

2013 User Guide

Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2013



 Microsoft Dynamics CRM

Contents

- What's new?
- Manage the sales cycle
- Manage your service team
- Work with cases
- Work with marketing campaigns
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- Monitor social media
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This user guide is for people who prefer a print version of CRM Online and CRM on-prem Help and for those who want to customize the content for their organization. For videos, quick reference cards, eBooks, and for up-to-date information, visit the Customer Center at www.CRMCustomerCenter.com.

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Welcome to the User Guide

This user's guide covers the following releases:

- Microsoft Dynamics CRM 2013
- Microsoft Dynamics CRM 2013 Service Pack 1 (on-premises)
- Microsoft Dynamics CRM Online up to the Spring '14 update

What's new

We're excited to tell you about the many new features available in Microsoft Dynamics CRM Online Spring '14 and Microsoft Dynamics CRM 2013 Service Pack 1 (on-premises)!

Deliver great service everywhere

The many new customer service features included in this release help you build customer loyalty and retain customers for life. These new features can help you:

- Respond quickly to service issues, whether they come in from phone calls, email, or social media.
- Tie entitlements to service level agreements (SLAs) to provide quality service until a case is resolved.
- See all entitlements for a customer at a glance, and assign entitlements to customers and products automatically.
- Use case timers to track service level agreement key performance indicators (KPIs) to ensure customer commitments are met.
- Monitor social media conversations to identify and resolve emerging issues before they escalate.
- Define case relationships to stay on top of details for all related cases and work more efficiently.

Take a look at these two new eBooks to learn more: [eBook: Meet your service goals with SLAs and entitlements](#) and [eBook: What's new in CRM customer service?](#)

Important

The new customer service features are included with product updates, so if you don't see them in your system, updates may not have been applied yet. Check with your system administrator.

Set up and manage service features in the new Service Management area

In the new Service Management area, a customer service manager can configure all service-related features in a single location on the user interface. To check out this new area: Click or tap **Settings > Service Management**.

Some of the ways that you can manage customer service through the Service Management area are:

- Define case relationships so that parent and child cases automatically inherit settings when closed.
- Use routing rules so that cases are automatically assigned to agents or queues.
- Specify the level of support and types of entitlements for multiple channels.
- Define and track service KPIs through service level agreements.
- Define support hours and associate schedules with service level agreements.



Important

The new customer service features are included with product updates, so if you don't see them in your system, updates may not have been applied yet. Check with your system administrator.

Gain insights from social networks like Facebook and Twitter with Microsoft Social Listening

Microsoft Social Listening is a powerful new analytics service that enables your organization to monitor social media channels like Twitter and Facebook. Use Social Listening to track products, brands, competitors, and campaigns globally, and in real time, to gain a true understanding of your customers and your business across the social web.

With Social Listening, you can scour the web to see what people are saying about your company and products. You can track sentiment across channels, identify top influencers, stay on top of the latest information and trends, get competitive insights, and more.

- **See how the total volume of posts is trending over time.** Social Listening captures the information you need in easy-to-read charts.
You can track information in 19 languages across Twitter, Facebook, blogs, and videos.
- **Get a true understanding of sentiment.** At a glance, see how people perceive your product, service, or brand. To figure out which posts are positive, negative, or neutral, Social Listening analyzes keywords and phrases in the native languages, which means it also picks up on cultural cues.
- **Follow spikes in positive or negative sentiment.** Use the information gleaned from Social Listening to seize an opportunity or to proactively work to change the social conversation in your favor.
- **Track how your marketing or service campaign is doing.** After rolling out a campaign, listen for reactions on Facebook, Twitter, blogs, and in videos to see what's working and what isn't. Then make adjustments to your campaign based on the social conversation.
- **Gain social insights.** Analyze social media conversations about your competitors, customers, and prospects.

For more information about how to get Microsoft Social Listening: **Get ready for the spring wave of releases**

Or, read these eBooks for examples that show how Social Listening can help you: [Introducing Microsoft Social Listening](#) and [Microsoft Social Listening for CRM](#)

Updating from an earlier on-premises version? Find out what else is new for you!

If you're updating from an earlier version of Microsoft Dynamics CRM 2013 Service Pack 1 (on-premises), there are many more exciting new features for you to take advantage of now.

Find out more: [eBook: What's changed in CRM 2013?](#)

The Training & Adoption kit gives you a jump start on creating training materials for users

To help you get your organization up and running, there's a Training & Adoption Kit with eBooks, help, and videos that you can customize to match your system and style.

More information: **Training & Adoption Kit for Microsoft Dynamics CRM**

New CRM apps for Windows Phone, iPhone, and Android

With the new smartphone apps, you can now access important customer information from your phone.

Download the app from Windows Marketplace, Apple Store, or Google Play, or check with your CRM admin (if that's someone other than you) for instructions for your organization.

Key features:

- See your CRM data quickly displayed and optimized for a mobile screen.
- Add and modify contacts, tasks, and notes as well as other relevant sales data.
- View activity feeds and see addresses on Bing Maps. Windows Phone only.
- Get back to recently viewed records even when you're not connected. Windows Phone only.
- All this with no additional license fees.

New CRM apps for Windows 8 mobile devices or your iPad

Microsoft Dynamics CRM for tablets helps you stay connected and productive wherever you are. Use your Windows 8 device or iPad to stay up to date with your customer info—even when you're on the go. Arrive prepared for every appointment, and update your notes, tasks, contacts, accounts, and leads while the details are still fresh in your mind.

Download the app from Windows Marketplace or the Apple Store, or check with your CRM admin (if that's someone other than you) for instructions for your organization.

Works with:

- Windows 8 (including Surface Pro or Surface RT)
- iPad (4th Gen)
- iPad (3rd Gen)

Key features:

- Access your activities, accounts, contacts, leads, and opportunities from an easy-to-use dashboard.
- Quickly enter customer data with only a few taps.
- Track progress for key performance indicators visually with charts.
- Use Skype to communicate with your contacts.
- Access your personalized views of lists to see the data most important to you.
- Pin tiles to the app dashboard to get to the info you need quickly.
- All this with no additional license fees.

New business processes help you follow best practices for common scenarios

Check out the Microsoft Dynamics Marketplace for several business process solutions that help organizations like yours follow best practices for common scenarios. These solutions help you save time by giving you a great starting point for creating business processes that match the way you do business. More information: [Business process solutions available for download](#)

The system also comes with several business processes already installed. You can use them as-is or edit them as needed. More information: [Add ready-to-use business processes](#)

For a short, easy-to-read intro to business processes, check out the [eBook: Business processes](#). This eBook is designed to help users get up and running quickly.

For a step-by-step guide to changing a business process to match the way your organization does things, check out the [eBook: Change a business process](#). This eBook is intended for administrators or managers.

Announcing Social Insights powered by InsideView

With Social Insights, powered by InsideView, your Microsoft Dynamics CRM account information goes from static to dynamic with constant updates to three essential types of information – data, insights, and connections. InsideView applies proprietary triangulation and validation techniques across 30,000+ sources and millions of company and people profiles to deliver relevant, accurate company and contact information that helps sellers find more leads, win more deals, and retain and grow customer accounts. Microsoft Dynamics CRM brings Social Insights to you with every Microsoft Dynamics CRM Online Professional license at no additional charge (U.S. only).

Create compelling customer interactions. Access more degrees of connection for every prospect. Social Insights helps sellers to be more efficient and effective, while driving CRM adoption, because it gives them the real-time insights they need to succeed – all in one place; all within Microsoft Dynamics CRM. [Learn more about Social Insights](#)

Navigate easily with the redesigned user interface

The new user interface makes doing common tasks quicker and easier:

- **No more Navigation Pane.** To move around in the web application, you'll use the nav bar at the top of the page. The nav bar includes “breadcrumbs” to let you know where you're working in the system. More information: [eBook: Start working in CRM](#)

- **It's easier to enter data.** Look for the Create command in the nav bar at the top of the page. Just click or tap the command, and then enter data in a few fields to get new information into the system. More information: [Quick create--Enter new contacts \(or other data\)--fast!](#)

You can add products quickly to opportunities, quotes, and orders — and update details like price, quantity, and discounts right on the screen where you're working. Plus, you can look up and add key stakeholders and see at a glance who is involved and what their role is. More information: [Create or edit an opportunity](#)

- **Click or tap to contact someone.** Stay in touch with your customers by clicking or tapping a phone number to make calls via Lync or Skype. Click or tap an email address to send an email. In addition, you can see addresses on Bing Maps. More information: [Place calls with Skype or Lync](#)

Microsoft Dynamics CRM is ideal for touch-enabled monitors as well as for monitors that require a mouse.

New color scheme improves readability of tiles

Microsoft Dynamics CRM 2013 Update Rollup 1 introduced a new brighter blue color for the tiles in the Sales, Service, Marketing, Settings, and Help areas, and changed the background color for the rows of tiles to light gray. The greater contrast between the background and foreground colors makes the tiles easier to see and use.

For example, the new light gray background makes it easier to see the row of tiles for the different record types, such as accounts, contacts, leads, opportunities, and cases. Additionally, it's easier to read the names for the groups of tiles, for example: **My Work**, **Customers**, or **Sales**.

The greater contrast makes it easier to read the names of records you viewed recently.

To see an example: On the nav bar, click or tap **Sales** and then click or tap **Accounts**. Click or tap the down arrow on the **Accounts** tile to see the new lighter background for recently viewed records.

Manage the sales cycle

Quick create--Enter new contacts (or other data)--fast!

The Quick Create command makes it fast and easy to enter almost any type of information into the system. The command is on the nav bar, so it's always available whenever you need to enter new info into the system.

With Quick Create, you need to complete only a few fields. Later, when you have more time or more information, you can fill in more details.





You can quickly create:

- Contacts
- Accounts
- Leads
- Opportunities
- Campaign responses
- Competitors
- Activities: tasks, phone calls, email, or appointments



On the nav bar, click or tap the plus sign , and then click or tap the item you want.

For an activity:

Click or tap...	To create a new...
	Task
	Phone call
	Email
	Appointment

2. Fill in the fields, and then click or tap **Save**.
3. If you would like to continue adding information, click or tap **View Record**. To create another one, click or tap **Create Another**.



Note

- * next to the field on the screen means the field is required.
- + next to the field on the screen means your organization recommends that you fill in the field.



Important

To maintain the integrity of your data, check regularly to make sure that you don't inadvertently create duplicate records in the system. More information: **Check for duplicates**

Use Bing Maps to view a location

Bing Maps help you plan customer visits, optimize your routes, calculate mileage for expense reports, and see nearby services. When you view the details for contacts, leads, or accounts, you'll see a map that shows where their address is located. Click or tap a map to explore aerial and satellite images, check traffic conditions, and get directions.

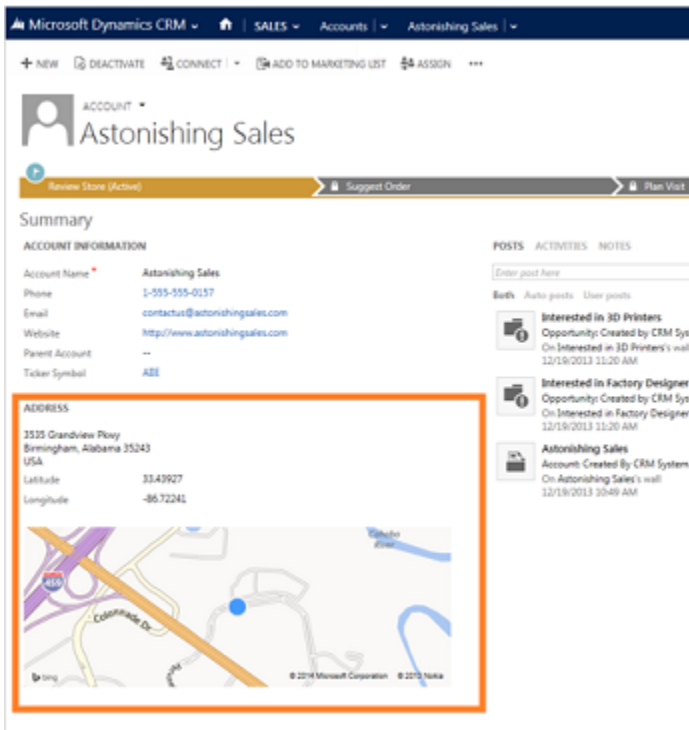
Important

Bing Maps may not be available in all countries/regions or languages. Additionally, Microsoft Dynamics CRM (on-premises) users may be prompted to enter a license key to view Bing Maps. Contact your system administrator for information about your organization's Bing Maps license.

View a Bing map for a contact, lead or account



1. Navigate to a contact, lead, or account.
2. Scroll down to see the map. If the **Address** field is blank, enter the address, and then click or tap **Done**. Wait a moment for the map to refresh.
3. Click or tap the map to view aerial and satellite images, check traffic conditions, and get directions.



The screenshot shows the Microsoft Dynamics CRM interface for an account named 'Astonishing Sales'. The account information includes the name, phone number (1-555-555-0157), email (contactus@astonishingsales.com), website (http://www.astonishingsales.com), and ticker symbol (AII). The address is highlighted with an orange box and includes the map:

ADDRESS
3525 Grandview Pkwy
Birmingham, Alabama 35243
USA
Latitude 33.43927
Longitude -86.72241

The map shows the location in Birmingham, Alabama, with a blue dot indicating the address. The map is credited to Microsoft Corporation and Nokia.

On the right side of the account details, there are sections for 'POSTS', 'ACTIVITIES', and 'NOTES'. The 'POSTS' section shows three entries:

- Interested in 3D Printers
Opportunity Created by CRM System
On: Interested in 3D Printers's wall
12/19/2013 11:20 AM
- Interested in Factory Designer
Opportunity Created by CRM System
On: Interested in Factory Designer's wall
12/19/2013 11:20 AM
- Astonishing Sales
Account Created By CRM System.
On: Astonishing Sales's wall
12/19/2013 10:49 AM

See Also

[Create or edit a lead](#)

[Create or edit a contact](#)

[Create or edit an account](#)

Turn Bing Maps on or off for your organization

Keep track of notes, tasks, calls, or email with activities

Activities are actions you perform when you contact customers--for example, sending email, making phone calls, taking notes, adding tasks, or setting up appointments.

You can create an activity and associate it with a customer, or if you are working on a customer record, you can create an activity that is automatically associated with that customer.



1. Navigate to the contact or account you want create an activity for.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Contracts** or **Accounts**.

2. In the list of contacts or accounts, click or tap a name, and then click or tap **Activities**. To create a new phone call or task, click or tap **Add Phone Call**, or click or tap **Add Task**. Or, to create a new email or appointment, click or tap the More Command (**), then click or tap **Email** or **Appointment**.

- OR -

- To edit an existing activity, in the list of activities, click or tap the activity, and then click or tap **Open this activity**. (Point to the area to the right of the activity to see the command.)
4. Fill in your information. Use the handy tooltips as a guide.
 5. Click or tap **OK** to save a new activity or click or tap **Save** to save an updated activity.



Note

You can't reactivate or edit a closed activity. However, you can add a note to a closed activity.

Also, you can't set reminders in CRM for Outlook for faxes, phone calls, e-mails, letters, or campaign response activities created in the web application or CRM for Outlook.

To create the same activity for multiple records, use a quick campaign. More information: [Create a quick campaign in the CRM marketing work area](#)

Stay up-to-date with customer news with the activity feed

Monitor real-time updates in the activity feed to stay current with fast-moving sales, customer projects, and marketing campaigns at your organization.

You'll find the activity feed on your dashboard under the heading **What's new**.

The activity feed includes automatic updates about the work your colleagues are doing. You can also choose to "follow" updates for up to 1,000 of the contacts, colleagues, and customer records you care most about.

Like or unlike a post in the activity feed



1. Under **What's new**, point to the post.
2. Click or tap **Like** or **Unlike**.

Below a post, you'll see the number of people who have liked it, and the names of people who liked the post most recently. Click or tap the counter to see more names.

Comment on someone's post in the activity feed



1. Under **What's new**, point to the post.
2. Click or tap **Reply**.

Type your comment. You can use up to 250 characters.

Follow or unfollow a contact, account, lead, or other customer info

In addition to seeing any automatic posts in the activity feed, you can follow customers and other types of records – to see real-time updates to the Microsoft Dynamics CRM customer information you care most about.



1. Open the contact, account, lead, or other type of record you want to follow.
Click or tap the **More Command** (***).
3. Click or tap **Follow** or **Unfollow**.

Follow or unfollow a colleague



1. On your dashboard, click or tap **Advanced Find**.
2. In the **Look for** drop-down list, click or tap **Users**.
3. In the **Show** group, click or tap **Results**.
4. Click or tap the person's name.
Click or tap the **More Command** (***).
6. Click or tap **Follow** or **Unfollow**.

Control which types of posts you see in the activity feed

At the top of the activity feed, you'll see commands that let you control whether you see posts about everything you follow or a smaller subset.




- Under **What's new**, select one of the following:
 - **All records**, and then select the type of records
 - **Both** to see automatic posts and posts for the additional things you're following
 - **Auto posts** to see only automatic posts
 - **User posts** to see only the things you've chosen to follow

Change the order that record types are listed in your activity feed

You can change the order that record types display in your activity feed so that the ones you care most about are listed at the top.



1. Under **What's new**, click or tap **All records**.
Click or tap **Modify this list** ().

3. In the **Filters My Filters** dialog box, select the record types you want to change.
4. Click or tap **Move Up** or **Move Down** to change the order the record types are displayed.
5. Close the dialog box.

Use keyboard shortcuts in activity feeds

To do this	Press this
Submit a post	Alt + P
Post a status update	Alt + S
Follow or unfollow	Alt + L
Delete a selected post or comment	Alt + L
Cancel a deletion	Alt + C

See Also

[Display your picture on the activity feed](#)

Display your picture on the activity feed

You can add a picture to your profile if you want other people to see your picture along with your posts in the activity feed.



1. In the activity feed, next to **What's New**, click or tap **Edit** next to the gray image.
2. Click or tap **Upload a picture from your computer**.
3. Browse to the image file, select it, and then click or tap **Open**.
4. Click or tap **OK**.

See Also

[Administer the activity feed](#)

[Stay up-to-date with customer news with the activity feed](#)

Create or edit an account

If you work mostly with other companies, you'll probably want to use accounts to keep track of them.

You can also use accounts to keep track of any vendors you do business with.

View your accounts



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. You'll see a list of your active accounts. You may need to scroll to see the whole list.



Tip

It's easy to get back to the customer data you were working with most recently. On the nav bar, next to **Accounts**, click or tap . Click or tap a name, and then get right back to what you were doing.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Accounts**.
You'll see a list of your active accounts. You may need to scroll to see the whole list.

2. Click or tap an account name to see the details of the account.

Create an account



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.

- b. Click or tap the work area name, and then click or tap **Accounts**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
 - b. Expand **Customers**, and then click or tap **Accounts**.
2. Click or tap **New**.
 3. Fill in your information. Use the handy tooltips as a guide.
 4. Click or tap **Save**.

Edit an account



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Accounts**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
 - b. Expand **Customers**, and then click or tap **Accounts**.
2. Open the account and change the information that you want.
 3. Click or tap **Save**.

See Also

[Run a report](#)

[Use Bing Maps to view a location](#)

[Assign a record to a user or team](#)

[Import accounts, leads, or other data](#)

[Deactivate or activate an account or contact](#)

[Quick create--Enter new contacts \(or other data\)--fast!](#)

[Keep track of notes, tasks, calls, or email with activities](#)

[Stay up-to-date with customer news with the activity feed](#)

Create or edit a contact

Use contacts to keep track of the people you do business with.

▶ View a contact


1. Navigate to your area.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Contacts**.
You'll see a list of your active contacts. You may need to scroll to see the whole list.



Tip

It's easy to get back to the customer data you were working with most recently. On the nav bar, next to **Contacts**, click or tap . Click or tap a name, and then get right back to what you were doing.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, then select your work area: **Sales**, **Service**, or **Marketing**.

- b. Expand **Customers**, then click or tap **Contacts**.
You'll see a list of your active contacts. You may need to scroll to see the whole list.
2. Click or tap a person's name to see the details for the contact.

▶ Create a contact

1. Navigate to your area.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Contacts**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, then select your work area: **Sales**, **Service**, or **Marketing**.
 - b. Expand **Customers**, then click or tap **Contacts**.
2. Click or tap **New**.
3. Fill in your information. Use the handy tooltips as a guide.
4. Click or tap **Save**.

▶ Edit a contact

1. Navigate to your area.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Contacts**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, then click or tap **Contacts**.

2. Open the contact and change the information that you want.
3. Click or tap **Save**.

See Also

[Run a report](#)

[Import contacts](#)

[Use Bing Maps to view a location](#)

[Assign a record to a user or team](#)

[Deactivate or activate an account or contact](#)

[Quick create--Enter new contacts \(or other data\)--fast!](#)

[Keep track of notes, tasks, calls, or email with activities](#)

[Stay up-to-date with customer news with the activity feed](#)

Create or edit a lead

A lead is someone who may be interested in doing business with you, or may even be a current customer who is interested in purchasing new products or services.

▶ **View your leads**


1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Leads**.
You'll see a list of your active leads. You may need to scroll to see the whole list.



Tip

It's easy to get back to the customer data you were working with most recently. On the nav bar, next to **Leads**, click or tap . Click or tap a name, and then get right back to what you were doing.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Leads**.
You'll see a list of your active leads. You may need to scroll to see the whole list.

2. Click or tap a lead to see the details for the lead.

▶ **Create a lead**

1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Leads**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then

- select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Leads**.

2. Click or tap **New**.
3. Fill in your information. Use the handy tooltips as a guide.
4. Click or tap **Save**.

▶ **Edit a lead**

1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Leads**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
 - b. Expand **Customers**, and then click or tap **Leads**.
2. Open the lead and change the information that you want.
 3. Click or tap **Save**.

See Also

[Run a report](#)

[Use Bing Maps to view a location](#)

[Assign a record to a user or team](#)

[Import accounts, leads, or other data](#)

[Add members to a dynamic marketing list](#)

[Quick create--Enter new contacts \(or other data\)--fast!](#)

[Keep track of notes, tasks, calls, or email with activities](#)

[Stay up-to-date with customer news with the activity feed](#)

Create or edit an opportunity

Are you a salesperson who works hard to nurture your best prospects? Then you'll probably be creating opportunities often.

An opportunity is a lead who is now almost ready to buy—in other words, it's a deal that you're ready to win.


▶ View your opportunities

1. Navigate to your area.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Opportunities**.
You'll see a list of your active opportunities. You may need to scroll to see the whole list.

Tip

It's easy to get back to the customer data you were working with most recently. On the nav bar, next to **Opportunities**, click or tap . Click or tap a name, and then get right back to what you were doing.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then select **Sales**.
- b. Expand the **Sales** folder, and then click or tap **Opportunities**.
You'll see a list of your active opportunities. You may need to scroll to see the whole list.

2. Click or tap an opportunity name to see the details.

▶ **Create an opportunity**

1. Navigate to your area.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Opportunities**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select **Sales**.
- b. Expand the **Sales** folder, and then click or tap **Opportunities**.

2. Click or tap **New**.
3. Fill in your information. Use the handy tooltips as a guide.
4. Click or tap **Save**.

▶ **Edit an opportunity**

1. Navigate to your area.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Opportunities**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select **Sales**.
- b. Expand the **Sales** folder, and then click or tap **Opportunities**.

2. Open the opportunity and change the information that you want.
3. Click or tap **Save**.

See Also

[Run a report](#)

[Use Bing Maps to view a location](#)

[Assign a record to a user or team](#)

[Quick create--Enter new contacts \(or other data\)--fast!](#)

[Keep track of notes, tasks, calls, or email with activities](#)

[Stay up-to-date with customer news with the activity feed](#)

[Quick create--Enter new contacts \(or other data\)--fast!](#)

Deactivate or activate an account or contact

In Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online, you deactivate an account or contact rather than deleting it. This ensures the integrity of the audit trail associated with that record.

A deactivated account or contact becomes inactive, which means that it cannot be edited or used in establishing new relationships with other records. However, all relationships created with the deactivated item are still available.

Deactivated accounts can subsequently be reactivated should the need arise.

Deactivate an account or contact



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Sales** or **Service** or **Marketing**, and then

click or tap either **Accounts** or **Contacts**.

2. Select the active account or contact that you want to deactivate, click or tap **Deactivate**, and then confirm the deactivation.

Activate an account or contact



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Sales** or **Service** or **Marketing**, click or tap **Customers**, and then click or tap either **Accounts** or **Contacts**.
2. To view a deactivated account or contact, in the **System Views** list, select **Inactive Accounts** or **Inactive Contacts**.
3. Select the inactive accounts or contacts you want to activate, click or tap **Activate**, and then confirm the activation.

See Also

[Import contacts](#)

[Create or edit a contact](#)

[Create or edit an account](#)

[Import accounts, leads, or other data](#)

Create or edit a product

You can add your products to the system and include them on price lists and in product catalogs, which you can then send to your customers.

Create a product



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Product Catalog**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Business > Product Catalog**.

3. In the Product Catalog area, click or tap **Products**.
4. Click or tap **New**.
5. Fill in your information. Use the handy tooltips as a guide.



Note

Before you can add a default price list, you must save the newly created product form.

6. Click or tap **Save**.



Note

If you're using an accounting program that is integrated with Microsoft Dynamics CRM, several of the fields in the product form are updated automatically.

You can't enter taxes on the product form. You can add taxes when you create a quote, order, or invoice.

Edit a product



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions. More information: **Permissions required for customization tasks**

Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Product Catalog**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Business > Product Catalog**.
3. In the Product Catalog area, click or tap **Products**.
 4. Open the product you want to make changes to.
 5. Edit information, noting any restrictions or requirements as needed.
 6. Click or tap **Save**.

See Also

[Run a report](#)

Create or edit a quote

Most sales begin with a price quote, which eventually becomes an order.

You'll probably edit a quote multiple times as a sale progresses. Initially, you create a draft, and then you need to activate it when it's ready to go to a customer.

When the customer accepts the quote, you create an order. Otherwise, you close the quote as revised, canceled, or lost.



1. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
Sales appears on the nav bar.
- b. Click or tap **Sales > Quotes**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales > Collateral > Quotes**.

2. Click or tap **New**, or click or tap the quote you want to edit.
3. Fill in your information. Use the handy tooltips as a guide.

Required fields are:

- **Quote ID**
This ID is created automatically and can't be edited.
- **Revision ID**
This ID is created automatically and can't be edited. The Revision ID tracks the number of times the quote has been changed.
- **Name**
Type a name between 1 and 100 characters.
- **Currency**
Select the currency in which the quote will be calculated.
- **Price List**
Select the price list from the product catalog.
- **Potential Customer**
Search for and select the account or contact who will receive this quote.

4. Click or tap **Save**.



Note

- * means the field is required.
- + means your organization recommends that you fill in the field.

See Also

[Run a report](#)

[Assign a record to a user or team](#)

[Quick create--Enter new contacts \(or other data\)--fast!](#)

[Keep track of notes, tasks, calls, or email with activities](#)

Create or edit a goal

Use goals to keep track of your progress on achieving target revenue.

Create a goal



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
Sales appears on the nav bar.
- b. Click or tap **Sales > Goals**.
- c. Click or tap **New**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Sales**, and then click or tap **Goals**.
 - b. In the **Records** group, click or tap **New**.
3. On the **New Goal** form, enter information or observe any noted restrictions or requirements as needed. Use the handy tooltips as a guide.
4. Click or tap **Save** or **Save and Close**.

Edit a goal



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions. More information: **Permissions required for customization tasks**

Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
Sales appears on the nav bar.
 - b. Click or tap **Sales > Goals**.
 - c. Click or tap **Edit**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Sales**, and then click or tap **Goals**.
 - b. In the **Records** group, click or tap **Edit**.
3. Fill in your information. Use the handy tooltips as a guide.
4. Click or tap **Save and Close**.

Create or edit an invoice

When a customer orders one or more of your products, you can create an invoice to bill them for the upcoming sale.

Typically, you convert an order into an invoice. However, you can also create an invoice that does not originate from an order.

Create an invoice from an order



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Orders**.
- c. Open the order that you want to convert to an invoice, and on the command bar, click or tap **Create Invoice**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales > Collateral > Orders**.

Open the order that you want to convert to an invoice, and click or tap the ******* icon, and then click or tap **Create Invoice**.

2. Review the contents of the invoice and make any additions or corrections before sending to your customer.

Create an invoice that doesn't originate from an order

You can create an invoice that doesn't originate from an order.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Invoices**. Click or tap **New**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales > Collateral> Invoices**.
- b. Click or tap **New**.

2.

Fill in your information. Use the handy tooltips as a guide.

3. Click or tap **Save**.

To add information about the product on the invoice, in the **Products** area, click or tap **+**, and then click or tap one of the following options:

Existing Product. A product created in the product catalog that is associated with a price list.

Write-in Product. A product that is available but not a part of the product catalog.

Get Products. Select products from a previously created opportunity.



Note

You need to enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM doesn't automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

5. Click or tap **Save**.



Warning

You close an invoice either by canceling the invoice or setting the invoice status as paid.

See Also

[Create or edit a quote](#)

[Create a price list](#)

[Create or edit an order](#)

Create or edit an order

Congratulations! Your hard work nurturing your customer has paid off and they're ready to place an order for your products or services. In Microsoft Dynamics CRM, an order can originate from a customer's acceptance of a quote, or you can place an order without an accepted quote, depending on the situation.

Create an order from a quote

Typically, you convert a quote that you have won into an order. Start with an active quote. Note that once a quote is accepted, you won't be able to revise it.



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Quotes**.
- c. Open the quote that you want to convert to an order, and then on the command bar, click or tap **Create Order**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales > Collateral > Quotes**.

Open the quote that you want to convert to an order, click or tap the **...** icon, and then click or tap **Create Order**.

- 2.

Fill in your information. Use the handy tooltips as a guide.

Create an order that doesn't originate from a quote

You can create an order that is based on your communication with a customer, instead of an accepted quote.



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Orders**. Click or tap **+ New**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales > Collateral > Orders**.

b. Click or tap **+ New**.

2.

Fill in your information. Use the handy tooltips as a guide.

Order ID. This ID is created automatically.

Name. Type a name between 1 and 100 characters.

Currency. Select the currency in which the order will be calculated.

Price List. Select the price list to make sure products are offered at the correct prices.

Price Locked. Specify if the prices are locked from any further updates. Use this setting to allow the order or invoice to remain at the agreed price even if the price changes in the product catalog.

Potential Customer. Select the account or contact you're processing the order for.

3. Click or tap **Save**.

To add information about the product that's ordered, in the **Products** area, click or tap **+**, and then click or tap one of the following:

Existing Product. A product created in the product catalog that is associated with a price list.

Write-in Product. A product that is available but not a part of the product catalog.

Get Products. Select products from a previously created opportunity.



Note

You need to enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

5. Click or tap **Save**.



Note

You close an order by either fulfilling the order or canceling the order. Products or services that are shipped are fulfilled. You should cancel orders for any products or services that are not shipped.

You can't update or change an order after it has been closed or if it has been partially or completely fulfilled.

See Also

[Create or edit a quote](#)

Create a price list

Price lists determine how much you charge for your products or services when you send a quote to a customer. You can create multiple price lists so that you can maintain separate price structures for different customer segments or sales channels.

To set up a price list, first create a new price list and then add products or services to it as price list items.

Step 1: Create a price list



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2.

Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Product Catalog**. Click or tap **Price Lists**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Business > Product Catalog**.
- b. Click or tap **Price Lists**.

3.

To create a new price list, click or tap **New**.

-OR-

To edit a price list, open a price list from the list.

4. Fill in your information. Use the handy tooltips as a guide.
5. Click or tap **Save** or **Save and Close**.

 **Important**

You must create at least one price list for each of the currencies that your organization does business in.

Step 2: Add items to the price list

Create a price list item for each unit in which the product is available. For example, if the product is available as a single item (each), in a dozen, and in a gross, create three list items. This lets you order the product in any quantity you want, using the same price list.



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Product Catalog**. Click or tap **Price Lists**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Business > Product Catalog**.
3. Click or tap **Price Lists**.
4. Open a price list from the list, and under **Common**, click or tap **Price List Items**.
5. On the **Price List Items** tab, in the **Records** group, click or tap **Add New Price List Items**.
6. Fill in your information. Use the handy tooltips as a guide.

Note that the **Quantity Selling Option** defines whether the product or service can be ordered in whole, partial, or both types of quantities. This information is used in the **Quantity** field of **Quote Product**, **Order Product**, and **Invoice Product** records:

No Control. Microsoft Dynamics CRM doesn't enforce a quantity selling option.

Whole. Selling a partial product isn't allowed. For example, digital cameras cannot be sold in fractions.

Whole and Fractional. The product can be sold both in whole and fractional units. For example, wood chips can be sold in cubic yards, or in fractions of a cubic yard.

7. Click or tap **Save** or **Save and Close**.

See Also

[Create or edit a product](#)

Create or edit a competitor record

You already know that tracking your competitors and their strengths and weaknesses can help you win sales. Microsoft Dynamics CRM lets you store the details about competitors so that you and your colleagues can share and stay current with the latest details.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- b. Click or tap **Sales > Competitors**.
- c. On the command bar, click or tap **+ New**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales > Sales > Competitors**.
- b. In the **Records** group, click or tap **New**.

- 2.

Fill in your information. Use the handy tooltips as a guide.

3. Click or tap **Save**.

To associate a competitor with an opportunity, in the **Opportunity** area, click or tap **+**. In the **Search** box, click or tap the Lookup icon, and then select an opportunity from the results.

See Also

[Competitor Win Loss](#)

Create or edit a rollup query

Use the rollup query to gather data about a given goal, including all its related goals, in one view.



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap Microsoft Dynamics CRM > **Sales** or **Service**.
- b. Then, click or tap **Sales** or **Service** > **Rollup Queries**.
- c. To create a new rollup query, on the command bar, click or tap **New**.
-OR-
To edit a rollup query, open the query from the list.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Sales** > **Goals** > **Rollup Queries**.
- b. To create a new rollup query, in the **Records** group, click or tap **New**.
-OR-
To edit a rollup query, click or tap **Edit**.

3. Fill in your information. Use the handy tooltips as a guide.
Name. Enter a name between 1 and 50 characters.
Entity Type. Select the record type.
Owner. Click or tap the **Lookup** icon, and select the user or team who will own this query.



