms

Save Edit Select Form Upgrade

Microsoft | Dynamics 365

FILE HOME INSERT

Save Save As Save and Close Publish

Change Properties Remove Undo Redo

Body Header Footer Navigation

Business Rules Form Properties Preview

Enable Security Roles Show Dependencies Managed Properties Merge Forms

Save Edit Select Form Upgrade

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

[Add Control...](#)

Editable Grid

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

General Primary Field Controls **Events**

Event List

▲ **Form Libraries**

Manage libraries that will be available in the home page.

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

Name	Display Name	Description
new_OpportunitySetRating	Opportunity Set Rating	

▲ **Event Handlers**

Manage functions that are called for home grid events.

Control: Editable Grid ▼

Entity: Opportunity ▼

Field: Actual Close Date ▼

Event: OnChange ▼

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

General Primary Field Controls **Events**

▲ **Event Handlers**

Manage functions that are called for home grid events.

Control: Editable Grid ▼

Entity: Opportunity ▼

Field: Probability ▼

Event: OnChange ▼

2 + Add | ✖ Remove | ↑ Up | ↓ Down | 📄 Edit | 📄 Edit Library

1

Handler Properties ×

Details Dependencies

Library new_OpportunitySetRating ▼

*Function OpportunitySetRating

Enabled

Parameters

Pass execution context as first parameter

Comma separated list of parameters that will be passed to the function

OK Cancel

Dynamics 365 Sales Opportunities

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NEW EDIT DELETE SHOW AS CLOSE AS WON CLOSE AS LOST REOPEN OPPORTUNITY SEND DIRECT EMAIL ASSIGN

All Opportunities Search for records

Group By: (no grouping)

Topic	Potent...	Email ...	Status	Actual ...	Actual ...	Est. Cl...	Est. Re...	Rating	Proba...
3D Printer Purchase	Margie's Tr...	---	Won	18-05-2016	₹38.73.600...	07-05-2016	₹38.73.600...	Hot	80
3D Printers	Adventure ...	---	Lost	24-04-2015	₹0.00	05-05-2015	₹27.92.325...	Warm	60
<input checked="" type="checkbox"/> 4G Enabled Tablets	Southridge...	---	Open	---	---	06-03-2017	₹32.57.500...	Hot	72
Audio	Proseware...	---	Won	03-07-2014	₹41.20.000...	02-07-2015	₹7.47.000.00	Hot	80
Audio Equipment	Wide Worl...	---	Open	---	---	20-04-2017	₹87.10.785...	Warm	60

Dynamics 365 Settings Customizations

Settings Training

Business Customization System Process Center Application

- Business Management
- Templates
- Product Catalog
- Service Management
- Customizations
- Solutions
- Dynamics Marketpla...
- Plug-In Trace Log
- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing
- Email Configuration
- Activity Feeds Confi...
- Activity Feeds Rules
- Dynamics 365 App f...
- Relationship Insights
- Processes
- Microsoft Flows
- My Apps

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.



Solutions

Create, modify, export, or import a managed or unmanaged solution.



Themes

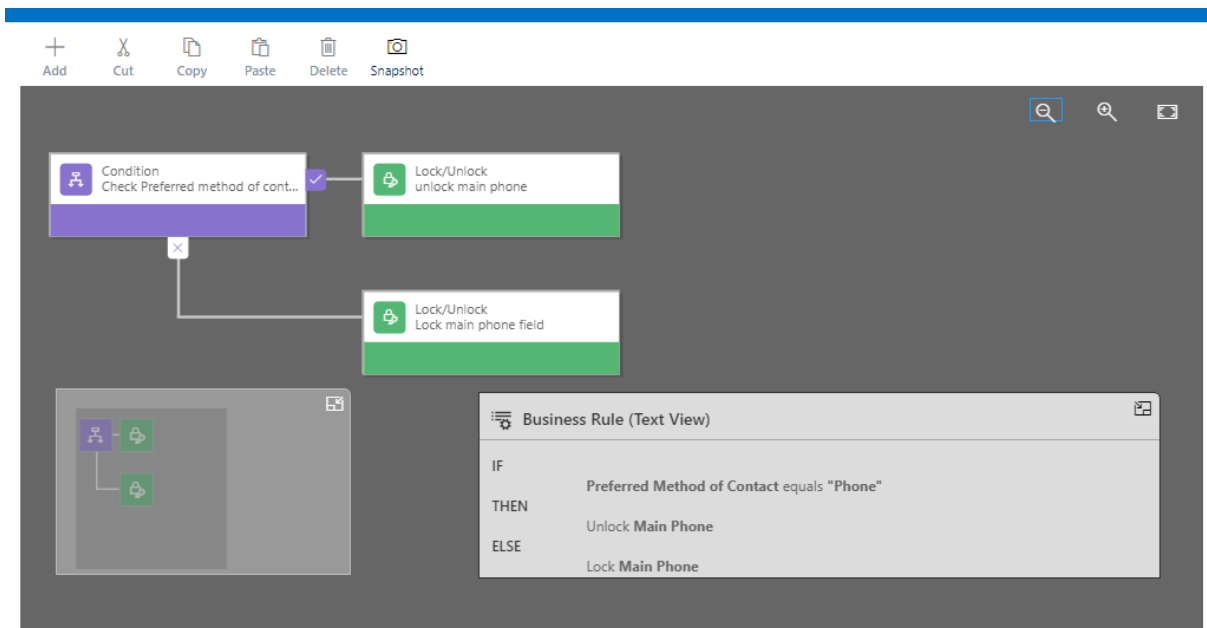
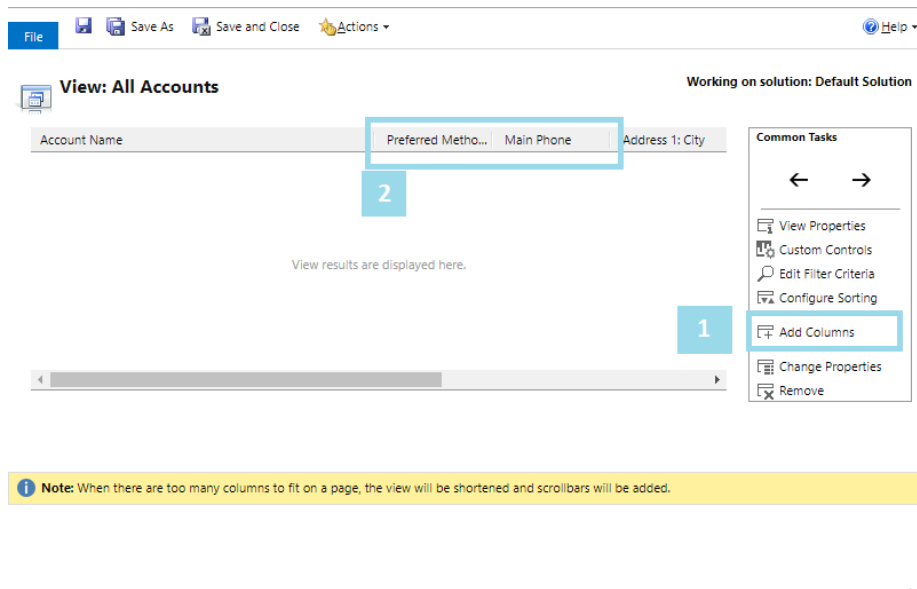
Adjust your organization's colors. Create, change, or delete themes that are used in your organization.

Account Views

Solution Default Solution

View: All Active Views

Name ↑	Type	State	Customizable	Description
Accounts: No Campaign Activit...	Public View	Managed	True	
Accounts: No Orders in Last 6 ...	Public View	Managed	True	
Accounts: Responded to Camp...	Public View	Managed	True	
Active Accounts	Public View	Managed	True	
<input checked="" type="checkbox"/> All Accounts	Public View	Managed	True	
Customers	Public View	Managed	True	



Dynamics 365 ▾ Sales ▾ Accounts ▾

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+ NEW EDIT ACTIVATE DEACTIVATE DELETE MERGE SHOW AS GEO CODE SEND DIRECT EMAIL

All Accounts ▾ Search for records

Group By: (no grouping) ▾

Account Name	Prefer...	Main P...	Addre...	Primary Contact	Email (Primary...	Status
A. Datum	Phone	+86-23-44...	Guangzhou	Vincent Lauriant	vincent@adatum.c...	Active
Adventure Works	Phone	+27-264-1...	Johannesb...	Adrian Dumitrascu	Adrian@adventure...	Active
<input checked="" type="checkbox"/> Alpine Ski House	Any	+43-1-1...	Vienna	Cathan Cook	Cathan@alpin...	Active
Blue Yonder Airlines	Any	555-0135	Sydney	Brian LaMee	brian@blueyonder...	Active

Dynamics 365 ▾ Settings ▾ Customizations

Settings Training

Business

- Business Managem...
- Templates
- Product Catalog
- Service Management

Customization

- Customizations
- Solutions
- Dynamics Marketpla...
- Plug-In Trace Log

System

- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing

Process Center


- Email Configuration
- Activity Feeds Conf...
- Activity Feeds Rules
- Dynamics 365 App f...
- Relationship Insights
- Processes
- Microsoft Flows


Application


- My Apps

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.

 **Solutions**
 Create, modify, export, or import a managed or unmanaged solution.




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

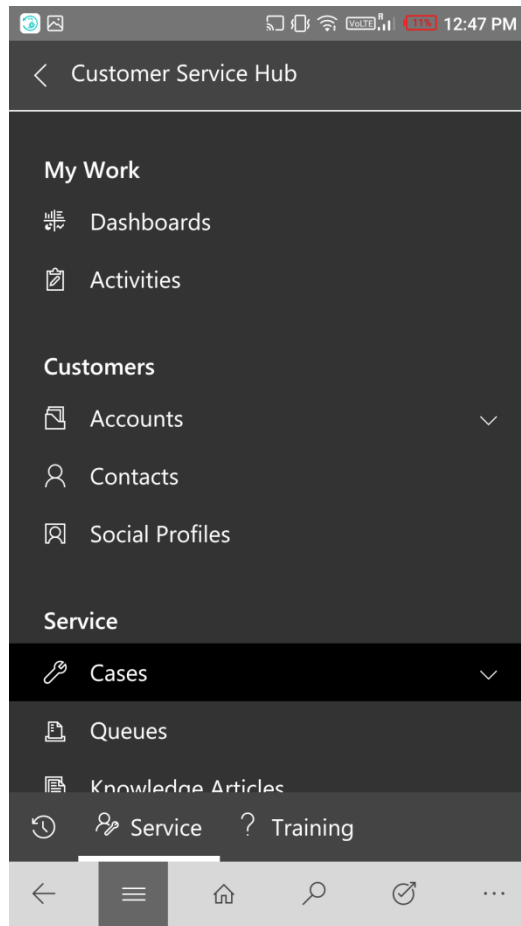
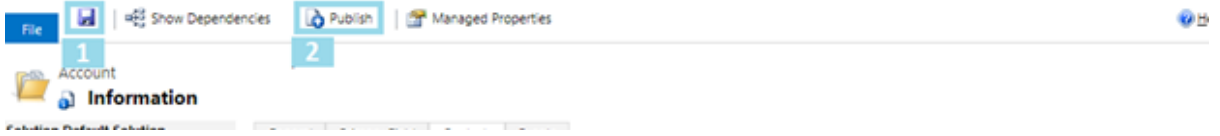
General Primary Field Controls Events

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

[Add Control...](#)

Editable Grid

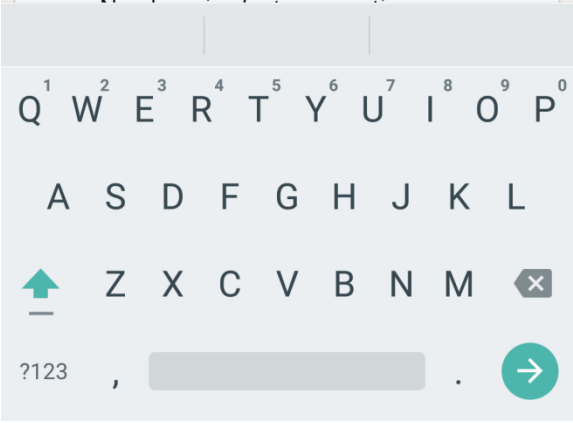
Property	Value	
Grid view		
Add Lookup		
Nested grid view		
Nested grid parent ID		
Group by Column *	Enabled (Enum)	






My Active Cases

Group By:	(no grouping)
Case Title	
→	Issue in product *
	Need Product user manual

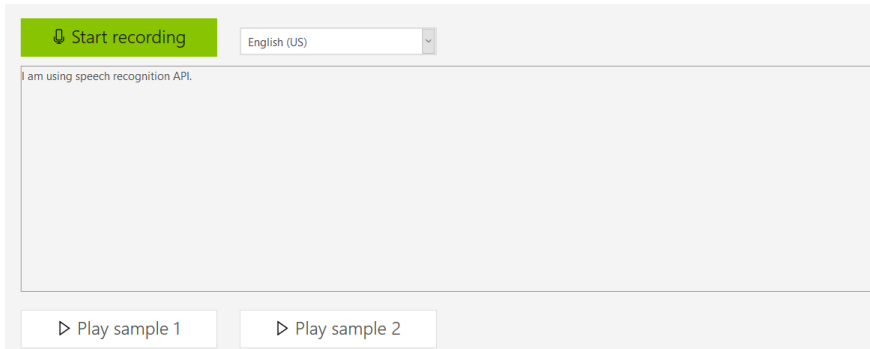


Chapter 10: Configure Microsoft Cognitive Services



The screenshot displays the Microsoft Cognitive Services Face API interface. On the left, there is a photograph of a woman with long brown hair and glasses, with a pink bounding box around her face. Below the image is an input field labeled "Image URL", a blue "Submit" button, and a "Browse" button with a folder icon. On the right, a text area shows the "Detection result" in JSON format:

```
Detection result:
JSON:
[
  {
    "faceId": "149c7407-9382-4559-b861-94d5ad52baea",
    "faceRectangle": {
      "top": 128,
      "left": 459,
      "width": 224,
      "height": 224
    },
    "faceAttributes": {
      "hair": {
        "bald": 0.0,
        "invisible": false,
        "hairColor": [
          {
            "color": "brown",
            "confidence": 1.0
          },
          {
            "color": "blond",
            "confidence": 0.69
          }
        ]
      }
    }
  }
]
```



The screenshot shows the Microsoft Cognitive Services Speech API interface. At the top left, there is a green "Start recording" button with a microphone icon. To its right is a language selection dropdown menu currently set to "English (US)". Below these elements is a large, empty text area with the text "I am using speech recognition API." at the top. At the bottom of the interface, there are two buttons: "Play sample 1" and "Play sample 2", each with a play icon.