Note

If you change this selection after you add your query criteria in the **Query** section, your query criteria will be deleted.

4. In the **Query** section, add the criteria for your query. The criteria you can add depends on the record type.
5. To see the results for the query, click or tap **View Records**.
6. Click or tap **Save**, **Save and Close**, or, to create a new rollup query, **Save and New**.
7. To view the data for a goal, on the nav bar, click or tap **Sales**, and then click or tap **Goals**.

Select the goal you want, then click or tap **More Commands** *******, and then click or tap **Recalculate**.

The values of the actuals are recalculated. You can see the recalculated values in the **Percentage Achieved**, **Actual**, and **In-Progress** columns. If you open the goal, under **Actuals**, you can see the **Last Rolled Up Date**.

Manage service

Get started with service

Key steps to get started with customer service

Customer service is an integral part of any organization. To retain your customers, it is very important to improve the customer experience by providing excellent customer service. Review the tasks in this article to quickly get started with customer service in Microsoft Dynamics CRM.

Key steps



1. **Find what's assigned to you**

See your queue to know what you've got to work on. More information: [Find what's assigned to you in a queue](#)

2. Use activities to track work in cases

After you open a case, you can open activities, such as tasks, from the case record. When you close an activity and record the duration, it is added to the total billing time for the case. You can adjust the billing time as needed. All activities must be closed to resolve a case. When you resolve the case, the total is displayed. More information: [Add a phone call, task, email, or appointment activity to a case or record](#)

3. Assign and share records

What Microsoft Dynamics CRM customer information you can work with is determined by permissions and ownership. If more than one person needs to work with a record, it can be shared or assigned. When you share a record with another user, you give that user specific permissions for that record, but you retain the ownership. However, when you assign a record to another user, you are making that user the owner of the record. More information:

For cases, you can assign a case to a queue.

4. Find information in articles in the knowledge base

The knowledge base is a collection of articles that can include procedures, answers to common questions, product sheets, problem solutions, or anything else your organization wants to share.

You can search for an article by keyword, title, article, number, subject, or use a full-text search. More information: [Use articles in the knowledge base](#)

5. Resolve and reactivate a case

When a problem has been solved or addressed to the customer's satisfaction, you can resolve the case and record the resolution and the amount of time to be billed to the customer.

Before a case can be resolved, all its activities must be closed. If the case is linked to a contract line, it must be active and have sufficient allotments to resolve the case. You can only resolve cases one at a time. More information: [Create and manage a case](#)

6. Using reports to track your work

You can use reports to manage your work and identify trends and issues. Microsoft Dynamics CRM comes with some default reports. You can also create reports that meet your requirements.

- On the nav bar, click or tap **Microsoft Dynamics CRM > Service > Reports**.

The two reports you may find the most useful are **Neglected Cases** and **Case Summary Table**.

See Also

[eBook: What's new in customer service](#)

[eBook: Give great customer service with CRM](#)

[eBook: Use KB articles to help your customers](#)

[Quick ref card for customer service reps](#)

How to create, reactivate, and reassign a case (1:47)

Basics of service and service scheduling

Avoid disruptions in service by making sure that your resources are scheduled optimally and efficiently. Learn the basics of getting started with managing services and service scheduling in Microsoft Dynamics CRM.

Understand the service terminology

- **Service:** A type of work, such as a maintenance activity, performed for a customer by one or more resources. Services are schedulable activities.
- **Resource:** Users, facilities or equipment, or teams that can be scheduled and have work schedules.
- **Resource groups:** Groups of resources that can be scheduled interchangeably.
- **Work hours:** The hours that a resource is available for scheduling.
- **Site:** The location of a resource. Use sites to make sure that the customer and the resource are in the same location.
- **Service activity:** A schedulable appointment to provide a service to a customer. A service activity uses one or more resources to perform a service at a specific time and place. An appointment is a schedulable activity that does not use services and does not require a resource with work hours.
- **Scheduling rule:** A set of criteria that specifies which personnel, equipment, facilities, or resource groups are required to perform a service, or how to select these resources, based on parameters like quantity and capacity.

Select resources for service

When you add a resource to a service, create a selection rule to determine how resources will be selected for service activities.

You can create a simple rule that selects resources from a list, or a compound rule that selects a combination of resources, or a complex tree of selection rules that selects from groups of equivalent resources.

More information: [Create a simple selection rule](#)

Capacity vs. effort—understand the difference

You can set up services and resources in Microsoft Dynamics CRM to take into account different-sized facilities or the experience levels of your users when a service is scheduled. This is known as capacity scheduling. Capacity is a relative unit that you define. For example, you could define capacity in a bicycle repair shop as the number of bikes the shop has room to accommodate at the same time. If a repair bay has room for four bike-repair stations, the repair bay can accept four bikes for repair or inspection at the same time.

Capacity can also measure skill level. For example, a junior bike technician has the ability to perform one bike inspection per hour, and a senior technician has the ability to perform four bike

inspections per hour. If two bikes must be inspected in one hour, it takes either two junior technicians, or one senior technician who can perform the inspections in half the time.

When you add effort required into the selection rule, every time a user searches for an available service activity time, the selection rules inspect the resources for capacity available. If the resource is scheduled, then that resource's capacity is reduced by the effort required for the service. This is repeated every time that a service is scheduled requiring that resource, until the capacity is exhausted.

Capacity is defined in the resource's working hours. Effort required is defined in the service. You can think of capacity as "how much money you have" and effort required as "how much something costs."

For example, the repair bay has a capacity of four. A bike repair requires an effort of one and a tandem bike repair requires an effort of two. The first time the repair bay is selected, its capacity is reduced to three for that time. The next service activity scheduled is for a tandem bike. This reduces the repair bay's capacity by two. The repair bay has the capacity of one left, which means it could accept another bike repair, but not a tandem bike repair.

Add resources to existing services

You can add as many resources as you want, and they can be a mix of individual users, facilities, equipment, and teams. More information: [Create or edit a service](#)

Use resource groups

Use resource groups to group users, facilities, and equipment as part of the selection rules for a service. You can add resources to a resource group from the service record. More information: [Create or edit a resource group](#)

Test your service

Before you start using a service, test it. Create a service activity with no criteria other than the service. You can use the results to confirm that the service is selecting correctly. The message bar will also display any problems with the search.

1. Click or tap **Microsoft Dynamics CRM > Service > Service Calendar**.
2. Click or tap **Service Activity**. This bypasses the scheduling form.
3. Select the service to test.
4. Click or tap **Find Available Times**.

See Also

[Key steps to get started with customer service](#)

[Create a service activity without checking for conflicts](#)

[Schedule a service activity](#)

[eBook: What's new in customer service](#)

Get started with service management

Easily set up and manage your customer service tasks from one place by using the Service Management page in Microsoft Dynamics CRM. Set up everything related to customer service, like defining parent-child case hierarchy, creating queues, routing rule sets, rule for automatic case creation, service level agreements (SLAs), entitlements, and customer service schedule. Use the links in this topic to learn more about each of these tasks.

Case settings

[Create or edit a queue](#)

[Define settings for parent and child cases](#)

[Create rules to automatically route cases](#)

[Automatically create cases from email or social monitoring](#)

Service terms

[Define service level agreements \(SLAs\)](#)

[Create an entitlement to define the support terms for a customer](#)

[Set up a holiday schedule](#)

[Create a customer service schedule and define the work hours](#)

Templates

[Set up entitlements quickly with templates](#)

[Create templates for email](#)

[Create templates for articles](#)

[Create templates for contracts](#)

Service scheduling

[Set when your business is closed](#)

[Create or edit a service](#)

[Add facilities and equipment for service scheduling](#)

[Create or edit a resource group](#)

[Create or edit site records](#)

See Also

[eBook: What's new in customer service](#)

[eBook: Give great customer service with CRM](#)

[eBook: Use KB articles to help your customers](#)

Configure the process flow for customer service

The process flow bar organizes tasks under various stages, which are used to easily lead you through the process of case resolution. The process flow bar also highlights the stages and tasks

that you've already completed. You can configure the bar to add or update the stages, steps, and fields to suit your business needs.

▶ **To change stages, steps, and fields in the customer service process**

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions. More information:

Permissions required for customization tasks

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

From the case form, click or tap the **More Commands** *** icon, and then click or tap **Edit Process**.

3. To add a new stage, click or tap the plus sign (+) next to **Stages**. You can add up to 30 stages, and each stage can contain up to 30 steps and fields.
4. Name the stage anything you like, and then add steps. To move the stage to where you want it to appear in the process, click or tap the up and down arrows at the bottom of the form.
5. To add a step within a stage, follow the same process: Click or tap the plus sign (+) next to **Steps**, name the stage, and then move it to the desired place in the order.
6. Fields appear automatically next to each new step. To select the type of field you want for a step, click or tap the field and select from the drop-down list.
7. Click or tap **Save**.

Improve customer service with better automation and tracking in Microsoft Dynamics CRM

Improve your customers' satisfaction by tracking and recording their customer issues, maintaining service levels, and managing service terms through entitlements in Microsoft Dynamics CRM.

Create queue and route cases

You can create queues to sort incoming cases according to subject-matter expertise or product or services to ensure that a customer service representative (CSR) with the right experience gets each case. Use routing rules to automatically route cases that match certain criteria to queues. You can also route individual cases manually.



Note

Routing rules feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises).

More information: [Set up queues to manage activities and cases](#)

Automatically create cases from email or social records



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

You can save your CSRs from having to manually create cases that come in from email or social records by setting up Microsoft Dynamics CRM to automatically create cases from multiple channels. You can create automatic case creation rules that convert incoming email or social posts targeted to specific queues. For cases that are created from email messages, you can also choose to send a response to the customer with case details by using a default template. More information: [Automatically create cases from email or social monitoring](#)

Track service levels through SLAs



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Service level agreements (SLAs) let you clearly define the timelines in which your customer service or support team is expected to meet the key performance indicators (KPIs) for the service you provide to your customers. You can associate a customer service schedule to the SLA to make sure that your business hours are considered while tracking the SLA timelines.

Help your CSRs see in real time the remaining time or passed time for a KPI on the case records by adding a timer control to the case form.

More information: [Define service level agreements \(SLAs\)](#)

Define service terms through entitlements



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Quickly determine what kind of support a customer is eligible for by defining and associating entitlements with customers. When a customer gets in touch with the support team, this information helps CSRs determine if the customer is eligible for support and whether a case should be created for the customer. You can create an entitlement based on the product that the customer has purchased. You can also have multiple entitlements for a customer. More information: [Create an entitlement to define the support terms for a customer](#)

Track service agreements and pricing details through contracts

Easily know if a customer has prepaid support for the products or services they've purchased by using contracts in Microsoft Dynamics CRM. Use contracts and contract lines to clearly define:

- Prices for the customer service of each product
- Number of calls allowed or the total number of minutes that can be spent on customer issues
- Duration for which the service will be valid

More information: [Define support terms for customers by using contracts](#)

Track customer issues through cases

When a customer contacts your organization, a CSR opens a case and enters information about the customer and the customer's issue.

CSRs can simplify tracking of cases by associating related cases as parent-child cases. For example, a customer reports an issue that needs coordination with other teams. You can create child cases to track the individual work items and assign the cases to the individuals. And, create a parent case to track the progress of the customer-reported case and any communication done with the customer.

More information: [Define settings for parent and child cases](#)



Note

Routing rules feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises).

If the person who opens the case isn't the one to resolve it, the case can be assigned to a queue or to another CSR. By logging activities and time spent on a case, a manager can track performance and productivity. Open and resolved cases can be searched. A resolved case can be reopened so that additional activities and time can be logged against it, if necessary.

More information: [Create and manage a case](#)

Share information in the knowledge base

CSRs can share information, including common issues and the approved fixes, product sheets, and updates, in the form of searchable articles stored in the knowledge base. After a CSR finds the right article, the CSR can email the article directly to the customer and store it with the case for review later. More information: [Use articles in the knowledge base](#)

Create and schedule services

Improve customer satisfaction by clearly defining what services you'll provide to them, and efficiently and optimally scheduling these services. With scheduling, you can provide a service to your customers and ensure that the right combination of personnel, facilities, and equipment are available to perform the service. You can also track a customer's preferences for time of day, service, and personnel.

More information: [Create or edit a service](#), [Basics of service and service scheduling](#)

Manage performance and productivity through reports and dashboards

Reports are an efficient way to stay informed of customer service performance in your organization. With this information, you can create more precise schedules, forecast resource needs, and manage performance improvements. More information: [Customize and organize reports](#)

Microsoft Dynamics CRM introduces new default dashboards for CSRs and customer service managers (CSMs). CSRs can use the dashboard to see their cases with details like:

- Case priority
- Cases close to running over their SLA
- Average handling time

CSMs can use the dashboard to see cases with each CSR (agent) or queue. The CSM can also get insight into whether the SLA for cases was met or not.

See Also

[eBook: What's new in customer service](#)

[eBook: Give great customer service with CRM](#)

Use articles in the knowledge base

Make critical knowledge available to everyone by capturing it in articles in Microsoft Dynamics CRM. Create a customized library for business information, product guides, data sheets, and other articles with timely and relevant information.

An administrator sets up a subject tree to categorize articles based on your organization's unique needs. New articles can be based on templates, which define the structure for individual articles, such as the question and answer sections in an FAQ.

After your organization has some articles in Microsoft Dynamics CRM, you can link them to a case or even send them to customers in e-mail.

A typical knowledge management consists of the following stages:

Create and update articles

Collaborate with colleagues while writing or editing your articles. Review suggestions, corrections, and additions in the comments on an article and then update the article based on these comments. When you're done, send your article to a manager for approval. Once approved, it is available in search results, to view, or to share with colleagues and customers after about 15 to 20 minutes.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.

Service appears on the nav bar.
Then, click or tap **Service > Articles**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Collateral > Articles**.
2. To create a new article: Click or tap **+New**.
To edit an article, open the article from the list.
 3. If you are creating a new article, in the **Select Template** dialog box, select a language and template that you want to use to create the article, and click or tap **OK**.



Note

If you need other templates, you can request your system administrator or customizer.

4. Type or modify information in the text boxes.
Hovertips provide hints about what to enter.
All articles are initially created in a Draft state. To publish the articles, a manager must approve these.
5. In the **Actions** group, click or tap **Submit**.

Edit, reject, or approve an article

To make sure that the articles that people in your organization use are up to date, someone with manager privileges needs to approve any new or revised articles. Similarly, managers can remove unneeded articles.

- To view or edit an unapproved article, on the nav bar, click or tap **Microsoft Dynamics CRM > Service > Articles**, and open the Unapproved Articles view, and then click or tap the article. To add comments to the article, in the **Actions** group, click or tap **Add Comments**.
- To reject an article, open the article and in the **Actions** group, click or tap **Reject**. Rejected articles are returned to the **Unapproved Articles** view for revision.
- To approve an article, in the list of unapproved articles, select the article, and then on the command bar, click or tap **APPROVE**.

When you approve an article, it is automatically published and is available for viewing in the knowledge base in approximately 15 minutes. After an article is published, if you want to edit it, you must first unpublish it.

Find an article

Microsoft Dynamics CRM provides several ways to look for articles that people in your organization have created. You can search by using keywords, titles, or the text from a published

article. If you know the exact article number, you can quickly open the article that you need. But if you are not sure what text to use before you begin looking, you can also browse through articles by subject.



1. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
Then, click or tap **Service > Articles**.

 **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Collateral > Articles**.
2. In the **Search** box, type the keyword, and then click or tap the Search icon.
 3. To filter search results, click or tap the Search Tool icon and select one of the following:
 - Full-Text Search. Looks at all the published articles for the specified keyword.
 - Keyword Search. Compares the keyword that you specified with alternate terminology assigned to an article to find articles. For example, an article about bicycles might use keywords such as "bike" or "cycle."
 - Title Search. Looks at the title of all published articles for the keyword that you specified.
 - Subject Search. Looks at the subject of all published articles for the keyword that you specified.
 - Article Number Search. Looks for the number that is assigned to the article when it is published.
 - Subject: 'None'. Looks for articles that have None selected as the subject.Select Exact Text to search for the exact words that you enter in the Search for box, or select Use Like Words to search for similar words. For example, if you enter "run," the search would include "running" and "runs."

See Also

[eBook: Use KB articles to help your customers](#)

[eBook: What's new in customer service](#)

Set up service terms

Define service level agreements (SLAs)

Define the level of service or support that your organization agrees to offer to a customer by using service level agreements (SLAs) in Microsoft Dynamics CRM. Include detailed items to define metrics or key performance indicators (KPIs) to attain the service level. KPIs help you get a timely warning on your team's issues while providing support.

You can associate an SLA with an entitlement so that when an entitlement is added to a case, the associated SLA is also applied. More information: [Create an entitlement to define the support terms for a customer](#)



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Create an SLA



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

When you create an SLA, a corresponding workflow is also created. Whatever action you do on the SLA, you must have permissions to perform the same action on workflows. The SLA is applied in context to the permissions that the owner of the SLA has.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management > Service Level Agreements**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Service Level Agreements**.

3. To create a new SLA, click **+ New**.

-OR-

To edit an SLA, in the list of records, choose the SLA, and on the command bar, click **Edit**.

4. Fill in your information. Use the handy tooltips as a guide.
 - **Name**
 - **Applicable From**. Choose the case field that specifies the date and time from which the SLA items will be calculated. For example, if you choose the **Case Created On** field, the calculations for service level agreements will start from the time the case is created.
 - **Business Hours**. Choose a customer service schedule record that defines your support organization's business hours. This is useful in the SLA time-tracking calculations.
5. Click or tap **Save**.

Add or remove SLA details

To define the key performance indicators (KPIs) or metrics for the service level agreement, add SLA details. You can define any KPI as per your organization's requirements. For example, a KPI could be that all cases for standard customers must be resolved within five days of case creation. Define success criteria and the actions that need to be taken when a service level metric isn't met for a customer case.

You can add multiple SLA items and arrange them in the order that works for you. For any given KPI (based on the **Related Case** field), only the first SLA item that matches the conditions in the **Applicable When** section is applied.



Note

In Microsoft Dynamics CRM, SLA and SLA items (SLA details) use the process (workflow) functionality. Although SLA items use workflows, not all of the actions available in workflows are available for failure and warning actions. The available actions are currently limited to **Send Email**, **Create Record**, **Update Record**, **Assign Record**, and **Change Status**. More information: [creating or editing processes](#)



While in the SLA record, in the **SLA Details** section, click **Add +**.

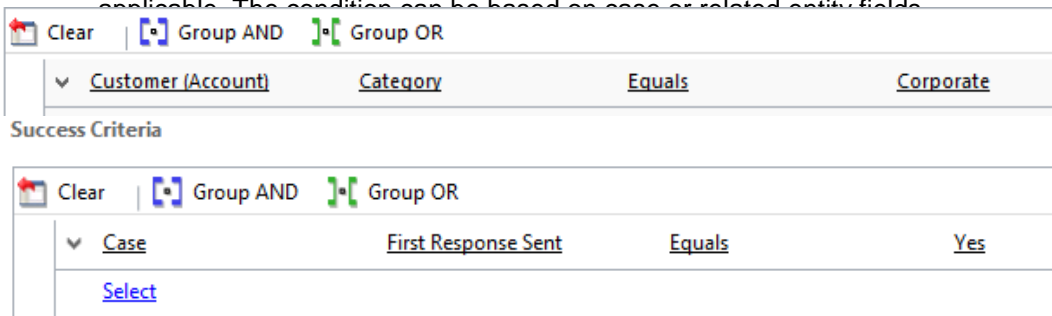
2. Fill in your information. Use the handy tooltips as a guide.
 - **Name**. Type a meaningful name.
 - **Related Case Field**. Choose the field of the case record that this SLA item refers to. For example, if you are creating a KPI for sending the first response within a specified time, choose the **First Response By** option from the drop-down box. If

required, ask your system customizer to create new fields.

 **Note**

When a case record is created or updated, in the case record this field is set to the date and time when the failure time is reached for the respective SLA item. For example, choose **First Response By** in **Related Case Field**, and set **Failure After** to 2 hours from case creation. If the case is created at 09:00, the **First Response By** field in the case record will be set to 11:00.

- In the **Applicable When** section, define the conditions under which the KPI will be applicable. The condition can be based on case or related entity fields.



Clear	Group AND	Group OR	
Customer (Account)	Category	Equals	Corporate
Success Criteria			
Clear	Group AND	Group OR	I be
Case	First Response Sent	Equals	Yes
Select			

 **Note**

Before you specify the SLA failure and warning details, save the SLA item record.

- Under **SLA Item Failure**, in the **Failure After** drop-down box, choose when the SLA items will be considered as failed. For example, if you choose **1 hour**, the KPI will be considered as failed if the first response is not done within 1 hour of case creation. 1 hour is calculated based on the value in date/time field that you choose in the **Applicable From** field of the SLA record.
- In the **Failure Actions** section, click **Add Step** and specify the actions that will be taken when the success criteria are not met and the case has exceeded the specified failure time. For example, to mark the case for escalation when the KPI has failed, click **Add Step > Update Record**. Then choose **Case**, and click **Set Properties**. Now in the case record, change the value of the **Is Escalated** field, and close the case form.
- Under **SLA Item Warning**, in the **Warn After** drop-down box, choose when a warning is to be raised for the KPI nearing violation.
- In the **Warning Actions** section, click **Add Step** and specify the actions to be taken when the KPI reaches the warning time. For example, to warn the case owner about the KPI nearing violation, click **Add Step > Send Email**. Then choose **Create New Message**, and click **Set Properties**. Now in the email record, specify the email details, and close the email form.

 **Note**

The time for failure and warning is calculated after considering the business

hours selected in the SLA record. If a business hours record (customer service schedule) isn't selected, the work hours are considered as 24 x 7.

3. Click or tap **Save and Close**.



Important

- The failure and warning actions run asynchronously and may not get triggered exactly at the failure or warning time.
- If the failure or warning times are set to less than 1 hour, there can be a delay in the processing of failure or warning actions.
- Make sure you author the SLAs in the best way suitable to your company's needs. For example, in the SLA **Applicable When** conditions, avoid using case fields that are updated too frequently because it may lead to frequent SLA computation and impact performance.

Set the SLA as default

Make an SLA a default one if you want it to apply to all the cases that don't have an SLA applied through an entitlement. This is useful when a customer wants a service level agreement without an entitlement. You can't apply an SLA to a case unless it's set as the default or it's associated with an entitlement.

To set an SLA as default, select an SLA from the list, and click **Set as Default** on the command bar.



Note

If you deactivate a default SLA, you must activate it again before resetting it as the default.

How is the SLA applied?

When a case is created, the SLA is applied (default or through entitlement) and the related case field values are updated. When the case is modified and any of the case field values change, that is, when the fields that are added in the **Applicable When** conditions of the SLA change, the SLA is applied again. For example, if the priority of the case changes from Normal to High, and according to the SLA the first response should happen soon, the SLA is reapplied to make sure the KPIs are tracked based on the updated values.

When the SLA is applied again, all the SLA items are evaluated based on the updated case fields and the failure or warning actions are initiated if the time has exceeded. This happens even if the failure or warning actions were already initiated before the case was updated. To avoid this, you can request your system customizer to add a custom field to the case entity (to track if the failure/warning actions were already taken) and add it to the **Applicable When** condition so that the actions aren't initiated multiple times.

Disable the SLA

During maintenance activities or when you're importing cases and you don't want the SLAs to apply to the cases, you can disable SLAs for the organization. A system administrator can disable SLAs from the System Settings. More information: [System Settings dialog box - General tab](#)

See Also

[Create a customer service schedule and define the work hours](#)

[Create an entitlement to define the support terms for a customer](#)

[Automatically create cases from email or social monitoring](#)

[Create rules to automatically route cases](#)

[Create and manage a case](#)

Disable or enable Service Level Agreements (SLAs) for cases

If your organization has installed and applied updates from Microsoft Dynamics CRM Online Spring '14 or Microsoft Dynamics CRM 2013 Service Pack 1, you can define service level agreements (SLAs) for your customers. SLAs include the metrics or key performance indicators (KPIs) required for an agreed-upon service level.

SLAs are enabled by default. You can enable or disable them for cases in your organization. For example, you might want to disable SLAs during maintenance activities or when you're importing cases and you don't want the SLAs to apply to the cases.



Note

When SLAs are disabled, SLA records can still be created or modified. SLAs will not be applied to case records, however.

Disable or enable SLAs



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.

Settings appears on the nav bar.

- b. Click or tap **Settings > Administration > System Settings**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings**.
3. On the **General** tab, under **Disable SLAs**, select **Yes** to disable SLAs. To enable SLAs, select **No**.
4. Click or tap **OK**.

See Also

[Define service level agreements \(SLAs\)](#)

[Create an entitlement to define the support terms for a customer](#)

Create an entitlement to define the support terms for a customer

Define what kind of support your customers are eligible for by creating entitlements in Microsoft Dynamics CRM. With entitlements, you specify the support term based on number of hours or number of cases. The customer's support level can vary based on the product or service that the customer has purchased. Customers who've purchased different products can be entitled to different support levels. This information helps the customer support agents verify what the customers are eligible for and accordingly create cases for them.



Note

This feature is available in organizations that have updated to CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises).

Create an entitlement



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using:

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management**.
- c. Click or tap **Entitlements**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Entitlements**.

3. To create a new entitlement from a template, click or tap **+ New > From Template**. In the **Select Template** dialog box, choose the entitlement template, and click or tap **Select**.

To create a new entitlement from scratch, click or tap **+ New > Blank Entitlement**.

-OR-

To edit an entitlement, in the list of records, choose the entitlement, and then on the command bar, click or tap **Edit**.

4. Fill in your information. Use the handy tooltips as a guide.
 - **Name**. Give the entitlement a meaningful name.
 - **Primary Customer**. Choose the customer you are creating this entitlement for.
 - **Start Date**. Choose the date from which the customer will be entitled for support.
 - **End Date**. Choose the date until which the customer will be entitled for support.
 - **Restrict based on entitlement terms**. To make sure no cases are created when the entitlement term is over, choose **Yes**. When you choose **Yes**, a customer service agent won't be able to create a case when **Remaining Terms** is less than 0 OR when the term remaining for a channel is less than 0.
 - **SLA**. Choose an SLA record to associate the service levels or key performance indicators for the support you are providing with this entitlement.

Under **Entitlement Terms**, specify the term details for the entitlement:

- **Allocation Type**. Choose whether the entitlement is for number of hours or number of cases.
- **Decrease Remaining On**. Choose whether to decrease the remaining term on case creation or resolution.

If you choose to decrease the remaining term based on case creation:

- Creating or updating a case with the associated entitlement decreases entitlement terms
- Canceling a case with the associated entitlement increases entitlement terms

- Reactivating a canceled case with the associated entitlement decreases the entitlement terms

If you choose to decrease the remaining term based on case resolution:

- Resolving a case with the associated entitlement decreases the entitlement terms
- Reactivating a resolved case with the associated entitlement increases the entitlement terms.
- **Total Term.** Specify the total amount of support the customer is entitled for with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in **Total Term**, then the customer is entitled for support up to 100 cases.
- The **Remaining Term** shows the total number of hours or cases remaining for the customer's entitlement. The value decrements every time a case is created or resolved (depending on what you select in Decrease Remaining On) against the entitlement.

5. Click or tap **Save**.

Add an entitlement channel term

The **Entitlement Channel** section specifies the support channel through which the customer can reach the organization and seek support.

Use this section to define the channels your customers are entitled to, and track the customer support term for each channel. For example, you can add phone and email as your channels through which you'll offer support. If you want to restrict support through the phone channel to 80 hours and email to 20 hours, create individual entitlement channel records and add their total terms.



Note

You must save the entitlement record before you can add entitlement channels to an entitlement.



1. In the **Entitlement Channel** section, click or tap **+**.
2. Specify the total terms that you want to allot to the particular channel.

The remaining term is auto-calculated and shows the total number of hours or cases remaining for the customer's entitlement.

Associate a product with the entitlement

If you want the entitlement to apply to a specific product for a customer, associate the product to the entitlement.



Note

If you don't add a product, the customer will be entitled to support for all the products.



1. While in the entitlement record, in the **Products** section, click or tap **+**.
2. In the **Search** box, type the first few letters of the name of the product that you want to associate with the entitlement.

If a product isn't available, to create a new product record, click or tap **+ New**.

Associate a customer contact with the entitlement

To let only certain contacts of a customer claim the entitlement for a specific product, associate the contacts with the entitlement.



Note

If you don't add a contact, all the contacts for the specified primary customer will be entitled to support.



1. While in the entitlement record, in the **Contacts** section, click or tap **+**.
2. In the **Search** box, type the first few letters of the contact that you want to associate with the entitlement. This contact record must belong to the account or contact specified in the **Customer** field.

If a contact isn't available, click or tap **+ New** to create a new contact record.

All active entitlements for a customer appear in the **Active Entitlements** section of the customer record.

Activate or deactivate an entitlement

Before you can start applying an entitlement to a case, you must activate it.



1. While in the entitlement record, on the command bar, click or tap **Activate**.
2. In the **Confirm Activation** dialog box, click or tap **Activate**.



Note

If the start and end date of the entitlement fall in the future, the status of the entitlement is set to **Waiting**. On the start date, the status automatically changes to **Active**. If the end date is in the past, the entitlement is set to **Expired**.

When an entitlement is active, you can't edit it. To deactivate an entitlement so you can edit it, on the command bar, click or tap **Deactivate**.

Associate entitlements to cases

In a case record, in the **Entitlement** field, click or tap the lookup icon, and select an entitlement. The inline lookup shows only the active entitlement for the customer of the case.

The Entitlements section in the case record lists all the active entitlements for the customer. More information: [Create and manage a case](#)

Cancel an entitlement

If the entitlement is no longer valid, you can cancel it. To cancel an active or waiting entitlement, open the entitlement, and on the command bar, click or tap **Cancel**.

Renew an entitlement

To renew a canceled or expired entitlement, open the entitlement, and then on the command bar, click or tap **Renew**.

The current entitlement will be set to **Closed** and a new entitlement will be created.

The start date of this new entitlement is set to the current date and the end date is set to current date + number of days between (End Date – Start Date). The data in other fields is copied from the old entitlement.

See Also

[Define service level agreements \(SLAs\)](#)

[Set up entitlements quickly with templates](#)

[Create and manage a case](#)

Create a customer service schedule and define the work hours

To define when your service or support team is available for providing support to customers, create a customer service schedule in Microsoft Dynamics CRM. A customer service schedule determines the business hours for each day in a week and also the weekly off. Microsoft Dynamics CRM uses these details for time tracking of service level agreements.

For SLA time tracking, make sure you add a holiday schedule to the customer service schedule, and associate this customer service schedule to the SLA record.



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Create a customer service schedule



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management > Customer Service Schedule**.

▶ **If using CRM for Outlook**

Weekly Schedule click or tap

Set the recurring weekly schedule

Work Hours Are the same each day [Set Work Hours](#)
 Vary by day
 24 x 7 support

Work Days Sun Mon Tue Wed
 Thu Fri Sat

Holiday Schedule Observe
 Do not observe

Select the time zone

Time Zone chedule section,

- a. For work hours, select one of these options:
 - **Are the same each day.** The schedule is the same for every day of the week. After you select this option, to select the days of the week that the customer support is available, click or tap **Set Work Hours**.

To set the work hours for the days, click or tap **Set Work Hours**. For more information, see the **Define work hours for the customer service schedule section** in this topic.

 - **Vary by day.** The new schedule is different for one or more days of the week. After you select this option, select the days of the week that the customer support is available, and also specify the work hours for each day.
 - **24 x 7 support.** The customer support is available 24 hours a day, and all days a week.
- b. For **Work Days**, select the check box for each day that the customer support resources will be available and working.
- c. For **Holiday Schedule**, select **Observe** to specify when your service organization will

be closed.

If you selected **Observe**, select a holiday schedule from the lookup box. More information: [Set up a holiday schedule](#)

6. Under **Select the time zone**, in the **Time Zone** drop-down box, select the time zone in which your customer support resources will work.
7. Click or tap **Save and Close**.

Define the work hours for the schedule

In the **Set Work Hours** dialog box, complete the following fields, and then click or tap **OK**:

- **Start**
Select the time the work day starts.
- **End**
Select the time the work day ends.

To add a break in the work hours, like a lunch break, click or tap **Add Break**, and then select the start and end time of the break.

See Also

[Set up a holiday schedule](#)

[Define service level agreements \(SLAs\)](#)

[Create an entitlement to define the support terms for a customer](#)

Navigate the service calendar

In the Service calendar, you can do the following tasks and activities:

- View your organization's daily, weekly, and monthly schedule of appointments and service activities.
- View work schedules and service activity schedules for a variety of resources.
- Create new appointments and schedule service activities.
- Change the status of an existing service activity.
- Search for conflicts in the schedule.

You can't customize the Service calendar or change the default view with the application. However, you can ask your system administrator to change the colors of the time blocks.



1. Follow the steps for the app you're using.


If using the CRM web application

- a. In the nav bar, click or tap **Microsoft Dynamics CRM > Service**.

Service appears in the nav bar.

- b. Click or tap **Service > Service Calendar**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Service > Service Calendar**.
-
2. A list of resources is displayed on the left side of the calendar in alphabetical order. To view the resources, appointments, and service activities for anyone in your organization, in the **Type** list, select **Resource**, and then in the **View** list select the resource view.
 3. To find a specific resource, in the **Search** box, enter the first few letters of a name. To view the details of any resource, appointment, or service activity, select the record in the list to the left of the calendar, and then at the bottom of the calendar, under the **Zoom** scale, click or tap the **Expand** button  to expand the preview pane. You can also double-click a record to open it.
 5. The Calendar pane appears on the right side of the calendar. It can be collapsed or expanded. To change the date, click or tap a date in the calendar. Use the arrows on either side of the month to change the month displayed.
 6. To change the number of days that are displayed in the linear calendar, click or tap any of the calendar options in the Calendar pane.
 7. To change how much of the calendar is available to view, use the **Zoom** scale. Select specific date ranges to view in the **From** and **To** lists.

Legend of colors and statuses

Appointments and service activities appear in the linear calendar as labeled color blocks. Move your mouse over these blocks to see the status of the appointment or service activity.