Proof

This is demo of Bing Spell Check API

Submit

Example 1

Example 2

Example 3

Preview

JSON

This is demo of Bing Spell Check API

Login

Examples

How do I login?

Who should use QnAMaker?

What are subscription keys?

What is the maximum size of a knowledge base?

Should I use botframework?

[Check the QnA Maker FAQ.](#)

Preview

JSON

Answer:


You can login with your Microsoft account.

Score:

77.8754535317421

Matched questions:


- how do i login to the qna maker portal?

Dynamics 365 


Examples

- european football
- financial markets
- Hollywood updates
- science updates
- top stories
- world news


Market

en-us (English-United States) 






SafeSearch

Strict 

Freshness

Day 

Preview JSON

AI among new Dynamics 365 features, Microsoft Teams top news from Ignite
 New **Dynamics 365** features include an influx of AI, with chatbot agents and virtual assistants, according to Microsoft, which announced the changes in Orlando late last month at its newly combined Envision and Ignite user conferences. In addition, Microsoft ...

How to Create App Modules Using App Designer in Dynamics 365
 Microsoft **Dynamics 365** comes with a new feature called App Designer. It allows us build our own task based applications by defining a subset of overall solution components to create an App Module. This enables the users to focus only on the components ...

Dynamics 365 for ERP
 It's an exciting time for those working in the Microsoft **Dynamics** channel. As Microsoft has painted a vision for **Dynamics 365**, PowerObjects is growing to meet the demand for end-to-end **Dynamics 365** services. That means we'll still be your go-to ...


Slack Partners With Oracle to Extend Enterprise Reach, More News
 Finally, this week Quebec City-based Coveo announced the early release of Coveo for Microsoft **Dynamics 365** for customer service and sales departments. Coveo provides intelligent and predictive search technologies, Microsoft **365** combines Office **365** ...

D365 In Focus: Become a Citizen Developer with Microsoft Flow [VIDEO]
 Our **Dynamics 365** University education programs have something for everyone whether you're a student, a professional, or a developer. Learn more about our **Dynamics 365** University education programs and how they can help you develop your skills.

Text Analytics Preview for Case Topic analysis, Suggest Similar Cases and Suggest Knowledge Articles

Enable the Dynamics Dynamics 365 Text Analytics Preview

Yes No

 For more information, see the [Dynamic 365 Customer Center](#)

- ☰
- + New
- Dashboard
- Resource groups
- All resources
- Recent
- App Services
- Virtual machines (class...
- Virtual machines
- SQL databases
- Cloud services (classic)
- Subscriptions
- Azure Active Directory
- Monitor
- More services >

Text Analytics API

Microsoft

Use a few lines of code to easily analyze sentiment, extract key phrases, and detect language for any kind of text.

Sentiment analysis

Find out what users think about your products or services. You can score the overall sentiment of text.

Key phrase extraction

Automatically extract key phrases from text to quickly identify the main points.

Language detection

Determine what language a piece of text is written in-from 120 supported languages.

Legal Notice

Microsoft will use data you send to the Cognitive Services to improve Microsoft products and services. For example, we will use content that you provide to the Cognitive Services to improve our underlying algorithms and models over time. Where you send personal data to the Cognitive Services, you are responsible for obtaining sufficient consent from the data subjects. The General Privacy and Security Terms in the [Online Services Terms](#) do not apply to the Cognitive Services.

Please refer to the Microsoft Cognitive Services section in the [Online Services Terms](#) for details.

Note: Microsoft offers policy controls that may be used to disable new Cognitive Services deployments. [Learn more](#)

Create

Create

Text Analytics API

* Name
Dynamics365TextAnalyticsAPI ✓

* Subscription
NishantAzureSubscription ▼

* Location
East US 2 ▼

* Pricing tier ([View full pricing details](#))
F0 (5K Calls per 30 days) ▼

* Resource group
 Create new Use existing
DemoResourceGroup ✓

* I confirm I have read and understood the notice below.

Microsoft will use data you send to the Cognitive Services to improve Microsoft products and services. Where you send personal data to the Cognitive Services, you are responsible for obtaining sufficient consent from the data subjects. The General Privacy and Security Terms in the Online Services Terms do not apply to the Cognitive Services. Please refer to the Microsoft Cognitive Services section in the [Online Services Terms](#) for details. Microsoft offers

Pin to dashboard

[Create](#) [Automation options](#)

Dynamics365TextAnalyticsAPI
Cognitive Services

Search (Ctrl+/)

- Overview
- Activity log
- Access control (IAM)
- Tags
- Diagnose and solve problems

Delete

Essentials

Resource group (change)	DemoResourceGroup	API type	Text Analytics API
Status	Active	Pricing tier	Free
Location	East US 2	Endpoint	https://eastus2.api.cognitive.microsoft.com/text/analytics/v2.0
Subscription name (change)	NishantAzureSubscription	Manage keys	Show access keys ...
Subscription ID	2bde1211-92e7-4733-b6cd-6e97e46b6219		

Click to copy

TEST CONNECTION DEACTIVATE DELETE EMAIL A LINK FLOWS

AZURE SERVICE CONNECTION : INFORMATION

Text Analytics Connection

Name	Text Analytics Connection
Azure Service URL	https://eastus2.api.cognitive.microsoft.com/text/analytics/v2.0
Azure Account Key	*****
Created By	Nishant Rana
Modified By	Nishant Rana
Modified On	10/5/2017 8:14 PM
Description	-----

CONNECTION TEST INFORMATION


Last Connection Status	Success
Last Connection Time	10/5/2017 8:14 PM


Active


KNOWLEDGE SEARCH MODEL : INFORMATION

Case Search Model

CONFIGURATION INFORMATION

* Name	Case Search Model
* Source Entity	 Case
* Maximum Number of Key Phrases	10
Description	-----

 Lead

 **Information**

Solution Default Solution

- Lead
- Lead Address
- Lead To Opportuni...
- Letter
- Mail Merge Templa...
- Mailbox
- Marketing List
- MarketingSiteMap
- New Process
- Note
- OData v4 Data So...
- Opportunity
- Opportunity Close
- Opportunity Line
- Opportunity Line ...
- Opportunity Line ...
- Opportunity Line ...
- Opportunity Line T...

General Primary Field Controls

Process

- Business process flows (fields will be created) +

Communication & Collaboration


- Feedback +
- Notes (includes attachments) +
- Activities +
- Connections +
- Sending email (If an email field does not exist, one will be created) +
- Mail merge
- Document management
- OneNote Integration
- Access Teams
- Queues +
 - Automatically move records to the owner's default queue when a record is created or assigned.
- Knowledge Management
- Enable for SLA

Keyword or Key Phrase Determination Fields

Text Analytics Entity Mappings	
Entity Name	Field Name
Case	Case Title

[+ NEW](#) [✓ ACTIVATE](#) [🗑 DELETE](#) [📧 EMAIL A LINK](#) [🔄 FLOWS](#) [📄 WORD TEMPLATES](#)

KNOWLEDGE SEARCH MODEL : INFORMATION

Case Search Model 

Activities Tab Properties

? X

Modify the properties for the Activities tab.

Unified Interface Properties (New) | Web Client Properties | **Formatting**

Display | Knowledge Base Search | **Activity Wall**

Filter Data

Filter search results by

Users can change filters

Set Default Language

User can change Language Filter

Additional Options

Turn on automatic suggestions

Give knowledge base (KB) suggestions using

Enable ratings on KB article search results based on the specified field.

Select primary customer

Number of results

Actions

Link the KB article

Unlink

Copy link

Link KB article and email link



OK Cancel

CASE ▾	Priority Normal	Created On 🔒 1/21/2017 2:50 AM
Need help with 3D printer components ☰		

✓ Identify
▶ Research (Active for 4 days, 23 hours)
▶▶ Resolve

General

CASE DETAILS	
*Case Title	Need help with 3D printer components
ID	🔒 CAS-01230-P5Y4B7
Subject	Query
*Customer	🏢 The Phone Company
Origin	Web
Contact	Allison Brown
Entitlement	-----
Product	Carbon Fiber 3D Printer 20"

POSTS	ACTIVITIES	KB RECORDS	NOTES
<input type="text" value="help D printer components"/> 🔍			
All published articles ▾			
10 results found		Relevance ▾	
<div style="border: 1px solid #ccc; padding: 5px;">  How to support 3D Printers? Find product name: Backup Cooling Fan for 3D printerSmart Extruder for 3D printerCarbon Fiber 3D Printer 20"ABS Filament 3D Printer 4"FD Modified on 10/1/2017 | 👁 0 </div>			
<div style="border: 1px solid #ccc; padding: 5px;">  How to setup and configure Printers, scanner... Find product name: Proseware Photo Ink Jet Printer M100 Proseware Photo Inkjet Printer M100 Proseware Ink Jet All in one M300 Proseware Laser Jet Color Printer Modified on 10/1/2017 | 👁 0 </div>			



LEAD ▾

Kim Abercrombie ☰

Lead Source

Rating

Warm

Status

New

Qualify (Active for 4 days, 23 hou... ▶

🔒 Develop

🔒 Propose

*Topic	Audio
*Name	Kim Abercrombie
Job Title	Purchasing Agent
Business Phone	+1-695-555-3400
Mobile Phone	415-555-555
Email	info@southridgevide

Audio 🔍

All published articles ▾

1 results found

Relevance ▾



How to setup and configure Audio ...

Find product name: Electronic, Inc - Speakers Electronic, Inc - Microphone Electronic, Inc - SubThe product name is located on the back
Modified on 10/1/2017 | 👁 0

Case Similarity Rule

CONFIGURATION INFORMATION

*Name	Case Similarity Rule
*Source Entity	 Case
Description	-----
Use Text Analytics for Target Match	Yes
Filter Result By Status	Active

ADVANCED TEXT MATCH SETTINGS

These settings are used to determine the keywords or key phrases from source records using text analytics to match with target records using text search. This helps to achieve keyword-based similarity between source and target records.

*Maximum Number of Key Phrases	10
--------------------------------	----

Match Fields

Text Analytics Entity Mappings		
Criteria	Entity Name	Field Name
Text Match	Case	Case Title

General

CASE DETAILS

* Case Title	Service requested
ID	🔒 CAS-01254-W2Y5H6
Subject	Maintenance
* Customer	🏢 Litware
Origin	Web

Find Similar Cases



Search Similar Cases

Subject: Maintenance

Search for records


Case Title

- Self Service Ticket #50031-1057: Portal 2 C...
- Service required soon
- Required Service scheduling request
- Service required
- Service requested soon
- Service information required for products
- Service information required
- Required Service
- Product configuration

1 - 10 of 10 Page 1

Self Service Ticket #50031-1057: Portal 2 Case 1

POSTS ACTIVITIES NOTES



There aren't any activity records to show. To get started, create an activity like a phone call, task, email, or appointment.

Found a Solution! Cancel

Find Similar Cases



Search Similar Cases

Subject **Maintenance**

Search for records


Case Title

- Service required soon
- Required Service scheduling request
- Service required
- Service requested soon
- Service information required for products
- Service information required
- Required Service
- Product service time

1 - 10 of 10 Page 1

Service required soon

POSTS ACTIVITIES NOTES




There aren't any activity records to show. To get started, create an activity like a phone call, task, email, or appointment.

Found a Solution! Cancel

CASE ▾


Service requested ☰

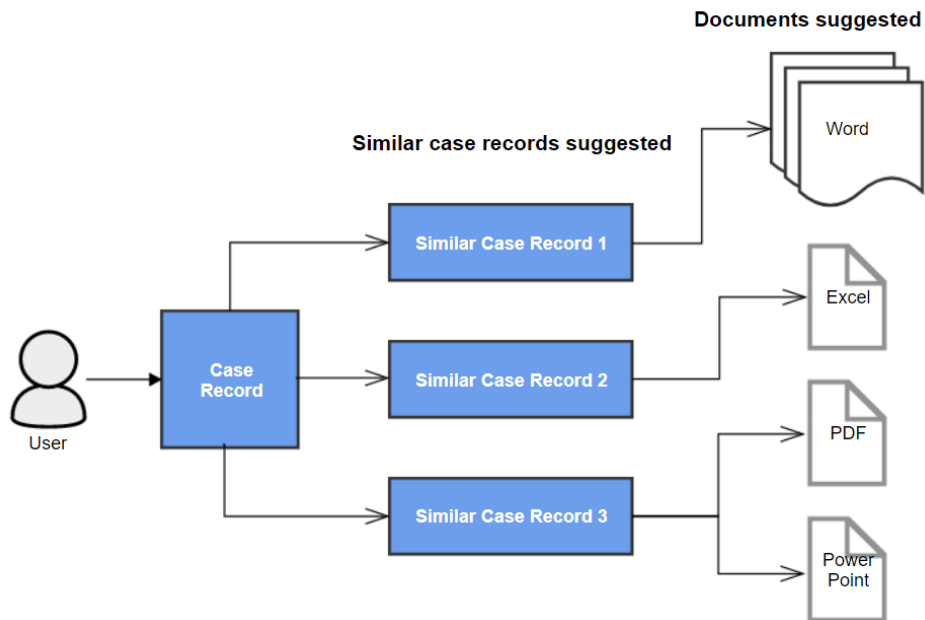
✓ Identify 

Case Relationships

SIMILAR CASES +

Title ↑

-  Service required soon



Document Management

Which feature would you like to work with?



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



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



SharePoint Document Locations
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics 365 record.



OneNote Integration
Set up OneNote Integration for selected entities so that a dedicated OneNote notebook is automatically created for each Dynamics 365 record. Users will be able to easily access a notebook directly on the activity wall in Dynamics 365 or from the record form in Dynamics 365 mobile apps.



Enable OneDrive for Business
Enable users to manage files stored in OneDrive for Business directly in Dynamics 365.



Manage Document Suggestions
Set up intelligent document suggestions.

Manage Document Suggestions

Entities not configured for document suggestions: Enable entities for document management and activate a corresponding similarity rule to start using document suggestions. [Learn more.](#)

Turn on document suggestions integration for the entities you select.

Only entities that are already enabled for document management and have an active **similarity rule** are listed.

Select Entities

Entity

Suggest documents from a system external to Dynamics 365. To enable, provide a base URL for the query results.

[Learn more](#) about external document suggestion results.

External Document Suggestions

External Base URL

Case

Information

Solution Default Solution

- ▶ Campaign Activity
- ▶ Campaign Response
- ▶ Case
- Forms
- Views
- Charts
- Fields
- Keys
- 1:N Relationships...
- N:1 Relationships...

General Primary Field Controls

- Connections +
- Sending email (If an email field does not exist, one will be created) +
- Mail merge
- Document management
- OneNote Integration
- Access Teams
- Queues +
 - Automatically move records to the owner's default queue when a record is created or assigned.
- Knowledge Management
- Enable for SLA

Manage Document Suggestions

Turn on document suggestions integration for the entities you select.

Only entities that are already enabled for document management and have an active **similarity rule** are listed.

Select Entities

Entity

Case

Suggest documents from a system external to Dynamics 365. To enable, provide a base URL for the query results.

[Learn more](#) about external document suggestion results.

External Document Suggestions

External Base URL

Unsaved changes

ADVANCED SIMILARITY RULE : INFORMATION

Case Similarity Rule

CONFIGURATION INFORMATION

* Name	Case Similarity Rule
* Source Entity	Case
Description	-----
Use Text Analytics for Target Match	Yes
Filter Result By Status	Active

ADVANCED TEXT MATCH SETTINGS

These settings are used to determine the keywords or key phrases from source records using text analytics to match with target records using text search. This helps to achieve keyword-based similarity between source and target records.

* Maximum Number of Key Phrases	10
---------------------------------	----

Match Fields

Text Analytics Entity Mappings

Criteria	Entity Name	Field Name
Text Match	Case	Case Title
Active		

CASE ▾ Service requested ☰

Find Similar Cases

Search Similar Cases

Subject Maintenance

Self Service Ticket #50031-1057: Portal 2 Case 1

Search for records

Case Title

Self Service Ticket #50031-1057: Portal 2 C...

Service required soon

Required Service scheduling request

Service required

Service requested soon

Service information required for products

Service information required

Required Service

Product service time

1 - 10 of 10 Page 1

POSTS ACTIVITIES NOTES

There aren't any activity records to show. To get started, create an activity like a phone call, task, email, or appointment.

Found a Solution! Cancel

CASE ▾ Service requested ☰

Identify Research (Active for 5 days, 21 hours)

Similar Cases Find more

* Assign to Others Allie Bellew (Sample)

Document Associated Grid ▾

Documents on Default Site 1

+ NEW ▾ ↑ UPLOAD 📁 DOCUMENT LOCATION ▾ 📁 OPEN LOCATION ▾ 📄 SHOW SUGGESTIONS 📄 ADD LOCATION 📄 EDIT LOCATION ▾





Name	Modified	Modified by	Document Location	Path ↑
------	----------	-------------	-------------------	--------

Document Suggestions



Here are the documents suggested for this record. You can view or copy suggested documents to this record.

Select and copy documents

Title ↓	Modified by	Associated Record
 Self Service Repair Manual List	Nishant Rana	Self Service Ticket #
 Repair Audio Device	Nishant Rana	Self Service Ticket #
 Printer Service Guide	Nishant Rana	Service required so
 Repair 3D printer	Nishant Rana	Required Service sc

Copy




Close

Document Suggestions



Here are the documents suggested for this record. You can view or copy suggested documents to this record.

Select and copy documents

Title	Modified by	Associated Record
 Repair Audio Device	Nishant Rana	Self Service Ticket ..
 Printer Service Guide	Nishant Rana	Service required so
 Repair 3D printer	Nishant Rana	Required Service sc

Copy

Close

CASE ▾

Service requested ☰

✓ Identify

Similar Cases

Find

✓ * Assign to Others

👤 Allie Bellew (Sample)

Document Associated Grid ▾

Documents on Default Site 1

+ NEW ▾

📄 UPLOAD

📍 DOCUMENT LOCATION ▾

| Name

📄 [Printer Service Guide.docx](#)

📄 [Repair 3D printer.docx](#)

📄 [Repair Audio Device.docx](#)

RESOURCE MANAGEMENT

- Keys
- Quick start
- Pricing tier
- Properties
- Locks
- Automation script

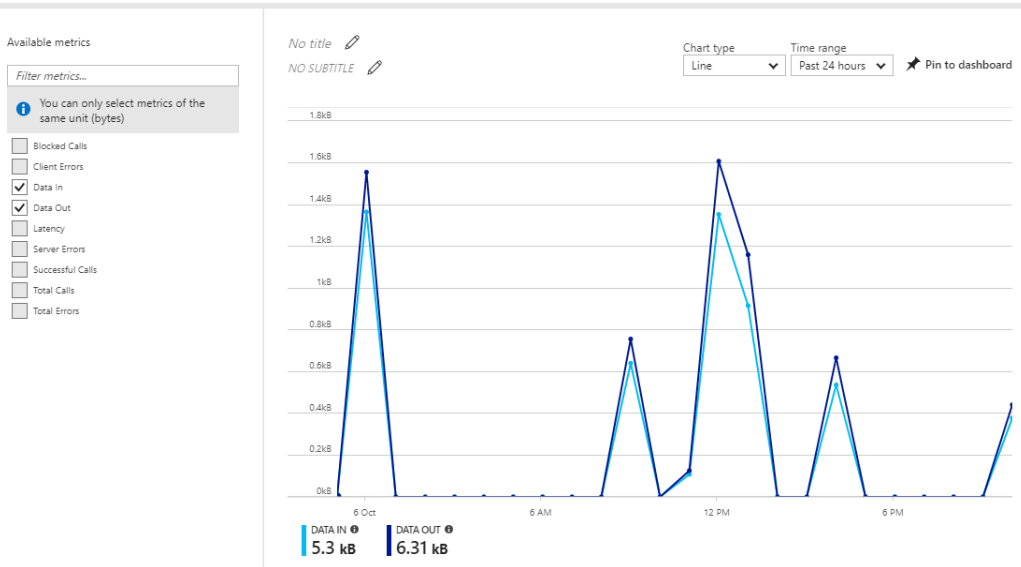
MONITORING

- Metrics**
- Alert rules

Available metrics

Filter metrics...

- Blocked Calls
- Client Errors
- Data In
- Data Out
- Latency
- Server Errors
- Successful Calls
- Total Calls
- Total Errors



Available metrics

Filter metrics...

i You can only select metrics of the same unit (count)

- Blocked Calls
- Client Errors
- Data In
- Data Out
- Latency
- Server Errors
- Successful Calls
- Total Calls
- Total Errors

No title

NO SUBTITLE

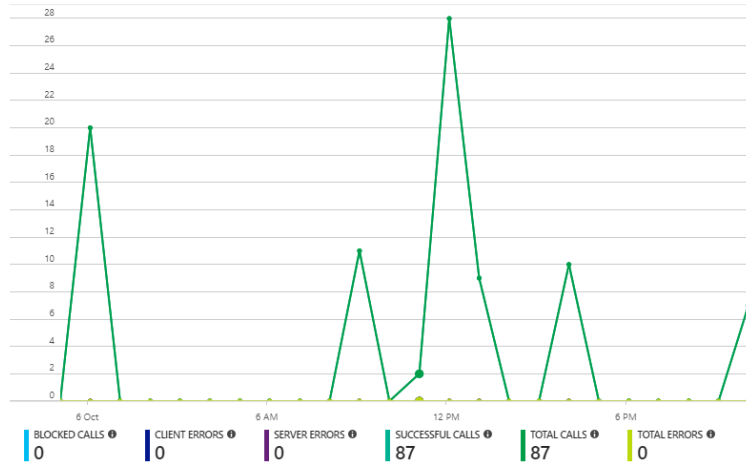
Chart type

Line

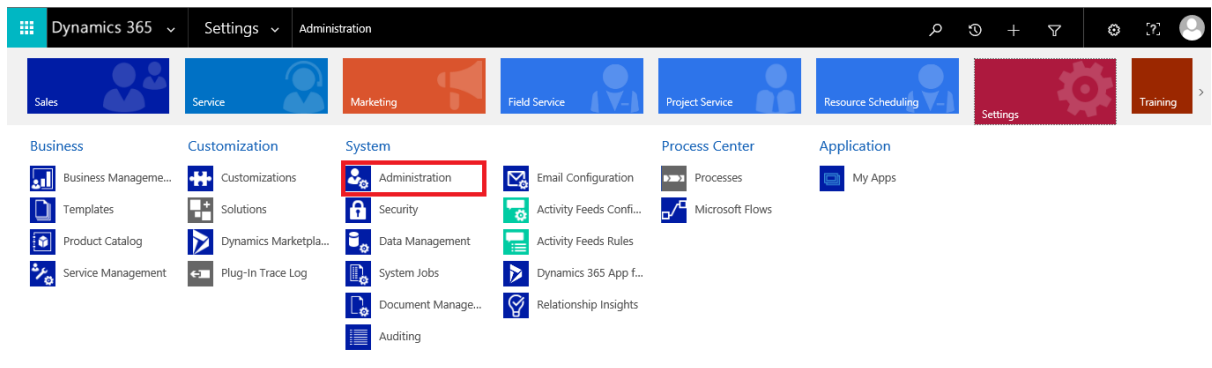
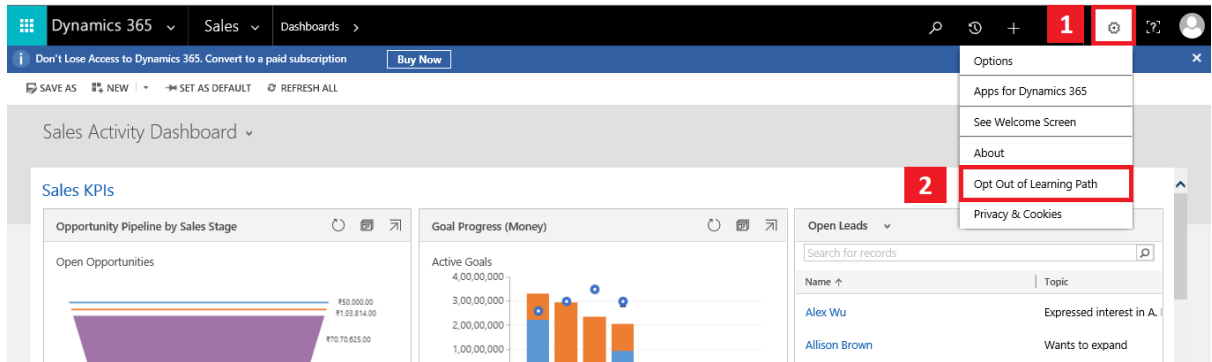
Time range

Past 24 hours

Pin to dashboard



Chapter 11: Train the Users through Learning Path



Dynamics 365 Administration

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

Administration

Which feature would you like to work with?