See Also

[Create a service activity without checking for conflicts](#)

[Schedule a service activity](#)

[Create or edit an appointment](#)

[Basics of service and service scheduling](#)

Use the workplace calendar

Use the calendar to view the appointments and service activities that you have to participate in.



1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the work area > **Calendar**.
3. On the calendar, change the view by doing any of the following:
 - To change the calendar view, under **Calendar Views**, click one of the views:
 - **Month**. Shows a monthly calendar.
 - **Week**. Shows a weekly calendar.
 - **Day**. Shows a daily calendar.
 - To view a summary of an appointment, on the calendar, place the cursor over the appointment.
 - To view or edit the details of an appointment, on the calendar, click the appointment link. The appointment form opens.
4. To change the dates displayed on the calendar, on the calendar control, click or tap the arrows to navigate to different months or click or tap a specific date.
5. To view today's appointments and service activities, on the calendar control, click **Today**. The calendar displays the hourly list for today.



Note

The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.

You can create an appointment or service activity from a normal calendar as well as a service calendar. More information: [Create or edit an appointment](#),

See Also

[Create a service activity without checking for conflicts](#)

[Schedule a service activity](#)

Set up a holiday schedule

Avoid having your service level agreements (SLAs) impacted when your service organization is closed by creating a holiday schedule and adding it to your service calendar.

For example, if your service organization has a SLA to reply to email cases within two business days, you can create a holiday schedule and add it to your service calendar. Then, if a customer submits an email case on that holiday, your SLA is clear and is not impacted by the holiday closure.



Important

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.
 - Follow the steps in [View your user profile](#). Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. Click or tap **Settings > Service Management**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Business > Service Management**.
3. Click or tap **Holiday Schedule**.
4. Click or tap **(+)New** and in the **Create Holiday Schedule** dialog box, enter a name and description for the holiday, and then click or tap **Create**.
5. In the list of holidays, click or tap the holiday you created.
6. Once the holiday is open, click or tap **New** to add the holiday to your customer service calendar.
7. In the **Add a Holiday** dialog box, specify the name and select the time of the holiday, and then click or tap **OK**.

The holiday is created and associated to your customer service calendar. Once the customer service schedule is associated to an SLA, then your SLA during business hours is not affected. More information: [Define service level agreements \(SLAs\)](#)

See Also

[Create a customer service schedule and define the work hours](#)

[Get started with service management](#)

[eBook: What's new in customer service](#)

Set when your business is closed

Prevent scheduling resources on holidays and other nonworking days by defining business closures in Microsoft Dynamics CRM. You can set both the days and times that your organization will be closed.



1. Make sure you have the Schedule Manager security role or equivalent permissions to update the business closures.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Service Management > Business Closure**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Business Closures**.

3. To create a new business closure, on the command bar, click or tap **New**.

-OR-

To edit an existing business closure record, open it from the list.

4. In the **Schedule a Business Closure** dialog box, type or modify information in the text boxes:
 - a. In the **Name** box, type a name that describes the purpose of the closure.
The first 12 characters of the name appear on each day of the closure on the calendar view of the affected resource's **Work Hours**.
 - b. In the **Start Time** and **End Time** boxes, enter the start and end date for the closure.
 - c. If you want to enter duration instead of an end time, select the length of the closure in the **Duration** box. Microsoft Dynamics CRM automatically calculates the end time for

you.

- d. If the closure is an all-day event, select the **All Day Event** check box. Microsoft Dynamics CRM automatically enters the duration of *1 day*.

If you want to enter a specific time period, clear the **All Day Event** check box. You can then specify the hours during which your organization will be closed.

5. To save this business closure, click or tap **OK**.

See Also

[Set work hours of a resource](#)

[Set up a holiday schedule](#)

[Create a customer service schedule and define the work hours](#)

Schedule time off

You can schedule a period of time in the middle of a schedule when a resource is not available to be scheduled for a service activity. For a user, this could be a sick day or vacation. For a facility or equipment, this could be an equipment failure.

More information on scheduling a resource for business closure or holiday: *Set or change work hours for a user, facility, or equipment*.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. Then click or tap **Administration > Users**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration**.
- c. Click or tap **Users**.
- OR - On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.

Then click or tap **Settings > Business Management > Facilities/Equipment**.

i.

▶ **If using CRM for Outlook**

a. In the Navigation Pane, click or tap **Settings > System > Administration > Users**.

- OR -

In the Navigation Pane, click or tap **Settings > Business > Business Management > Facilities/Equipment**.

3. In the list, open the resource you want to modify.
4. Under **Common**, click or tap **Work Hours**.
5. On the **Monthly View** tab, select a date on the calendar.
6. On the Actions toolbar, click or tap **Set Up > Time Off**, and then in the **Schedule Time Off** dialog box, enter the following details:
 - **Reason**. Type a short explanation for the resource's absence.
 - **All Day Event**. Select this check box if the resource is unavailable for the entire day (midnight to midnight) of all of the days,
 - **Start Time** and **End Time**. If you have not selected the **All Day Event** check box, you can set specific start and end times. When the end date is reached, the previous schedule continues.
 - **Duration**. If you do not want to calculate the end date, select the number of days the resource is unavailable.
 - **Time Zone**. If the resource is in a different time zone, select the time zone. Microsoft Dynamics CRM automatically adjusts the times on the calendars.
7. Click or tap **OK**.

In the working hours calendar, affected days are marked with a red block. In the Service calendar the time appears as a white block and cannot be scheduled.

You can update your own working hours or time off, and add yourself to teams and resource groups. On the **Tools** menu, click or tap **Options**. On the **General** tab, at the bottom of the page, click or tap the **user information** link.

See Also

[Set work hours of a resource](#)

Create or edit a service

To make scheduling services quick and easy, it's helpful to predefine the specifics of the services you'd provide to customers. By using the service records in Microsoft Dynamics CRM, you can define:

- How long a service activity would last
- What resources are available for the service activity, like users, facilities, or equipment

A service requires at least one selection rule and one or more resources, resource groups, or teams before the service can be scheduled with a service activity.



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Navigate to the Business Management area.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Service Management > Services**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Services**.

3. To create a new service, click or tap **New**.


-OR-

To edit a service, open a service from the list.

4. Type or modify information in the text boxes.

- a. Under **General**, enter a name and description to reflect the specifics of the service and describe what the service is. Also, specify the initial status of the service activity when it is created. If your organization prefers to approve all service activities before committing them to the schedule, you can select **Requested** or **Tentative**.
 - b. Under **Scheduling**, in **Default Duration**, select how long the service lasts. This can be changed when the service activity is created. The maximum duration of an appointment or service activity is 10 days.
 - c. In **Start Activities Every**, select how often service activities can start. This allows the start times of service activities to be staggered.
 - d. In **Beginning At**, select the time when the service activities must begin.
5. In the **Required Resources** area, define a selection rule:

- a. Click or tap a selection rule in the right-hand pane.

Selection rules appear in the tree beside a cog icon .

- b. Click or tap one of the items under **Common Tasks** to define the selection rule by indicating how many resources are required and in what combination.

Add a Selection Rule

You can add complexity to a rule by adding a subrule to it.

Add Resources

Add users, facilities, equipment, or teams as resources to a selection rule.

Add Resource Groups

Resource groups are users, facilities, or equipment that can be scheduled interchangeably.

You can save a service without defining a selection rule, but you won't be able to schedule that service.

More information: [Create or edit a selection rule](#)

6. When you're ready to save your data, click or tap **Save**.

Activate or deactivate a service

You can make a service available or unavailable for scheduling by activating or deactivating it. To do this, in the list of service records, select a service, then click or tap **More Actions** > **Activate** or **More actions** > **Deactivate**.

See Also

[Set the capacity required for a service or resource](#)

[Create or edit a selection rule](#)

[Create or edit a resource group](#)

[Set work hours of a resource](#)

Create or edit a contract

Use contracts and contract lines in Microsoft Dynamics CRM to define accurate terms and conditions for the support or services to be provided to your customers.

Create a contract



Note

Although it is possible, creating a contract from an account is not recommended. The contract does not associate to the account correctly and allotments are not recorded.



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. **Service** appears on the nav bar.
- c. Then, click or tap **Service > Contracts**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Service > Collateral > Contracts**.

2. Click or tap **+New**.

3. In the **Select Template** dialog box, select a template to base the new contract on.

4. Type or modify information in the text boxes.

Hovertips provide hints on what to enter.

- a. In the **Header** section, enter the details of a contract such as contract name, customer, and contract start and end date.

When you save the contract, Microsoft Dynamics CRM automatically assigns the **Contract ID** and calculates the duration, in days, based on the contract start and end dates.

- b. In the **Contract Type** section, enter the discount and service level of a contract.

Discounts for contract lines are given the same discount type that you select here. Service levels are defined by your business's guidelines.

- c. In the **History** section, the following fields are filled automatically

- Originating Contract. This is set when you renew an existing contract.
- Contract Template. This is set based on what you select in the **Select Template** dialog box.

- Owner
- d. In the **Billing Information** section, Microsoft Dynamics CRM automatically completes the most of the fields when the fields in the **Header** section are entered; however, you can change or enter the information as required. **Bill To Address** is required to change the status of the contract to invoiced.
5. To add activities or notes, click or tap **Activities** or **Notes**. More information: [Add a phone call, task, email, or appointment activity to a case or record](#)



Note

- The contract becomes active once it is invoiced and the start date is reached.
- You can edit an existing *draft* contract, but not invoiced, active, expired, canceled, or on hold contracts.
- The default days and hours of service are defined in the contract template. To change the days and hours of service, open the contract and on the command bar, click or tap **Set Calendar**.

Add a contract line to a contract

Use contract lines to define specific dates, the product covered, and how many cases or total minutes of allotted support are provided. You can define several contract lines for each contract; for example, one line for parts and another for maintenance.



1. In the contract record, in the **Contract Lines** section, click or tap **+**.
-OR-
In the contract record, on the nav bar, click or tap the arrow next to the contract name > **Contract Lines**, and then click or tap **Add New Contract Lines**.
2. Type or modify information in the text boxes.
Hovertips provide hints about what to enter
 - a. Under **General**, enter details about the contract line item such as the line item name and the product that is eligible for service under the contract.
The start date and end date for the line item is automatically filled based on the contract dates; however, you can change the dates as needed.
 - b. Under **Pricing**, type or modify information about the pricing of the contract such as the quantity of product or service, total price, and discount.
 - c. Under **Administration**, the customer field is automatically populated with the contract's customer. You can change it if required. Enter the serial number of a product.
 - d. Under **Allotment Details**, type or modify information about the allotment such as the total allotment, and the used and remaining allotments.
The contract template determines the type of allotment (cases or minutes). As cases are opened against this contract, Microsoft Dynamics CRM displays the allotments used in the **Allotments Used** box.

3. Click or tap **Save**.
4. To add a note, under **Notes**, click or tap **Enter a note**, type the details, and click or tap **Done**.

**Note**

You cannot delete a contract line once it is active; instead, you can cancel it.

You can cancel a contract line only when it is set to Active. By canceling a contract line instead of deleting it, you can reuse the contract lines later if you renew the contract or create a new contract based on it. In the list of contract lines, select the contract line, and on the command bar, click or tap **CANCEL CONTRACT LINE**.

Invoice a contract

You must define at least one contract line for the contract before you can change the status of the contract to *invoiced*. You can define several contract lines for each contract; for example, one for parts and another for maintenance.

To invoice a contract, after you add a contract line, on the command bar, click or tap **Invoice Contract**.

Hold, renew, or release a contract

If you want to make changes to an active or invoiced contract, you must either cancel it or put it on hold. A canceled contract can be renewed and then edited. When a contract is *on hold*, no cases can be opened against the contract. For example, you might choose to put a contract on hold if there is an invoicing dispute, and then release the contract when the dispute is resolved.

- To put an invoiced contract on hold, in the contract record, on the command bar, click or tap **Hold Contract**.
- To release the contract that's on hold, in the contract record, on the command bar, click or tap **Release Hold**.
- To renew a canceled contract, in the contract record, on the command bar, click or tap **Renew Contract**.

See Also

[Define support terms for customers by using contracts](#)

Define support terms for customers by using contracts

Effectively track the terms and conditions of support you'll provide to customers for the products they've purchased. In Microsoft Dynamics CRM, contracts define information like the duration of the contract, how many case incidents or minutes of service the customer has purchased, and what hours and days of the week the service or support coverage is available.

Create contracts

You can create new contracts based on contract templates. These define some information, such as allotment types, before you actually write a contract. You can create contracts only for existing accounts and contacts.

A contract has the status of *draft* until it is invoiced. Each new contract is assigned a unique ID that cannot be used for another contract, unless the contract is being renewed. When renewing a contract, the contract is saved as a draft with an ID that corresponds to the original contract.

Invoice and activate a contract

After a contract has at least one contract line and a billing address, you can mark the contract status as invoiced. Changing the status implies that you have accepted the contract.

Microsoft Dynamics CRM does not automatically invoice the customer or create an invoice record unless your business has integrated Microsoft Dynamics CRM with a Microsoft BackOffice product.

The contract status is *invoiced* until the start date has passed. Then, the status changes to *active*. You cannot delete a contract with an invoiced or active status.

Renew a contract

After passing the end date of the contract, the contract is expired and cases cannot be opened against it. To open a new case against the contract, renew the contract.

When you renew a contract, a draft copy of the contract is created with the same ID number as the original, expired contract. You can make modifications to the new draft contract, including adding or modifying contract lines. You have the option of including contract lines that were canceled from the original contract. After the original contract expires, invoice and activate the renewed contract.

A renewed contract has the same ID number as the original contract, reflecting the renewal action in the contract's history. The start date is automatically set to the day after the existing contract expires. While Microsoft Dynamics CRM gives the renewed contract the same duration as the original contract automatically, you can change the duration manually.

See Also

[Create or edit a contract](#)

[Create templates for contracts](#)

[Improve customer service with better automation and tracking in Microsoft Dynamics CRM](#)

[eBook: What's new in customer service](#)

Set up and define rules for service

Create a simple selection rule

This procedure assumes that no selection rules have been created previously for this service.



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.


If using the CRM web application

- a. In the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears in the nav bar.
- b. Click or tap **Settings > Business Management > Services**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Business Management**, and then click or tap **Services**.

3. In the list of services, open the service to which you want to add a selection rule.
4. On the **Service** form, click or tap **Required Resources**, and then double-click or double-tap the first selection rule in the right pane.

Selection rules appear in the tree beside .

5. In the **Edit a Selection Rule** dialog box, enter the following information:

- **Quantity**

Select the number of resources required for the service. If you select **All**, all the

selected resources are included in the service activity.

- **Description**

Enter any additional information about the scheduling rule you want to include.

- **Selection Site**

This option defines whether the resources must all be from the same site or if they can be from any site in the business unit. This option is available only in the top-level selection rule.

6. Click or tap **OK**.

7. Under **Common Tasks**, you can add resources:

- To add individual users, facilities, equipment or teams to the selection rule, click or tap **Add Resources**.

In the **Look Up Records** dialog box, select the records you want to add. You can add as many records as you want, and they can be a mix of individual users, facilities, equipment, and teams.

- To add resource groups to the selection rule, click or tap **Add Resource Groups**.

In the **Look Up Records** dialog box, select the records you want to add. You can add as many records as you want.

 **Tip**

If you select multiple users in the **Look Up Records** dialog box and click or tap **OK**, the **Save the selection as a Resource Group** dialog box opens. If you want to create a resource group from the selected resources, click or tap **Yes, save the selection as a resource group with the name**, enter a name in the box, and then click or tap **OK**. The new resource group appears in the selection tree.

8. Click or tap **OK**.

9. Click or tap **Save** or **Save and Close**.

 **Tip**

After you set up the selection rule, create a service activity for the service rule and check the search results to verify that the results are what you expect.

See Also

[Create or edit a selection rule](#)

[Schedule a service activity](#)

[Create or edit a resource group](#)

Add facilities and equipment for service scheduling

Looking for help?

You'll need to search online to see what's available for this topic

Create or edit a resource group

Use resource groups to group users, facilities, and equipment as part of the selection rules for a service.

▶ Create a resource group

1. Navigate to your area.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Business Management > Resource Groups**.

▶ If using CRM for Outlook


- a. In the Navigation Pane, expand your organization if necessary, and then expand **Settings**.
- b. Expand **Business**, and then click or tap **Business Management > Resource Groups**.

2. On the Actions toolbar, click or tap **New**.
3. In the **Resource Groups** form, enter information in the following fields:

- **Name**

You must enter a name for the resource group. Microsoft Dynamics CRM does not check that the name is unique.

- **Business Unit**

To locate and select a business unit, click or tap the Lookup button .

- **Description**

You can add a detailed description of this resource group, including the criteria that you used to determine which resources to add to the resource group.

4. Click or tap **Save**.
After you save the record, **Resources** appears under **Common**.
5. Click or tap **Resources**, and then on the Actions toolbar, click or tap **Add Resources**.

6. In the **Look Up** dialog box, select the users, facilities/equipment, teams, or other resource groups to add to this resource group.

Adding other resource groups to a resource group is a good way to manage large numbers of resources. For example, you could add the resource groups of "senior technicians" and "junior technicians" to a resource group of "technicians."

7. Click or tap **OK** to add the selected resources to the resource group.
8. Click or tap **Save** or **Save and Close**.

▶ **Edit a resource group**

1. Navigate to your area.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Business Management > Resource Groups**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then expand **Settings**.
- b. Expand **Business**, and then click or tap **Business Management > Resource Groups**.

2. Open the resource group you want to change.
3. In the **Resource Groups** form, change the information.
4. Click or tap **Save** or **Save and Close**.



Note

Resource groups are published automatically when you save and close the form. If the new resource group doesn't appear in the list of available resource groups for a service, or if changes are not appearing, you can manually publish the change by clicking **Publish** on the **Resource Groups** page.

To remove a resource, select the resource you want to remove from the resource group. On the Actions toolbar, click or tap **More Actions**, and then click or tap **Remove Resources**.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Set the capacity required for a service or resource

Define a limit to the number of activities a resource can perform in a stipulated time by setting the capacity of the resource and services in Microsoft Dynamics CRM.

You must set both the capacity of the service and of the resources required for the service.

When you set capacity of a resource and service, the service calendar doesn't allow booking the resources once they reach their capacity.

Set the capacity of a service



1. Before you start, make sure you have the Schedule Manager role assigned or have the required permissions for doing the scheduling tasks.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Navigate to the Business Management area.

If using the CRM web application

- a. Click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Business Management**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Business > Business Management**.
3. Click or tap **Services**.
 4. In the list of services, open the service you want to set the capacity for.
 5. Under **Required Resources**, in the column on the right, double-click or tap the selection rule you want to modify.
 6. In the **Edit a Selection Rule** dialog box, expand the **Scheduling Details** area.
 7. In **Select Criteria**, to make sure everyone has the same workload, select **Least Busy**.
Or, to make sure each member works at full capacity before assigning work to anyone

else, select **Most Busy**.

8. In **Capacity Required**, specify the capacity required by a resource to perform this service.

For example, a workshop has four work compartments. The capacity of the workshop is 4, that is, the workshop can have four different services scheduled for the same time. You can then add different workers, where the more skilled workers complete two tasks at once, so their capacity can be set to 2. They can have two jobs scheduled for the same time.

9. Click or tap **OK**.
10. Click or tap **Save & Close**.

Set the capacity of a resource



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Navigate to the Users or Facilities/Equipment area.

▶ If using the CRM web application

- a. Click or tap **Microsoft Dynamics CRM > Settings**. Then, click or tap, **Settings > Administration > Users**.

-OR-

Click or tap **Microsoft Dynamics CRM > Settings**. Then, click or tap, **Settings > Business Management > Facilities/Equipment**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Settings > System > Administration**. Then click or tap **Users**.

-OR-

Click or tap **Settings > Business > Business Management**. Then click or tap **Facilities/Equipment**.

3. In the list of records, open the record you want to set the capacity for.
 4. In the user record, on the nav bar, click or tap the chevron icon next to the record name, and then **Work Hours**.
- OR-
- In the Facilities/Equipment record, under **Common**, click or tap **Work Hours**.
5. On the **Monthly View** tab, double-click the date on the calendar that is the first day you want the new schedule to start, or any date that will be affected by this edit.
 6. In the **Edit Schedule** dialog box, select one of the following and then click or tap **OK**:
 - a. **This date only**. This option changes only the date selected. If you select this option, skip to step 8.
 - b. **From <this date> onward**. This option changes only the schedule going forward.
 - c. **Entire recurring weekly schedule from start to end**. This option changes this entire schedule from the start to end date. Selecting this option might change past days, which might affect reports regarding hours worked in the past.
 7. In the **Weekly Schedule** dialog box, click or tap the work hours link for the schedule you want to edit.

If working hours have not been set previously, the link is displayed as "Set Working Hours." You must set up a schedule for a user, facility, or equipment before you can continue. More information: [Set work hours of a resource](#)
 8. In the **Set Work Hours and Service Restrictions** dialog box, click or tap **Show Capacity**, and then in the **Capacity** column, enter the capacity.
 9. Click or tap **OK**.
 10. Click or tap **Save & Close**.

See Also

[Create or edit a selection rule](#)

Set work hours of a resource

You can set the hours a user works or set the operating hours for a facility or equipment. By default, users, facilities, and equipment are set up for a 7 days a week, 24-hour schedule.

You can edit existing work hours by following steps 1 and 2 to navigate to the Users or Facilities/Equipment area. Then, open the resource you want to edit. Editing a schedule does not affect existing service activities created for the resource.



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > Users**.
- OR -
Click or tap **Settings > Business Management > Facilities/Equipment**.
- c. In the list, open the resource record you want modify.
- d. On the nav bar, click or tap the arrow next to name of the resource you opened. Select **Work Hours**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > System > Administration > Users**.
- OR -
In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Business > Business Management > Facilities/Equipment**.
 - b. In the list, open the resource record you want modify.
 - c. Under **Common**, click or tap **Work Hours**.
3. On the **Monthly View** tab, double-click a date on the calendar that is the first day you want the new schedule to start, or any date that will be affected by the new schedule.
 4. In the **Edit Schedule** dialog box, select one of the following and then click or tap **OK**.
 - **This date only**
This option changes only the date selected.
Skip to step 7.
 - **From <this date> onward**

This option changes only the schedule going forward.

- **Entire recurring weekly schedule from start to end**

This option changes this entire schedule from the start to end date.

Selecting this option might change past days, which might affect reports regarding hours worked in the past.

5. In the **Weekly Schedule** dialog box, in the **Set the recurring weekly schedule** section, select one of the following:

- **Are the same each day**

The new schedule is the same for every day of the week. After you select this option, select the days of the week that the resource is available.

- **Vary by day**

The new schedule is different for one or more days of the week. After you select this option, select the days of the week that the resource is available.

- **None. Resource is not working**

The new schedule includes time that the resource is not working.

In the **Weekly Schedule** dialog box, you can also do any of the following:

- If the schedule is for more than one day, select the days of the week that this schedule is effective.
- If the resource does not work during business closures, select the **Observe** option.
- Under **Date Range**, in the **Starting on** box, you can change the date the schedule starts.

You cannot change the date the schedule ends. To end a schedule, you must define a new schedule on that date.

6. Click or tap the work hours link for the schedule you want to modify.

If work hours have not been set previously, the link is displayed as "Set Work Hours."

7. In the **Set Work Hours and Service Restrictions** dialog box, complete the following fields, and then click or tap **OK**:

- **Date**

Select a date from which the work hours for services are to be considered.

- **Start**

Select the time the work day starts.

- **End**

Select the time the work day ends.

To add a break in the work hours, such as a lunch break, click or tap **Add Break**, and then select the start and end time of the break.

8. To define a time when a service will not be available, click or tap the **Service Restrictions** tab, and then click or tap **New**. In the **Edit a Service Restriction** dialog box, select the service, and select the start and end time between which the service will be unavailable, and then click or tap **OK**.

9. Click or tap **Save and Close** to close the **Weekly Schedule** dialog box.



Note

- You can set the work hours for a single day by double-clicking the day, and then in the **Edit Schedule** dialog box, select **This date only**, then click or tap **OK**. Then, perform step 6 in the procedure.
- All of the options may not be available to you for selecting how much of the schedule you want to edit. The available options are based on the schedules that are already set up.

See Also

[Set the capacity required for a service or resource](#)

[Set when your business is closed](#)

Restrict a resource from performing a service

You can restrict a resource from performing a service and define the service capacity for the resource. You can also restrict when a resource is available to be scheduled for a specific service. The resource is still available for scheduling service activities for other services.



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

▶ Check your security role


- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the step for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Administration > Users**.
- c. In the list, open the resource record you want to modify. The resource name appears in the nav bar. Click or tap the arrow beside the resource name and select **Work hours**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > System > Administration > Users**.
 - b. In the list, open the resource record you want to modify.
 - c. Under **Common**, click or tap **Work Hours**.
3. On the **Monthly View** tab, double-click a date on the calendar that is either the first day you want to restrict the resource from performing the service or a date in a recurring schedule.
 4. On the **Edit Weekly Schedule** dialog box, select one of the following options and then click or tap **OK**.
 - **This date only**
This option changes only the date selected.
If you select this option, skip to step 8.
 - **From <this date> onward**
This option changes only the schedule going forward.
 - **Entire recurring weekly schedule from start to end**
This option changes this entire schedule from the start to end date.
Selecting this option might change past days, which might affect reports regarding hours worked in the past.
 5. On the **Weekly Schedule** dialog box, click or tap the work hours link for the schedule you want to modify.
 6. On the **Work Day** dialog box, click or tap the **Service Restrictions** tab.
 7. On the Actions toolbar, click or tap **New**.
On the **Service Restrictions** dialog box, locate and select a **Service**. Click or tap the **Lookup** button  to search for a record.
 9. In the **Start time** and **End time** lists, set the time when the facility or equipment is not available, and then click or tap **OK**.
 10. Click or tap **OK**, to close the **Work Day** dialog box.
 11. Click or tap **Save** or **Save and Close**.



Note

- You can set up service restrictions in your own work schedule.
- All of the options may not be available to you for selecting how much of the schedule you want to edit. The available options are based on the schedules that are already set up.

See Also

[Set work hours of a resource](#)

Create or edit a selection rule

Before you can add a resource to a service, you must define a selection rule to determine how resources are selected for service activities.

You can create a simple rule that selects resources from a list, and nest selection rules and sub-rules to create compound and complex rules. A compound rule selects a combination of resources, and a complex tree of selection rules selects from groups of equivalent resources.

You can also add resources to existing selection rules.

See Also

[Create a simple selection rule](#)

[Set the capacity required for a service or resource](#)

Set up case and queue settings

Define settings for parent and child cases

Track multiple issues for one customer, or the same issue that's affecting multiple customers, using parent and child cases in Microsoft Dynamics CRM. When you need to track a case where work needs to be done by other departments or when you need to track the same issue for multiple customers, you can open a primary case called the parent case, and then create secondary cases called child cases.

Before your service team can start using this feature, you'll need to go into the settings area and set-up a few rules. Using the **Parent and Child case settings**, specify the information that will be inherited from a parent case to the child case. You can also select a case closure setting that defines how parent and child cases are closed.

Important

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Set parent and child case attributes



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.
 - Follow the steps in [View your user profile](#). Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Business > Service Management**.
3. Click or tap **Parent and Child case settings**.
4. On the **Case Settings** dialog box, select the attributes that the child case will be inherit from the parent case.
5. Select one of the case closure preference for parent and child cases:
 - **Close all child cases when parent case is closed**: The parent case can't be closed UNTIL all the child cases are closed.
 - **Don't allow parent case closure until all child cases are closed**: The parent case can't be closed UNTIL all the child cases are closed.



Note

If you don't make a selection, parent and child cases are closed independently of each other. This is the default setting.

6. When you're done, click or tap **OK**.

See Also

[Get started with service management](#)

[Create and manage parent and child cases](#)

[eBook: What's new in customer service](#)

[eBook: Give great customer service with CRM](#)

Create rules to automatically route cases

Use routing rules in Microsoft Dynamics CRM to automatically route the cases to the right people on right time without any manual intervention. You can also use routing rules to route cases that are escalated to specific queues.



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Create a routing rule set



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

When you create and activate a routing rule set, internally a corresponding workflow is also created. Whatever action you do on the routing rule set, like creating or assigning the rule, you must have privileges to perform the same action on workflows. For the rule to work, you must have sufficient privileges to run a workflow. The routine rule set is applied in context of the privileges that the owner of the routing rule set has.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management**.
- c. Click or tap **Routing Rule Sets**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Routing Rule Sets**.

3. To create a new routing rule set, click or tap **New**.

-OR-

To edit a routing rule set that you already have, in the list of records, choose the rule, and then on the command bar, click or tap **Edit**.

4. Fill in your information. Use the handy tooltips as a guide.
5. After you enter information in all the required fields, click or tap **Save**.
6. In the **Rule Items** section, click or tap **+** to specify conditions for routing cases to a queue.

You can add multiple conditions here and arrange them in the desired order. The rule items are run in the same order. As soon as an applicable rule item (based on the If Conditions) is applied on the case, the other rule items are not run on the case.



- a. In the Rule Item form, type a descriptive name for the rule item.

The screenshot shows the 'Rule Criteria' form. Under the 'If Conditions' section, there are two options: 'Group AND' (selected) and 'Group OR'. Below this, there is a table with one row: 'Case', 'IsEscalated', 'Equals', and 'Yes'. A 'Select' button is located below the table.

- c. Under **Then Conditions**, specify the queue to which the cases will be routed

The screenshot shows the 'Then Conditions' section of the form. It has two radio buttons: 'Queue' (selected) and 'User/Team'. Below this, there is a field labeled 'Add to Queue' with a dropdown menu showing 'Tier 2'.



Tip

To group conditions in the criteria, use the **Group And** or **Group Or** options.

7. Click or tap **Save and Close**.
8. In the Routing Rule Set record, click or tap **Activate** so that the rule set is applied to the cases matching the conditions in the rule.



Note

Only one routing rule set can be active at any point of time. If you try to activate another rule when one rule is already active, it will deactivate the currently active rule. You can activate or deactivate only the rules that you own.

Apply a routing rule set

An active routing rule set automatically applies to all automatically-created cases.

To manually apply the rule to existing or manually-created cases, in the list of cases, select the cases that you want to route using this rule, and on the command bar, click or tap **Apply Routing Rule**.



Note

If you're importing bulk records, and you don't want the routing rules to apply to the cases that you're importing, add a column "Route Case" to your spreadsheet, and add the value "No" for all the cases that you don't want to route.

See Also

[Create and manage a case](#)

[Automatically create cases from email or social monitoring](#)

[Create or edit a queue](#)

Automatically create cases from email or social monitoring

Reduce the need for manually creating cases from incoming email or social messages and increase the efficiency of customer service agents by creating automatic case creation rules in Microsoft Dynamics CRM. The conditions in these rules automatically convert email and social messages to cases.



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

You can use a social listening application to receive social posts and messages in Microsoft Dynamics CRM. More information: [Receive social data in Microsoft Dynamics CRM](#)

Use rules to create cases automatically

▶ Create automatic case-creation rules

1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

When a case creation rule is activated, a corresponding workflow is created automatically. If you create or assign a rule, you must have permissions to perform the same action on workflows. The case creation rule is applied and a case is created in context to the permissions that the owner of the case creation rule has.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using:

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management > Automatic Case Creation Rules**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Automatic Case Creation Rules**.

3. To create a new case creation rule, click or tap **New**.

-OR-

To edit an existing rule, in the list of rules, select a rule, and then on the command bar, click or tap **Edit**.

4. Type or modify information in the fields.

Hover over the field labels to see what to enter.

- **Name.** Type the name of the queue the rule is defined for.
- **Source Type.** Select **Email** or **Social Monitoring** to indicate whether the case is to be automatically created from email or social messages.
- **Queue.** Select the queue that the rule applies to. For example, if you want to convert email messages or social posts sent to the Support queue, select that queue here.



Note

You can associate only one rule per source type to a specific queue. If you're creating a rule to convert email to case, make sure you specify an email address for this queue. Otherwise, automatic case creation for email won't work. More information: [Create or edit a queue](#)

5. In the **Specify Conditions for Case Creation** section, select the conditions for creating the case automatically. You can add multiple conditions here and arrange them in the desired order. The conditions are considered in the same order. Only one item that has conditions matching the incoming email or social posts is applied.

Specify conditions for email to case creation

- a. **Create cases for email from unknown senders.** If you select this check box, all email messages from unknown senders (a sender whose email address is not present in any CRM records) are converted to cases. A contact record is also created for this unknown sender.



Note

If this option is not selected, cases are created only for email messages that have a CRM contact or account as the senders. Email messages from sender that are present as other record types in CRM won't be converted to cases.

This option, in conjunction with the **Automatically create records in Microsoft Dynamics CRM** option in the rule owner's Personal Options, determines whether a case and contact record is created (see **Set personal options**):

This table shows if a contact and case record is created based on the values set for the **Automatically create records in Microsoft Dynamics CRM** field in Personal Options and the **Create cases for email from unknown**

senders check box in the automatic case creation rule:

“Automatically create records in Microsoft Dynamics CRM” option is set to:	If “Create case from unknown sender” option in this rule is set to:	Contact or case created?
Create Lead	Selected	Both, contact and case, created
Create Lead	Not selected	None
Create Contact	Selected	Both, contact and case, created
Create Contact	Not selected	Only contact created
None	Selected	Both, contact and case, created
None	Not selected	None

- b. Create case if a valid entitlement exists for the customer. If you select this check box, Microsoft Dynamics CRM creates a case only if an active entitlement exists for the customer.
 If the sender of the email is a contact with a parent account, Microsoft Dynamics CRM creates a case if the contact’s parent account has a valid entitlement, and the contact is listed in the **Contacts** section of the entitlement or if the **Contacts** section is empty (which means the entitlement is applicable to all contacts for the customer).
- c. **Create cases for activities associated with a resolved case.** If you select this check box, Microsoft Dynamics CRM creates a case if the email is related to a resolved case. If the email is related to an active case, a new case won’t be created.
- d. **Create case when the case associated with the activity is resolved since.** If you select the **Create cases for activities associated with a resolved case** check box, select the duration here. Microsoft Dynamics CRM creates a case only if the case is resolved earlier than the duration you specify. If the incoming email is related to a case resolved later than the specified duration, Microsoft Dynamics CRM only associates the incoming email with the existing resolved case; a new case won’t be created.
- e. Under **Specify Autoresponse Settings**, select the **Send automatic email response to customer on case creation** check box if you want to automatically send email responses to the sender of the email after a case for the email is created.
Select email template to respond to customer. If you select the **Send**

automatic email response to customer on case creation check box, select an email template (global email template or email template of case entity type). If you don't select a template, an automatic response won't be sent.