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

Dynamics 365 Administration

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

General 1

Skype Skype for Business / Lync

Set whether users see Microsoft Dynamics 365 message
Users see app download message Yes No

Set custom Help URL
Use custom Help for customizable entities
Global custom Help URL
Append parameters to URL Yes No

Enable Learning Path 2 Yes No

Enable Learning Path Authoring Yes No

Disable Social Engagement
Prevent feature from receiving social data in Dynamics 365 Yes No

Set whether users see welcome screen
Display welcome screen to users when they sign in Yes No

Use legacy form rendering

OK Cancel

Office 365 Admin center

Home > Groups

Learning Path Authors
Security group

+ Add a group More

Group name

Learning Path Authors

Change Delete group

Name Learning Path Authors Edit

Description The Learning Path service automatically created this group. Add any members from your organization who are supposed to author Learning Path content.

Owners (1) CRM Admin Edit

Members (2) CRM Admin Edit

+ Office 365 group

Create a space for a team to collaborate, communicate, and schedule meetings.

Close

Feedback

3 Dynamics 365 4 Learning Path 5 | Content 6 Library

MANAGE PUBLISH LOCALIZE CONFIGURATION

Publishing Environment: Draft

Guided Task Sidebar

Search (Alt+M+Q)

1 Name	2 Title	Type	Form Factor	Tags	App Versi...	Author	Languages
--------	---------	------	-------------	------	--------------	--------	-----------

Dynamics 365 Administration

Resources **Learning Path**

Help Center Content Library

Dynamics 365 | Learning Path | Content Library

MANAGE PUBLISH LOCALIZE CONFIGURATION Publishing Environment: Draft

Guided Task **Sidebar** Search (Alt+M+Q)

Name	Title	Type	Form Factor	Tags	App Versi...	Author	Languages	Status	Enabled
<input type="checkbox"/> Introduction Of Dynamics 365	Introduction of...				9.0.0.3172	CRM Admin	1	Published	Enabled
<input type="checkbox"/> Sales Process					9.0.0.3172	CRM Admin	1	Draft	Enabled

Showing 1 - 2 of 2 Page 1 of 1 10

Dynamics 365 | Learning Path | Content Library

MANAGE PUBLISH LOCALIZE CONFIGURATION Publishing Environment: Draft

Guided Task **Sidebar** Search (Alt+M+Q)

Name	Title	Type	Form Factor	Tags	App Versi...	Author	Languages	Status	Enabled
------	-------	------	-------------	------	--------------	--------	-----------	--------	---------

Sidebar ✔

Disable

Make this an error sidebar ?

Make this home sidebar ?

Name:

Client:

Form factor: Desktop Tablet

Sidebar opens when:

Lifecycle stage:

Security roles: Any role Selected roles

Template:

Status:

The image shows the 'Sidebar' configuration panel on the left, which is used to customize the user interface. The main area displays a dashboard with a bar chart titled 'Goal Progress (Money)' and a table of 'Open Leads'.

Name	Topic
Alex Wu	Expressed interest in A...
Allison Brown	Wants to expand
Brian LaMee	Interested in online only
Cat Francis	Interested in our newer
Cathan Cook	New store opened this y...
Counts Vong (sample)	Follow-up with informat...
Darren Parker	Likes our products

Learning Path

Settings

Preview

Dynamics 365 > Sales > Dashboards >

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 SET AS DEFAULT REFRESH ALL

Sales Activity Dashboard

Sales KPIs

Opportunity Pipeline by Sales Stage

Open Opportunities

Active Goals

Goal Progress (Money)

Open Leads

Search help and training

1 Dynamics 365 Introduction

2 Sale Process

sales

A B I U

Section #2

A [] [] ...

Section #3

A [] [] ...

Experience it now

Search help and training

ynamics 365 Introduction

Sale Process

Follow Sales Process

Section #2

Section #3

Content Types

- Video
- List of links

Button

- 1 button
- 2 buttons

Existing guided tasks

Predefined page help

Cat Francis

Cathan Cook

Counts Vong (sample)

Darren Parker

David Ahs

The image shows a screenshot of the Dynamics 365 help interface. On the left, a 'Content Types' menu is open, listing options like 'Video', 'List of links', 'Button', 'Existing guided tasks', and 'Predefined page help'. A red box highlights the edit icon (a pencil) next to the 'Content Types' header. The main content area on the right displays a 'Sale Process' section with a 'Follow Sales Process' heading and a rich text editor toolbar. Below this, there are two sections labeled 'Section #2' and 'Section #3', each with a toolbar containing an 'A' icon, a square icon, a link icon, and a three-dot menu icon. The top of the page features a search bar and a navigation bar with the text 'Experience it now'.

The image shows a software interface with a dark header and a light main area. At the top left, there is a button with a document icon, highlighted with a red box. Below it is a search bar labeled "Search help and training" with a magnifying glass icon and a close button. The main content area is titled "ynamics 365 Introduction". A "Content Types" menu is open on the left, listing "Video", "List of links", "Button" (with sub-items "1 button" and "2 buttons"), "Existing guided tasks", and "Predefined page help". Below the menu are several user names: "Cat Francis", "Cathan Cook", "Counts Vong (sample)", "Darren Parker", and "David Ahs". The main content area has a "Sale Process" section with a "Follow Sales Process" button and a rich text editor. Below this are two sections, "Section #2" and "Section #3", each with a row of buttons: "A", a square icon, a link icon, and a three-dot menu icon. The bottom of the interface has a blue bar with a hamburger menu icon and a smiley face icon.

The image shows a screenshot of a Dynamics 365 Sales dashboard. On the left, there is a blue sidebar with the text "LEARNING PATH" written vertically. At the top of the sidebar is a home icon. Below the sidebar, there are two icons: a gear icon labeled "Settings" and a document icon labeled "Preview". The main content area of the dashboard is partially visible and includes the following elements:

- Top navigation: "Dynamics 365" and "Sales" with dropdown arrows.
- Header: "New version of Organization Insights dashboard".
- Buttons: "NEW" and "SET AS DEFAULT".
- Dashboard Tiles:
 - "Sales Activity Dashboard" with a dropdown arrow.
 - "Sales KPIs".
 - "Opportunity Pipeline by Sales Stage".
 - "Open Opportunities".
- Visuals: A large chart area with a purple header and a yellow body, and a blue bar at the bottom.

Microsoft Dynamics 365 Sales Dashboards

Search help and training

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 SET AS DEFAULT REFRESH ALL

es Activity Dashboard

s KPIs

portunity Pipeline by Sales Stage

Open Opportunities

Goal Progress (Money)

Active Goals

Open Leads

Search for records

Name

- Alex Wu
- Allison Brown
- Brian LaMee
- Cat Francis
- Cathan Cook
- Counts Vong (sample)
- Darren Parker
- David Ahs

The screenshot displays a Dynamics 365 Sales dashboard. On the left, a vertical blue bar contains the text 'LEARNING PATH' and three icons: 'Publish', 'Check in', and 'Edit'. The main content area is divided into several sections: 'Opportunity Pipeline by Sales Stage' (a funnel chart with values \$30,000.00, \$133,814.00, \$70,70,655.00, and \$2,35,45,425.50), 'Open Opportunities', 'Goal Progress (Money)' (a bar chart with 'Active Goals' and a legend for Target, In-progress, Today's Target, and Actual money), and 'Open Leads' (a list of names). A search bar at the top right contains the text 'Search help and training'. The top navigation bar shows 'Dynamics 365', 'Sales', and 'Dashboards'.

Microsoft Dynamics 365

LEARNING PATH

version of Organization

NEW

es Activity Da

s KPIs

portunity Pipeline b

This image is a close-up of the left sidebar of the Dynamics 365 interface. It features a blue vertical bar with the text 'LEARNING PATH' written vertically. At the top of this bar is a white house icon, which is highlighted with a red square. To the right of the sidebar, the top portion of the dashboard is visible, showing the 'Dynamics 365' header and a 'NEW' button.

LEARNING PATH

Guided Task

Disable this guided task

Make this an error guided task ?

Name:

Client: ?

Form factor: ? Desktop Tablet

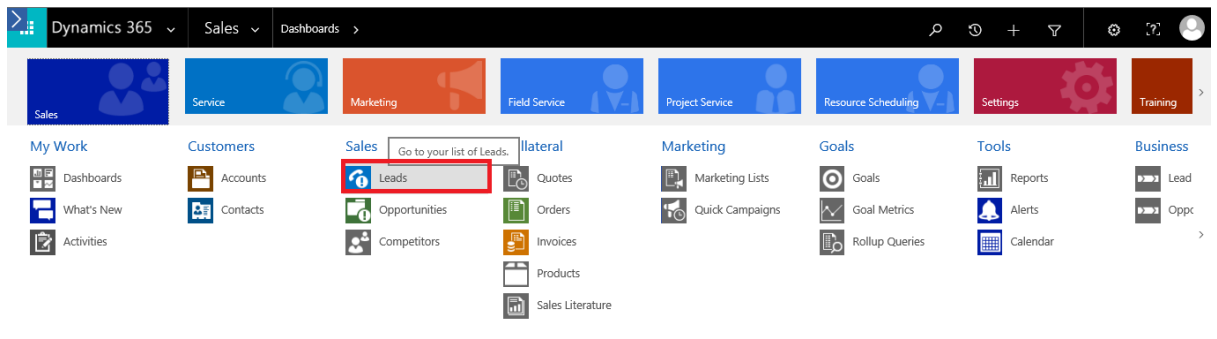
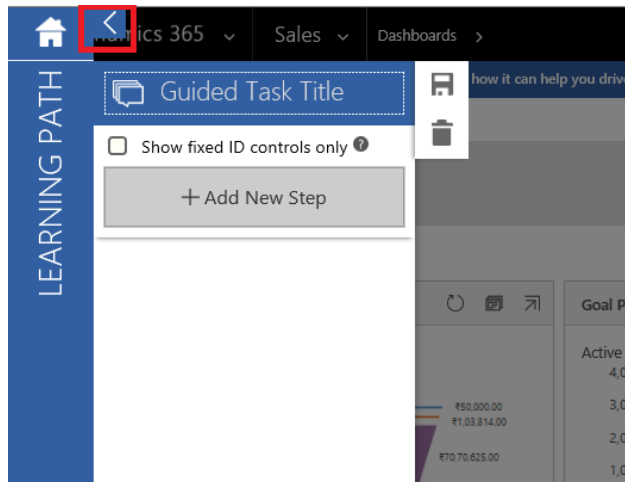
Guided task opens when: ?

Lifecycle stage: ?

Security roles: ? Any role Selected roles

Status:

Advanced options



Dynamics 365 Sales Leads

NEW DELETE EMAIL A LINK FLOWS

My Open Leads

Name	Topic
Counts Vong (sample)	Follow-
Debra Garcia (sample)	Store is

Dynamics 365 Sales Leads

Guided Task Title

Show fixed ID controls only

+ Add New Step

Step with Next button

Step with User action

User action with next but...

Learning Step

1

2

Flow Editor Settings Preview

Topic	Status Reason	Created
Follow-up with information reg...	New	04-01
Store is expanding - send new...	New	04-01
Interested in our newer offerin...	New	04-01
Some interest in our products (...)	New	04-01
Interested in online only store (...)	New	04-01
New store opened this year - f...	New	04-01
Good prospect (sample)	New	04-01
Likes our products (sample)	New	04-01
Mailed an interest card back (s...	New	04-01
New store opened this year - f...	New	04-01

B C D E F G H I J K L

Dynamics 365 Sales Leads

+ NEW DELETE EMAIL A LINK FLOWS RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL

Create new Lead record

Learn more

Topic	Status Reason	Created On
Follow-up with information reg...	New	04-01-2018 12:49
Store is expanding - send new...	New	04-01-2018 12:49
Interested in our newer offerin...	New	04-01-2018 12:49
Lidman Anna (sample)	Some interest in our products (...)	04-01-2018 12:49
Maria Campbell (sample)	Interested in online only store (...)	04-01-2018 12:49

Dynamics 365 Sales Leads

+ NEW DELETE EMAIL A LINK FLOWS

Create new Lead record

Add new lead to start sales process.

Learn more

Topic
Follow
Store
Intere
Some

Lidman Anna (sample)

Home Dynamics 365 Sales Leads > New Lead

Guided Task Title

Show fixed ID controls only ?

+ Add New Step

- Step with Next button
- Step with User action
- User action with next but...**
- Learning Step

LEARNING PATH

Flow Editor

POSTS

Enter post here

All posts Aut

The image shows a screenshot of the Dynamics 365 Flow Editor interface. At the top, there is a navigation bar with a home icon, a back arrow, and the text 'Dynamics 365 Sales Leads > New Lead'. Below this, a blue sidebar on the left contains the text 'LEARNING PATH' and a 'Flow Editor' icon. The main area displays a 'Guided Task Title' field. Below the title, there is a checkbox labeled 'Show fixed ID controls only' with a help icon. A '+ Add New Step' button is visible, and a dropdown menu is open, listing four step options: 'Step with Next button', 'Step with User action', 'User action with next but...', and 'Learning Step'. The 'User action with next but...' option is highlighted with a red rectangular border. In the background, a blurred view of a 'POSTS' section is visible, showing a text input field and a list of posts.

LEAD New Lead

Lead Source

Qualify (Active)

Develop

Pro


Summary

CONTACT	
*Topic	need of product
*Name	s s
Job Title	.....
Business Phone	.....
Mobile Phone	.....
Email	.....

COMPANY

ed fields for Contact record

Enter fields for contact records.



LEAD New Lead

Account Information

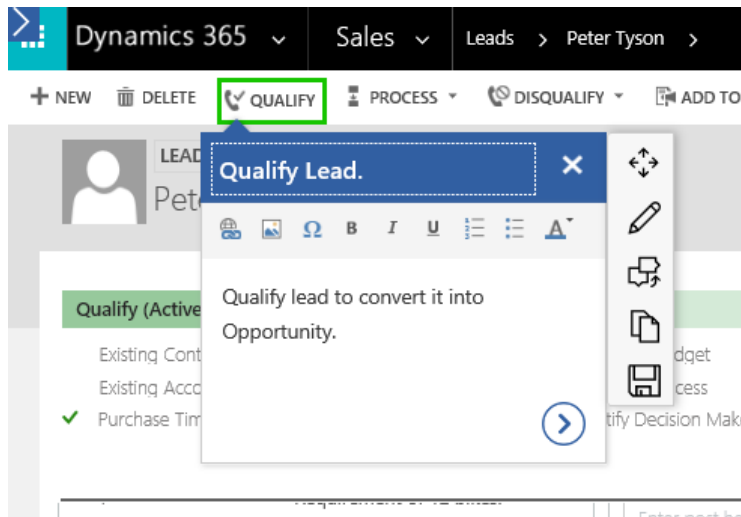
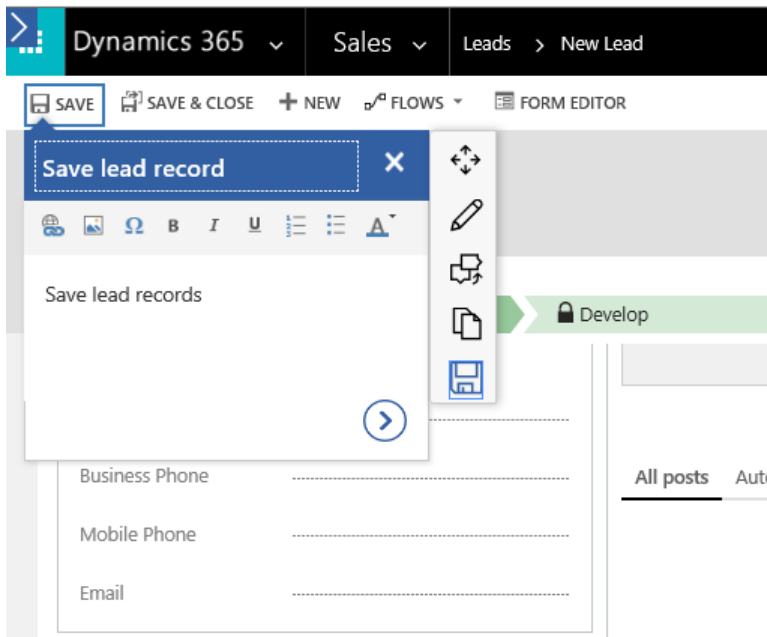
complete these fields to create new account for lead.

+ Company

Website

Address

Develop

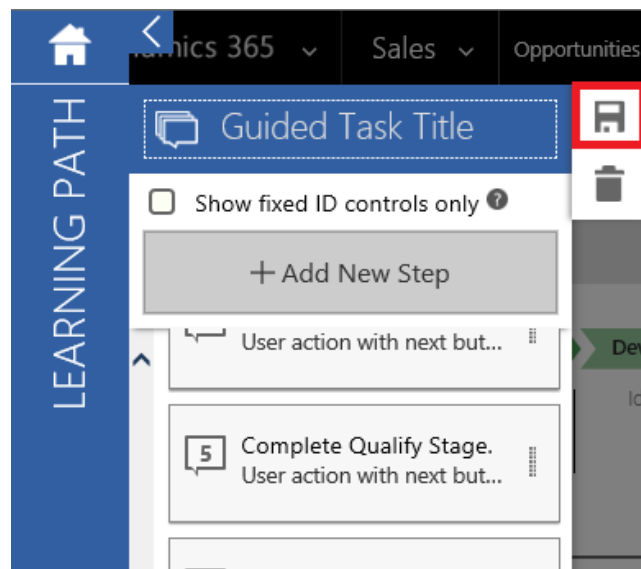
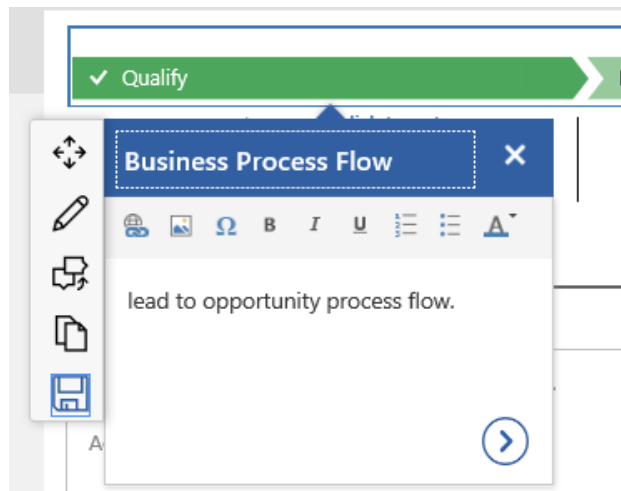


The screenshot shows a Dynamics 365 interface. A blue dialog box titled "Proceed to Opportunity" is open, containing a text area with "Proceed to next stage" and a blue arrow button. Above the dialog, a notification bar reads "Lead to Opportunity Sales Process (Active for 13 minutes) Next Stage". Below the dialog, a "POST" button is visible. To the right, a "STAKEHOLDERS" table is displayed with the following data:

Name ↑	Role
Peter Tyson	Stakeholder

posts User posts

The screenshot shows a Dynamics 365 "LEARNING PATH" configuration screen. The breadcrumb navigation at the top reads "Dynamics 365 > Sales > Opportunities > R...". The main title is "Guided Task Title". There is a checkbox labeled "Show fixed ID controls only" with a help icon. Below this is a "+ Add New Step" button. A list of step options is shown, with the first option, "Step with Next button", highlighted with a red rectangle. Other options include "Step with User action", "User action with next but...", and "Learning Step".



Dynamics 365 Administration

Resources **Learning Path**

Help Center **Content Library**

Dynamics 365 | Learning Path | Content Library

MANAGE PUBLISH LOCALIZE CONFIGURATION Publishing Environment: Draft

Guided Task Sidebar Search (Alt+M+Q)

Name	Title	Type	Form Factor	Tags	App Versi...	Author	Languages
<input type="checkbox"/> Lead to Opportunity					9.0.0.3172	CRM Admin	1
<input checked="" type="checkbox"/> Introduction Of Dynamics 365	Dynamics 365 Introduction				9.0.0.3172	CRM Admin	1
<input type="checkbox"/> Sales Process					9.0.0.3172	CRM Admin	1

Dynamics 365 | Learning Path | Content Library

MANAGE PUBLISH LOCALIZE CONFIGURATION Publishing Environment: Draft

Guided Task Sidebar Search (Alt+M+Q)

Name	Title	Type	Form Factor	Tags	App Versi...	Author	Languages
<input type="checkbox"/> Lead to Opportunity					9.0.0.3172	CRM Admin	1
<input checked="" type="checkbox"/> Introduction Of Dynamics 365	Dynamics 365 Introduction				9.0.0.3172	CRM Admin	1
<input type="checkbox"/> Sales Process					9.0.0.3172	CRM Admin	1

Dynamics 365 | Settings | Administration

Training

Resources

Help Center

Learning Path

Content Library

Dynamics 365 | Learning Path | Content Library

MANAGE | PUBLISH | LOCALIZE | CONFIGURATION

Publishing Environment : Draft

Guided Task | Sidebar

Search (Alt+M+Q)

Name	Title	Type	Form Factor	Tags	App Versi...	Author	Languages
<input type="checkbox"/> Lead to Opportunity					9.0.0.3172	CRM Admin	1

Dynamics 365 | Learning Path | Content Library

SECURITY ROLES

PUBLISHING CONFIGURATION

CONFIGURATION > PUBLISHING CONFIGURATION

Publishing Environments

+ New Delete

Name	Description
<input type="checkbox"/> org00d2e066	

Publishing Environments + New  Delete

Name	Description
<input type="checkbox"/> org00d2e066	

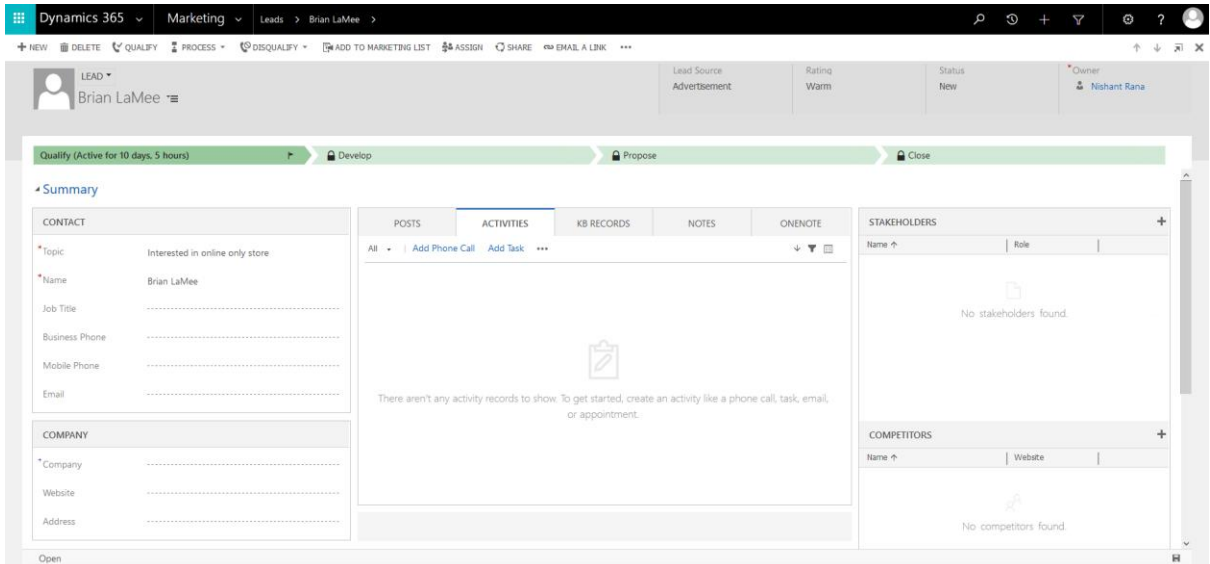
Name*

Description

Select the organization you want to add to this Publishing Environment*:

Name	URL
------	-----

Chapter 12: Other New Features in Dynamics 365



System Settings

Set system-level settings for Microsoft Dynamics 365.

General	Calendar	Formats	Auditing	Email	Marketing	Customization	Outlook	Reporting	Goals
Allow text wrapping in form fields labels and values									<input checked="" type="radio"/> Yes <input type="radio"/> No

*Topic	Interested in online only store
*Name	Brian LaMee
This is a test field having a long label defined in it. This is a	This is a test field having a long label defined in it. This is a new feature introduced in Dynamics
Job Title	.....

Dynamics 365 | Sales | Leads > Brian LaMee

LEAD: Brian LaMee | Lead Source: Advertisement | Rating: Warm | Status: New | Owner: Nishant Rana

Qualify (Active for 10 days, 9 hours) | Develop | Propose | Close

Summary

<p>CONTACT</p> <p>*Topic: Interested in online only store</p> <p>*Name: Brian LaMee</p> <p>This is a test field having a long label defined in it. This is a</p> <p>This is a test field having a long label defined in it. This is a new feature introduced in Dynamics</p> <p>Job Title:</p> <p>Business Phone:</p> <p>Mobile Phone:</p> <p>Email:</p> <p>COMPANY</p> <p>Open</p>	<p>POSTS | ACTIVITIES | KB RECORDS | NOTES | ONENOTE</p> <p>All | Add Phone Call | Add Task</p> <p>No activity records to show.</p>	<p>STAKEHOLDERS</p> <p>No stakeholders found.</p> <p>COMPETITORS</p>
---	--	--

Name

Label *

Display label on the Form

Panel header color

STAKEHOLDERS	
Name ↑	Role
Adrian Dumitrascu	Stakeholder
Alex Wu	Stakeholder

Multiselect

Item 2 x Item 1 x Item 3 x

Enter text here

Select All 3 Items

Item 1

Item 2

Item 3

COMPANY

+ Company

Website

Address

FILE **ADVANCED FIND**

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: Leads **Use Saved View:** [new]

Select

Tasks (Regarding) Does Not Contain Data

Conditions cannot be added under this

Solution: Default Solution
Web Resource: Case.Library.js

General Dependencies

Select dependencies this web resource needs.

+ Add | - Remove

Name	Display Name	Language Code	Description
msdyn_/LocalizationLibrary/Localization.Library.js	Localization.Library.js		

+ Add | - Remove

Entity	AttributeName
incident	accountid
incident	accountidname

The image displays a grid of Dynamics 365 application tiles. Each tile includes an icon, a title, a brief description, the product name, a date, and a category tag (WEB or UNIFIED INTERFACE).