▶ **Specify conditions for social to case creation**

- a. **Create cases for blocked social profile.** If you select this check box, Microsoft Dynamics CRM creates a case for the social posts (social activities) from social profiles that are blocked by you.

 **Note**

Social posts enter in Microsoft Dynamics CRM as social activities.




- b. **Create cases for direct messages only.** If you select this check box, Microsoft Dynamics CRM creates a case only when the social posts are sent as direct or private messages to the queue specified in the case conversion rule. If the check box is cleared, cases will be created for all social posts including public messages (timeline).



- 6. Click or tap **Save**.
- 7. In the **Specify Case Details** section, define the conditions for creating a case and specify the case properties.

By default, the Title field of the new case is set to the subject of the email and the Customer field is set to the sender of the email. If the sender of the email is a contact with a parent account, the Customer field is set to the parent account, and the Contact field is set to the sender of the email.

▶ **Specify case details**

Condition

 Clear  Group AND  Group OR

 <u>Sender (Contact)</u>	<u>Credit Limit</u>	<u>Is Greater Than</u>	<u>1,000,000.00</u>
 <u>Senders Account (Account)</u>	<u>Category</u>	<u>Equals</u>	<u>Preferred Customer</u>

[Select](#)

Case Properties

Priority to High

Once a case is created, the incoming email is removed from the queue.

 **Note**

If there's no routing rule to route the newly created case to another user or queue, the user who's the owner of the case creation rule will be set as the owner of the case, too.

Activate or deactivate the case creation rule

Cases are created automatically only when the case creation rule is active. To activate a rule, open the rule, and on the command bar, click or tap **Activate**.

Once the rule is active, you can't change it. To change a rule, open the rule and on the command bar, click or tap **Deactivate**.

Manage automatic case creation from a queue form

You can create or manage an automatic case creation rule from a queue form, too. To do this, open the queue record, and on the command bar, click or tap **Email to Case Settings** or **Social to Case Settings**.

See Also

[Create rules to automatically route cases](#)

[Create or edit a queue](#)

[eBook: What's new in customer service](#)

Create or edit a queue

Make sure that the unresolved cases are acted upon faster by using queues in Microsoft Dynamics CRM.

Queues can be useful in:

- Having a centralized list of pending work that needs attention
- Sorting tasks by type or by the people assigned to complete them

Use queues to categorize and prioritize your cases. You can categorize based on:

- Different products or services
- Different subscription levels (regular, premium customers)
- Various case categories
- Different geography

Create or edit a queue



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management**.
- c. Click or tap **Queues**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Queues**.

3. To create a new queue, click or tap **New**.

-OR-

To edit a queue, in the list of queues, choose the queue, and then on the command bar, click or tap **Edit**.

4. Type or change information in the text boxes.

Hovertips provide hints about what to enter.

- In the **Summary** section, complete the required fields.



Note

The email address that you enter in the **Incoming Email** field receives all messages sent to the queue.

- In the **Type** field, choose if the queue is a private or public queue. You can use a private queue to allow only a specific set of people to work on cases in this queue. If you're creating a private queue, you'll have to add members to this queue manually (see step 6).
- In the **Email Settings** section, in the **Convert to email activities** drop-down box, choose which messages to track as activities.
- In the **Mailbox** field, a mailbox record for the queue is automatically created and selected as soon as you save the queue record. To update the mailbox details, click or tap the mailbox name. More information: [Create forward mailboxes or edit mailboxes](#)

5. Click or tap **Save**.
6. If you're creating a private queue, in the **Members** section, click or tap **+** to add members to the queue. Only these members will be able to work on the items in this queue.

View queue items

In the **Queue Items** section, all cases that are either routed to this queue automatically by the routing rules or the cases that are manually assigned to this queue will be listed here.

Additional actions

To create an automatic case creation rule for this queue, on the command bar, click or tap **Email to Case Settings** or **Social to Case Settings**.

More information: [Automatically create cases from email or social monitoring](#)

See Also

[Create and manage a case](#)

[Find what's assigned to you in a queue](#)

[Set up queues to manage activities and cases](#)

[eBook: What's new in customer service](#)

Set up queues to manage activities and cases

Use queues to organize, prioritize, and monitor the progress of your work. In Microsoft Dynamics CRM, queues are containers to store anything that needs to be completed or requires an action. For example, completing a task or closing a case.



Note

Private and public queues or automatic case creation functionality is available only in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises).

Create queues

By default, a queue is created for each user and team in Microsoft Dynamics CRM. You can use this default queue to track all your work items, or you can set up queues to reflect your organization's structure, business processes, or both. How you set up queues depends on your unique business needs. For example, you could create separate queues for First Tier and Second Tier product support teams that reflect their differing levels of expertise, or Gold and Silver queues to reflect differing priorities based on service contracts that customers have with your organization.

Microsoft Dynamics CRM lets you create two types of queues. Create private queues with limited set of members to let only those members view the items in the queue. Create public queues to let everyone in the organization view the items in a queue.

Route items to queues

For all cases that are automatically created from incoming email and social posts, create routing rules to route the cases to queues. Then assign the items in the queue to appropriate CSR or users. . Alternately, you can manually add cases and activities to queues.

Assign items in the queue to work

Queues share cases or activities as a group until these are taken out of the queue, or accepted, by a customer service representative (CSR) who assumes responsibility for handling them. CSRs can pick the items for themselves, or a customer service manager (CSM) can manually route these cases to the CSRs or to other queues, users, or teams.

See Also

[Create or edit a queue](#)

[Find what's assigned to you in a queue](#)

[Create rules to automatically route cases](#)

[Automatically create cases from email or social monitoring](#)

[eBook: What's new in customer service](#)

Add a timer control to the Case form to track time against an SLA

You can add a timer control to the **Case** form to help customer service representatives gauge the amount of time they have to complete a task—typically associated with a service level agreement (SLA). The timer control initially displays a count-down timer to show the time remaining to complete the task.

The timer control can show any of the following, depending on the actions of the customer service representative (CSR) and what you specify when you set up the timer control:

- If the CSR completes the task within the time remaining, the control shows the word **Succeeded**.
- If the CSR doesn't complete the task within the time remaining, the control shows the word **Expired**.
- As the timer counts down, the color changes to yellow as the time remaining nears non-compliance. If the time remaining expires, the timer shows the word **Expired**. Then the timer color changes to red and the timer starts counting up to show the elapsed time since the task should have been completed. This behavior is optional.
- If a condition causes the milestone to be canceled, the control shows the word **Canceled**. This behavior is optional.
- If either of the required fields in the **Timer Control** dialog box do not have a value in the record, the control shows the words **Not Set**.

APPLICABLE SLA	
First Response By	🔒 4/7/2014 10:27 AM
Resolve By	🔒 4/7/2014 12:27 PM
First Response due	⚠️ 0h 43m 24s
Resolve by due	⚠️ 2h 43m 24s

Time remaining for both of these SLAs is nearing non-compliance.

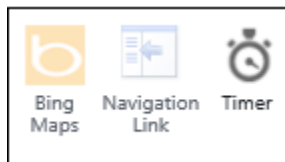
Add a timer control to the Case form



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
2. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. Then click or tap **Customizations > Customize the System**.
 3. In the solution explorer, in the left navigation pane, expand **Entities**, expand the **Case** entity, click or tap **Forms**, and then open the **Case** form.
 4. Click or tap on the form where you want to place the control. You can add it anywhere except the form header or footer.
 5. On the **Insert** tab, in the **Control** group, click or tap **Timer**.



6. In the **Timer Control** dialog box:



- a. In the **General** section, enter a name and label for the control.
- b. Under **Data Source**, next to **Failure Time Field**, select the date-time field that represents the time when a milestone should be completed. For example, select the **First Response By** field.
- c. Next to **Success Condition**, select a field to use to evaluate the success of the milestone, and then choose the condition that indicates success. For example, select the **First Response Sent** field, and then select **Yes** to indicate the success criteria of the First Response metric. This setting is required.
- d. Next to **Warning Condition**, enter the condition that will cause the timer control to display a warning when the time is about to expire. For example, in the first list next to **Warning Condition**, select **First Response SLA Status**. In the list to the right, select **Nearing Noncompliance**. This setting is optional.

- e. Next to **Cancel Condition**, select a field to evaluate whether the achievement of the milestone should be canceled. Then choose the option that indicates the milestone is canceled. This setting is optional.

Timer Control -- Webpage Dialog

Timer Control

Set the properties of the timer control.

General

Name
Specify a unique name.

Name *

Label *

Data Source
Specify the data source for failure time, and the conditions for this timer control.

Failure Time Field *

Success Condition *

Warning Condition

Cancel Condition

OK Cancel

Local intranet | Protected Mode: Off

7. Click or tap **OK** to add the control to the form.

Notes

- The timer control refreshes on the **OnChange** form event, and also when the form is loaded.
- You can add a timer control to a form based on any record type (entity), including custom record types.
- You can add multiple timer controls for different key performance indicators (KPIs).
- You can add a timer control to any Main form, but timer controls are not displayed in Microsoft Dynamics CRM for tablets.

See Also

[Define service level agreements \(SLAs\)](#)

[Common field properties](#)

[Special field properties](#)

Define status reason transitions for incident (case) management

Microsoft Dynamics CRM 2013 Service Pack 1 and the CRM Online Spring '14 release include a new capability to specify status reason transitions for the **Case** record type (entity) or custom record types.

If you're in charge of incident management for an organization, it's important to provide a simple model for customer service representatives responsible for entering and updating case status. In CRM, there are two fields that work together to provide information about case status: the **Status** field and the **Status Reason** field. The **Status** field for the **Case** record type has three possible values: **Active**, **Resolved**, or **Canceled**. The **Status Reason** field stores a reason for a specific status value. For example, for a case with an **Active** status, a status reason could be **In Progress**, **On Hold**, **Waiting for Details**, or **Researching**.

Big organizations often have a large number of combinations for the **Status** and **Status Reason** fields. This can make it difficult for customer service reps to choose the correct next status reason. You can define status reason transitions to add another level of filtering for what the status reason value can be changed to for each status reason. Limiting these values to just allowed status reasons can help customer service representatives make the right choices.



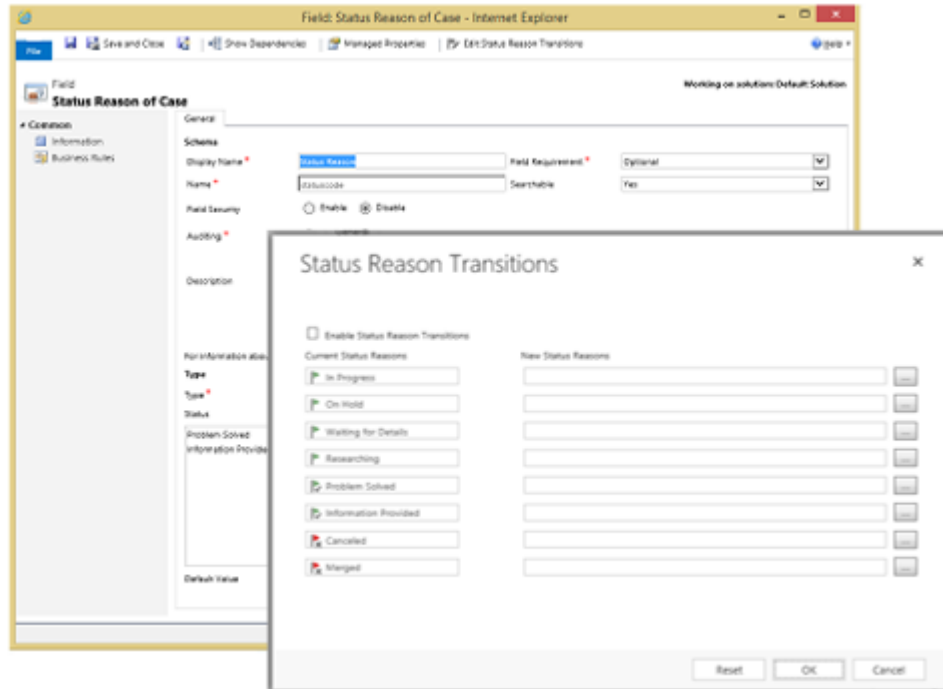
1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
2. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. Then click or tap **Customizations > Customize the System**.
 3. In the solution explorer, in the left navigation pane, expand **Entities**, expand the **Case** entity, and then double-click or tap **Fields**.
 4. Go to the second page of fields, and then open the **statuscode** (Status Reason of Case)

field.

5. In the **Field: Status Reason** dialog box, click or tap **Edit Status Reason Transitions** at the top of the dialog box.



In the **Status Reason Transitions** dialog box, under **New Status Reasons**, click or tap one of the **Enter Value** buttons corresponding with one of the existing status reasons.

In the **Select Status Reason** dialog box, in the **Available Values** list, select the values you want to add, and then click or tap the chevron button to add to the **Selected Values** list. Click or tap **OK** when you're done with that status reason.

Click or tap another **Enter Value** button to modify other status reasons. When you're done, click or tap **OK**.



Note

Each status reason option for an active status must allow at least one path to an inactive status. Otherwise, you could create a condition where it would not be possible to resolve or cancel a case.

9. In the **Status Reason Transitions** dialog box, select the **Enable Status Reason Transitions** check box to apply the defined status reason transitions to case records. The list of available status reasons will be filtered for each case record based on the defined transitions.

See Also

[Learn more about defining status reason transitions](#)

[Create or edit entity fields](#)

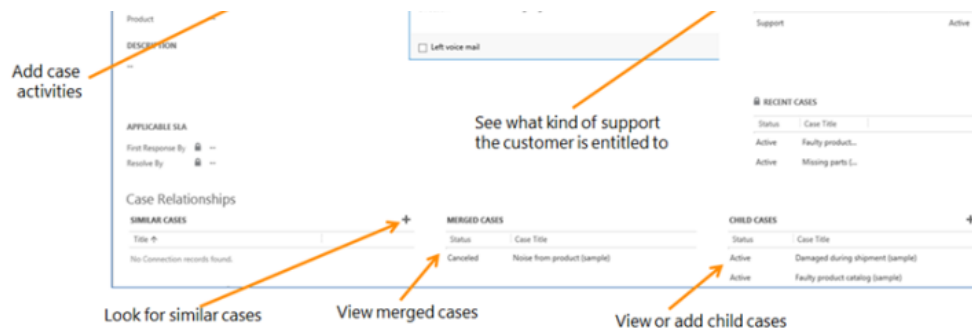
Work with cases

Create and manage a case

Keep track of your customer requests and issues by creating support cases in Microsoft Dynamics CRM. When a customer contacts support with a question or problem, you can quickly check if there is an existing case or open a new case and start tracking the issue. You can also escalate, reassign, or put a case back into the service queue if you don't have enough information or time to work on it.

Before you provide support, you can also check the customer's entitlements. Entitlements are like contracts that tell you what kind of support a customer is eligible for. You can see if the support terms are based on number of hours or cases, support channel, or based on the product or service that the customer has purchased.

To help you choose the right status of a case, your admin may have set things up so that you only see a limited set of statuses to choose from based on the current status of a case. For more information on the available list of case statuses, contact your administrator.



Create a case



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. Then, click or tap **Service > Cases**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Service > Service > Cases**.

2. Click or tap **New Case**.
3. Find the customer:
 - a. Click or tap the **Customer** lookup button. By default, this field shows both account and contact records. Or, type a few letters and press **Enter** to search for records that contain the letters. When you select an existing customer, the customer details will show the contact details, along with recent cases and activities for the customer.
 - b. If a customer record doesn't exist, click or tap **New** in the inline lookup results to create a new record.
4. Click or tap the **Contact** lookup button and select an existing contact for the case or click or tap **New** in the inline lookup results to create a new contact record.
5. Before you create a new case, check if there is an existing case:
 - a. From the **Identify** area of the process bar, click or tap the **Find Case** lookup button and then select a case from the list of cases.
 - b. If a case does not exist, click or tap **New** in the inline lookup results to create a new case record.
6. In the **Case title** field, type a subject or descriptive name to identify the case.
7. To track your conversation with the customer, add activities. For more information, see [Add a phone call, task, email, or appointment activity to a case or record](#).
8. To see what kind of support you should provide the customer, click or tap the **Entitlements** lookup button and select an active entitlement.
9. Fill in the other details that apply to the case, and then click or tap **Save**.

Find a solution from similar cases

You can look at resolved cases to see if they can help you resolve the open case you're working on. For example, if the subject of the case you're working on is "Service outage", then you could look for resolved cases with the same subject to get help with your current case.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. Then, click or tap **Service > Cases**.

If using CRM for Outlook

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
2. In the list of active cases, open the case you're looking for.
 3. When the case is open, to find similar cases, click or tap **Case Relationships** to expand the menu.
 4. For **Similar Cases**, click or tap **(+) Add Connection record**.
 5. From the **Find Similar Cases** dialog box, use the search to find similar cases.
Select a different subject to see the cases with that subject. You can also search for cases by typing the keyword in the **Search** box, and then click or tap the **Search** button. When you use a search keyword, it searches on the title of the case and shows the matching results.
 6. When you find a similar case, click or tap the case to review the case activities, posts, and notes.
Typically, a phone call, task, or case resolution activity has the information about how the case was resolved.
 7. Once you find the case that has the information you need, click or tap the case, and then click or tap **Found a Solution**.
The case you select is added to the **Similar Cases** area for the case you're working on.

Resolve a case

For information about how to resolve parent and child cases, see "Resolve a case with a parent and child relationship" section in [Create and manage parent and child cases](#).



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
Then, click or tap **Service > Cases**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Service > Service > Cases**.

2. In the list of active cases, open the one you want to resolve.
3. On the command bar, click or tap **Resolve case**.

 **Important**

Before you resolve a case, make sure that all the case activities are closed. Otherwise, you'll get a message saying that you still have open activities associated with the case, which will be canceled if the case is resolved.

4. In the **Resolve Case** dialog box, in the **Resolution Type** list, select how the case was resolved.
5. In the **Resolution** box, type a short explanation of the resolution.
The actual time spent on all activities for this case, as recorded in the **Duration** box in each activity, is filled out automatically in the **Total Time** box.
6. In the **Billable Time** list, select the amount of time spent on the case to be billed to the customer.
If this case is linked to a contract or entitlement, the billable time will be subtracted from the allotted minutes for that contract.
7. Click or tap **Resolve**.
A case resolution activity is created and shown in the **Activities** area. The resolution activity contains information about a resolved case, including the resolution and total time spent on the case. You can reactivate a resolved case at any time.

Edit a case



1. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. **Service** appears on the nav bar.
- c. Then, click or tap **Service > Cases**.

 **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
2. From the list of cases, open the case you want to edit.
 3. When the case is open, make the necessary updates to the case.
 4. When you're done, click or tap **Save**.

Cancel a case

All case activities must to be closed before you can cancel a case.



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
Then, click or tap **Service > Cases**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
2. In the list of active cases, open the case that you want to cancel, and then on the command bar, click or tap **Cancel Case**.
 3. In the **Confirm Cancellation** dialog box, select the case status:
 - **Canceled**: This means the case is canceled. It will no longer be assigned to you.
 - **Merged**: This means the case is merged into another case. When the case is merged, the case activities will be moved to the case it was merged into.
 4. Click or tap **Confirm**.


Reassign a case

If you don't have enough information to resolve a case, or if you think another member in your team has expertise on the subject, you can assign the case to another user or team.




1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
- b. Then, click or tap **Service > Cases**.
- c. Select the case that you want to reassign.
On the command bar, click or tap **More Commands**  and select **Assign**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Service**, and then click or tap **Cases**.
- b. Select the case that you want to reassign.
- c. In the **Collaborate** group, click or tap **Assign**.

Click or tap the **Lookup** button , and select who you want to assign the case to.

3. Click or tap **Assign**.

Add a case to a queue

If you think another group in your team has the expertise on the subject, then you can move the case to a queue so that someone else can pick it up



1. Follow the steps for the app you're using.


▶ **If using the CRM web application**

- a. In the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears in the nav bar.
- b. Click or tap **Service > Cases**.
- c. Select the case that you want to add to a queue.

Click or tap the **More Commands** icon , and select **Add to Queue**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Service**, and then click or tap **Cases**.
- b. Select the cases that you want to add to a queue.
- c. In the **Collaborate** group, click or tap **Add to Queue**.

Click or tap the **Lookup** button , and select the queue that you want to add the case to and then click or tap **Add**.

See Also

Video: How to create, reactivate, and reassign a case (1:47)

[eBook: Give great customer service with CRM](#)

[Quick ref card for customer service reps](#)

[Merge similar cases](#)

[Create and manage parent and child cases](#)

[Find what's assigned to you in a queue](#)

Merge similar cases

Eliminate redundancies between similar cases in Microsoft Dynamics CRM by merging them into one case. When a customer opens multiple cases about the same issue (through different support channels) or when multiple customers from the same account call in about the same issue, you can merge those cases into one case so everything's visible in one place.

For example, when a customer or multiple customers from the same account submit a case on the web and also call in about the same issue, you can merge the cases into one case instead of keeping track of multiple cases.

When a case is merged, the state of the case is changed to canceled and the status is changed to merged. This is because it is merged into another case and all of the open case activities, emails, and attachments are now associated with the case it was merged into. By default you can merge up to 10 cases at a time.

A few things to remember when you merge cases with parent and child relationships:

- When you merge a case that has child cases, then those child cases become child cases of the parent case they were merged into.
- You can only merge a child case into another child case if both of the the child cases have the same parent case.

More information: [Create and manage parent and child cases](#)

Important

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.

- b. Then, click or tap **Service > Cases**.

 **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
-
2. In the list of active cases, select the cases that you want to merge. You must select at least two active cases.
 3. On the command bar, click or tap **Merge Cases**.
 4. In the **Merge Cases** dialog box, from the list of cases, select the case that the other cases will be merged into and then click or tap **Merge**.
 5. To see the merged case, open the case it was merged into, and you'll find the merged case listed under **Case Relationships > Merged Cases**.

See Also

[Create and manage a case](#)

[Create and manage parent and child cases](#)

Video: How to create, reactivate, and reassign a case (1:47)

[eBook: Give great customer service with CRM](#)

[Quick ref card for customer service reps](#)

Create and manage parent and child cases

You can manage multiple cases more efficiently if you use parent and child cases in Microsoft Dynamics CRM. When you need to track a case where work needs to be done by other departments or when you need to track the same issue for multiple customers, you can open a primary case called the parent case, and then create secondary cases called child cases.

For example, if you get a service request to install new electrical and gas connections, this requires work to be done separately by the gas and electric department. In this situation, you can open two child cases, one for the gas and the other for the electric department. The original case is marked as the parent case. Once the child cases are resolved, you can then close the parent case.

Similarly, you can create parent and child cases when multiple customers call in about the same issue, for example, a network outage. Instead of creating a new case for each customer, you can create a parent case to track the main network outage with the Network Operations team, and then create child cases when customers call in about the issue.

Note, a child case can't have a child case.

 **Important**

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

View or add child cases

Create a new child case

When you need to create a child case for the case you're working on, you can quickly do this from the case form.

Important

A case can only have up to 100 child cases.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. Then, click or tap **Service > Cases**.

If using CRM for Outlook

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
2. When the case form is open, do one of the following:
 - On the command bar at the top, click or tap **Create Child Case**.
 - Or, click or tap to expand **Case Relationships**, and next to **Child Case**, click or tap **(+) Add Case record**.
 3. Next, fill in the necessary case information for the child case, and then click or tap **Save**.
 4. To see the child case that was just created, from the parent case, click or tap **Case Relationships**, and you'll see the child case listed under **Child Cases**.

Associate a parent case to a child case

You can create a case and then associate it as child case.

Note

A child case can't have a child case.



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. Then, click or tap **Service > Cases**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
- b. Click or tap **Service > Service > Cases**.

2. Then, do one of the following:

▶ **From your active list of cases, do this:**

- a. Select the cases that you want to associate as parent and child case(s). You must select at least two cases.
- b. On the command bar at the top, click or tap **Associate Child Cases**.
- c. In the **Set Parent Child Relationship** dialog box, from the list of cases, select the case that you want to make the parent case, and then click or tap **Set**.

▶ **From an open case, do this:**

- a. From the open case form, click or tap to expand **Case Relationships**, and next to **Child Case**, click or tap (+) **Add Case record**.
- b. Click or tap the **Lookup** button, and then find the case you want associate as the child case.

Associate a child case to a parent case

You can associate a parent case to a case from the case form.



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. Then, click or tap **Service > Cases**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
2. Open the case that you want to link a parent case to.
 3. From the case form, click or tap the **Parent Case** and use the search to find a case that you want to associate as the parent case for this case.

Resolve a case with a parent and child relationship

Depending on your settings, a case with a parent and child relationship can be closed in one of the following ways:

❗ **Important**

Sometimes, resolving a case action might be blocked based on your current case status. This is because your admin may have set things up so that you only see a limited set of statuses to choose from based on the current status of a case. For more information about the available list of case statuses, contact your administrator.

- When all the child cases are resolved, you can then close the parent case.
- When you resolve the parent case, it will then resolve all the active associated child cases.
- A parent and child case can be closed independently of each other. This is the default setting.



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
Then, click or tap **Service > Cases**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Cases**.
2. In the list of active cases, open the one you want to resolve.
 3. On the command bar, click or tap **Resolve case**.

Important

Before you resolve a parent case with active child cases, make sure that all the case activities are closed. Otherwise, you'll get a warning stating that you need to manually close the open activities or the system will automatically cancel the open activities when the case is resolved. Also, performance may be slow when you close a parent case with lots of active child case associated with it.

4. In the **Resolve Case** dialog box, in the **Resolution Type** list, select how the case was resolved.
5. In the **Resolution** box, type a short explanation of the resolution.
The actual time spent on all activities for this case, as recorded in the **Duration** box in each activity, is filled out automatically in the **Total Time**
6. In the **Billable Time** list, select the amount of time spent on the case to be billed to the customer.
If this case is linked to a contract or entitlement, the billable time will be subtracted from the allotted minutes for that contract.
7. Click or tap **Resolve**.
A case resolution activity is created and shown in the **Activities** area. A case resolution activity contains information about a resolved case, including the resolution and total time spent on the case. You can reactivate a resolved case at any time.

See Also

[Create and manage a case](#)

[Merge similar cases](#)

[eBook: Give great customer service with CRM](#)

[Quick ref card for customer service reps](#)

Video: How to create, reactivate, and reassign a case (1:47)

Add a phone call, task, email, or appointment activity to a case or record

The activity feed helps you keep track of all the interactions with your customers. You don't have open up other windows or apps – you see everything in one place. Whether you or one of your colleagues has contact with a customer, you'll see a record of it in the feed.

Activities are actions or tasks you do when you contact a customer, for example, sending email, making phone calls, taking notes, adding tasks, or setting up appointments. You can create an activity and associate it with a customer, or if you're working on a customer record, you can create an activity that is automatically associated with that customer.

 Add your activities

Add a phone call

 **If using the CRM web application**

1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

▶ **If using CRM for Outlook**

1. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
2. Expand **Customers**, and then click or tap **Contract** or **Accounts**.
3. Open the record you want to add the activity to.
4. If you do not see the **Add Phone Call** area open in the middle of the page, click or tap **Activities > Add Phone Call**.
5. In the Description area, provide a summary of the conversation with the customer. You must fill in this area before you can save the phone call.

The **Call With** field is automatically populated with the customer name you select in the account or contact field. You can select a different contact, account, lead, or user record if required.

6. By default, the direction is set to **Outgoing**. You can change it to **Incoming** by clicking or tapping the **Phone Support** button in the list of case records. To select multiple records, click or tap **Look Up More Records**, and then in the **Look Up Records** dialog box, select the records.
7. Select the **Left voice mail** check box if you make an outgoing call to a customer and leave a voice mail for them. You can also select this check box if a customer leaves a voice mail message when they call you.
8. Click or tap **OK** to save the activity.



Note

By default, every phone call activity that you add in context of a record is marked **Completed** when the record is saved at least once. However, if you add a phone call activity to an unsaved record, or if you create a new activity and then set the **Regarding** field of the activity to another entity record, the activity is set to an **Open** state. You can click or tap the **Complete** link to close the activity as **Completed**. The **Complete** link is available only after you save the case record at least once.

Add a task

▶ **If using the CRM web application**

1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

▶ **If using CRM for Outlook**

1. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
2. Expand **Customers**, and then click or tap **Contract** or **Accounts**.
3. Open the record you want to add the activity to.
4. In the middle of the page, click or tap **Activities** > **Add Task**.
5. Fill in your information. Use the handy tooltips as a guide.
6. The **Owner** field is set to the current user by default. If you want to reassign the task, click or tap the lookup icon, and then select another user or team.
7. Click or tap **OK** to save the task.

Add an email

To add an email activity to a record, you must first save the record you are adding the activity to.

▶ **If using the CRM web application**

1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

▶ **If using CRM for Outlook**

1. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
2. Expand **Customers**, and then click or tap **Contract** or **Accounts**.
3. Open the record you want to add the activity to.
4. In the middle of the page, click or tap **Activities** > **More Commands** *** > **Email**.
5. Fill in your information. Use the handy tooltips as a guide.
6. To save the record, click or tap **Save**.
7. To add an attachment to the email, under **Attachments**, on the right, click or tap **+**.
8. To use a template for the email body, in the email editor, click or tap **Insert Template**, and then select the template.
9. To attach an article to the email, in the email editor, click or tap **Insert Article**, and then add the article.
10. Click or tap **Save**.

Add an appointment

To add an appointment activity to a record, you must first save the record you are adding the activity to.

▶ If using the CRM web application

1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.

▶ If using CRM for Outlook

1. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
2. Expand **Customers**, and then click or tap **Contract** or **Accounts**.
3. Open the record you want to add the activity to.
4. In the middle of the page, click or tap **Activities** > **More Commands** *** > **Appointment**.
5. Fill in your information. Use the handy tooltips as a guide.
6. To save the record, click or tap **Save**.

Create an activity and associate it with a customer

You can also create an activity from the Activity area and then link it to a customer or support case.

1. Click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sale**, **Service**, or **Marketing**, and then select **Activities**.
2. On the command bar, select and add an activity. Fill in your information. Use the handy tooltips as a guide.
3. Use the **Regarding** field on the activity form to associate it with a customer or support case

See Also

[Create and manage a case](#)

Video: How to create, reactivate, and reassign a case (1:47)

[eBook: Give great customer service with CRM](#)

[Quick ref card for customer service reps](#)

Create or edit an appointment

Block time to meet or talk to your customers by using appointments in Microsoft Dynamics CRM. You can modify any of the information in an open appointment. If you change the date and times

of the appointment, Microsoft Dynamics CRM will recheck for schedule conflicts. The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.



1. Create an appointment or a recurring appointment in:

Service Calendar

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
Then, click or tap **Service > Service Calendar**.
- b. On the command bar, click or tap **Appointment** or **Recurring Appointment**.

If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Service > Service > Service Calendar**.

Activities area

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
Click or tap the work area name, and then click or tap **Activities**.
- b. On the command bar, click or tap **Appointment** or **Recurring Appointment**.

If you're using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Sales** or **Service** or **Marketing > My Work > Activities**.

2. Type or change information in the text boxes. Hovertips provide hints about what to enter.
3. If this is a recurring appointment, click or tap **Recurrence** and select the time, pattern, and date range you want.

4. Click or tap **Save**.

If any participants have a schedule conflict, a warning appears. You can click or tap **Ignore and Save** to save the appointment anyway.



Important

If you plan to include appointments in solutions, it is strongly recommended that you don't include only appointments and only recurring appointments in separate solutions. If you install and uninstall separate solutions with different appointment types, you'll encounter a SQL Server error and have to recreate the appointments.



Note

Appointments created in the web application and synchronized with CRM for Outlook automatically set a 15-minute reminder and appear on the Microsoft Outlook calendar. You can change the reminder in Outlook.

See Also

[Navigate the service calendar](#)

[Keep track of notes, tasks, calls, or email with activities](#)

Create and manage activities

Schedule a service activity

Use this form to search for an available time for a service activity. You can either search for an open time using search criteria that, at a minimum, includes selecting a service, or you can define a more complex set of criteria. You can also create a service activity without checking for conflicts in the scheduled service. The service activity appears as a color block on the service calendar. You can't create a recurring service activity. Create individual service activities as needed.

See Also

[Find the next available time before creating a service activity](#)

[Create a service activity without checking for conflicts](#)

Find the next available time before creating a service activity

Avoid conflicts while scheduling services by finding the time the resources are available beforehand.



1. Make sure you have the Scheduler role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Navigate to the service calendar, and open the **Schedule Service Activity** dialog box.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**. Then, click or tap **Service > Service Calendar**.
- b. On the command bar, click or tap **Schedule**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
- b. Click or tap **Service > Service > Service Calendar**.
- c. In the **Actions** group, click or tap **Schedule**.

3. On the **Schedule Service Activity** form, type or change information in the text boxes.

Hovertips provide hints about what to enter.

- Under **Requested Time**, select criteria for the times you want:
 - To search for a time on a specific date, in **Start Date**, select **Specific Date**, and then enter the date you want.
 - To search within a range of dates, select **Range of Dates**, and then enter the **On or After** and **On or Before** dates. You can also select specific days of the week.
 - You can also search for times based on dates relative to the current date, such as **Today**, **Tomorrow**, **This Week**, **Next Week**, or **Next Month**.
 - Similarly, to search within specific range of time, in **Start Time**, select **Specific Time**, **Range of Times**, or **Morning**, **Evening**, **Afternoon**.
 - Do not clear the Use Default Duration check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.

4. Click or tap **Find Available Times**. The next available times are shown.

5. Under **Available Times**, select the time for which you want to schedule the service activity, and then click or tap **Schedule**.

The Schedule Service Activity form closes, and Microsoft Dynamics CRM fills in the information from the selected time in the Service Activity form.

6. Type or modify information in other text boxes, as required.
Hovertips provide hints about what to enter.
7. When you're ready to save your data, click or tap **Save**.
The service activity appears as a color block on the Service calendar.