Application	Icon	Category
Dynamics 365 — custom	Play button	WEB
Customer Service	Person with heart	WEB
Customer Service Hub	Interlocking circles	UNIFIED INTERFACE
Field Resource Hub	Truck	UNIFIED INTERFACE
Field Service	Truck	WEB
Project Resource Hub	Grid of squares	UNIFIED INTERFACE
Project Service Automati...	Grid of squares	WEB
Sales	Gauge chart	WEB
Sales Hub	Gauge chart	UNIFIED INTERFACE

Dynamics 365 Customer Service Hub Service > Dashboards

Service Training Global Filter Switch to Tile View Set As Default Refresh All

My Work Dashboards Activities

Customers Accounts Contacts Social Profiles

Service Cases Queues Knowledge Articles

Customer Service Hub

board This Quarter 10/1/2017 - 12/31/2017

My Resolved Cases	My Draft Emails	My Activities
Filtered 2 Modified On Normal Web Test User Mp Missing parts Problem Solved	Unfiltered 2 Modified On Normal A. Datum Draft	Unfiltered 16 Last Updated Email Normal Open
Normal Request Web Test User Pf Product feature information required Problem Solved	Normal Adrian Dumitrascu TM Test Mail Video Hardware Upgrade Draft	Email Normal TM Test Mail Video Hardware Upgrade Open
		Appointment Normal 4/8/2015 8:00 AM PS Prepare Sales Presentation Computer Upgrade

Dynamics 365 Customer Service Hub Service > Dashboards

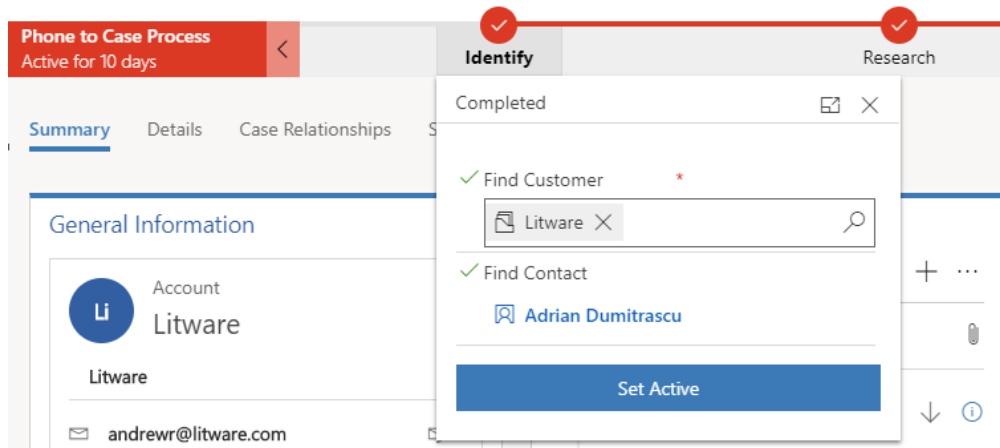
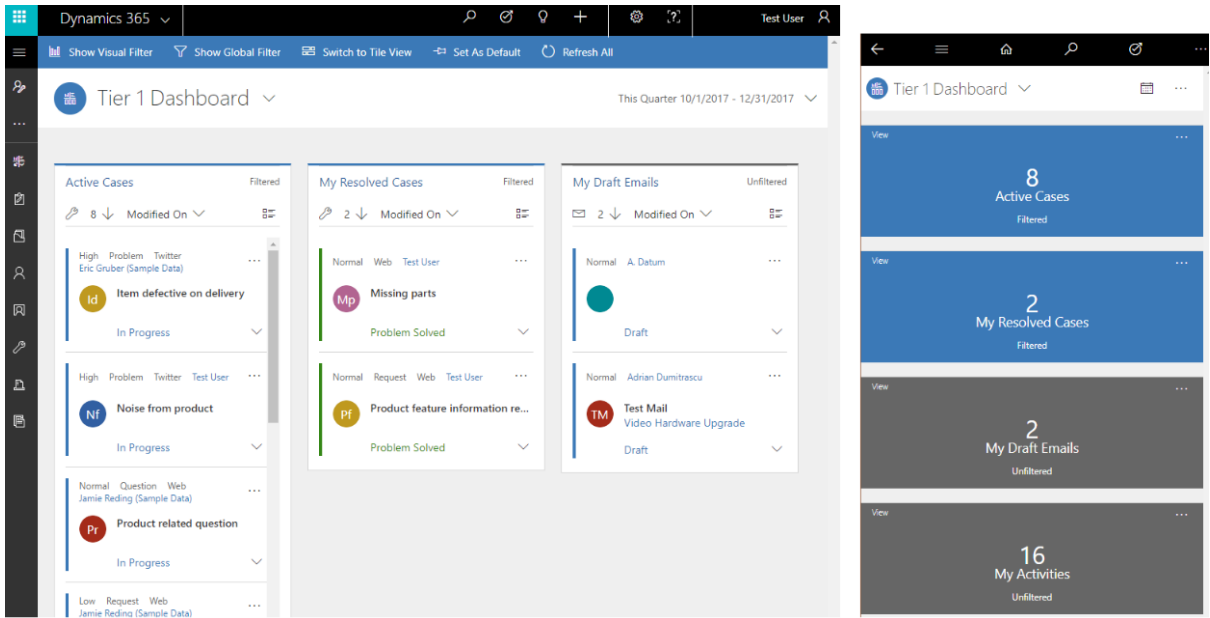
Service Training Global Filter Switch to Tile View Set As Default

Recently Used

- Tier 1 Dashboard
- Information on the pr...
- My Active Cases
- Item defective on deli...
- Missing parts

board

My Resolved Cases
Filtered 2 Modified On



Dynamics 365

Custom1 Save & Route New Create Child Case Resolve Case

CASE
Average order shipment time

Identify Research Resolve (7 Min)

Summary Details Case Relationships SLA Related

Priority Normal

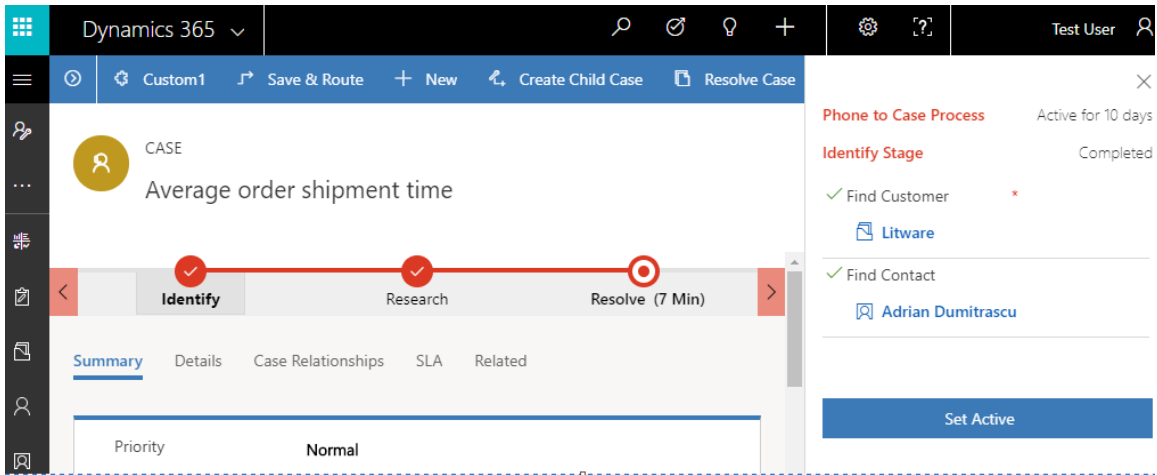
Phone to Case Process Active for 10 days

Identify Stage Completed

Find Customer * Litware

Find Contact Adrian Dumitrascu

Set Active



Timeline

Timeline



Enter a note...



What you missed (Click To Filter)



New posts (1)

New activities (1)

Filter by (Click To Filter)

By record type

All



4

2 Posts

2 Activities

Activity status



Closed A...

By activity type

By date

All

All

LAST WEEK



Auto-post on Complete overhaul required's wall -
Wednesday, October 18, 2017 7:26 PM

Case: Created by Nishu Rana for Account Consolidated
Messenger.

Like | Reply | ...



Auto-post on Complete overhaul required's wall -
Wednesday, October 18, 2017 7:26 PM

Case: Closed by Nishu Rana for Account Consolidated
Messenger.

Like | Reply | ...



Resolved by Test User - Wednesday, October 18, 2017
7:26 PM

this is resolved



Phone Call from Test User - Wednesday, October 18, 2017
7:27 PM

Call back to understand the problem

Check customer and product information. Create follow-up
activities. Generate letter or email using the relevant
template. Assign to the relevant team...

Assign | Delete | ...











Close Activity

Add to Queue

Open Entity Record

Dynamics 365 Settings Administration

Administration

-  **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.
-  **Privacy Preferences**
Set the privacy preferences for the organization.
-  **System Notifications**
View important system messages such as scheduled outage notifications.
-  **Yammer Configuration**
Connect Microsoft Dynamics 365 to your enterprise Yammer network.
-  **Microsoft Social Engagement Configuration**
Connect Microsoft Dynamics 365 to Microsoft Social Engagement for Social Insights
-  **Languages**
Add or remove support for additional languages.
-  **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.
-  **Resources In Use**
View details about your organization's use of storage, custom entities, and workflows and dialogs.
-  **Data Performance**
Review, analyze, and optimize the data access performance of components in your organization.
-  **Virtual Entity Data Sources**
Add, edit, or delete connection information for external data sources used by virtual entities in the system.

Select Data Provider

The data provider determines the type of data source you'll use. Select the data provider to use for this data source:

OData v4 Data Provider

OK Cancel

ODATA V4 DATA SOURCE : INFORMATION ▾

Sample OData Source ☰

▾ General

*Name	Sample OData Source
*URL	http://sample.odata.net/
Timeout	60
*Pagination Mode	Server-side Paging
Return Inline Count	False

▸ Request Parameters

▸ Additional Request Parameters

General Primary Field

Entity Definition

Display Name *	<input type="text" value="Virtual Entity"/>	<input checked="" type="checkbox"/> Virtual Entity
Plural Name *	<input type="text" value="Virtual Entities"/>	Data Source <input type="text" value="[None]"/>
Name *	<input type="text" value="new_virtualentity"/>	Ownership * <input type="text" value="Organization"/>
External Name *	<input type="text" value="EntityName"/>	<input type="checkbox"/> Define as an activity entity.
External Collection Name *	<input type="text" value="EntitySetName"/>	<input checked="" type="checkbox"/> Display in Activity Menus
Primary Image	<input type="text"/>	
Color	<input type="text" value=""/>	
Description	<input type="text"/>	


Schema

Display Name*

Name*

External Name

Field Security Enable Disable

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

Auditing* Enable Disable

Description

Set Auto-Numbering



Specify prefixes for these entities. Select suffix length for the eligible entities.

Contracts	Cases	Articles	Quotes	Orders	Invoices	Campaigns	Categories	Knowledge Articles
Prefix*	<input type="text" value="CNR"/>							
Number	<input type="text" value="1000"/>							
Suffix Length	<input type="text" value="6"/>							
Preview	CNR-01000-AS7FX3							

OK

Cancel

Summary

CONTACT INFORMATION	
* My Auto Number	Auto Number - 1000 - Y2K1 - 20171026033118

System Settings

Set system-level settings for Microsoft Dynamics 365.

General	Calendar	Formats	Auditing	Email	Marketing
---------	----------	---------	----------	-------	-----------

Display currencies by using

Set up Search

Enable Relevance Search

Enable Quick Find record limits

Select entities for Categorized Search

The screenshot shows the Microsoft Dynamics 365 Solution Explorer interface. The top menu bar includes options like File, Save and Close, Export Solution, Translations, Publish All Customizations, and Actions. The main area displays the 'Entities' component type for a 'Default Solution'. A table lists the entities, with the 'Account' entity selected. The table has columns for Display Name, Name, Schema Name, State, and Customizable.

Display Name ↑	Name	Schema Name	State	Customizable
Account	account	Account	Managed	True

Select Entities



Select the entities that will be included in the Relevance Search results. The number in parentheses indicates the number of fields for an entity that will be synced to the external search index.

Available Entities		Selected Entities
Account Project Price List (0)		Account (8)
Actual (35)		Appointment (6)
Actual Data Export (Deprecated) (0)		Attachment (8)
Ad (0)		Campaign (2)
Ad Placement (3)		Campaign Activity (4)
Agreement (13)		Campaign Response (6)
Agreement Booking Date (14)	<input type="button" value="Add >"/>	Case (5)
Agreement Booking Incident (10)	<input type="button" value="< Remove"/>	Competitor (1)
Agreement Booking Product (8)		Contact (11)
Agreement Booking Service (8)		Contract (7)
Agreement Booking Service Task (11)		Email (8)
Agreement Booking Setup (7)		Fax (10)
Agreement Business Process (0)		Goal (19)

Total fields indexed: 22.50% used (225 of 1000)

Start search

Relevance Search

Eva

Record Type

- Opportunities (3)
- Contacts (2)
- Notes (1)
- Leads (1)

SHOW MORE

Owner

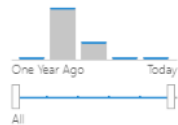
- Anne Weiler (S... (3)
- Jamie Reding (... (2)
- Sven Mortense... (1)
- SYSTEM (1)

SHOW MORE

Modified On



Created On



CONTACT
Eva Elznicova
 A. Datum
 Guangzhou
 eva@adatum.com
Eva

LEAD
Eva Corets
 Likes our products
 Fabrikam, Inc.
 New
Eva

CONTACT
Eva Corets
 Fabrikam, Inc.
 Redmond
 407-967-2222
Eva

OPPORTUNITY
Ready to buy product SKU E Series
 Fabrikam, Inc.
 40450
 9/19/2017
Eva Corets

OPPORTUNITY
Home Electronics
 Fabrikam, Inc.
 36314
 5/18/2017
Eva Corets

Set Personal Options



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

Records Per Page 50

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Select the default search experience

Default Search Experience Use last search

Facets and Filters Use last search

Set the time zone you are in

Time Zone (GMT+04:00) Abu Dhabi, Muscat

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

OK Cancel

Set Personal Options ? X

Change the... X

Configure Facets and Filters X

Select up to four facet fields for each searchable entity. Select an entity and then add, remove, or rearrange the fields you want to see in Relevance Search.