**Tip**

If you want to find an available time without any time restriction, do not specify any criteria under **Requested Time**, and click or tap **Find Available Times**.

See Also

[Create a service activity without checking for conflicts](#)

[Navigate the service calendar](#)

Create a service activity without checking for conflicts

Make sure you provide timely and efficient service to your customers by creating a service activity that defines who will perform the service and when. In Microsoft Dynamics CRM, a service activity uses one or more resources to perform a service at a specific time and place. You can create a service activity by finding the next available times of resources for a service or simply without checking for conflicts.

You can force a service activity into a time slot to squeeze another service activity into the leftover time from a previous service activity.

If you save a service activity without finding available times in the schedule, then Microsoft Dynamics CRM displays the service activity in the schedule without checking for conflicts.

One reason to force a service activity into a time slot is to squeeze another service activity into the leftover time from a previous service activity.



1. Make sure you have the Scheduler security role or equivalent permissions in Microsoft Dynamics CRM.
2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
Service appears on the nav bar.
- b. Then, click or tap **Service > Service Calendar**.

 **If using CRM for Outlook**

- a. Click or tap your organization.
 - b. Click or tap **Service > Service > Service Calendar**.
3. On the command bar, click or tap **Service Activity**.
 4. On the Service Activity form, type or change information in the text boxes.
Hovertips provide hints on what to enter.
 5. When you're ready to save your data, click or tap **Save**.



Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.



Note

- If at any time before you save this service activity you want to search the schedule for an available time, you can click or tap **Schedule** in the **Actions** group to open the **Schedule Service Activity** dialog box.
- To check the schedule for conflicts, in **Service Calendar**, in the **Actions** group, click or tap **Conflicts**.

See Also

[Navigate the service calendar](#)

[Find the next available time before creating a service activity](#)

[Basics of service and service scheduling](#)

[Create or edit a service](#)

Manage queue items

Assign an activity to a user or queue

If you would like another person in your organization to work on an activity, you can assign the activity to that person or move it to another queue.

Assign to other user or team



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap **Activities**.

In the list of activities, select the activity that you want, and on the command bar, click or tap **More Commands** (**), and then click or tap **Assign**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **My Work**, and then click or tap **Activities**.
- c. In the list of records, click or tap the record that you want.
- d. In the **Collaborate** group, click or tap **Assign**.

2. In the **Assign to another user or team** field, click or tap **Lookup**, and select the user or team you want to assign the activity to.

If you don't see the user or team you are looking for, click or tap **Lookup**, and then click or tap **Look Up More Records**. From the **Look for** drop-down list, select **User** or **Team**. In the **Search** box, type the name, click or tap the search button, and then click or tap the name to select it. Click or tap **Add**.

3. Click or tap **Assign**.

Add to a queue



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap **Activities**.

In the list of activities, select the activity that you want, and on the command bar, click or tap **More Commands** (**), and then click or tap **Add to Queue**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **My Work**, and then click or tap **Activities**.
- c. In the list of records, click or tap the record that you want.
- d. In the **Collaborate** group, click or tap **Add to Queue**.

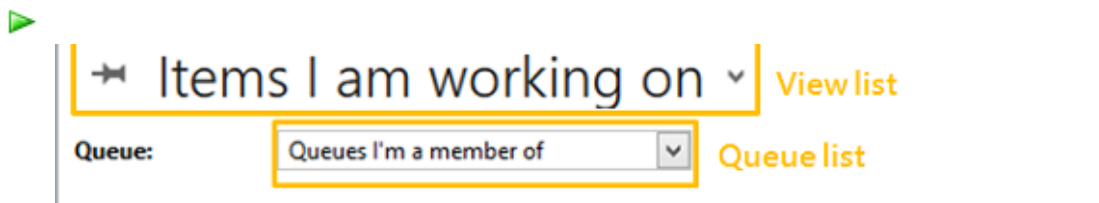
2. In the **Queue** field, click or tap **Lookup**, and select the queue you want to route the activity to, and click **Add**.

Find what's assigned to you in a queue

Quickly see the items assigned to you or that are available to work on by using queues in Microsoft Dynamics CRM. Think of them as a to-do list that helps you organize your work

Find the queue items

Use the View list and Queue list to filter and find items in queues.



▶ **Find all cases in selected queues**

- a. To see all cases from the selected queue, in the **View** list, click or tap **All Cases in Selected Queues**.
- b. In the **Queue** list, choose one of the following options to filter cases based on queues:
 - <Individual queues>
 - All Queues
 - All Public Queues.
 - Queues I'm a member of

▶ **Find all items in queues**

- a. To see all cases from the selected queue, in the **View** list, click or tap **All Items in Selected Queues**.
- b. In the **Queue** list, choose one of the following options to filter cases based on queues:
 - <Individual queues>
 - All Queues
 - All Public Queues.
 - Queues I'm a member of

▶ **Find cases that are available to work on**

- a. To see only the cases that no one else is working on, in the **View** list, click or tap **Cases Available to Work On**.
- b. In the **Queue** list, choose one of the following options to filter items based on queues:
 - <Individual queues>
 - All Queues
 - All Public Queues
 - Queues I'm a member of

▶ **Find cases that you're working on**

- a. To see only the cases that you're currently working on, in the **View** list, click or tap **Cases I am Working on**.
- b. In the **Queue** list, choose one of the following options to filter the cases based on queues:
 - <Individual queues>

- All Queues
- All Public Queues
- Queues I'm a member of

▶ **Find items available to work on**

- To see only items (activities and cases) that no one else is working on, in the **View** list, click or tap **Items available to work on**.
- In the **Queue** list, choose one of the following options to filter items:
 - <Individual queues>
 - All Queues
 - All Public Queues
 - Queues I'm a member of

▶ **Find items that you're working on**

- To view only items that you're currently working on, in the **View** list, click or tap **Items I am working on**.
- In the **Queue** list, choose one of the following options to filter items:

Pick an activity or case to work on



- In the **View** list, select one of the views that show the items or cases available to work on.
- Select the case or item that you want to work on, and on the command bar, click or tap **Pick**.

You also have an option to remove the item from the queue once you pick it up.

When you pick an activity or a case, it gets assigned to you. The **Worked By** field (in the list of queue items) is also set to you if you leave the activity or case in the queue.

Release an item or case that you're working on so someone else can pick it up



- In the **View** list, select one of the views that show the items or cases you're working on.
- Select the case or item that you want to release, and on the command bar, click or tap **Release**.

When you release an item, your name is removed from the **Worked By** field, and the item is no longer assigned to you; it's assigned to the queue owner.

Route an activity or case to another queue or assign to a different user or team



1. Select the case that you want to move to another queue, and on the command bar, click or tap **Route**.
2. To move an activity or case to a different queue, click or tap **Route**, and select a queue.

-OR-

To assign the activity or case to another user or team to work on, click or tap **User/Team**, and select the user or team. When you assign the activity or case to someone else to work on, the **Worked By** field is set to that user or team. You also have the option to remove the item from the queue.

Remove an activity or case from a queue



1. In the **View** list, select one of the views that show the items you want to remove.
2. Select the activity or case, and on the command bar, click or tap **Remove**.

See Also

[Create and manage a case](#)

[Add a phone call, task, email, or appointment activity to a case or record](#)

Video: How to create, reactivate, and reassign a case (1:47)

[eBook: Give great customer service with CRM](#)

[Quick ref card for customer service reps](#)

Use the Unified Service Desk

Unified Service Desk Base package

Unified Service Desk (USD) is a desktop application that helps your customer service agents provide phone, email, and chat support to your customers. USD provides a configurable framework to quickly build an Agent Desktop application that's integrated with Microsoft Dynamics CRM. With USD you can quickly make a customized agent desktop application by leveraging the User Interface Integration (UII) framework.

With the Unified Service Desk Base package, the following components are installed:

- User Interface Integration Solution
- Unified Service Desk Solution
- Data required for Microsoft Dynamics CRM and customizations

For more information on how to set up and administer USD see the, [Unified Service Desk Administration guide](#).

Here's what you'll see when you install the Base package:

1. **Left Nav:** Opens the left navigation area that you can open or collapse.
2. **Dashboards:** Opens the CRM customer service dashboard.
3. **My Work:** Shows a list of all the active cases assigned to a service rep.
4. **Search:** Opens search for navigating through various entities. For this package you can search for Accounts and Contacts.
5. **Session tabs:** When you have multiple customer sessions open, each tab shows the different session. The tabs make it easy for an agent to work on multiple customer cases.
6. **Session overview:** Shows relevant information about the customer.
7. **Call Script:** Shows call scripts that the service agent can use when they're working on a case. The scripts help guide the agent by giving them step-by-step instructions on how to handle the case.
8. **Notes:** This is the area to take notes in regarding the case.

View active cases

- From the toolbar, click or tap **My Work** to see all of your active cases and then select a case to work on. When you open a case, a new session opens.

Create a case

1. Look up the contact information. From the toolbar click or tap **Search**.
2. In the **Search** field, enter the contact information.
3. When you find the contact information, click or tap the record to open a new session.
4. In the left nav **Call Script** area, use the of list call scripts to guide you through the support case.
 - When you click or tap a call script, a green checkmark displays to indicate that the action has been performed.
5. Enter your case notes in the **Notes** area. To attach your notes to the case, click or tap **Update notes** from call scripts.

Search for solutions

To help you resolve the case you, you can use the knowledge base articles or Bing search to help find a solution.

1. From the **Call script** area, click or tap the **Search for solutions** call script.

2. Then click or tap on one of the following:

- **KB articles:** Use the search to find articles that can help you resolve the case
- **Bing search:** The title automatically populates in the Bing search box.

Send an email

- From the list of call scripts click or tap the **Send email** call script and then select a template that automatically populates the body of the email.

Resolve a case

- To resolve a case, from the **Call Script** area, click or tap the **Resolve Case** call script.

Unified Service Desk for CRM 2013 SP1 with product updates package

Unified Service Desk (USD) is a desktop application that helps your customer service agents provide phone, email, chat, and social media support to your customers. USD provides a configurable framework to quickly build an Agent Desktop application that's integrated with Microsoft Dynamics CRM. With USD you can quickly make a customized agent desktop application by leveraging the User Interface Integration framework.

With the Unified Service Desk for Microsoft Dynamics CRM 2013 Service Pack 1 package with product updates, the following components are installed:

- User Interface Integration Solution
- Unified Service Desk Solution
- Customizations for this package
- Data required for Microsoft Dynamics CRM and customizations
- KPI Custom Control
- Customer Information System

This package automatically populates the sample data for the new features introduced through product updates, such as:

- Entitlements
- Service level agreements (SLAs)
- Routing rules
- Automatic case creation rules
- Customer service schedule

For more information on how to set-up and administer USD see the, [Unified Service Desk Administration guide](#)

Here's what you'll see when you install USD:

1. **Left Nav:** Opens the left navigation area that you can open or collapse.
2. **Dashboards:** Opens the CRM customer service dashboard.
3. **My Work:** Shows a list of all the active cases assigned to a service rep.
4. **Search:** Opens search for navigating through various entities. For this package you can search for accounts, contacts, cases, activities, and queues.
5. **Reminder:** Shows a list of your activity reminders.
6. **Applications:** Shows custom applications for this package. When you're working on a customer session, this shows global applications and session specific applications.
7. **Session tabs:** When you have multiple customer sessions open, each tab shows the different session. The tabs make it easy for an agent to work on multiple customer cases.
8. **Session overview:** Shows the relevant information about the customer.
9. **Call Script:** Shows call scripts that the service agent can use when they're working on a case. The scripts help guide the agent by giving them step-by-step instructions on how to handle the case.
10. **Notes:** This is the area to take notes in regarding the case.
11. **KPI Control:** Shows Key Performance Indicators (KPI) such as Average Case Resolution Time, Number of Cases Resolved, and Customer Satisfaction.
12. **Session timer:** Shows how long a service rep has been on the session.

View your activities

- From the toolbar, click or tap **My Work** to see all of your activities.

Create a case

1. Look up the contact information. From the toolbar click or tap **Search**.
2. In the **Search** field, enter the contact information.
3. When you find the contact information, click or tap the record to open a new session.
4. In the left nav **Call Script** area, use the list of call scripts to guide you through the support case.
 - When you click or tap a call script, a green checkmark displays to indicate that the action has been performed.
5. Enter your case notes in the **Notes** area. To attach your notes to the case, click or tap **Update notes** from call scripts.

Locate a customer

When you are working on a customer session, if you want to find the location of your customer, use Bing Maps.

- From the toolbar click or tap, **Applications > Locate the customer**. Then use Bing Maps to look up the customer's location. This will open Bing Maps and automatically populate the address of the customer in the **Search** field.

Search for solutions

To help you resolve the case you, you can use the knowledge base articles or Bing search to help find a solution.

1. From the **Call script** area, click or tap the **Search for solutions** call script.
2. Then click or tap on of the following:

- **KB articles:** use the search to find articles that can help you resolve the case
- **Bing search:** the title automatically populates in the Bing search box.

Send an email

- From the list of call scripts click or tap the **Send email** call script and then select a template that automatically populates the body of the email.

Resolve a case

- To resolve a case, from the **Call Script** area, click or tap the **Resolve Case** call script.

When the case is resolved, the time spent on the case gets updated in **Actual Service Unit** field of case form. The KPI control is also updated with the number of cases and average handling time.

Unified Service Desk for CRM 2013 SP1 package

Unified Service Desk (USD) is a desktop application that helps your customer service agents provide phone, email, chat, and social media support to your customers. USD provides a configurable framework to quickly build an Agent Desktop application that's integrated with Microsoft Dynamics CRM. With USD you can quickly make a customized agent desktop application by leveraging the User Interface Integration framework.

With the Unified Service Desk for Microsoft Dynamics CRM 2013 Service Pack 1 package, the following components are installed:

- User Interface Integration Solution
- Unified Service Desk Solution
- Customizations for this package

- Data required for Microsoft Dynamics CRM and customizations
- KPI Custom Control
- Customer Information System

For more information on how to set up and administer USD, see the [Unified Service Desk Administration guide](#).

Here's what you'll see when you install USD:

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2. **Dashboards:** Opens the CRM customer service dashboard.
3. **My Work:** Shows a list of all the active cases assigned to a service rep.
4. **Search:** Opens search for navigating through various entities. For this package you can search for accounts contacts, cases, activities, and queues.
5. **Reminder:** Shows a list of your activity reminders.
6. **Applications:** Shows custom applications for this package. When you're working on a customer session, this shows global applications and session specific applications.
7. **Session tabs:** Each tab shows a different session when you have multiple customer sessions open. The tabs make it easy for an agent to work on multiple customer cases.
8. **Session overview:** Shows relevant information about the customer.
9. **Call Script:** Shows call scripts that the service agent can use when they're working on a case. The scripts help guide the agent by giving them step-by-step instructions on how to handle the case.
10. **Notes:** Shows an area to take notes in regarding the case.
11. **KPI Control:** Shows Key Performance Indicators (KPIs) such as Average Case Resolution Time, Number of Cases resolved and Customer Satisfaction.
12. **Session timer:** Shows how long a service rep has been on the session.

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- From the toolbar, click or tap **My Work** to see all of your activities.

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1. Look up the contact information. From the toolbar, click or tap **Search**.
2. In the **Search** field, enter the contact information.
3. When you find the contact information, click or tap the record to open a new session.
4. In the left nav **Call Script** area, use the list of call scripts to guide you through the support case.

- When you click or tap a call script, a green checkmark displays to indicate that the action has been performed.

5.

Enter your case notes in the **Notes** area. To attach your notes to the case, click or tap **Update notes** from call scripts.

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When you are working on a customer session, if you want to find the location of your customer, use Bing Maps.

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Resolve a case

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When the case is resolved, the time spent on the case gets updated in **Actual Service Unit** field of case form. The KPI control is also updated with number of cases and average handling time.

Work with marketing campaigns

Get started with CRM marketing

Promote your business and improve sales with targeted marketing campaigns in Microsoft Dynamics CRM. Create activities for each campaign and assign them to different team members. Track customer response and costs for each campaign. Follow this step-by-step guide to get started with your marketing campaigns.

**Note**

The Marketing work area within CRM provides basic marketing features and gets you started with running marketing campaigns. Microsoft Dynamics Marketing takes you to the next level by providing deep customer insights and behavioral data to help plan and analyze your campaigns, greater functionality for automation and collaborating with team members, and social media integration. More information: [Microsoft Dynamics Marketing Help Center](#)

Import contacts, accounts, and leads

Get your customer records into Microsoft Dynamics CRM, and add these to marketing lists so you can target your campaigns. More information: [Import accounts, leads, or other data](#)

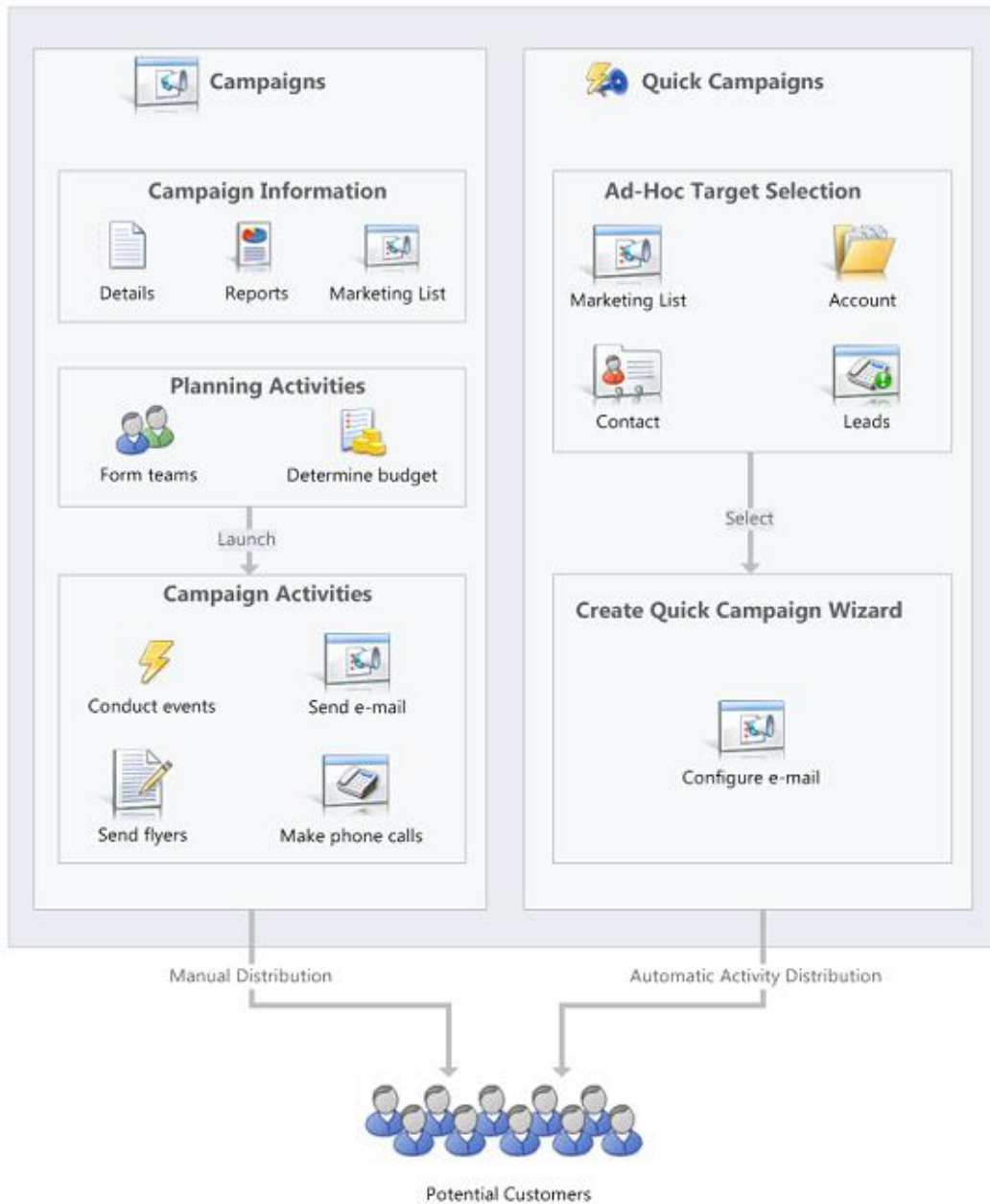
Create marketing lists

Group accounts, contacts, or leads into a targeted marketing list. You can create a marketing list easily with the search functionality in Microsoft Dynamics CRM, so you find all of your customers in a particular area, for example, and add them to the member list. More information: [Create a marketing list in the CRM marketing work area](#)

Understand the difference between a campaign and a quick campaign

In Microsoft Dynamics CRM, use standard campaigns to manage the end-to-end process of a complete marketing campaign, like managing campaign and planning activities, distributing the activities to other team members, and tracking how the campaign did. Campaigns include extensive tracking features, including detailed information, reports, and multiple marketing lists.

In contrast to standard campaigns, use quick campaigns to automatically distribute a single activity to selected accounts, contacts, or leads, or to a single marketing list. The effects of a quick campaign are immediate.



Create a campaign or a quick campaign

Depending on your requirement, track your marketing activities through a campaign or a quick campaign. More information: [Create or edit a campaign in the CRM marketing work area](#), [Create a quick campaign in the CRM marketing work area](#)

Track a campaign response

Record the replies you get from the potential customers in response to a specific marketing campaign to make sure your team can act on the responses. Measure the success of specific campaign activities based on their response rates. More information: [Track a campaign response in the CRM marketing work area](#)

See how your campaigns are doing with default marketing reports

Use one of the following reports to assist you in monitoring and analyzing marketing activities:

- **Campaign Activity Status:** Use this report to track a campaign. The report displays a summary for one campaign.
- **Campaign Comparison:** Use this report to identify your most and least successful campaigns.
- **Campaign Performance:** Use this report to track the progress and status of your campaigns.

Let your customers unsubscribe from marketing communications

You can enable customers to unsubscribe from email marketing communications your organization sends them.

More information: [System Settings dialog box - Marketing tab](#)

Note that you cannot add unsubscribe functionality to direct email or email templates.

See Also

[Create a marketing list in the CRM marketing work area](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#)

[Create or edit a campaign template in the CRM marketing work area](#)

[Track a campaign response in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

Create a marketing list in the CRM marketing work area

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The CRM Marketing work area provides a way for your sales force to run sales-driven marketing activities. If you use Microsoft Dynamics Marketing along with CRM, you might be looking for a similar topic for that product. Microsoft Dynamics Marketing provides a full-scale, integrated set of functionality, automation, and analytical insights for multistage and multichannel campaigns.

More information: [Microsoft Dynamics Marketing Help Center](#)

Your marketing list is the core of running a successful marketing campaign. It can include any one type of customer record, such as leads, accounts, or contacts.

You can create two types of marketing lists:

- **Static** Use a static list if you prefer to add and update members manually.
- **Dynamic** Use a dynamic marketing list if you want the list to return a list of members dynamically when needed, based on search criteria you set. For example, if you want to run a campaign to members of a specific city, use a dynamic list. A dynamic marketing list retrieves the updated list of members each time you open the list, create a quick campaign from this marketing list, or distribute a campaign activity for a campaign associated with this marketing list.

Create a marketing list



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**.
Marketing appears on the nav bar.
- b. Click or tap **Marketing > Marketing Lists**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Marketing > Marketing > Marketing Lists**.
2. Click or tap **New**.
 3. Add or change the information in the **Summary** area. This screenshot provides an example.

Summary

Information

Name	*	Los Angeles Customers
List Type	*	Dynamic
Purpose		Email new offerings
Targeted At	*	Contact
Source		LA user group
Currency		US Dollar
Modified On		3/10/2014 3:22 PM
Cost		\$200.00
Last Used On		--
Locked		No
Owner	*	First name Last name
Description		--



Note

To look up records in the **Owner** field, first click or tap **Save**, or you'll lose your changes.

4. Click or tap **Save** so you can enter information in other areas of the form.
5. Add any other information that applies to your marketing list in the **Notes** area.
6. Click or tap **Save**.

Add members to a marketing list

Add members to a static marketing list



In any marketing list record, in the **Members** area, click or tap the **Add +** button.

2. In the **Manage Members** dialog box, click or tap one of the following options, and then click or tap **Continue**.

Add using Lookup

- a. In the **Look Up Records** dialog box, select your search criteria.
- b. Select the records that you want to add, click or tap **Select**, and then click or

tap **Add**.

▶ Add using Advanced Find

- a. In the **Add Members** dialog box, click or tap **Select**, and then click or tap the field on which you want to search, such as **Account Name** or **City**. You can select fields from the current record type, or from related record types. When you select a related record type, a new line appears with another Select list for the related record type.
- b. Click or tap **Equals**, and then click or tap a query relational operator (for example **Contains** or **Begins With**).
- c. Click or tap **Enter Text**, and then type the value that you want to locate.
- d. To specify the columns to include in the search results, click or tap **Edit Columns**, and then **Add Columns**. Then select the columns that you want to add, and click or tap **OK**.
- e. Click or tap **Find**.
- f. Select the members that you want to add, click or tap one of the following, and then click or tap **Add to Marketing List**.
 - Add only the selected members to the marketing list
 - Add all the members returned by the search to the marketing list

▶ Remove using Advanced Find

- a. In the **Add Members** dialog box, click or tap **Select**, and then click or tap the field on which you want to search, such as **Account Name** or **City**. You can select fields from the current record type, or from related record types. When you select a related record type, a new line appears with another Select list for the related record type.
- b. Click or tap **Equals**, and then click or tap a query relational operator (for example **Contains** or **Begins With**).
- c. Click or tap **Enter Text**, and then type the value that you want to locate.
- d. To specify the columns to include in the search results, click or tap **Edit Columns**, and then **Add Columns**. Then select the columns that you want to add, and click or tap **OK**.
- e. Click or tap **Find**.
- f. Select the members that you want to remove, click or tap one of the following, and then click or tap **Remove from Marketing List**.
 - Remove only the selected members from the marketing list
 - Remove all the members returned by the search from the marketing list

▶ Evaluate using Advanced Find

- a. In the **Add Members** dialog box, click or tap **Select**, and then click or tap the field on which you want to search, such as **Account Name** or **City**. You can select fields from the current record type, or from related record types. When you select a related record type, a new line appears with another Select list for the related record type.
- b. Click or tap **Equals**, and then click or tap a query relational operator (for example **Contains** or **Begins With**).
- c. Click or tap **Enter Text**, and then type the value that you want to locate.
- d. To specify the columns to include in the search results, click or tap **Edit Columns**, and then **Add Columns**. Then select the columns that you want to add, and click or tap **OK**.
- e. Click or tap **Find**.
- f. Select the members that you want to keep, click or tap one of the following, and then click or tap **Update Marketing List**.
 - Keep only the selected members in the marketing list
 - Keep all the members returned by the search in the marketing list

Define the member selection criteria for a dynamic marketing list



In any marketing list, in the **Members** area, click or tap the **Add +** button.

2. In the **Manage Members** dialog box, click or tap **Select**, and then click or tap the field on which you want to search, such as **Account Name** or **City**. You can select fields from the current record type, or from related record types.

When you select a related record type, a new line appears with another **Select** list for the related record type.

3. Click or tap **Equals**, and then click or tap a query relational operator.
4. Click or tap **Enter Value**, and then type the value that you want to locate (for example, "Seattle" or "Email").

For some values, you can click or tap the **Lookup** icon to open the **Select Values** dialog box and select the value you want.

5. To specify the columns to include in the search results, click or tap **Edit Columns**, and then **Add Columns**. Select the columns that you want to add, and click or tap **OK**.
6. Click or tap **Use Query** to add the matching records to your dynamic marketing list.

Associate campaigns or quick campaigns to a marketing list

After you have created a campaign or quick campaign, you can associate it to your marketing list. You can also create a new campaign or quick campaign from your marketing list.



In the **Campaigns** or **Quick Campaigns** area, click or tap click or tap the **Add +** button.

2. Search for the campaign or quick campaign you want to associate to this marketing list.



Note

If you don't have any campaigns, or if you want to create a new one, you can click or tap **+ New**.

If you don't have any quick campaigns, the Quick Campaign Wizard will start.

See Also

[Get started with CRM marketing](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#)

[Track a campaign response in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

Create or edit a campaign in the CRM marketing work area

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The CRM Marketing work area provides a way for your sales force to run sales-driven marketing activities. If you use Microsoft Dynamics Marketing along with CRM, you might be looking for a similar topic for that product. Microsoft Dynamics Marketing provides a full-scale, integrated set of functionality, automation, and analytical insights for multistage and multichannel campaigns.

More information: [Microsoft Dynamics Marketing Help Center](#)

Promote your business, expand your reach to new customers, and improve sales by using campaigns in Microsoft Dynamics CRM. Use campaigns to store all your marketing information and activities, and to measure the success of your efforts. Campaigns contain planning tasks and campaign activities you need to manage for the marketing campaigns.

Add strategic campaign information to your campaign, such as:

- Budgets and expenses
- Promotion codes
- Target products
- Marketing collateral, including sales literature
- Target marketing lists

Campaigns can include whatever planning activities you want to perform before you launch the campaign, and also the campaign activities you want to manage as part of the campaign. More information: [Add an activity to a campaign in the CRM marketing work area](#)

The screenshot shows the 'New ad campaign (sample)' form in Microsoft Dynamics CRM. The form is divided into several sections: Summary, CAMPAIGN, ACTIVITIES, NOTES, MARKETING LISTS, LEADS, and CAMPAIGN ACTIVITIES. Callouts with orange boxes and lines point to specific areas of the form:

- Add campaign information:** Points to the Summary section, which includes fields for Name, Campaign Code, Currency, Campaign Type, and Expected Response.
- Add planning activities:** Points to the ACTIVITIES section, which includes a 'Randy Blythe' activity with a phone icon and a note 'Modified by Randy Blythe Today'.
- Add marketing lists:** Points to the MARKETING LISTS section, which includes a table with columns for Name, Members Count, and Owner. The table contains one entry: 'Los Angeles Customers'.
- Add leads:** Points to the LEADS section, which includes a table with columns for Name, Owner, and Status. The table contains one entry: 'Brad Glasgow' with Owner 'Randy Blythe' and Status 'Open'.
- Add campaign activities:** Points to the CAMPAIGN ACTIVITIES section, which includes a table with columns for Subject and Channel. The table contains two entries: 'Prepare brochure' and 'Letter via Mail...'.



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**. Then, click or tap **Marketing > Campaigns**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
- b. Click or tap **Marketing > Marketing > Campaigns**.

2. To create a new campaign, click or tap **New**.
- OR -
To edit a campaign, open a campaign from the list.
3. Add or change information in the text boxes.
 - a. In the **Campaign** section, enter the campaign details such as, name, type, and the expected response rate.
 - b. In the **Schedules** section, enter the proposed and actual start and end dates of the campaign.
 - c. Under **Financials**, enter details about the cost of the campaign and campaign activities, and the budget and revenue of the campaign.
 - d. To track conversations in the planning phase of the campaign, in the **Activities** area, add activities. More information: [Add a phone call, task, email, or appointment activity to a case or record](#)
4. When you're ready to save your data, click or tap **Save**.
5. To add a marketing list to the campaign, in the **Marketing Lists** area, click or tap **+**, and in the **Look Up Records** dialog box, find and select a marketing list.
6. To create planning and campaign activities for your campaign, for example, identifying advertising channels or prepare campaign communications to send to the members on the marketing lists, see [Add an activity to a campaign in the CRM marketing work area](#).

See Also

[Create or edit a campaign template in the CRM marketing work area](#)

[Create a marketing list in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#)

[Track a campaign response in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

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More information: [Microsoft Dynamics Marketing Help Center](#)

Send an e-mail blast to customers who fit a specific demographic, a mail campaign to clients in a specific region, or perhaps a phone call campaign to previous buyers of a particular product by

using a quick campaign in Microsoft Dynamics CRM. A quick campaign is a single campaign activity geared toward a targeted audience. Track the success of your quick campaign through campaign responses, and convert the positive responses into new leads, quotes, orders, or opportunities.

Create a Quick Campaign

Select the Activity Type and Owners

Activity Type:

- Phone Call
- Appointment
- Letter
- Fax
- Email

Select who will own these new activities.

Assign these activities to:

- Me
- The owners of the records that are included in the quick campaign
- Assign to another user or team

Add the created activities to a queue

Select whether email activities should be closed.

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

<Back Next> Cancel

If you need to perform more than one activity for your campaign, such as an email blast and a mailing, create a new campaign instead. More information: [Create or edit a campaign in the CRM marketing work area](#)



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**. Then, click or tap **Marketing > Marketing Lists**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Marketing > Marketing > Marketing Lists**.

Open a record, and then in the **Quick Campaigns** area, click or tap the **Add** button **+**.

3. In the Quick Campaign Wizard, read the instructions on the Welcome page, and click or tap **Next**.
4. Specify a name for the quick campaign.
5. Select the type of activity you want to create.

You can also select who you want Microsoft Dynamics CRM to assign the activity to and whether CRM should perform the activity automatically for appropriate activities, such as sending email messages. For example, if you are creating a phone call activity for all the sales representatives, you can select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative can then see the activity and take action on it. However, if you are creating a large number of email activities that CRM will perform automatically, you can assign the email activity to yourself instead of the record owners.

6. Add or change information in the text boxes in the activity form, and click or tap **Next**.
7. Click or tap **Create**.



Note

You can't add records to a quick campaign after you create it.

See Also

[Get started with CRM marketing](#)

[Create a marketing list in the CRM marketing work area](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

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More information: [Microsoft Dynamics Marketing Help Center](#)

Make your marketing campaigns successful by creating, distributing, and assigning planning and campaign activities in Microsoft Dynamics CRM. Planning activities are those you want to perform before you launch the campaign, and campaign activities are those you want to manage as part of the campaign. Examples of planning and campaign activities you can add include:

- Identify advertising channels and supporting materials
- Contact media channels to reserve time or space for advertising
- Create or refine target marketing lists
- Contact a design agency to request creation of collateral pieces and advertising materials

By default, a campaign targets an activity to the group of marketing lists that you select for the campaign. If you want to run a campaign activity on a subset of your marketing lists, you can distribute the activity to certain members instead.

Add a planning activity to a campaign




1. Follow the steps for the app you're using.

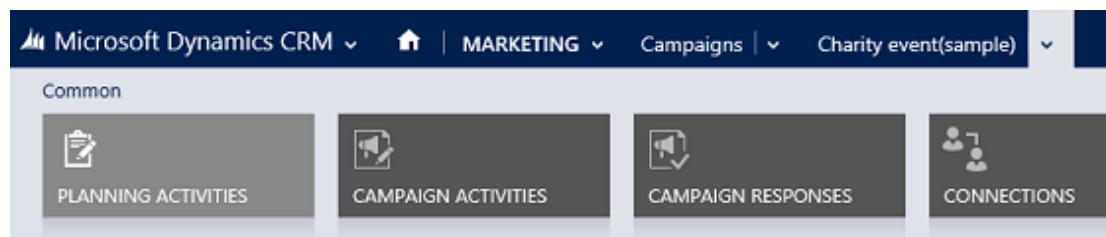
If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**.
- b. Then, click or tap **Marketing > Campaigns**.

If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Marketing > Marketing > Campaigns**.

In the campaign record you want to add the planning activity to, on the nav bar, click or tap the down arrow  next to the campaign you're working on and then click or tap **Planning Activities**.



3. To add a new activity, on the command bar, click or tap **Add New Activity**, and then select the type of activity you want to create.

-OR-

To add an existing activity, click or tap **Add Existing Activity**. In the inline lookup field, search for and select the activity.

4. In the new activity form, add or change information in the text boxes.
5. When you're ready to save your data, click or tap **Save**.

Add a campaign activity to a campaign



1. Follow the steps for the app you're using.

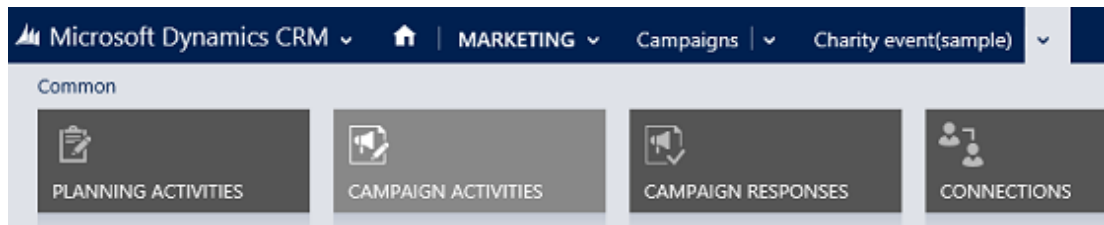
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- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**.
- b. Then, click or tap **Marketing > Campaigns**.

If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Marketing > Marketing > Campaigns**.

In the campaign record you want to add the planning activity to, on the nav bar, click or tap the down arrow next to the campaign you're working on and then click or tap **Campaign Activities**.



3. In the new campaign activity form, add or change information in the text boxes. Specify the campaign activity's priority and the amount of budget your organization wants to allocate to the activity.
4. Under **Marketing Lists**, you'll see the marketing list that you had added to the main campaign if you'd chosen to add it to the campaign's undistributed campaign activities, too.



Note

Before you can see any items under **Marketing Lists**, you have to create and

save the activity record.

If a marketing list isn't added, click or tap **+**. In the inline lookup box, click or tap the **Search** button, and select a marketing list that's already added to the main campaign.

5. When you're ready to save your data, click or tap **Save**.
6. To distribute the new campaign activity, on the command bar, click or tap **Distribute Campaign Activity**.
7. In the activity form, type or modify information in the text boxes, and click or tap **Distribute**.
8. Choose who will own the activities, and click or tap **Distribute**.



Note

You can only distribute campaign activities of type "mail merge" to marketing lists that contain the same type of record. For example, if one marketing list contains accounts and a second marketing list contains leads, the mail merge campaign activity will fail. Create a separate mail merge campaign activity for each group of marketing lists with the same record type.

9. After all the distributed activities are closed, you can close the campaign activity. To close the campaign activity, open the campaign activity record, and on the command bar, click or tap **Close Campaign Activity**. Set an appropriate status for the activity, and click or tap **OK**.
10. When the activity is completed, update the campaign activity record with the actual costs. Open the campaign activity and update the **Actual Cost** field. This can help guide you in planning future campaign activities.

See Also

[Get started with CRM marketing](#)

[Create a marketing list in the CRM marketing work area](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#)

[Track a campaign response in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

Add a marketing list, sales literature, or product to a campaign

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The CRM Marketing work area provides a way for your sales force to run sales-driven marketing activities. If you use Microsoft Dynamics Marketing along with CRM, you might be looking for a similar topic for that product. Microsoft Dynamics Marketing provides a full-scale, integrated set of functionality, automation, and analytical insights for multistage and multichannel campaigns.

More information: [Microsoft Dynamics Marketing Help Center](#)

Add all items to your campaign that you need in this marketing context. Usually you need to add marketing lists, but you might also want to refer campaigns to products and related campaigns, or you might want to add sales literature that documents sales procedures.



1. Follow the steps for the app you're using.

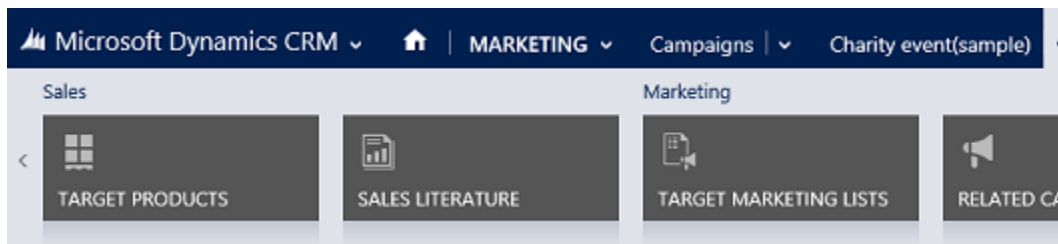
▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**.
- b. Then, click or tap **Marketing > Campaigns**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Marketing**, and then click or tap **Campaigns**.

2. Click or tap the name of the campaign that you want to add a list, product, or sales literature to. In the nav bar, click or tap the down arrow next to your campaign.




The following table shows what you need to do to add each type of item.

To add	Do this
A marketing list	Under Marketing , click or tap Target Marketing Lists , and then in the Records group, click or tap Add Existing Marketing List .
A product	Under Sales , click or tap Target Products , and then in the Records group,

	click or tap Add Existing Product .
Sales literature	Under Sales , click or tap Sales Literature , and then in the Records group, click or tap Add Existing Sales Literature .
A related campaign	Under Marketing , click or tap Related Campaigns , and then in the Records group, click or tap Add Existing Campaign .

3. Select the type of record you want in the **Look Up Records** dialog box, in the **Look for** list.

Type the first few letters of the name of the record to narrow your search in the **Search** box, and then click or tap the **Find** button .

5. Select the check boxes for the records that you want to add in the list of records that appears, click or tap **Add**, and then click or tap **OK**.
6. Click or tap **Save** or **Save and Close**.

 **Note**

To verify that the item you selected was added to the campaign, reopen the campaign. Under **Marketing**, click or tap **Target Marketing Lists**, or under **Sales** click or tap either **Target Products** or **Sales Literature**. The information you added appears in the list.

See Also

[Get started with CRM marketing](#)

[Create a marketing list in the CRM marketing work area](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

[Track a campaign response in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

Track a campaign response in the CRM marketing work area

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The CRM Marketing work area provides a way for your sales force to run sales-driven marketing activities. If you use Microsoft Dynamics Marketing along with CRM, you might be looking for a similar topic for that product. Microsoft Dynamics Marketing provides a full-scale, integrated set of

functionality, automation, and analytical insights for multistage and multichannel campaigns.
More information: [Microsoft Dynamics Marketing Help Center](#)

Record the replies you get from potential customers in response to a specific marketing campaign to make sure your team can act on the responses. Measure the success of specific campaign activities based on their response rates. You can manually create campaign responses in Microsoft Dynamics CRM or have CRM generate them automatically.

Create campaign responses manually



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**.
- b. Then, click or tap **Marketing > Campaigns**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap **Marketing > Marketing > Campaigns**.

Click or tap the campaign that you want to add campaign responses to, and under **Responses**, click or tap **Add +**.

3. Add information in the **Campaign Response** form.
4. Click or tap **Save**.

Create campaign responses automatically



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Marketing** tab.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap the **Settings > System > Administration > System Settings > Marketing** tab.

3. Set the **Create campaign responses for incoming email** option to **Yes**.

See Also

[System Settings dialog box - Marketing tab](#)

[Get started with CRM marketing](#)

[Create a marketing list in the CRM marketing work area](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#)

[Create or edit a campaign template in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

Create and run reports

Add a report

If you've created a custom report outside of Microsoft Dynamics CRM, you can easily add it to CRM.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Reports**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Workplace**, and then under **My Work** click or tap **Reports**.

2. Click or tap **New**.

Add a file created in another application

- a. In the **Source** section, in the **Report Type** box, select **Existing File**.
- b. In the **File Location** box, enter the path and file name of the file to add, or click or tap **Browse** to locate the file.


-OR


Add a link to a webpage

- a. In the **Source** section, in the **Report Type** box, select **Link to Webpage**.
- b. In the **Webpage URL** box, enter the URL of the webpage.


3. Specify the properties for the report on the **General** tab.

- a. In the **Details** section, specify a meaningful name and description for the report.
- b. The **Parent Report** text box displays the parent report of the current report, if one exists.

Categories. Click or tap the **Select or change the values for this field**  button, and then specify the categories to include in this report.

Related Record Types. To have the report appear in the Reports list on a page for specific record types, click or tap the **Select or change the values for this field**  button, and then

select record types.

Display In. To specify where reports should be visible, click or tap the **Select or change the values for this field**  button, and then select one or more of the options.

If no values are selected, the report won't be visible to end users.

4. Edit the report ownership information on the Administration tab:
 - **Owner**
This option is only available if you have Assign permission for the report.
 - **Viewable By**
Select **Organization** to make the report organization-owned, and to make it viewable by anyone in the organization. Select **Individual** to make the report viewable only by the owner and anyone the owner shares the report with.
5. Click or tap **Save** or **Save and Close**.

To share the new report, see the instructions in [Share a report with other users or teams](#).

See Also

[Create, edit, or copy a report using the Report Wizard](#)

[Customize and organize reports](#)

[Report Writers Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#)

Organize and lay out your data

When you create a report, you have to decide which columns to include, the order in which they are displayed, and whether to group data into subcategories. By grouping and summarizing the data, you make it easier to see the patterns.

For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.



1. Define how to organize the report:
 - To group items so that they are organized together in the report by date or other common properties:
 - i. For each grouping level you need, click or tap **Click here to add a grouping**.
 - ii. Define the grouping:
 - **Record type**. You can select records from the primary record type you

selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.

- **Column.** The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.
 - **Time interval.** For datetime fields, group the data by Month, Day, Week, or Year.
 - **Sort order.** Sort order for displaying the groups.
 - **Column width.** Width of the column heading in pixels.
 - **Summary type.** You can group records by a count of matching records.
- iii. To reorder the grouping levels, use the up and down arrows in the **Common Tasks** section.
 - iv. Click or tap **OK**.
- To define the sort order within each group, click or tap **Configure Sorting**, select a column and sort order, and then click or tap **OK**.
 - To limit reports to groups with the highest or lowest values, click or tap **Set Top or Bottom Number**:
 - i. Select **Top** or **Bottom**.
 - ii. Select the number of groups to display.
 - iii. Click or tap **OK**.
2. Define which columns to display in the report. You can display columns that show data from a record, or columns that show summary information:
 - a. For each column you want to include, click or tap **Click here to add a column**:
 - **Record type.** You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
 - **Column.** The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.
 - **Data type.** The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.
 - **Name.** The name used in the database.
 - **Column width.** The width in pixels of the column.
 - **Summary type.** The specific type of summaries available depends on the data type of the column.
- None:** lookup, datetime, owner, picklist, bit, ntext
- Average, Maximum, Minimum, Percent of Total, Sum:** all numeric record types (decimal, int, float, money)
- **Include unformatted value column.** Typically, in a report, the underlying data is

formatted as plain text. When you export the report to Excel, you can't change the format of the cell that contains the exported data (plain text) to a different format. This causes problems with calculations. To avoid this, you can select the **Include unformatted value column** check box for fields of type Date Only, Date and Time, Whole Number, Decimal, Currency, or Floating Point Number. This adds a column, which contains the unformatted value of the fields, to the report.

- Use the left and right arrows to reorganize the columns.
- b. Click or tap **OK**.
 3. Click or tap **Next**.

See Also

[Create, edit, or copy a report using the Report Wizard](#)

Share a report with other users or teams

When you create a new report, share it with other people on your team or in your organization so that they can also benefit from it. There are several ways that you can share your new report with other people.

Share the report with other users or teams

▶ If using the CRM web application

1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the area name, and then click or tap **Reports**.
3. In the list of reports, select the report.
Click or tap **More Commands** *******, and then click or tap **Share**.
5. In the **Share Report dialog** box, click or tap **Add User/Team**.
6. In the **Look Up Records** dialog box, select the users or team you want to share the report with, and click or tap **OK**.
7. In the **Share Report dialog** box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.

▶ If using CRM for Outlook

1. In the Navigation Pane, expand your organization if necessary, and then click or tap **Sales** or **Service** or **Marketing**.
2. Click or tap **Tools > Reports**.
3. In the list of reports, select a report, and in the **Collaborate** group, click or tap **Share**.
4. Specify the users or teams you want to share the report with.

Share the report with your organization

If the report would be useful for all users, make it available to the organization.

▶ If using the CRM web application

1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the area name, and then click or tap **Reports**.
3. In the list of reports, select the report, and on the command bar, click or tap **Edit**.
On the **Actions** 🌟 menu, click or tap **Make Report Available to Organization**.

▶ If using CRM for Outlook

1. In the list of reports, select the report, and in the **Records** group, click or tap **Edit**.
On the **Actions** 🌟 menu, click or tap **Make Report Available to Organization**.

Run a report

After you've entered and saved all your data related to your contacts and accounts, you can run reports to gain valuable insight into the data you've collected to help in the running of your business.



1. Navigate to the contact or account you want create an activity for.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Reports**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then expand **Workplace**.
- b. Expand **My Work**, and then click or tap **Reports**.

2. Double-click the report you want, and in the **Report Viewer** dialog box, you can leave the criteria as is, or change it as needed.
3. Click or tap **Run Report**.



Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: [Customize your regional settings \(number, currency, time, and date\) in CRM for Outlook](#)

See Also

[Customize and organize reports](#)

Download a report

To edit a default report, you can download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment, and then make the necessary changes.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Reports**.
- c. Select the report, and then click or tap **Edit**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Workplace**, and then under **My Work**, click or tap **Reports**.
- b. On the **Reports** tab, in the **Records** group, click or tap **Edit**.

On the **Actions** menu, click or tap **Download Report**.

The RDL file for the report contains tags that specify whether the report is a Fetch-based report or an SQL-based report.

3. Click or tap **Save**, and specify the location in which to save the file. If you're creating a new report rather than modifying a report, rename the file.
4. In the **Download Complete** dialog box, click or tap **Close**.


See Also

[Create, edit, or copy a report using the Report Wizard](#)

[Create a Custom Fetch-Based Reporting Services Report](#)

Troubleshoot problems with data not displaying in a report

There are several possible reasons why data that you expect to be in a report does not appear:

- **Insufficient security permissions.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered.** The person entering data may have left fields empty.
- **Data does not match the criteria for the report.** Many reports include a default filter that displays only active records, or you may have selected criteria that don't have any matching record. Try changing the report filter. More information: [Edit the default filter of a report](#)
- **You may be viewing a cached copy of the report.** By default, data in Microsoft Dynamics CRM reports is pulled from the database each time you run a report. However, your system administrator may have changed a report to run from the cache. If data you entered recently is not included in the report, you may have an older version of the report from the cache. To refresh the report, on the Report toolbar, click or tap the **Refresh** button .
- **You may not have permission to read records in a sub-report.** If you do not have permission to read record types that are included in a sub-report, you will get an error message saying that the sub-report could not be displayed.
- **Your Microsoft Internet Explorer privacy settings may block required cookies.** For chart reports, if instead of seeing the chart, you see a red letter X, your privacy settings may be blocking a cookie that is required for the chart control. To fix this problem, in your browser, enable cookies for the server that is running Reporting Services.
- **If you are offline, your local data groups may not include all the data.** If you are using the report from Microsoft Dynamics CRM for Microsoft Office Outlook while you are offline, you must have a local data group that includes all the data that will be in the report. More information: [Example of going offline with CRM for Outlook](#)

Determine who can use a report

By default, a report is a personal report and can be used only by the author unless it is shared.

If you use Microsoft Dynamics CRM for Microsoft Office Outlook all reports that you own will be available when you're offline. More information: [Work offline with CRM for Outlook](#).



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Then click or tap **Settings > Customizations > Customize the System**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**. Then click or tap **Customize the System**.
3. Click or tap **Components > Reports**, and then click or tap the report that you want to share.
4. Click or tap **Actions**.
 - a. To change the owner, select **Assign**, and then select the user or team.
 - b. To share the report, select **Sharing**, add the user or team you want to share the report with, and then give them specific permissions. Click or tap **Share**.
5. Click or tap **Save** or **Save and Close**.

See Also

[Report Writers Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#)

Edit the default filter of a report

When a report is a Microsoft SQL Server Reporting Services report, is enabled for prefiltering, and has a default filter, you can change the default filter to display the data you expect to see in the report. This filter is used each time any user runs the report.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Reports**.

If using CRM for Outlook

- a. Click or tap your organization.
- b. Click or tap the work area, **Sales** or **Service** or **Marketing**, and then click or tap **Tools > Reports**.


Select a report, and on the command bar, click or tap **More Commands** *******, and then click or tap **Edit Default Filter**.

To see all reports, including sub-reports that aren't visible in the default view, select the **All Reports, Including Sub-Reports** view.

4. Modify the filter criteria.

The criteria are grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

- To edit an existing row, click or tap the query relational operator and select an operator, or click or tap the underlined value and enter a new value.
- Click or tap the query relational operator, and select an operator.
- To add a criteria row:
 - i. Click or tap **Select**, and specify the field to filter on.
 - ii. Click or tap the query relational operator, and select an operator.

Click or tap **Enter Value**, and enter a value to filter on. For some values, you can click or tap the **Select or change the values for this field** button  to open the **Select Values** dialog box and select the value you want.

- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

For each row you want to group, in detailed mode, click or tap the **Options menu** button ▼ for that row, and then click or tap **Select Row**.

- ii. On the Filter toolbar, select **Group AND** or **Group OR**.

To remove a row from a group, click or tap the **Options menu** button ▼ for that row, and then click or tap **Delete**.

To select a group, click or tap the **Options menu** button ▼ for that group, and then click or tap **Select Group**.

To add a criteria clause to a group, click or tap the **Options menu** button ▼ for that group, click or tap **Add Clause**, and then select the field, query relational operator, and value.

To unselect a group that has been previously selected, click the **Options menu** button ▼ for that group, and then click or tap **Deselect Group**.

To ungroup a group, click or tap the **Options menu** button ▼ for that group, and then click or tap **Ungroup**.

To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button ▼ for that group, and then click or tap **Change to OR** or **Change to AND**.



Tip

- To clear all criteria and start over, on the Filter toolbar, click or tap **Clear**, and then click or tap **Confirm**.

To delete a row, click or tap the **Options menu** button ▼ for that row, and then click or tap **Delete**.

5. Click or tap **Save Default Filter**.

See Also

[Create, edit, or copy a report using the Report Wizard](#)

[Customize and organize reports](#)

[Report Writers Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#)

Top knowledge base articles

Use this report to identify the most frequently used knowledge base articles. The report displays a chart grouped by the subject of the article or case, or by the product associated with the case.

This report only displays published articles.

The data in this report comes from Articles and Case forms.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[eBook: Use KB articles to help your customers](#)

[eBook: What's new in customer service](#)

[Run a report](#)

[Customize and organize reports](#)

Customize and organize reports

Analyze data in Microsoft Dynamics CRM by using reports. Microsoft Dynamics CRM includes default reports for many common business needs. However, most organizations customize the default reports and add custom reports for specific needs.

Ownership of reports

System reports are available to all users. Individuals who own reports can share them with specific colleagues or teams, or can make the reports available to the organization, so that all users can use them.

Report types

Microsoft Dynamics CRM supports two types of report:

- **Microsoft SQL Server Reporting Services report.** These reports use SQL queries and filtered views to retrieve report data. Filtered views restrict the data to what is available to the security role of the person running the report. All the default reports that ship with Microsoft Dynamics CRM are SQL-based reports.

You cannot access filtered views in Microsoft Dynamics CRM Online because access to the SQL database is not supported. Thus, if you have a Microsoft Dynamics CRM Online subscription, use Fetch-based reports for custom reporting.

- **Fetch-based Reporting Services report.** These reports use FetchXML queries that are proprietary to Microsoft Dynamics CRM instead of filtered views to retrieve data for reports. Reports that you create by using the Report Wizard in Microsoft Dynamics CRM are Fetch-based reports.

The other reports can be:

- Links to webpages

- Static files
- Dynamic Microsoft Office Excel files that read data from the Microsoft Dynamics CRM database

For each report, you can edit the following properties:

- File name or URL
- Display name
- Description
- Information about where the report displays in the user interface

Security of data in reports

All reports read Microsoft Dynamics CRM data from filtered views, which filter the data based on the user's security role. Reports only display data that the person running the report has permission to view.

Options for creating new reports

To create a new report, users with appropriate permissions can:

- Add a file or a link to a webpage as a report.
- Run the Report Wizard to create a new Reporting Services report. The Report Wizard can create table and chart reports, including drill-through reports and top N reports.
- Write a new Fetch-based Reporting Services report. To author custom fetch-based reports, you must install the Microsoft Dynamics CRM Report Authoring Extension. More information: "Create a Custom Fetch-Based Reporting Services Report" in [Report Writers Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#).

Options for modifying existing reports

For existing reports, users with appropriate permissions can:

- Organize reports into categories to control which views in the Reports area display each report.
- Determine where a report is visible in the user interface, and edit other properties of the report.
- Edit a report created with the Report Wizard.
- Edit a default report. For example, if you customize Microsoft Dynamics CRM, you might need to modify labels or add or remove fields in default reports. More information: "Edit a Default Report or create a SQL-based Reporting Services report" in [Report Writers Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#), [Create Reports for Microsoft Dynamics CRM Using SQL Server Reporting Services](#)

- Edit the default filter for a default report, a report created with the Report Wizard, or other Reporting Services reports.
- Create a one-time snapshot for a Reporting Services report or schedule a Reporting Services report to run at set intervals.
- Share a personal report with other users, or make it available to everyone in your organization.
- Publish a report so that it is available for use with external applications, such as Microsoft SharePoint or custom programs.

More information: **Permissions required for reporting tasks**

Reports in solutions

In Microsoft Dynamics CRM, reports are solution aware. Adding a report as a component to a solution makes it become a single unit of software that extends Microsoft Dynamics CRM functionality and the user interface. Only reports that are organization-owned or visible to the organization can be added to solutions.



Note

To find if a report is viewable to the organization: In the list of reports, select a report, and click or tap **Edit**. Then, on the **Administration** tab, see if **Viewable By** is set to **Organization**.

You can add, import, or export snapshots of reports as part of a solution. In Microsoft Dynamics CRM, reports, sub reports, report category, report display area, and report-related record type are considered as components of a report set. When you import a solution update in a non-overwrite mode, any updates by the solution to a report will be ignored if any component of the report set has been customized.

See Also

[Create, edit, or copy a report using the Report Wizard](#)

Available reports

User Summary

Use this report to identify contact information and Microsoft Dynamics CRM security roles for all Microsoft Dynamics CRM users.

The data in this report comes from the Users form.

If data does not match the criteria for the report, it won't be displayed. If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Create, edit, or copy a report using the Report Wizard](#)

[Run a report](#)

Case Summary Table

Use this report to find out what kind of cases are being opened and resolved. You can select how data is grouped in both the rows and columns in this report. This report provides a chart of cases, organized by status reason, owner, priority, subject, customer, or product.

By default, the report only displays active cases that were created in the last month.

The data in this report comes from the Case form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#)



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Neglected Cases

Use this report to identify cases that have not been contacted recently. The report displays a chart of cases that have had no changes to activities, notes, or the case itself in the specified number of days, and no scheduled activities.

By default, this report displays only active cases with no activities or notes in the number of days specified by the person running the report.

The data in this report comes from the following forms:

- Activity
- Appointment
- Case

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Campaign Activity Status

Use this report to track a campaign. The report displays a summary for each campaign activity, including planned and actual time parameters, parent campaign details, and definition status.

By default, this report displays only campaigns with activities or notes that were created within the dates specified by the person running the report.

The data in this report comes from Campaigns and Campaign Activity forms.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Campaign Comparison

Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.

By default, this report displays only data available based on the two reports you select.

The data in this report comes from Campaigns form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Campaign Performance

Use this report to track the progress and status of your campaigns. The report provides a detailed view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

By default, this report displays only campaigns modified in the last 30 days.

The data in this report comes from the following forms:

- Campaign Activity form
- Campaigns form
- Marketing List form
- Product form
- Sales Literature form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#)



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Activities

Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

By default, this report only displays activities created within the last week and considers only the activities that are related to case or opportunity records.

The data in this report comes from the Activity form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Competitor Win Loss

Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

By default, this report displays only opportunities that have competitors associated, that the user running the report has permission to view, and that are in the country or region and time period specified by the person running the report.

The data in this report comes from:

- Close Opportunity dialog box
- Competitor form
- Opportunity form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Products by Contact

Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

By default, this report displays only line items for orders that don't have a status of **Canceled**, and line items for opportunities that have a status of **Won**.

The data in this report comes from:

- Close Opportunity dialog box
- Order form
- Product form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Invoices

Use this report to print invoices.

If you run this report from a list without selecting any records, the report generates a customer-ready invoice for each invoice record in the system. If you run this report from within a specific record, the report generates a customer-ready invoice only for the record you were working with.

The data in this report comes from the Invoice form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Invoice Status

Use this report to view your accounts receivable. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

By default, this report displays only active accounts or contacts.

The data in this report comes from the Invoice form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Lead Source Effectiveness

Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

By default, this report displays all leads.

The data in this report comes from the Lead form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Neglected Leads

Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

By default, this report displays only active leads, with no activities or notes, in the number of days specified by the person running the report.

The data in this report comes from the Lead form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Orders

Use this report to print orders.

If you run this report from a list without selecting any records, the report generates a customer-ready order for each active order record in the system. If you run this report from within a specific record, the report generates a customer-ready order only for the record you were working with.

The data in this report comes from the Order form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Customize and organize reports](#)

[Run a report](#)

Progress Against Goals

Use this report to view the sales progress against the primary and subordinate goals. This report displays a chart with the target values and the actual values of the goals.

By default, the report is generated from data that is rolled up to the goals. This data might not be up-to-date because the rollup jobs run at set intervals. This report does not display data for the discarded goals.

The data in this report comes from the Goal form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Quotes

Use this report to print quotes.

If you run this report from a list without selecting any records, the report generates a customer-ready quote for each quote record in the system. If you run this report from within a specific record, the report generates a customer-ready quote only for the record you were working with.

The data in this report comes from the Quote form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Sales History

Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.

The data in this report comes from the following forms:

- Account form
- Contact form
- Opportunity form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Service Activity Volume

Use this report to review the patterns in service activity volume. The report displays either the duration of or number of service activities, grouped by services, resources, time periods, and additional criteria.

By default, this report displays only service activities that started in the last year.

The data in this report comes from the Service Activity form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Account Distribution

Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.

This report is generated from revenue that is based on opportunity records that are closed as won. Other revenue is not measured in the report.

The data in this report comes from the Account form.

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Account Overview

Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

For opportunities, this report displays two charts. The Active Opportunities by Probability chart displays the active opportunities grouped by the probability of the opportunities turning into a sale. The Opportunity by Current State chart displays the state the opportunities are currently in.

For cases, this report displays two charts. The All Closed Cases by Customer Satisfaction displays the closed cases grouped by customer satisfaction level. The All Cases by Status displays the cases grouped by the status.

By default, this report displays only accounts that have been modified within the last 30 days.

The data in this report comes from:

- Account form
- Appointment form
- Case form
- Contact form
- E-mail form
- Fax form
- Opportunity form
- Phone Call form
- Service Activity form

- Task form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

Run a Report

[Customize and organize reports](#)

Products by Account

Use this report to see which products are used by an account. For each account, the report lists the associated products.

By default, this report displays only line items for orders that don't have a status of **Canceled**, and line items for opportunities that have a status of **Won**.

The data in this report comes from:

- Close Opportunity dialog box
- Opportunity form
- Order form
- Product form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Account Summary

Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

This report cannot display more than 10 accounts at a time.

The data in this report comes from:

- Activity form
- Case form

- Contact form
- Contract form
- Invoice form
- Note form
- Opportunity form
- Order form
- Quote form

If some data is missing from the report, see [Run a report](#)



Tip

To quickly view the Account Summary report for an account, open the account record. On the **Account** tab, in the **Data** group, click or tap **Run Report**, and then click or tap **Account Summary**.



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Neglected Accounts

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

By default, this report displays only active accounts, with no activities or notes, in the number of days specified by the person running the report.

The data in this report comes from the following:

- Account form
- Task form
- Phone Call form
- E-mail form
- Letter form
- Appointment form
- Service Activity form
- Campaign Response form
- Account form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Run a report](#)

[Customize and organize reports](#)

Sales Pipeline

Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.



Note

Opportunities (potential sales) can be filtered based on the sales stages the opportunities are in. The sales process with stages can be implemented using a workflow (process).

If you group data by product, this report cannot display user provided revenue from opportunities.

The data in this report comes from the following forms:

- Opportunity form
- Territory form

If some data is missing from the report, see [Troubleshoot problems with data not displaying in a report](#).



Note

This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

See Also

[Customize and organize reports](#)

[Creating and Using Workflows](#)

Create, edit, or copy a report using the Report Wizard

All reports that are created using the Report Wizard are Fetch-based reports.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Reports**.

▶ **If using CRM for Outlook**

- a. Click or tap **Sales**, **Service**, or **Marketing**, and then click or tap **Tools > Reports**.

3. To add a new report, click or tap **New**.
4. In the **Report: New Report** dialog box, in the **Report Type** list, click or tap **Report Wizard Report**, and then click or tap **Report Wizard**.
You can only use the Report Wizard to edit reports that were created with the wizard.
5. Select the starting point for your report.
 - a. To create a new report, select **Start a new report**.

- OR -

To start from a copy of an existing report, click or tap **Start from an existing report**, and check the **Overwrite existing report** check box.

- OR -

To edit an existing report, select **Start from an existing report**, select the report, and check the **Overwrite existing report** check box.

- b. Click or tap **Next**.
6. Enter the name of the report, and specify which record types the report will use.
This step identifies where the data in the report comes from. You can include data from one or two record types, or data from related records.
 - a. Enter data in the fields:

- **Report name.** This value will be displayed in the Reports area.
- **Primary record type.** Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include.
- **Related record type.** If you need to display data from a related record type, select an additional record type here.

 **Caution**

Avoid selecting data from a related record type that is not required, as it makes the report take longer to load.

- b. Click or tap **Next**.
7. Define a filter to determine which records are included in your report. More information: [Edit the default filter of a report](#).
8. [Organize and lay out your data](#)
9. Select the basic format of the report.
 - **Table only.** This provides a table grouped and sorted as you specified.
 - **Chart and table.** Displays both a chart and table.
 - **Show table below the chart on same page.** Clicking on the chart does nothing.
 - **Show chart. To view data for a chart region, click the chart region.** Clicking on an area in the chart will display a table with details for that section of the chart.
10. Click or tap **Next**.
11. If the report includes a chart, specify the type of chart, and how the data is displayed in the chart.
 - a. Select the chart type, and then click or tap **Next**.

The **Chart preview** area shows how the data will be displayed.

- For vertical and horizontal bar charts and line charts, specify which data to display on each axis:
 - In the **Format Column (X) Axis** section, select the field to use for the X axis, and the label that is displayed on the chart for the field.
 - In the **Format Value (Y) Axis** section, you can select two fields. For each field, you can specify the label that is displayed on the chart.
 - In the **Format Labels and Legends** section, specify whether or not to show the data labels and a legend.
- For pie charts, specify the slices and values for the chart.
 - For slices, you must select one of the groupings in your report.
 - For values, you must select a numeric column with a summary type.

- b. Click or tap **Next**.
12. Review the summary of the report, click or tap **Next**, and then click or tap **Finish**.
13. After you finish defining the report, return to the Report form, and if required, update the name and description of the report, and determine where the report is displayed.
14. Test the report. On the **Reports** tab, in the **Actions** group, click or tap **Run Report**. If the report needs modifications, edit the report.
15. Make the report available to others for use. More information: [Determine who can use a report](#)



Note

- To edit an existing Report Wizard report, first select the report. Then, in the **Records** group, click or tap **Edit**. Finally, click or tap **Report Wizard**.
- All reports generated with the Report Wizard print in landscape mode.
- If you need to change data on the **General** or **Administration** tabs for a new report, wait until the report is saved before making the changes. Any changes on these tabs made before a report is saved will be ignored.

See Also

[Run a report](#)

[Report Writers Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#)

Administer CRM

Introduction to administration

Introduction to Microsoft Dynamics CRM

The [Microsoft Dynamics CRM Customer Center](#) provides a central location where you can find help and videos to get the most out of Microsoft Dynamics CRM. Check out the Customer Center whenever you need information about doing sales, marketing, or service tasks in Microsoft Dynamics CRM.