Note: This configuration applies to Relevance Search only; it doesn't apply to Categorized Search.

Select Entity:

Available Fields

Add >

< Remove

Move Up

Move Down

Default

Selected Fields

Potential Customer

Est. Revenue

Est. Close Date

Tools
 Copy
 Restore
 Export
 Set server firewall
 Delete

Resource group [\(change\)](#)
 RGDynamics365DB

Status
 Online

Server name
dynamics365db.database.windows.net
 Elastic database pool
 No elastic pool

Categories

- Analytics
- Collaboration
- Customer service
- Finance
- Human resources
- IT + administration
- Marketing
- Operations + supply ...
- Productivity
- Sales



Microsoft Dynamics 365 - Data Export Service

By Microsoft Dynamics 365
Dynamics 365

This service exports schema and data from Dynamics 365 (online) to customer owned Azure SQL database

Get it now

ADVANCED FIND

Data Export Service for Dynamics 365 disclaimer

By enabling this command, you consent to exporting your data with an external system. Please consult the technical documentation if you want more information.

Create Export Profile



Properties > Select Entities > Select Relationships > Summary

Provide the basic properties of the export profile.

Name *	<input type="text"/>
Key Vault URL *	<input type="text"/>
Schema	<input type="text" value="dbo"/>
Prefix	<input type="text"/>
Retry Count	<input type="text" value="12"/>
Retry Interval (in sec.)	<input type="text" value="5"/>
Write Delete Log	<input checked="" type="checkbox"/>

Validate

Next

Cancel

```
# -----PLACEHOLDER----- #
$subscriptionId = '[Specifies the Azure subscription to which the Key Vault belongs.]'
$keyvaultName = '[Specifies the name of the Key Vault. If the Key Vault does not exist,
the script will create one]'
$secretName = '[Specifies the name of the secret that is put into the Key Vault.
The secret holds the destination database connection string.]'
$resourceGroupName = '[Specifies the Resource Group for the Key Vault.]'
$location = '[Specifies the Azure region where the Resource Group and Key Vault is placed.]'
$connectionString = '[Specifies the destination database connection
string that would be placed as a secret in the Key Vault.]'
$organizationIdList = '[Specifies a comma separated list of all the CRM Organization Id
which will be allowed to export data to the destination database.]'
$tenantId = '[Specifies the Azure Active Directory Tenant Id
to which all the specified CRM organizations belong to.]'
# -----PLACEHOLDER----- #
```


Create Export Profile



Properties > Select Entities > Select Relationships > Summary

Provide the basic properties of the export profile.

Name *

Key Vault U

Schema

Prefix

Retry Coun

Retry Interv

Write Delete Log

Validate Data Export Profile



Validation of profile was a success. We were able to reach the KeyVault endpoint.

We have detected the destination database service tier(Sku) lower than P1. This can cause throttling in Data Export.

Ok

Validate

Next

Cancel

Create Export Profile



- ✓ Properties
- ✓ Select Entities
- ✓ Select Relationships
- Summary

Review the summary of the export profile. Finish to create the export profile.

Key Vault URL **https://d365keyvalue.vault.azure.net/secrets/DataExpo...**
Schema **dbo**
Prefix **crmm**
Retry Count **12**
Retry Interval (in sec.) **5**

Entities

Display Name	Schema Name
Contact	contact

Relationships

Schema Name	Primary Entity	Related Entity
-------------	----------------	----------------

- Previous
- Create
- Create & Activate
- Cancel

- + NEW
- DELETED
- REFRESH
- FAILED RECORDS
- MANAGE ENTITIES
- MANAGE RELATIONSHIPS
- RESYNC FAILED RECORDS (PREVIEW)

EXPORT PROFILE

Export Profile

Status
Active

Last Sync Status
Success

- PROPERTIES & OVERVIEW
- ENTITIES**
- RELATIONSHIPS

Entity	Metadata Sync Status	Initial Sync Status	Last Sync Status	Last Synchronized On
contact	Created	Completed	Success	10/23/2017 7:41 PM

	fullname	Id	SinkCreatedOn
22	Yvonne McKay	65A0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
23	Darren Parker	69A0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
24	Allison Brown	6DA0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
25	Sean Chai	71A0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
26	Humberto Acevedo	73A0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
27	Luca Argentiero	B5A0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
28	NeKeta Argrow	B7A0E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
29	Tomasz Bochenek	1FA1E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
30	Nana Bule	55A1E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
31	Greg Chapman	9DA1E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
32	Can Comertoglu	C9A1E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000
33	Robin Counts	D7A1E5B9-88DF-E311-B8E5-6C3BE5A8B2...	2017-10-23 15:41:20.000

System Settings

Set system-level settings for Microsoft Dynamics 365.

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

For more information, see the [Dynamic 365 Customization Guide](#)

Cortana for Dynamics 365
 Enable Cortana for Dynamics 365. By enabling this feature, you consent to share your data with an external system. Cortana's Privacy Policy Statement apply to customer data sent to Cortana. Please consult the feature technical documentation if you want more information. Yes No
 For more information, see the [Cortana for Dynamics 365 documentation](#)

MailApp Preview
 Enable Dynamics 365 App for Outlook Preview Yes No

Text Analytics Preview for Case Topic analysis, Suggest Similar Cases and Suggest Knowledge Articles
 Enable the Dynamics Dynamics 365 Text Analytics Preview Yes No
 For more information, see the [Dynamic 365 Customer Center](#)

Relationship Insights
 Enable Auto Capture [Learn more](#) Yes No
 Enable Relationship Assistant [Learn more](#) Yes No
 Enable Email Engagement [Learn more](#) Yes No

OK Cancel



Dynamics 365 Relationship Insights

Set up Relationship Insights

Relationship Insights leverages data-integration and artificial-intelligence capabilities to combine and analyze your Dynamics 365 and Microsoft data. It uses the insights derived from this analysis to surface features that help guide your daily work, find critical opportunities, manage email communications, identify actionable email messages, and propose the best path forward. Relationship Insights features are context sensitive, so the information they present and the suggestions they make are always most relevant to whatever you are doing (or should be doing) right now.

Dynamics 365 Instance

Select Dynamics 365 Instance

Please read the [Terms and Conditions](#) and the [Privacy Statement](#)

Accept the Dynamics 365 Software License Terms and Privacy Statement.

Relationship Insights

Configure Relationship insights offered by Dynamics 365.

Relationship Assistant Auto Capture Email Engagement

SAVE

▼ Base Cards

<input checked="" type="checkbox"/> Base Cards	Card Options
<input checked="" type="checkbox"/> Close Date Coming Soon	Days before notifying me when the close date for an opportunity is approaching: <input type="text" value="14"/>
<input checked="" type="checkbox"/> Custom Activity Due Today	
<input checked="" type="checkbox"/> Email Due Today	
<input checked="" type="checkbox"/> Fax Due Today	
<input checked="" type="checkbox"/> Letter Due Today	
<input checked="" type="checkbox"/> Meeting Today	
<input checked="" type="checkbox"/> Missed Closed Date	
<input checked="" type="checkbox"/> Phone Call Due Today	
<input checked="" type="checkbox"/> Service Appointment Due Today	
<input checked="" type="checkbox"/> Task Due Today	

Enable enhanced cards for your organization.

i By enabling this feature, you consent to share your data with external systems. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

▶ Email Cards from Exchange **i**


▶ Relationship Analytics Cards



▼ Email Engagement Cards **i**


<input checked="" type="checkbox"/> Email Engagement Cards	Card Options
<input checked="" type="checkbox"/> Email Opened	
<input checked="" type="checkbox"/> Email Reminder	

▶ Productivity Cards

▶ "Today" Cards


POSTS	ASSISTANT	ACTIVITIES
<p>Today's Insights <i>(Preview)</i></p> <div style="border: 1px solid #ccc; padding: 5px;">  Opportunity Closing Soon 🔔 ✕ <p style="margin: 0;">Video Hardware Upgrade</p> <p style="margin: 0; font-size: small;">Opportunity closes on Friday, November 3, 2017.</p> </div> <p style="margin-top: 5px; color: #0070c0; font-weight: bold; text-decoration: underline;">OPEN OPPORTUNITY</p>		

CONTACT INFORMATION	POSTS	ASSISTANT	ACTIVITIES	NOTES
*Full Name	Benno Kurmann			
Job Title	-----			
Account Name	 School of Fine Art			
<div style="border: 1px solid #ccc; padding: 5px;"> <p>All ▾ | Add Phone Call ...</p> <hr/> <div style="border: 1px dashed #ccc; padding: 5px;">  Nishu Rana TRACK 📅 | 🗑 <p style="margin: 0; font-size: small;">Let us meet next week</p> <p style="margin: 0; font-size: x-small; color: #c00000;">Today Not tracked. Only you can see this email.</p> </div> </div>				

POSTS	ASSISTANT	ACTIVITIES	NOTES
<p>All ▾ | Add Phone Call Add Task ...</p> <hr/> <div style="border: 1px dashed #ccc; padding: 5px;">  Nishu Rana 📅 | 🗑 <p style="margin: 0; font-size: small;">Let us meet next week</p> <p style="margin: 0; font-size: x-small; color: #c00000;">Today Tracking pending</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; text-align: center;"> <p style="margin: 0; font-size: small;">This email is now being tracked and should be shared within 15 minutes.</p> </div>			

EMAIL ENGAGEMENT



Recipient Activity will be followed. 
[DON'T FOLLOW](#)



Schedule email to be sent at a later time.
[SEND LATER](#)



Set a reminder to follow up on this email.
[SET REMINDER](#)

Send Later ✕

Send this email later at specific time.

* Send at

Delivery of this email will be delayed to 10/30/2017 3:05 PM

OK

Cancel

Set Reminder



Set a reminder to follow up on this email.

* Condition
 If the email is not opened by

* Remind by

Comment

We'll remind you if email is not opened by 10/30/2017 3:06 PM.

Ok

Cancel

POSTS ASSISTANT ACTIVITIES NOTES

All | Add Phone Call ...

Nishant Rana
Test Email
This is test email. Today

Scheduled to send on 10/30/2017 3:26 PM

Relationship Assistant



Your email was just opened!
Benno Kurmann opened your email!



'Sample Mail CRM:0009004' was opened at Saturday,
October 28, 2017 3:38 PM.

[OPEN RECIPIENT](#)

[OPEN EMAIL](#)


Manage Attachment

Click the file to view it, or click Remove to remove it.

File Name:  Profile.pdf (1,006,068 Byte(s))

Remove

Follow

 Choosing to follow attachment will upload the attachment to OneDrive for Business as a link. [Learn more](#)

Close






RECIPIENT ACTIVITY

6 
Opens

1 
Attachment Views

1 
Link Clicks

0 
Replies

- Yesterday 10:21 PM  Opened on **Windows 10 Device**
- Yesterday 10:17 PM  Opened on **Windows 10 Device**
- Sat 3:40 PM  Viewed **Profile.pdf**
- Sat 3:40 PM  Clicked on link <https://community.dynamics.com/>
- Sat 3:40 PM  Opened on **Windows 10 Device**

FILE		ADVANCED FIND	
Query	Saved Views	Results	New
Save	Save As	Edit Columns	Edit Properties
View	Clear	Group AND	Group OR
	Details	Download XML	Fetch XML
	Query	Debug	

Run Workflow... Start Dialog More Actions							
<input type="checkbox"/>	Title	Open Count	Open Rate ↓	Recommended	Reply Count	Reply Rate	Sent email count
<input type="checkbox"/>	Contact Reconnect	1	100	Yes			1
<input type="checkbox"/>	Email invoice template			No			



CaféX



Live Assist for Dynamics 365 Powered by CaféX

Providing exceptional customer experience is the new competitive advantage. **CaféX Live Assist™ for Microsoft Dynamics 365** enables personalized, omnichannel customer engagement that will delight your customers and improve your agents' productivity.

Hosted in the Azure cloud, the combined solution embeds real-time customer interaction within the Unified Service Desk and web clients for Dynamics 365. The immersive solution extends in-app live assistance to customers, who can interact with service representatives via text, co-browsing, bot escalation and more.

With CaféX Live Assist and Dynamics 365, highly interested, you can:

Publisher: CaféX

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365
 Organization to add the application to:

Agree to Microsoft's [Legal Terms and Privacy Statement](#)

Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365



Live Assist for Dynamics 365 Powered by CaféX

Support customers in real time, directly from your company's apps and webpages. Chat live to create more personalized experiences. Resolve issues faster with innovative cobrowse technology that lets you see customers' apps and webpages as well as navigate for them. Share documents and even fill out forms on their behalf, all from the agent interface.

Contact us:

[Email Support](#)
[Support Website](#)

Set up Live Assist

Select Dynamics 365 Instance

Dynamics 365 Instance

Contact email address

Install Live Assist Powered by CaféX for Unified Service Desk

[Read the CaféX Privacy Statement](#)

CaféX Software License Terms

TERMS OF SERVICE
FOR CAFÉX COMMUNICATIONS INC. LIVE ASSIST® FOR MICROSOFT
DYNAMICS 365 POWERED BY CAFÉX

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Live Assist Powered by CAFÉ X TEST365CRM USERS LINKS

30 1 29 1 1 0 0

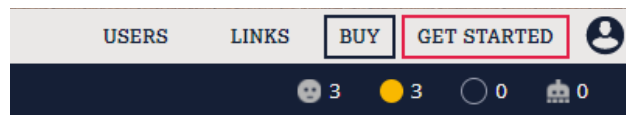
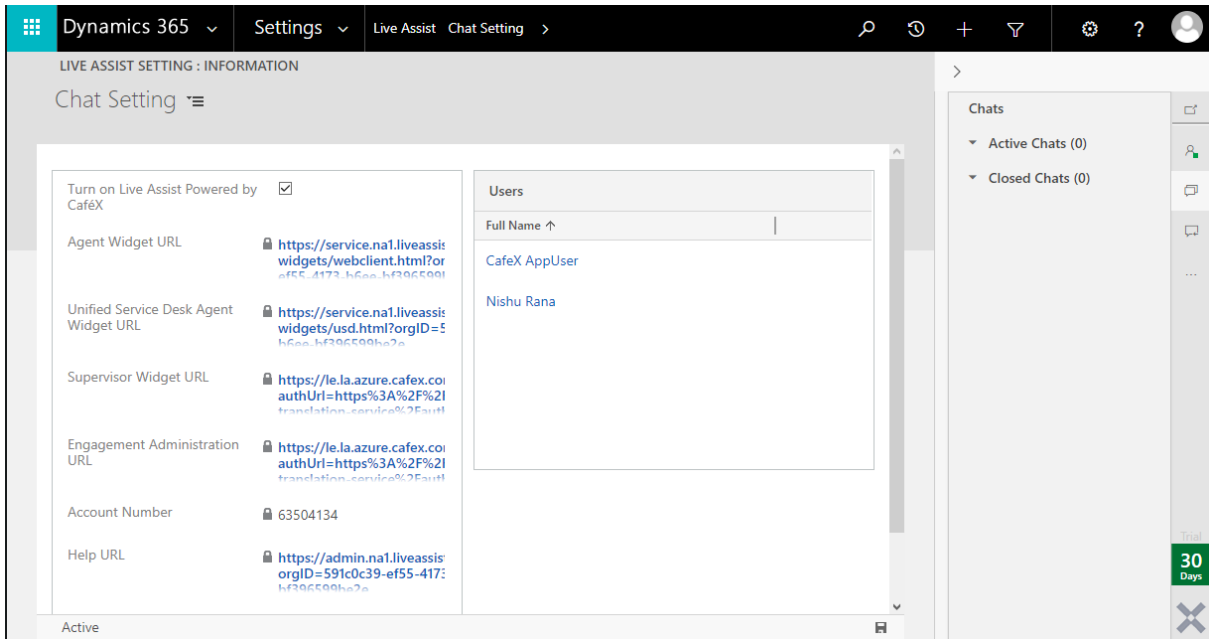
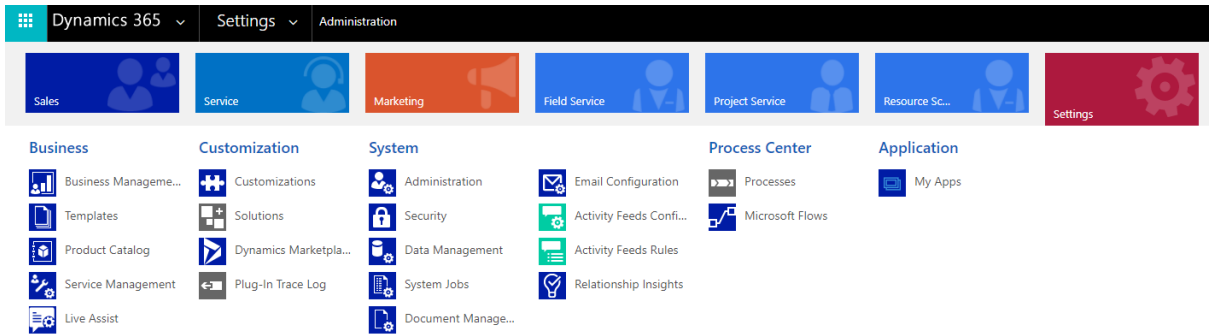
Preview

30 Days Left

You are in the trial mode

Users

Users	Active	Inactive	Licenses
1	1	0	30



Open Live Assist For Dynamics 365

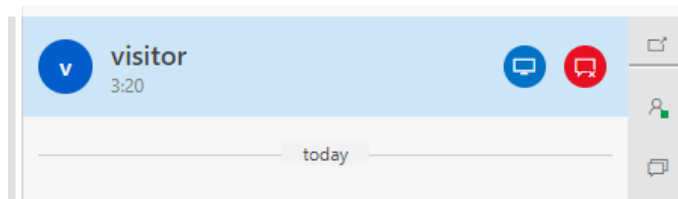
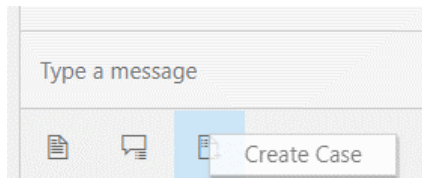
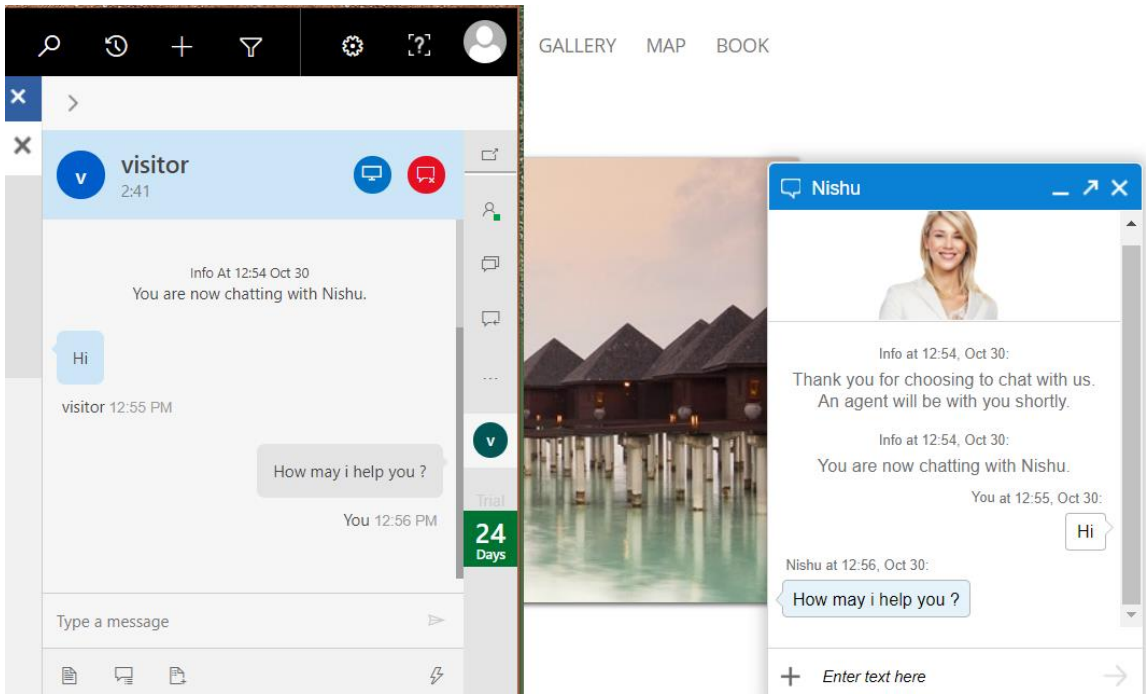
- Log into Dynamics 365 using the link below. Since you have installed Live Assist, you will see the Live Assist panel appear on the right hand side of the browser window.
- If you had already logged in, you may need to close your browser and log back into Dynamics 365.
- You are now ready to take a chat!

[LAUNCH DYNAMICS 365](#)

If you don't have your own website available then you can use our demo site link below, it will launch a page and automatically add your unique embed code into the page so that you can make chats to your Dynamics CRM. It's a great way to try out the power of Live Assist while you wait to update your own website.

- Click the link below to open a demonstration website with the customer chat pre installed. Be sure you're not blocking pop ups - this will open in another window.

[DEMO SITE](#)



Chat Context

CONTACT
visitor
[+ NEW](#)

CHAT ACTIVITIES
chat wit... 10/30/2017 6:16 PM

CASES
Search for 'visitor' in Cases
[+ NEW](#)

Visitor Information

City	Dubai
Device	DESKTOP
Browser	Chrome 61.0.3163.100
Portal	No
Country	United Arab Emirates
Operating System	WINDOWS
ISP	Emirates Telecommunications ...

Chat Information

Wait Time	18.66 sec
Ended On	-
Requested on	6:16 PM 10/30/2017

visitor 6:30

today

Info At 18:16 Oct 30
Thank you for choosing to chat with us. An agent will be with you shortly.

Info At 18:16 Oct 30
You are now chatting with Nishu.

Hi
You 6:17 PM

We have not heard from you for some time. Do you wish to continue to chat?
You 6:19 PM

Since we have not heard from you for some time, we will now end this chat. Please contact us again if we can be of further assistance.
You 6:22 PM

Type a message

24 Days
Powered by CAFÉ

LinkedIn test@test365crm.onmicrosoft.com

Organization Selector Summary

Dynamics 365 Connector for LinkedIn Lead Gen Forms Settings ?

Summary

? Setup may take several minutes. You can continue to work in [Dynamics 365](#) while setup is in progress, and closing this page won't affect installation. You'll receive email confirmation once it's complete.

Process	Status	
Application Services	? Not started	
Dynamics 365 packages	? Not started	

Dynamics 365 Settings LinkedIn Lead Match... > Email Lead Matching... >

NEW DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS WORD TEMPLATES

LINKEDIN LEAD MATCHING STRATEGY : INFORMATION

Email Lead Matching Strategy (Default) ☰

! This Lead Matching Strategy will not generate Leads from Form Submission. Please set at least one field to match the Lead.

i You can't delete or deactivate this matching strategy unless another one is activated. Activate a different matching strategy to deactivate this one.

General

*Name	Email Lead Matching Strategy (Default)	
Activate	<input checked="" type="checkbox"/> Yes	
Matching Lead Fields + [table icon]		
LinkedIn Prede...	Lead field ↑	
EMAIL	emailaddress1	

On Matching Fail

Ignore

Create new lead

The screenshot shows the Dynamics 365 interface with a sidebar on the left and a main content area on the right. The sidebar displays the 'LINKEDIN USER PROFILE : INFORMATION' for 'Nishant Rana'. The 'General' section includes the following details:

Name	Nishant Rana
Authorized	Not Authorized
Authorized User Name	.....
Sync Status	Not Syncing
Last Sync Date	.....

The main content area shows a browser window titled 'Authorize | LinkedIn - Google Chrome' with the URL 'https://www.linkedin.com/oauth/v2/authorization?response_type=code&client_id=78aur8q02x46qa&redirect_uri...'. The browser displays a LinkedIn authorization dialog box with the LinkedIn logo and the following text:

LinkedIn

Dynamics 365 Connector will use the info below under its privacy policy:

- Name, photo, headline, and current positions
- Access your Lead Gen Forms and retrieve leads
- The primary email address you use for your LinkedIn account

Not you?

Cancel Allow

LINKEDIN USER PROFILE : INFORMATION
Nishant Rana

Status details
Owner: Test User

General

Name	Nishant Rana
Authorized	Authorized
Authorized User Name	nishant_bliss@hotmail.com
Sync Status	Active
Last Sync Date	10/31/2017 1:03 PM

Associated LinkedIn Accounts			
Name	Sync enabled	Last sync	Sync status
Nishant's Ad Account	Yes		Active



LEAD ▾
Kim Abercrombie

Lead Source
LinkedIn Sponsored Form

Rating
Warm

Qualify (Active for 12 days, 19 hours)

Develop

Propose

*First Name	Kim
*Last Name	Abercrombie
Email	info@southridgevideo.com
Business Phone	+1-695-555-3400
City	Clinton
State/Province	CO
Country/Region	US
ZIP/Postal Code	94285

Company	
*Company Name	Southridge Video
Company size	.....

LinkedIn Form Submissions	🔒 📄 1
Source LinkedIn Form	LinkedIn Form
Lead Source	LinkedIn Sponsored Form
LinkedIn Campaign	Dynamics 365 Campaign

LinkedIn Form Submissions

LinkedIn form | Lead ↑

[LinkedIn Form](#) Kim Abercrombie

Open