In addition, there are more resources to help you achieve your goals with Microsoft Dynamics CRM, no matter who you are, or what your role is:

If you want to...	Go here...
Find everything you need to know to manage the system every day	Administration Guide
Get info about planning and deploying	Implementation Guide

If you want to...	Go here...
Microsoft Dynamics CRM	
Customize Microsoft Dynamics CRM to match your business needs	Customization Guide
Get info designed for IT pros who administer Microsoft Dynamics CRM	CRM IT Pro Center
Get developer resources and see sample code	CRM Developer Center

See Also

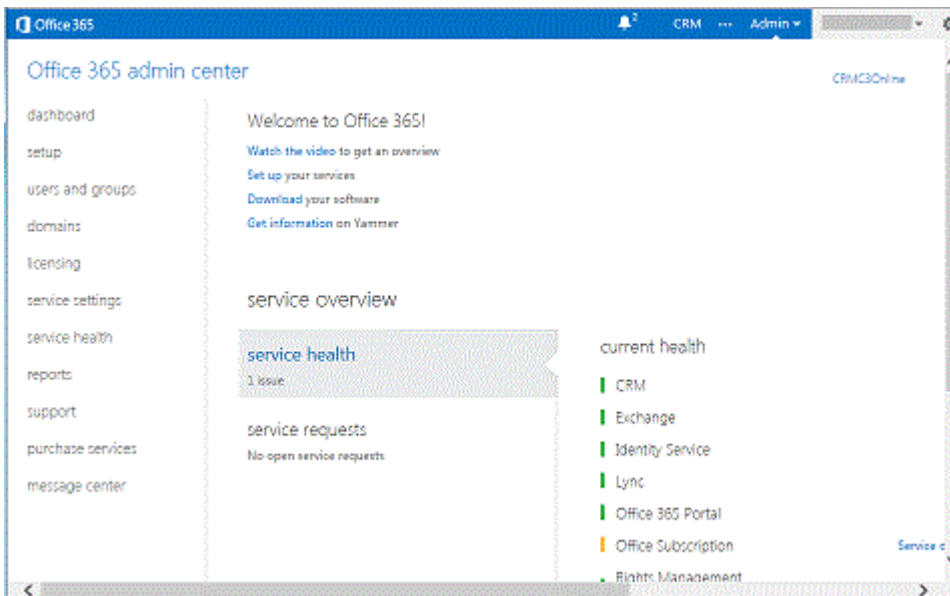
[Quick guide to CRM help resources](#)

Administering Microsoft Dynamics CRM

Manage your subscription

Manage your CRM subscription

You manage your Microsoft Dynamics CRM Online subscription through the Microsoft Office 365 admin center.



This topic applies to users who are on the Microsoft online services environment.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > Subscription Management**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > Subscription Management**.

You'll be redirected to the Office 365 admin center, where you can view and manage multiple settings for your CRM Online subscription. These settings include:

Setting	Description
dashboard	Get a quick view of your system health and status.
users and groups	Add, remove, and manage licenses for CRM Online users.
domains	Add your company domain so users can access your CRM organization with a familiar sign-in such as username@contoso.com.
licensing	Add and manage licenses, storage, and

Setting	Description
	instances.
service settings	Click or tap “dynamics crm” to edit settings such as the CRM Online URL name and security groups.
service health	Get a detailed view of current service health and dates for planned maintenance.
support	Get information for issues and how to get support.

See Also

[Add user licenses to your subscription](#)

[Administration Guide](#)

Add user licenses to your subscription

For information about user licensing, see [Manage Microsoft Dynamics CRM Online licenses](#) in Manage Your Microsoft Dynamics CRM Online Subscription.

Install product updates

Microsoft Dynamics CRM Online Spring '14 and Microsoft Dynamics CRM 2013 Service Pack 1 have many new features and updates for your CRM deployment. Some of these features are disabled by default to prevent any disruptions in your CRM experience. However, you can enable these features by installing the product updates. [Learn about installing product updates.](#)

See Also

[Learn about installing product updates](#)

[What's new for administrators in CRM Online?](#)

View system status and notifications

Use this page to view current notifications from Microsoft Dynamics CRM about your organization and subscription.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Administration > System Notifications**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Notifications**.

Add storage

Check and manage your Microsoft Dynamics CRM Online storage through Microsoft Office 365.



Note

This topic applies to users who are on the Microsoft online services environment.

Monitor the amount of storage your organization is using

If your Microsoft Dynamics CRM organization is consuming 100% of your available storage, users in your organization won't be able to enter data or create records, although they will be able to view data.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > Resources in Use**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration**, and then click or tap **Resources in Use**.

Review your storage used.

To get more storage

- Free up storage consumed by unneeded data. More information: [10 ways to free storage space in Microsoft Dynamics CRM](#)
- Purchase additional storage from the Office 365 Admin portal page. In the Office 365 admin portal, in the Office 365 admin center, go to **licensing > subscriptions** and click or tap your subscription. Click or tap **Buy now**, expand **optional add-ons**, and enter the number of gigabytes of additional storage desired.

See Also

[Remove storage from your subscription](#)

Remove storage from your subscription

You may find that you don't need extra storage and choose to remove it for your subscription. By removing storage capacity, you are reducing the amount of storage space available to your organization. Storage can't be removed if it's being used, or if you have the minimum amount of storage required by your subscription.



1. Make sure you have the System Administrator security role or equivalent permissions in

Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the step for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Then click or tap **Settings > Administration > Subscription Management**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings**, click or tap **Administration**, and then click or tap **Subscription Management**.

3. Under **Resource Usage and Management**, click or tap **Remove Storage**.

4. Complete the **Remove Storage Wizard**.



Tip

Changes to your subscription take a few minutes to take effect, and will be reflected in your next month's billing on a prorated basis.

See Also

[Add storage](#)

[10 ways to free storage space in Microsoft Dynamics CRM](#)

Add License Wizard and Add Storage Wizard errors

You may see an error while running the Add User License Wizard if you have:

- Reached the maximum number of licenses available for your offer.
- Attempted to remove licenses, which would result in less than the minimum number of licenses required by your offer.



Important

To see other offers available to you, on the **Subscription Management** page, under **Application Usage**, click or tap **View Offers**. If you are eligible to change your

current offer, the offers will be listed. If you are not eligible for an offer at this time, contact the Microsoft Dynamics CRM sales team.

You may see an error while running the Add Storage Wizard if you have:

- Reached the storage limit available for your offer.
- The minimum amount of storage for that offer.

If you cannot add storage from your Microsoft Dynamics CRM Online subscription, it might be that your current offer has a limited amount of storage available.

Manage users and set up security

Understand security roles

Use security roles to help protect data integrity and privacy and also to support efficient data access and collaboration. The security model:

- Provides a licensing model for users.
- Gives users access only to the information that they require to do their jobs.
- Allows the administrator to categorize users and teams by role and restrict access based on those roles.
- Supports data sharing so that users can be granted access to information they don't own but can collaborate on.

For more information about security roles, see [Overview of security for Microsoft Dynamics CRM](#)

For information about assigning a security role, see [Manage users](#) in the Administration Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.

See Also

[Create or edit a security role](#)

[Copy a security role](#)


View your user profile

Your user profile displays useful information about you to your entire organization; for example, your contact information, your organization, and your security role. Depending on your security role, you may be able to make changes to your user profile.



1. This task requires permissions that are found in all default security roles.
2. Follow the steps for the app you're using.


 **If using the CRM web application**


Click or tap the **Settings** gear () in the upper right side of the screen, then click or tap **Options**.

 **If using CRM for Outlook**

- a. Click or tap **File > CRM > Options**.

3. Scroll down and click or tap **View your user information**.

To check your security role: On the nav bar, click or tap the down arrow () next to your name, and then click or tap **Security Roles**.

To view other profile information, such as Work Hours, Connections, and Services, on the nav bar, click or tap the down arrow () next to your name.

Add users to Microsoft Dynamics CRM

For information about adding users, see [Manage users](#) in the Administration Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.

Manage users

For more information, see [Manage users](#) in the Administration Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.

Assign a security role to a user

For information about assigning a security role, see [Manage users](#) in the Administration Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.

See Also

[Overview of security for Microsoft Dynamics CRM](#)

Create or edit a team

You can create two types of teams: Owner or Access. If you want to assign a record to the team, choose the team type “Owner.” If you want to share a record with the team, choose the team type “Access.”

For information about the two team types, see [About team templates](#).

Create a team



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.

Click or tap **Settings > Administration**.

▶ **If using CRM for Outlook**

- a. In the navigation pane, expand your organization if necessary, and then click or tap **Settings > System > Administration**.

3. Click or tap **Teams**.
4. On the Actions toolbar, click or tap the **New** icon, complete the required fields, and then click or tap **Save**.

If you don't select the business unit to which the team will belong, by default, the root business unit is selected. The root business unit is the first business unit created for an organization.

Edit a team



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.

Click or tap **Settings > Administration**.

▶ **If using CRM for Outlook**

- a. In the navigation pane, expand your organization if necessary, and then click or tap **Settings > System > Administration**.
3. Click or tap **Teams**.
 4. In the Teams dropdown list, select All Teams or another appropriate view.
 5. In the grid, select the team you want to edit.
 6. On the Actions toolbar, click or tap **Edit**, change the desired fields, and then click or tap **Save**.

See Also

[Create a team template and add to an entity form](#)

[About team templates](#)

Assign security roles to form

You can control form and field access by assigning different security roles to different forms that you create.

More information: [Overview of security for Microsoft Dynamics CRM](#)



1. Make sure you have the System Administrator security role or equivalent permissions in

Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**. Then click or tap **Customize the System**.

3. Enable security roles.

- a. Under **Components**, expand **Entities**, and then expand the entity you want.
- b. Click or tap **Forms**. In the list, click or tap a form to edit it if it has a **Form Type** of **Main**.
- c. On the **Home** tab, in the **Form** group, click or tap **Enable Security Roles**.

4. Assign security roles.

- a. In the **Assign Security Roles** dialog box, select the security roles to which this form will be available.
- b. To make this the fallback form, select the **Enabled for fallback** check box.
At least one form per entity must be a fallback form, the form that is displayed to a user when no other form is available for that user's security role.
- c. Click or tap **OK**.

5. Preview the main form.

- a. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form, or Read-Only Form**.
- b. To close the **Preview** form, on the **File** menu, click or tap **Close**.

6. When you're ready to save your data, click or tap **Save and Close**.

7. Publish your customization.
 - For only the edited component: Click or tap **Save > Publish** on the **Home**
 - For all unpublished components at one time, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Add or remove security from a field

You can restrict access to or set field-level security for custom fields. More information: [Overview of security for Microsoft Dynamics CRM](#)



Note

You can't change the permissions on a field that you don't have permission to access.



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Customization > Customizations > Customize the System**.
2. Under **Components**, expand **Entities**, expand the entity that has the custom field that you want to secure, and then click or tap **Fields**.
 3. In the list of fields, double-click or tap the entry for the field you to secure.
 4. In the field window, on the **General** tab, to the right of **Field Security**, specify whether to **Enable** or **Disable** security for the field.
 5. Click or tap **Save** or **Save and Close**.

6. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Create a field security profile

You can use a field security profile to manage the permission of users and teams to read, create, or write in secured fields.

For an overview of security concepts see [Overview of security for Microsoft Dynamics CRM](#)



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > System > Administration**.

3. Click or tap **Field Security Profiles**, and then on the Actions toolbar, click or tap **New**.
4. Type information in the text boxes.
 - In the **Name** text box, type a name for the new profile.
 - In the **Description** text box, optionally type information to help define or identify security profile.
5. When you're ready to save your data, click or tap **Save**.
6. Add field permissions.
 - a. Click or tap **Related > Common > Field Permissions**.
 - b. Select a field permission, and then click or tap **Edit**.
 - c. Select the permission types to be assigned to the users and teams of the security profile, and then click or tap **OK**.
7. Add users or team.
 - a. Click or tap **Related > Teams** or **Related > Users**.
 - b. On the **More Actions** toolbar, click or tap **Add**.
 - c. Select a team or user from the list or search for a team or user and click or tap **Select**.
 - d. Click or tap **Add**.
 - e. Repeat the above steps to add multiple teams or users, and then click or tap **Add**.

Secure sensitive data by enabling encryption

To provide an additional layer of security, you can encrypt the data in some fields that contain sensitive data, including user names and passwords. When you enable encryption, even database administrators can't see the password data.

Microsoft Dynamics CRM users who have the System Administrator security role can enable data encryption or change the encryption key after enabling data encryption. More information: [Data encryption in the Implementation Guide](#)

Check your security role

- Follow the steps in [View your user profile](#).
- Don't have the correct permissions? Contact your system administrator.

Important

Once you enable data encryption, you can't turn it off.

See Also

[For admins: Data encryption](#)

Manage data

Set up duplicate detection rules to keep your data clean

To maintain the integrity of your data, it's a good idea to have rules in place to reduce duplicate records in the system. Microsoft Dynamics CRM includes default duplicate detection rules for accounts, contacts, and leads, but not for other types of records. If you want the system to detect duplicates for other record types, you'll need to create a new rule.

After you've created duplicate detection rules, you need to turn duplicate detection on.



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Data Management > Duplicate Detection Rules**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Data Management > Duplicate Detection Rules**.

3. To create a new duplicate detection rule, click or tap **New**. Type a name and description.

–OR–

To edit an unpublished existing duplicate detection rule, click or tap the duplicate detection rule.

–OR–

To edit a published duplicate detection rule, select the rule. On the **Actions** menu, click or tap **Unpublish**, and then click or tap the rule.

4. Select the criteria to be used to identify a record as a duplicate.
 - a. If you are creating a new rule:
 - In the **Duplicate Detection Rule Criteria** section, in the **Base Record Type** list, click or tap the type of record that this rule applies to. For example, select **Contacts**.
 - In the **Matching Record Type** box, click or tap the type of record to compare. In most cases, you'll probably want to use the same record type for **Base Record Type** and **Matching Record Type**. It's also useful to be able to compare different record types. For example, you might want to compare the **Email** field in Contacts to the **Email** field in Leads.
 - b. If you want the rule to consider only active records while detecting duplicates, select the **Exclude inactive matching records** check box. You should also select this check box if your duplicate detection rule criteria are based on a status field.
 - c. If you want the rule to be case-sensitive, select the **Case-sensitive** check box.
 - d. If you selected different record types for the base and matching record types, for each new criterion, in the **Base Record Field** column, click or tap **Select**, and then click or tap a field name. In the same row, in the **Matching Record Field** column, click or tap **Select**, and then click or tap a field name.

- OR -

If you selected the same record types for the base and matching record types, for each new criterion, in the **Field** column, click or tap **Select**, and then click or tap a field.
 - e. In the same row, in the **Criteria** column, click or tap **Select**, and then click or tap an operator. For example, select **Exact Match**.
 - f. If you specified **Same First Characters** or **Same Last Characters**, in the **No. of Characters** column, click or tap **Enter Value**, and then enter the number of characters to compare.
 - g. If you don't want the rule to consider blank fields (null values) as equal while identifying duplicates, select the **Ignore Blank Values** check box.



Important

If the duplicate detection rule contains only one condition, blank values are ignored during duplicate detection job.

The number of criteria that you can select is limited by the number of characters that can be stored in the matchcode for the record. As you add criteria, watch the **Current matchcode length** value shown at the bottom of the criteria list.

General

Name * Find duplicate records in Contacts and Leads Status Reason * Unpublished

Description

Matches records using Email field from Contact and Lead record types

Duplicate Detection Rule Criteria

Base Record Type * Contact Matching Record Type * Lead

Case-sensitive Exclude inactive matching records

Clear

Base Record Field	Matching Record Field	Criteria
▼ Email	Email	Exact Match ▼
Select		

- When you're finished adding criteria, click or tap **Save and Close**.
- To make the new or changed duplicate detection rule usable, select the rule, and then click or tap **Publish**.

When you publish a duplicate detection rule, a matchcode is created for every record in the matching record type for that rule. You can publish only five rules for the same base record type (Account, for example) at a time. You might need to delete or unpublish an existing rule if you bump up against this limit.



Note

- We recommend that you set the duplicate detection criteria on a field that has unique values, for example, **Email**.
- You can have more than one duplicate detection rule for each record type.

See Also

[Turn duplicate detection rules on or off for the whole organization](#)

[Run bulk system jobs to detect duplicate records](#)

Run bulk system jobs to detect duplicate records

To maintain the integrity of system data, you should check for duplicates regularly to make sure that users don't inadvertently create duplicate contacts, accounts, leads, or other types of records.

The Check for Duplicates wizard helps you set up a bulk “job” that finds and cleans up duplicate records. You can schedule the job to run daily, and you can receive an email confirmation when the job finishes.



Note

If you haven't already done so, create and publish duplicate detection rules, and turn duplicate detection on before you run the wizard. More information: [Set up duplicate detection rules to keep your data clean](#).



1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Data Management**. Click or tap **Duplicate Detection Jobs**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > System > Data Management > Duplicate Detection Jobs**.
2. Click or tap **New**, or click or tap the name of the duplicate detection job you want to run. You'll see the Check for Duplicates wizard, which helps you create a job to check for duplicates.
3. Click or tap **Next**.
4. In the **Look for** drop-down list, select the record type that you want to check for duplicates.



Note

What you see in this list depends on which duplicate detection rules are published. More information: [Set up duplicate detection rules to keep your data clean](#).

5. In the **Use Saved View** drop-down list, select a view if you want to limit the records searched to records in that view. For example, select Active Accounts. When you select a view, CRM adds criteria to the criteria grid below.
6. To further limit the records searched, click or tap **Select** in the criteria grid, and then enter

the criteria you want.

Select Records Help

Specify the entity to check. To limit the records checked, specify additional criteria.

Look for: Accounts **Use Saved View:** Active Accounts

<input type="checkbox"/> Status	Equals	Active
<input type="checkbox"/> Created On	On or After	3/31/2014 <input type="button" value="x"/> <input type="button" value="v"/>

7. Click or tap **Next**.
8. Accept the default name for the job, or type a different name.
9. Enter the start time for the job, and enter how often to run the job in days. (Type *1* to run the job daily.)
10. If you want to receive an email confirmation when the job is completed, select the **Email options** check box. Enter an additional email address, if desired.
11. Click or tap **Next**, and then click or tap **Submit**.

See Also

[Set up duplicate detection rules to keep your data clean](#)

[Turn duplicate detection rules on or off for the whole organization](#)

[View and take action on bulk deletion jobs](#)

Turn duplicate detection rules on or off for the whole organization

To maintain the integrity of your data, it's a good idea to set up duplicate detection rules to reduce duplicate records in the system. Remember that after you create duplicate detection rules, you need to turn them on.



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the step for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings > Data Management > Duplicate Detection Settings**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings**. Under **System**, click or tap **Data Management**, and then click or tap **Duplicate Detection Settings**.

3. Select or clear the **Enable duplicate detection** check box.



Note

If your system contains a large number of records, checking for duplicates can impact performance.

4. If you're turning duplicate detection on, select or clear the check boxes to set when duplicates are detected:
- **When a record is created or updated**

The system checks for duplicates when a user enters or updates records.



Important

Duplicates aren't detected when a user merges two records, activates or deactivates a record, or saves a completed activity.

- **When Microsoft Dynamics CRM for Outlook goes from offline to online**

For users of Microsoft Dynamics CRM for Outlook, the system detects duplicates when the user synchronizes their data after working offline, as long as users have enabled duplicate detection in Outlook. To enable duplicate detection in Outlook, click or tap **File > CRM > Options**. Click or tap the **Local Data** tab, and then select the **Enable duplicate detection during offline to online synchronization** check box.

- **During data import**

When you use the Import Data wizard to bring in contacts, leads, accounts, or other types of data, the wizard detects any duplicate records as long as you enable duplicate detection in the wizard. More information: [Import accounts, leads, or other data](#)

5. Click or tap **OK**.

See Also

[Set up duplicate detection rules to keep your data clean](#)

[Synchronize data in CRM for Outlook](#)

[Run bulk system jobs to detect duplicate records](#)

Delete bulk records

The *bulk deletion* feature helps you to maintain data quality and manage the consumption of system storage in Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.

For example, you can delete the following data in bulk to achieve improvements in data quality and storage consumption:

- Stale data.
- Data that is irrelevant to the business.
- Unneeded test or sample data.
- Data that is incorrectly imported from other systems.

For more information on bulk deletion, see [Delete bulk records](#) in the Administration Guide for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online.

View and take action on bulk deletion jobs

You can view the status of, pause, postpone, and resume a system job that you created using **Bulk Record Deletion**.



1. Follow the steps for the app you're using.

▶ If using the CRM web application


- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.

- b. Click or tap **Settings > Data Management > Bulk Record Deletion**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Data Management > Bulk Record Deletion**.

2. In the **Bulk Record Deletion** window, you can perform the actions described in the following table.

To	Do this
View status	Look in the Status Reason column.
View detailed status, including success and failure information	Select the bulk-deletion job.
View queries submitted for deletion	Select the bulk-deletion job, and then under Information , click or tap Properties .
Review the errors	Select the bulk-deletion job, and then under Related , click or tap Failures .
Pause a bulk-deletion job	<ul style="list-style-type: none"> a. Select the bulk-deletion job, and then on the Actions menu, click or tap Pause. b. When the confirmation message appears, click or tap OK. <p> Note Bulk deletion jobs of fewer than 1,000 records cannot be paused.</p>
Postpone a bulk-deletion job	<ul style="list-style-type: none"> a. Select the bulk-deletion job, and then on the Actions menu, click or tap Postpone. b. When the confirmation message appears, click or tap OK.
Resume a bulk-deletion job	<ul style="list-style-type: none"> a. Select the bulk-deletion job, and then on the Actions menu, click or tap Resume. b. When the confirmation message

	appears, click or tap OK .
Cancel a bulk-deletion job	<ol style="list-style-type: none"> a. Select the bulk-deletion job, and then on the Actions menu, click or tap Cancel. b. When the confirmation message appears, click or tap OK.
Modify recurrence of a bulk-delete job	<ol style="list-style-type: none"> a. Select the bulk-deletion job, and then on the Actions menu, click or tap Modify Recurrence. b. If you select the Run this job after every check box, specify the interval after which you want the bulk-deletion job to run, and then click or tap OK. <p>If you select the Run this job after every check box when you create a bulk-deletion job, the job becomes recurring and is moved to the Recurring Bulk Deletion System Jobs view. You can only change the recurrence for these recurring bulk-deletion jobs.</p>

See Also

Data Management Area

[Delete bulk records](#)

Monitor and manage system jobs

Several Microsoft Dynamics CRM features use system jobs to perform tasks automatically, including workflows, import, and duplicate detection, running independently or in the background.

You can monitor them to ensure that they run smoothly or have completed successfully.

Monitoring system jobs

If there is a problem with a system job, you can cancel, postpone, pause, or resume it.

- **Canceling system jobs**

You cannot resume a canceled system job.

- **Postponing completion of system jobs**

Postponing an active system job stops any current and subsequent actions. You can specify a later time when you want the system job to restart.

- **Pausing system jobs**

You can resume a paused system job.

- **Resuming paused system jobs**

Resuming restarts a system job that was paused.

 **Tip**

- a. If a system job fails, you can view the details about what steps failed and what the problems may have been. First, open the system job record. To display details about system job failures, move your pointer over the warning symbols.
- b. To view system job failures in a format that you can print or copy and paste, click the **Print** button.

 **Note**

You cannot make changes to the status of a system job that has been completed or canceled.

Send bulk email to customers

You can send the same message to multiple recipients using email templates. This is known as *direct* or *bulk* emailing.


Or, you can use mail merge with Microsoft Office Word and Word templates to create the message.



1. Follow the steps for the app you're using.


 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM** and then click or tap **Sales** or **Marketing**.
Sales or **Marketing** appears on the nav bar.
- b. Click or tap **Sales** or **Marketing** and then click or tap the record type you want, for example, **Contacts**.

From the records list, select who you want to send email to and then, click or tap the **More Commands** icon () , and then click or tap **Send Direct Email**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Sales** or **Marketing**, and then click or tap the record type you want, for example, **Contacts**.

From the records list, select who you want to send email to and then, in the **Collaborate** group, click or tap **Send Direct Email** (). Or, just click or tap **Send**

Direct Email to send email to everyone on the list.

2. In the **Send Direct Email** dialog box, select the template you want to use.
3. Click or tap **Send**.

See Also

[Create templates for email](#)

Add or remove sample data

Sample data gives you something to experiment with as you learn Microsoft Dynamics CRM, and to help you see how data is organized in the system. At some point, you'll probably want to remove the sample data.

Or, if sample data isn't installed on your system, you may want to add it for training purposes. Later, when you're ready, you can remove it.

Important

Use sample data to learn and play around with system features. However, to avoid unwanted results, don't associate it with any data you actually need.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
Click or tap **Settings > Data Management**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > System > Data Management**.
-
3. Click or tap **Sample Data**. You'll see a message that tells you whether the sample data is currently installed.
 4. Do one of the following:
Click or tap **Remove Sample Data**, then click or tap **Close**.
-OR-
Click or tap **Install Sample Data**, then click or tap **Close**.

Create or edit charts and dashboards

Create charts

Use charts in Microsoft Dynamics CRM to get an insightful peek into your data. Charts can be useful in analyzing data, such as reviewing your team's performance or identifying patterns, and further taking timely actions.

Microsoft Dynamics CRM supports two types of charts, based on ownership:

- **System charts.** These are available to all users in the organization.
- **User charts.** These are available to those with whom a chart has been shared or assigned.

You can display your data using the following chart types in Microsoft Dynamics CRM:

- Column, Stacked Column, 100% Stacked Column
- Bar, Stacked Bar, 100% Stacked Bar
- Line
- Pie
- Funnel
- Area, Stacked Area, 100% Stacked Area

Use stacked charts to show relative proportions of each closely related item in the charts. Multi-series charts can show comparison between multiple series. Similarly, use comparison charts to show comparison between two category fields.

If you want to create complex charts, export an existing chart, edit the chart's definition file, and then import the changed definition file back into Microsoft Dynamics CRM. More information:

[View Data Using Charts \(Microsoft Dynamics CRM SDK\)](#).

See Also

[Create or edit a chart](#)

Create or edit a chart

Present large quantities of data in your organization in a more insightful and graphical way by creating useful charts in Microsoft Dynamics CRM.

Create a chart



1. Before you start, make sure you have the Create, Write, and Read privileges on the User Chart entity.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Open the chart designer.

If using the CRM web application

- a. Navigate to the list of records for which you want to create a chart. For example, to create a chart for the accounts data, on the nav bar, click or tap Microsoft Dynamics CRM > **Sales**. Then, click or tap **Accounts**.
- b. On the right side, click or tap the charts pane.
- c. In the **Chart** area, click or tap the **New Chart +** icon.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then navigate to the list of records for which you want to create a chart. For example, to create a chart for accounts, click or tap **Sales > Customers > Accounts**.
- b. On the **Charts** tab, in the **Charts** group, click or tap **New Chart**.

3. Define the properties of the chart.

Specify what you want to display on the chart

- a. In the first drop-down box under **Legend Entries (Series)**, select a field to display on the series axis.


- b. In the **Aggregate** drop-down box, click or tap the option by which you want to group the field you selected in **Legend Entries (Series)**.

For non-numeric fields, you can select only **Count: All** or **Count: Non-empty**. For numeric fields, you can select one of the following aggregation options: **Count: All**, **Count: Non-empty**, **Avg**, **Max**, **Min**, or **Sum**.

NULL values are not considered for computing minimum, maximum, and average of data. However, zeros (0) are considered. For example, if you have the following data:

Records	Potential Customer	Established Value
Opportunity 1	Account 1	Null
Opportunity 2	Account 1	250
Opportunity 3	Account 2	0
Opportunity 4	Account 2	250

The average for Account 1 is 250 because the NULL value was not used. The average for Account 2 is 125 because the zero was used.


To create a chart with multiple series, click or tap the **Add a series** icon , select another field to display on the series axis, and then select an aggregate option for that series.

- d. To change the chart type for a series, select the series, click or tap the **Current chart type** icon for that series, and then select a chart type.
- e. To stack items in a chart, click or tap the chart type, and then click or tap **Stacked** or **100% Stacked**. You can stack items only in a bar, column, or an area chart.
- f. To display only top items on the chart, click or tap the **Top/Bottom Rules** icon > **Top X Rule** icon, > **Top 3** or **Top 5**, or **Custom** to specify a different number. For example, to display only the top three opportunities grouped by potential customers, click or tap the **Top/Bottom Rules** icon > **Top X Rule** icon > **3**.

-OR-

To display only the bottom items on the chart, click or tap the **Top/Bottom Rules** icon > **Bottom X Rule** icon > click or tap **Bottom 3** or **Bottom 5**, or **Custom** to specify a different number.

- g. From the list under **Horizontal (Category)**, select the field to display on the category axis.

To create a comparison chart with multiple categories, click or tap the **Add a category** icon , and then select another field to display on the category axis.

You can add only two category items and one series item to a comparison chart.

- i. For fields that are of the datetime type, click or tap the option by which you want to group the field you selected as the category.

The chart is named based on the fields you chose for the series and category axes.

4. To specify a different name for the chart, click or tap the chart name to edit it.
5. To save the chart, in the chart designer, click or tap the **Save** icon.

The chart obtains the data from the view that is selected for a record type. A chart is automatically updated every time that you change the view in the list of records. However, if the chart has been idle for some time, we recommend that you click or tap **Refresh Chart** on the **Charts** tab, so that the chart and the list of records show the synchronized data.

Edit a chart



1. Open the chart designer.

If using the CRM web application

- a. Navigate to the list of records for which you want to edit the chart. For example, to edit the chart for the accounts data, on the nav bar, click or tap Microsoft Dynamics CRM > **Sales**. Then, click or tap **Accounts**.
- b. On the right side, click or tap the charts pane.
- c. In the chart area, click or tap the chart list, then the chart you want to edit, and then click or tap the **Edit Chart** icon.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then navigate to the list of records for which you want to edit the chart. For example, to edit the chart for accounts, click or tap **Sales > Customers > Accounts**.
- b. On the **Charts** tab, in the **Layout** group, click or tap **Chart Pane > Right or Top**.
- c. In the chart area, click or tap the chart list, then the chart you want to edit, and then in the **Charts** group, click or tap **Edit Chart**.

2. Modify the properties of the chart. For details, see Step 3 in the **Create a chart** section.

See Also

[Create charts](#)

[Manage dashboards](#)

[Drill down in a chart](#)

Drill down in a chart



1. Open the list of records that you want to view a chart for. Then, click or tap the chart bar on the right or top of the list of records.
2. Follow the steps for the app you're using.

If using the CRM web application

- a. Click or tap the **Charts** area.

If using CRM for Outlook

- a. In the ribbon, click or tap **Chart Pane**, and select where you would like the chart to be displayed.
3. In the chart area, click or tap the arrow next to the chart name, and then click or tap a name of the chart that you want to see drill down into.
4. Click or tap the category area of the chart in which you want to drill down further to see lower level data.
5. In the shortcut menu, click or tap **Select Field**, and then click or tap the field by which you want to group the category.
6. Click or tap the corresponding icon for a chart type that you want use for viewing the data.
7. Click or tap **OK**.



Note

To go to the chart from which you drilled down, click or tap **Back**.

See Also

[Create or edit a chart](#)

Manage dashboards

Dashboards in Microsoft Dynamics CRM provide an overview of business data; actionable information that is viewable across the organization.

Create dashboard components that help you find and analyze important data.

You can create two types of dashboard:

- **User dashboards.** An individual user owns a user dashboard. It can be assigned to other users or teams. A user dashboard can be set as the default dashboard for individual users. A user dashboard overrides the system dashboard for the user.
- **System dashboards.** A system dashboard is available to all users in the organization, and can be set as the default dashboard for the organization. Importing, exporting, or uninstalling a solution applies the relevant actions on the dashboards.

More information: [Microsoft Dynamics CRM Customer Center](#)

Set the default dashboard

You can set a dashboard as the default dashboard. This makes it available to the organization each time users navigate to the Dashboards area.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.
3. Under **Components**, click or tap **Dashboards**, select a dashboard, and then click or tap **Set as Default**.

More information: [Microsoft Dynamics CRM Customer Center](#)

Manage dashboard components

You can create and design dashboards to show the information that you want exactly how you want to see it. While designing the dashboard, you can rearrange or remove the components that you have already added and change the height and width of a component.

By default, you can add only six components to any dashboard layout. This limit is configurable. For more information, contact your system administrator.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
Click or tap the work area name, and then click or tap **Dashboards**.
- b. Click or tap **New** to begin creating your dashboard.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **My Work**, and then click or tap **Dashboards**.
- b. In the **Dashboard Management** group, click or tap **New** to begin creating your dashboard.

As you're creating your dashboard, to undo the last action, click or tap **Undo**. To repeat an action, click or tap **Redo**.

2. To rearrange the components, click or tap the component header and drag it to an empty area on the dashboard or to the area of an existing component. When you drag a component over other components, a red line appears on top of the components to show that if you drop the component here, the existing component will move down.

To change the width of a component, select the component, click or tap the **More Commands** icon ******* and click or tap **Increase Width** or **Decrease Width**. The width increases or decreases by one column.

4. To change the height of a component, click or tap **Increase Height** or **Decrease Height**. The height increases or decreases by three rows.
5. To remove a component, select it and click or tap **Remove**. When you remove a component, any new components are added in the bottom area of the designer. You can

rearrange the components at any time after you insert them.

Create or customize entities and forms

View or edit entity information

You can view all the information, or properties, associated with an entity, but you can only edit selected properties. This is because many of the properties associated with an entity are set when it is created. The editable properties associated with an entity vary depending on the type of entity you are working with.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Customization > Customizations > Customize the System**.

3. Under **Components**, expand **Entities**, and then click or tap the entity you want to view or edit information for.

Information about that entity is displayed, and it appears on two tabs:

- **General.** Use this tab to edit some or all of the properties (depending on the entity) listed in the following table:

Option	Comments
Note (includes attachments)	Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record.
Activities	Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, e-mails, and tasks.
Connections	Select this to permit ad hoc connections between a record in this entity and records in other entities.
Sending e-mail (if an e-mail field does not exist, one will be created)	Select to add the Send Direct E-mail button to the main ribbon tab for the entity.
Mail merge	Select this to allow this entity to be used in a mail merge.
Document management	This allows you to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: Manage SharePoint documents from within Microsoft Dynamics CRM
Queues	Select this to use this entity in queues.
Duplicate detection	Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them.
Auditing	Select this to track changes made to your business data.
CRM for phones	Select this to display and use this entity in Microsoft Dynamics CRM for phones.

Reading pane in CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for CRM for Outlook	Select this to let users create, read, update, or delete records while offline.

- **Primary Field.** On this tab, the only editable property is **Description**.
4. Publish your customizations:
- To publish customizations for only the component that you are currently editing, on the nav bar or in the Navigation Pane, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Important

Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

See Also

Customization Area

Create a new entity

You can create new entities for your Microsoft Dynamics CRM implementation to address specific business requirements. After you create a custom entity, additional tasks are required to ensure that the entity is accessible to your users.

Security

By default, when an entity is created, only the System Administrator and System Customizer security roles have any privileges to read or change data in the custom entity. You must add privileges explicitly to all security roles that need to use the new entity.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Customization > Customizations > Customize the System**.

3. Click or tap **Entities**, and then on the Actions toolbar, click or tap **New**.
4. Specify the **Display Name** and **Plural Name** that will be used for this entity throughout Microsoft Dynamics CRM.
5. In the **Name** box, view the name that Microsoft Dynamics CRM will use for this entity.



Note

When you specify the display name, a default value for the **Name** field is provided. If you change the display name before you save, the value in the **Name** field will not change. You can also modify the value in the **Name** field independently of the display name.

6. The **Primary Image** list only has the option **[None]** when you create a custom entity. After you create the entity you can create a new image field. Each entity can have only one image field. After you create a new image field, that field will be available for selection. After you change this setting you must save the entity and publish the customizations.

7. In the **Ownership** list, select one of the following:
 - **User or Team.** Records for this entity can be owned by individual users or by teams. Security can be defined according to the business unit with which the current owner is associated. For example, *contact records* are set to **User or Team**.
 - **Organization.** Records for this entity are used for reference by all Microsoft Dynamics CRM users. Individual users or teams can't own these records. For example, *product records* are set to **Organization**.
8. Under **Areas that display this entity**, select the areas where this entity will be displayed in the Microsoft Dynamics CRM user interface.



Note

All new entities are displayed in Advanced Find.

9. Under **Options for Entity**, select the appropriate options for your scenario based on the detail provided in the following table.

Option	Comments
Business process flows (fields will be created)	Select this to enable creating business process flows for this entity.
Note (includes attachments)	Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record.
Activities	Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, emails, and tasks.
Connections	Select this to permit connections between a record in this entity and records in other entities.
Sending email (if an email field does not exist, one will be created)	Select to add the Send Direct Email button to the main ribbon tab for the entity.
Mail merge	Select this to allow this entity to be used in a mail merge.
Document management	Select this to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More

	information: Manage SharePoint documents from within Microsoft Dynamics CRM
Access Teams	Select this to enable this entity for access teams.
Queues	Select this to use this entity in queues. More information: Find what's assigned to you in a queue
Allow quick create	When this is enabled, and after you have created and published a Quick Create Form for this entity, people will have the option to create a new record using the Create button in the navigation pane.
Duplicate detection	Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them.
Auditing	Select this to track changes made to your business data.
CRM for phones	Select this to display and use this entity in Microsoft Dynamics CRM for phones.
CRM for tablets	When this is enabled this entity will be available using Microsoft Dynamics CRM for tablets. You also have the option to make this entity Read-only in CRM for tablets . If the forms for an entity require an extension that is not supported by CRM for tablets, such as I-frame or web resource controls, use this setting to ensure that the data for these entities is not editable by people using CRM for tablets.
Reading pane in CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for CRM for Outlook	Select this to let users choose to include records for this entity with those they can

work with while offline.

10. To ensure that an easily recognizable name is used to reference this entity, on the **Primary Field** tab, enter a descriptive **Display Name**, and then verify that **Requirement Level** set to **Business Required**.

The primary field is displayed when relationships to this entity are created or displayed, such as in the **Look Up Records** dialog box.

**Note**

The default **Display Name** for the primary field is **Name**. The **Name** will be “new_name” if you use the default publisher customization prefix of “new”. If this is not the name you want to use, you must set the name when you create the entity. You can edit the display name after you save the entity.

11. Click or tap **Save**.

When a new entity is created, the following items are created also:

- A default public view showing active records and a view showing inactive records.
- An Advanced Find View, a Quick Find View, an associated view, and a lookup view.
- The primary attribute you defined and the standard attributes. To see a list of them, navigate to the new entity you created, and under it, click or tap **Fields**. They are displayed in the main pane.
- For entities that have **Ownership** set to **User or Team**, the creation of the Owner and Owning Business Unit attributes. For entities that have **Ownership** set to **Organization**, the creation of the Organization ID attribute.
- A filtered view is created in the CRM Online database for the entity. This filtered view can be used to write reports using data from this entity.

**Note**

Relationships are created with the **User** entity to resolve user names for the **Created By** and **Modified By** attributes.

12. Change the icon for the new entity. More information: [Change custom entity icons](#).
13. For any security roles that need access to the new entity, add the needed privileges.

**Note**

When adding privileges, you can follow the pattern for the privileges that are used on the **Marketing**, **Sales**, or **Service** tabs for the security role to provide users the same level of access to the custom entity that they have to other entities.



- a. Follow the steps for the app you're using.

▶ **If using CRM web application**

- i. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- ii. Click or tap **Settings > Administration > Security Roles**.

▶ **If using CRM for Outlook**

- i. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > Security Roles**.
- b. Open a security role, and then on the **Custom Entities** tab, specify the level of privileges that you want users with that security role to have.
- c. Click or tap **Save and Close** to save the changes to the security role.

14. Publish your customizations:

- To publish customizations for only the component that you're currently editing, click or tap the entity you've been working on, and then click or tap **Publish**.
- To publish customizations for all unpublished components at one time, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.

 **Important**

Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Create or edit entity fields

Create new fields to capture data when existing system entities don't have fields that meet your requirements.


After you create new fields, be sure to include them on the forms and views for the entity so that they are available from the Microsoft Dynamics CRM user interface. You can also add the new fields to relevant reports with the following restrictions:

- In the default solution, you can edit some of the properties for all fields. You can create new fields for only some entities.
- In a managed solution, you cannot create new fields or edit existing fields for entities. However, you can create new fields or edit existing fields in the Customization area of Microsoft Dynamics CRM.
- In an unmanaged solution, you can edit some of the properties for all fields. You can create new fields for any entities that you create for the solution. If you add an existing business entity to the solution, you can add new fields only if that entity allows it.

You can find more information about creating and editing entities in the [Customization Guide](#).



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. Click or tap **Fields**.

- To add a new field, on the Actions toolbar, click or tap **New**, and enter a **Display Name** to generate the **Name**.
- OR -
- To edit a field, select it in the list, and then on the Actions toolbar, click or tap **Edit**.
 - Select the **Field Requirement**.
 - In **Searchable**, select whether to include this field in the list of fields shown in Advanced Find for this entity and also in the field available for customizing the find columns in the Quick Find view and the Lookup view.
 - For **Field Security**, enable or disable the feature for this field. More information: [Add or remove security from a field](#).
 - For **Auditing**, enable or disable the feature for this field.



Important

Auditing tracks value changes to the field, but does not track enabling or disabling Field Security for the field.

5. For new fields, select the **Type**, and then enter required information for the specified type. For existing fields, you cannot modify the type, but you can modify the settings for the type.

Possible data types for a field

Data Type	Notes
Single Line of Text	<p>The following formats are available:</p> <ul style="list-style-type: none"> • E-mail. This opens a new e-mail message in the default e-mail software when clicked. • Text. This creates a text box. • Text area. This creates a scrolling text box. • URL. This opens the URL in the user's default browser when clicked. • Ticker Symbol. This creates a stock ticker symbol in all capital letters. Click the symbol to open information about the stock in the user's default browser. By default, the MSN website opens. • Phone. This creates a link that enables Skype or Lync users to initiate a call by using the linked number.

Option Set	Select an existing option set, or define a new one.
Two Options	After creating this field, configure it in the form to which it was added. In the form, select whether the field is displayed as option buttons (also known as radio buttons), a check box, or a list.
Image	Each entity can have one image field. When an entity has an image field it can be configured to display the image for the record in the application.
Whole Number	<p>The following formats are available for this field:</p> <ul style="list-style-type: none"> • None. The defaults are integer values between -2,147,483,648 and 2,147,483,648, although you can set different minimum and maximum values. • Duration. This creates a drop-down list box with values in minutes, hours, and days. • Time Zone. This creates a drop-down list box with options for every available time zone. • Language. This creates a drop-down list box with options for every language that your organization has made available for users.
Floating Point Number	Select up to 5 precision points. You can set the minimum and maximum values.
Decimal Number	Select up to 10 decimal points. You can set the minimum and maximum values.
Currency	<p>When you add a currency field to an entity, a corresponding (Base) field is also created. The (Base) field also has a currency data type.</p> <p>If the entity does not already have a field with a currency data type, two additional</p>

	<p>fields are created:</p> <ul style="list-style-type: none"> • Currency. A lookup data type whose value must be set before you can set the value of a field with a currency data type. • Exchange Rate. This has a decimal number data type.
Multiple Lines of Text	This is a scrolling text box. You can set the maximum number of characters for this field.
Date and Time	There are two formats: date only, or date and time.
Lookup	You can create a lookup field using an entity relationship that has already been created, but not yet used with another lookup field. If you create a lookup field in an entity form, the relationship is automatically generated. A lookup field is created as a relationship field.

6. Set Status Reason options.
 - Many entities have the status reason system attribute that may be customized. The status reason attribute is displayed like a picklist attribute except that it also contains a reference to the status attribute.
 - Valid values for **Status Reason** are dependent on the **Status (state)** attribute. You must first select the appropriate status before you can set the **Status Reason** options.
7. Select the IME mode for this attribute.
8. Click or tap **Save and Close** to close the form editor.
9. Publish your customization.
 - To publish view customizations for just one entity, under **Components**, click or tap **Entities**. Then, on the Actions toolbar, click or tap **Publish**.
 - To publish all customizations you have made to any entities or components, on the Actions toolbar, click or tap **Publish All Customizations** .



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

See Also

[Customization Guide](#)

Mapping entity fields

Mapping streamlines data entry when you create new records that are associated with another record. When two entities have an entity relationship, it is possible to create new related entity records from the associated view that is visible on the primary entity. When the user creates a new record from an associated view, mapped data from the primary entity record is copied to the form for the new related entity record. You control what data is copied by adding new mappings in the relationship between the two entities. If a record is created any way other than from the associated view of the primary entity, data is not mapped.

Mapping only applies just before a new record is created from an associated view. Users are able to make changes before saving the record. Later changes to the data in the primary record are not applied to the related record.

Mapping picklists

If the field is an option set (picklist), make sure that the option values are identical between the two option sets. When values are added to an option set, the values are assigned an integer based on the order in which they are added. If they were not added in the same order, the labels for the option values on the target field can be edited so they represent a valid mapping as long as this does not affect existing data. If you later modify either option set, you must also remember to modify the other option set to keep them synchronized. Any invalid option set mappings will cause the target field to use the default option set value.

Generate mappings automatically

It is possible to automatically create mappings for the relationship *but this usually is not recommended*. This process will map any mappable fields based only on the data type and name of the field. All existing mappings are removed.

Create or edit N-N relationships between entities

A N:N (many-to-many) relationship allows users to relate one or more records from another entity to a record of the current entity. More information: [Creating and editing entity relationships](#)

In the default solution or any unmanaged solution, you can create new relationships or edit existing ones for all entities that allow customization.



Important

Customization tasks can be performed only while you are online.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears in the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.

3. Under **Components**, expand **Entities**, and then expand the entity you want to work with.
4. Click or tap **N:N Relationships**.
5. To edit or view the details for an existing relationship, select the relationship, on the Actions toolbar, click or tap **Actions**, and then click or tap **Edit**.

- OR -

To add a new relationship, click or tap **New Many-to-Many Relationship**.

Important

If **New Many-to-Many Relationship** does not appear on the Actions toolbar, you cannot create a N:N relationship for that entity.

6. For a new relationship, in the **Current Entity** section, in the **Display Option** list, choose one of the following options:
 - **Do Not Display**. The other entity will not display an associated view for the current entity.

- **Use Custom Label.** This label will be used for the associated view created for the other entity. Be sure to enter a corresponding value in the **Custom Label** field.
- **Use Plural Name.** This will use the plural name of the current entity for the associated view.



Note

When the **Use Plural Name** or **Use Custom Label** options are selected, you can choose from the **Display Area** option list to specify the display area (for example Marketing or Sales) on the form where the relationship label will be displayed. You can also specify the **Display Order** to control where the label will be included within the selected display area.



Important

The navigation paradigm for the forms associated with updated entities is significantly different than that for entities that have not been updated. While the mechanics for defining the Display Area and Display Order are common, be sure that you understand the various navigation paradigms as you establish entity relationships.

7. In the **Other Entity** section, select the other entity from the **Entity Name** list.



Note

When you specify the entity name, default values are set for the **Name** and **Relationship Entity Name** fields in the **Relationship Definition** section. If you change the **Entity Name** value before you save, these names will not change, so be sure these names are meaningful before saving.

8. In the **Relationship Definition** section, confirm the **Name** and the **Relationship Entity Name**.

These values must be unique among N:N relationships.

9. Click or tap **Save and Close** to close the N:N Relationship form.
10. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, click or tap **Publish All Customizations**.



Note

Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields, are applied immediately.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

See Also

[Mapping entity fields](#)

Create or edit N-1 relationships between entities

A N:1 relationship is simply a 1:N relationship viewed from the perspective of the related entity. For every N:1 relationship, a corresponding 1:N relationship has been created. The 1:N relationship is a N:1 relationship viewed from the perspective of the primary entity.

More information: [Creating and editing entity relationships](#)

See Also

Work with Entities

Create or edit 1-N relationships between entities

A 1:N (one-to-many) relationship represents a relationship viewed from the primary entity. The same relationship can be viewed as an N:1 (many-to-one) relationship from the related entity.

More information: [Creating and editing entity relationships](#)

In the default solution or any unmanaged solution, you can create new relationships or edit existing ones for all entities that allow customization.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.

3. Under **Components**, expand **Entities**, and then expand the entity you want to work with.
4. Click or tap **1:N Relationships**.
5. To edit a relationship or view the details for a relationship, select the relationship, and on the Actions toolbar, click or tap **More Actions**, and then click or tap **Edit**.

- OR -

To add a new relationship, click or tap **New 1-to-Many Relationship**.

 **Important**

If **New 1-to-Many Relationship** does not appear on the Actions toolbar, you cannot create a 1:N relationship for that entity.

6. For a new relationship, in the **Relationship Definition** section, in the **Related Entity** list, select the entity to be related.

 **Note**

Specifying the related entity sets a default value for the **Name** field. If you change the related entity before you save, the value of the **Name** changes accordingly.

7. In the **Lookup Field** section, specify a value for the **Display Name** field.

 **Important**

Specifying the **Display Name** sets a default value for the **Name** field. If you change the **Display Name** of the lookup field before you save, the value in the **Name** field will not change. As a result, be sure the **Name** is meaningful before saving.

8. In the **Field Requirement** list, choose an option to specify data requirements for the field prior to saving a record.
9. In the **Navigation Pane Item for Primary Entity** section, in the **Display Option** list, choose an option for displaying associated views or a custom label.
10. In the **Relationship Behavior** section, in the **Type of Behavior** list, choose one of the following options:
 - **Parental**. In a parental relationship between two entities, any action taken on a record of the parent entity is also taken on any child entity records that are related to the primary (or parent) entity record.

- **Referential.** In a referential relationship between two entities, you can navigate to any related records, but actions taken on one will not affect the other.
- **Referential, Restrict Delete.** In a referential, restrict delete relationship between two entities, you can navigate to any related records. Actions taken on the parent record will not be applied to the child record, but the parent record cannot be deleted while the child record exists. Note that you cannot delete a record when related records exist.
- **Configurable Cascading.** In a configurable cascading relationship between two entities, you select the behavior associated with each of a set of possible actions.

Important

If you set the behaviors for the actions so that they match the behaviors for the actions associated with another **Type of Behavior**, when you save the relationship, the **Type of Behavior** is automatically set to the matching type.

More information: [Creating and editing entity relationships](#)

11. Click or tap **Save and Close** to close the **Relationship** form.
12. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, on the Actions toolbar, click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the nav bar or in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.

Note

- A custom entity cannot be the primary entity in a relationship with a related system entity that cascades. This means you cannot have a relationship with any action set to Cascade All, Cascade Active, or Cascade User-Owned between a primary custom entity and a related system entity.
- No new relationship can have any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned** if the related entity in that relationship already exists as a related entity in another relationship that has any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned**. This avoids relationships that create a multi-parent relationship.
- Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.
- If a relationship is part of a managed solution, the developer of the managed solution can restrict you from customizing the relationship.
- Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

See Also

Work with Entities

Create and configure forms- default solution

In the default solution or an unmanaged solution you can create new forms or edit existing forms for all entities that allow form customization.

In an unmanaged solution, you can edit the managed properties for an unmanaged custom entity that was created for the solution.

If you are viewing a managed solution, you cannot create new forms or edit existing forms for entities. However, if the managed properties for an entity in the managed solution are set to allow customization, you can add or edit forms to that entity in the **Customization** area of Microsoft Dynamics CRM.

Customization tasks can be performed only while you are online.



Note

You can also navigate to the form editor from a record list in the Workplace, Sales, Marketing, or Service nodes. For example, to edit an account form, navigate to **Accounts > Customize**. Then click or tap in the **Design > Form**.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Customization > Customize the System**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**. Then click or tap **Customize the System**.
3. Under **Components**, click or tap **Entities**, and then expand the required entity.
4. Click or tap **Forms**, and select the form. Then on the Actions toolbar, click or tap **Managed Properties**.
5. In the **Set Managed Properties** dialog box, if **Customizable** is set to **True**, you can add or edit forms.

See Also

[Create or edit the main form for an entity](#)

[Assign security roles to form](#)

Create or edit the main form for an entity

When you create a new form for an entity, its form type is Main. When the new form opens, it is identical to the form named Information. You can add or edit fields, sections, tabs, and navigation, and properties associated with the form, and then save the form.

This procedure applies to any form with a **Form Type** of **Main**. Each main form is comprised of one or more *tabs*. Each tab can have one or more *sections*. Each section contains one or more *fields* or IFRAMES.

If you want to base your new form on an existing form, you can clone a form.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.

- b. Click or tap **Settings > Customization > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.
-
3. Under **Components**, expand **Entities**, expand the entity you want to modify the main form for, and then click or tap **Forms**.
 4. To create a new form, on the Actions toolbar, click or tap **New**.
- OR -
To edit an existing form, double-click or tap any form with a **Form Type** of **Main**.
 5. Change the form design in any of the following ways, as needed:
 - a. Add a tab to a form
 - b. Add a section to a form
 - c. Add a field to a form
 - d. Add or edit a form IFRAME
 - e. Add or edit a sub-grid in a form
 - f. Add or edit a form web resource
 - g. Add or edit form navigation for related entities
 - h. Edit form headers and footers
 - i. Remove a tab section field or IFRAME
 - j. Enable or disable the Form AssistantFor more information, see the [Customization Guide](#).
 6. Edit the properties for parts of the form, as needed:
 - a. Edit form properties
 - b. Edit form field properties
 - c. Edit tab properties
 - d. Edit section propertiesFor more information, see the [Customization Guide](#).
 7. Add event scripts, as needed.
 8. Determine which security roles will be able to view the form:
[Assign security roles to form](#)
 9. Preview how the main form appears and how events function:
 - a. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form**,

or **Read-Only Form**.

b. To close the **Preview** form, on the **File** menu, click or tap **Close**.

10. When you finish editing the form, click or tap **Save As**, enter a name for the form, and then click or tap **OK**.

11. When your customizations are complete, publish them:

- To publish customizations for only the component that you are currently editing, under **Components**, click or tap the entity you have been working on, and then click or tap **Publish**.
- To publish customizations for all unpublished components at one time, under **Components**, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

- You cannot apply a requirement level to a field using this form. Requirement level constraints are applied to the attribute.
- Before deleting a field from a form, make sure the field is not required by other components or custom scripts. For example, the Opportunity form requires the Price List field to determine the pricing to use when adding a product to that opportunity. Removing the Price List field would prevent adding a new product to an opportunity.
- Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM, such as custom entities, relationships, or fields, are applied immediately.
- You cannot use the form editor to modify the visual style of forms, such as the font style, font size, or colors used in the form. Modification of the Cascading Style Sheets (CSS) pages in the web application or style properties of the form through scripts is not supported.
- Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

See Also

[Create or edit entity fields](#)

Add a field to a form

If a Microsoft Dynamics CRM form doesn't meet your organization's business requirements, you can customize the form by changing existing fields or by adding new fields. While it might be simpler to edit the existing fields on a form, sometimes it's better to add a field to address a specific business scenario.



1. Make sure that you have the System Administrator or System Customizer security role or

equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations > Customize the System**.
3. Under **Components**, expand **Entities**, expand the entity you want to customize, and then click or tap **Forms**.
 4. In the list, locate an entry with the **Form Type** of **Main**, and then double-click or tap to edit it.
 5. In the form, click or tap the section you want to add a field to, and then in the **Field Explorer** pane, double-click the field you want added to the form.
 6. To preview how the form appears and how events function:
 - a. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form, or Read-Only Form**.
 - b. To close the preview form, click or tap **Close** [09bfa77f-30b3-4dd3-a791-3e4572218654](#).
 - c. To publish customizations for the form that you're editing, with the form open, click or tap **Publish**.
 7. When you're finished editing the form, click or tap **Save and Close**.
 8. To publish customizations for all unpublished components at one time, click or tap **File**, and then click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Edit form field properties



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations > Customize the System**.
2. Under **Components**, expand **Entities**, expand the entity you want to work with, and then click or tap **Forms**.
 3. In the list, locate an entry with the **Form Type** of **Main**, and then double-click or tap to edit it.
 4. On the form body, double-click or tap the field you want to edit.
 5. In the **Field Properties** dialog box, you can access and edit a variety of the properties associated with the field by using a series of tabs:
 - **Display**. Use this tab to perform the following tasks:
 - Change or hide the label used for this field in this form. The field display name remains unchanged.
 - Specify whether the field is read-only by selecting or clearing the **Field is read-only** check box.
 - In the **Locking** section, specify whether to lock the field to the form and prevent anyone from removing it by selecting or clearing the **Lock the field on the form** check box.
 - Specify whether a field is visible in the default view by selecting or clearing the **Visible by default** check box. If the check box is cleared, the field will not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook.

However, the field will display in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides the value set by this check box.

For lookup fields, this tab displays extra properties:

- In the **Related Records Filtering** section, to filter the list of displayed records in the lookup, select the **Only show records where** check box.

The relationship combinations that are possible when you filter related records are listed in the following table.

First list relationship	Second list relationship	Available?
N:1	1:N	Yes
N:1	N:1	Yes
N:1	N:N	Yes
1:N	1:N	Yes
1:N	N:1	No
1:N	N:N	No
N:N	1:N	Yes
N:N	N:1	No
N:N	N:N	No

The first list is populated with all the potential relationships you can use to filter this lookup. Click one.

The second list is then populated with all relationships that connect the related entity (selected in first list) to the target entity. Click one.

Select the **Allow users to turn off filter** check box to give users the option of

turning off the filter you define here. This makes it possible for them to view a wider range of records. If you want to make sure that users only see the limited range of records defined by this filter, clear this check box.

- Also, for lookup fields, the tab displays the **Additional Properties** section. Here, select the **Display Search box in lookup dialog** check box if you want a search box to be available in the lookup.

In the **Default View** list, click the default view for which results will be displayed in the lookup.

If you want users to also have the option of selecting other views, select the **Enable the View selection in lookup dialog** check box.

- **Formatting.** The formatting options displayed vary based on the which options are set for the section of the form that the field appears within.
 - **Details.** This tab provides access to the basic properties associated with the field. Click or tap **Edit** to modify them.
 - **Events.** This tab includes two sections:
 - **Form Libraries.** In this section, you can add or remove the available JScript libraries for form or field events. You can edit the listed custom libraries if necessary.
 - **Event Handlers.** In this section, you can add a JScript library (a script web resource) authored by a developer and associate a function within that library to an event.
 - i. In the **Events** list, click or tap **onChange**, and then click or tap **Add**.
 - ii. In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.
 - iii. Click or tap **OK**.
 - **Business Rules.** Use this tab to create or edit the process components of business rules.
6. When you finish modifying the properties for the field, in the **Field Properties** dialog box, click or tap **OK**.
 7. To preview how the form appears and how events function:

- a. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form, or Read-Only Form**.
 - b. To close the Preview form, on the **File** menu, click or tap **Close**.
8. When you finish editing the form, on the **Home** tab, click or tap **Save and Close** to close the form.
 9. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, on the nav bar or in the Navigation Pane, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Add or edit form navigation for related entities

In the form Navigation Pane, you can add links to related entities. When a user clicks one of these links in a record, the associated view for the entity is displayed.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Customization > Customizations > Customize the System**.
3. Under **Components**, expand **Entities**, expand the entity you want to work with, and then click or tap **Forms**.
4. In the list, locate an entry with the **Form Type** of **Main**, and then double-click or tap to edit it.
5. To add a link to a related entity, on **Home** tab, in the **Select** group, click or tap **Navigation**.

The **Relationship Explorer** pane displays on the right side of the form editor.

6. In the **Relationship Explorer** pane, in the **Filter** list, select one of the following options:
 - **Available Relationships**. Lists all the entities that can be related to the entity the form is associated with.
 - **1:N Relationships**. Lists entities that can be related in a 1:N relationship to the entity the form is associated with.
 - **N:N Relationships**. Lists entities that can be related in a N:N relationship to the entity the form is associated with.



Note

If no related entities show up in the **Relationship Explorer** pane, you cannot create a link on this form to a related entity.

7. Select the related entity you want link to, drag it to the Navigation Pane, and then drop it where you want it to display.



Tip

You can also create a new relationship by clicking or tapping **New 1:N** or **New N:N** in the **Relationship Explorer**. More information: [Create or edit 1-N relationships between entities](#), [Create or edit N-N relationships between entities](#)

8. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the **Home** tab, click or tap **Change Properties**.
9. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
10. On the **Name** tab, click or tap **Edit** to view or edit the details associated with the relationship record.
11. Click or tap **OK**.
12. Preview how the main form will appear and how events will function:

- a. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form, or Read-Only Form**.
 - b. To close the **Preview** form, on the **File** menu, click or tap **Close**.
13. When you finish editing the form, click or tap **Save and Close** to close the form.
14. When your customizations are complete, publish them:
- To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Add or edit a form web resource

You can add or edit web resources on a form to make it more appealing or useful to users. The types of web resources that you can add or edit on a form are images, HTML files, or Silverlight controls.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.


3. Under **Components**, expand **Entities**, and then expand the entity you want to work with.
4. Click or tap **Forms**, in the list locate a form of type **Main**, and then double-click or tap the entry to open and edit the form.
5. To add an existing web resource, click or tap the tab (for example, **General** or **Notes**) you would like to insert it on, and then on the **Insert** tab, click or tap **Web Resource**.
- OR -
To edit a Web resource, select a form tab and the web resource that you want to edit, and then on the **Home** tab, click or tap **Change Properties**.
6. In the **Add Web Resource** or **Web Resource Properties** dialog box, on the **General** tab, enter the appropriate information in the required fields.
In particular, note the following:
 - a. In the **Web resource** box, select the image, HTML, or Silverlight web resource that you want to use.



Note

After you specify a web resource, the **Web Resource Properties** section appears at the bottom of this tab, providing options that vary based on the type of web resource you are adding. These options include specifying custom parameters, passing a record object-type code as a parameter, or specifying alternative text that describes the resource or, for images, that makes the image more accessible to all users.

- b. In the **Name** box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.
 - c. The **Label** field is automatically populated with a variation of the name you specify, but ensure that the proposed label meets your needs or update it accordingly.
-
7. On the **Formatting** tab, the options that display vary based on the type of web resource inserted. These options include specifying the number of columns and rows display, whether a border displays, and the scrolling behavior.

If the **Dependencies** tab displays in the In the **Add Web Resource** or **Web Resource Properties** dialog box, from the **Available fields** list, select the fields that are required by the Web resource, click or tap the Add Selected Records button  to move the selected

fields to the **Dependent fields** list, and then click or tap **OK** to close the dialog box.

9. When you finish editing the form, on the **Home** tab, click or tap **Save and Close** to close the form.
10. To preview how the main form will appear and how events will function:
 - a. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form, or Read-Only Form**.
 - b. To close the **Preview** form, on the **File** menu, click or tap **Close**.
11. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Add or edit an image web resource

Web resources are virtual files in multiple formats, such as html files, JavaScript, and Silverlight applications, that are stored in the Microsoft Dynamics CRM database and can be retrieved by using a unique URL address.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.

- b. Then click or tap **Customization > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**. Then click or tap **Customize the System**.
3. To create a new web resource, click or tap **Components > Web Resources**, and then on the Actions toolbar, click or tap **New**.
4. Type or modify information in the text boxes.
 - The name entered in the **Name** text box, plus the file extension will become its file name.
 - The name entered in the **Display Name** text box will be displayed in the **Display Name**.
 - In the **Type** drop-down box, select the file type you want.
5. Click or tap **Browse** to select and upload the file from your local machine.
 - To preview an uploaded image web resource: Click or tap **Web Resource>Preview**.
 - To edit a text web resource: Click or tap **Text Editor**.
 - To preview a text web resource: Click or tap **Web Resource> Preview**.
6. When you're ready to save your data, click or tap **Save and Close**.
7. Publish your customization.
 - For only the edited component: Click or tap **Save > Publish** on the **Home**.
 - For all unpublished components at one time, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Create or edit views

In the default solution or an unmanaged solution, you can create new public views or edit existing views of all types for entities that allow view customization.

In a managed solution, you can't create new views or edit existing views for entities. However, if the managed properties for an entity in the managed solution are set to allow customization, you can create new public views or edit existing views of all types in the Customization area of Microsoft Dynamics CRM.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Customization > Customize the System**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**. Then click or tap **Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. Click or tap **Views**, and then select the view.
5. On the Actions toolbar, click or tap **More Actions**, and then select **Managed Properties**.
6. You can edit the view if the entity is unmanaged. In the **Set Managed Properties** dialog box, set **Customizable** to allow editing or creating views.
7. Click or tap **Set**.

See Also

[Create or edit a public view for an entity](#)

[Edit the quick find view](#)

[Understand security roles](#)

Create or edit a public view for an entity

If you edit a public view, the changes are visible to everyone who has permission to view records for the entity. Besides public views, the following views are provided for all entities and can't be deleted or shared: Quick Find Views, Advanced Find Views, associated views, and lookup views.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Customizations > Customize the System**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.

3. Under **Components**, expand **Entities**, and then expand the entity you want.
4. Click or tap **Views**.
5. To create a new public view, on the Actions toolbar, click or tap **New**. On the **View Properties** dialog box, in the **Name** box, type a name for the new view, and then click or tap **OK**.

If the **New** button does not appear, you can't add views for the entity you selected.

- OR -

To edit a view, double-click or tap a **Public View** in the list. The view type is specified in the **Type** column.

6. Modify the columns that are displayed.
 - Add a column:
 - a. In the **Common Tasks** area, for Quick Find Views, click or tap **Add View Columns**, or for other types of views, click or tap **Add Columns**.
 - OR -

For other types of views, click or tap **Add Columns**.
 - b. Select the check boxes for the columns you want to add, and then click or tap **OK**.
 - Move a column:
 - a. Click or tap the column you want to move.
 - b. In the **Common Tasks** area, use the arrows to move the column left or right.
 - Change the width of a column:
 - a. Click or tap the column you want to change.
 - b. In the **Common Tasks** area, click or tap **Change Properties**.
 - c. In the **Change Column Properties** dialog box, click or tap an option to set the column width, and then click or tap **OK**.
 - Remove a column:
 - a. Click or tap the column you want to remove.
 - b. In the **Common Tasks** area, click or tap **Remove**.
 - c. In the confirmation message, click or tap **OK**.
 - Change the sort order of a column:
 - a. In the **Common Tasks** area, click or tap **Configure Sorting**.
 - b. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click or tap **Ascending Order** or **Descending Order**, and then click or tap **OK**.
 - Enable online presence for instant messaging:
 - a. In the **View** form for the selected entity, click or tap the column you want to change.
 - b. In the **Common Tasks** area, click or tap **Change Properties**.
 - c. In the **Change Column Properties** dialog box, select the **Enable presence for this column**, and then click or tap **OK**.
7. Click or tap **Save and Close**.
8. Set any public view as the default view for an entity.



Note

Every entity in Microsoft Dynamics CRM must have a default public view. This is the view that is displayed for a list of entities, such as Appointment, Account, or Contact. For example, if your organization is set up so that users manage their own appointments, you can change the default view for Appointments from **All Appointments** to **My Appointments**.

- a. In the list of views, select the public view that you want to set as the default. The view

type is indicated in the **Type** column.

- b. On the Actions toolbar, click or tap **More Actions**, and then click or tap **Set Default**.
9. Click or tap **Save and Close** to close the view.
 10. Publish view customization.

 **Important**

Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

- To publish view customizations for just one entity, under **Components**, click or tap **Entities**, and select the entity. Then, on the Actions toolbar, click or tap the **Publish** button.
- To publish all customizations you have made to any entities or components, on the Actions toolbar, click or tap **Publish All Customizations**.

 **Tip**

To create views that appear in the Service calendar, create views in the **Service Activity**, **Appointment**, **User**, or **Facility/Equipment** entities. To see views created in these entities from the Service calendar, users select the view type from the **Type** list.

See Also

Create and configure views

Edit the quick find view

You can edit an entity's Quick Find view (the view used to display results of searches performed using the **Search** box), for example to modify the fields that are searched and which columns display or to specify the width and sort order of the columns displayed.

 **Important**

Changes to the Quick Find view associated with an entity set the default view for everyone who uses the search box for that entity.



1. Make sure that you have the System Administrator or System Customizer security role or

equivalent permissions. More information: **Permissions required for customization tasks**

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. In the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears in the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.
3. Under **Components**, expand **Entities**, expand the entity you want to modify, and then click or tap **Views**.
 4. In the list of views, in the **Type** column, locate **Quick Find View**, and then double-click or tap the view.
 5. Modify the fields that are searched:
 - a. In the **Common Tasks** pane, click or tap **Add Find Columns**.
 - b. Select the check boxes for the columns you want to add, and then click or tap **OK**.
 6. Modify the columns that are displayed.
 - To add a column:
 - i. In the **Common Tasks** area, for Quick Find Views, click or tap **Add View Columns**.

- OR -

- ii. Select the check boxes for the columns you want to add, and then click or tap **OK**.

- To move a column:
 - i. Click or tap the column that you want to move.
 - ii. In the **Common Tasks** area, use the arrows to move the column left or right.

- To change the width of a column:
 - i. Click or tap the column that you want to change the width for.
 - ii. In the **Common Tasks** area, click or tap **Change Properties**.
 - iii. In the **Change Column Properties** dialog box, click or tap an option to set the column width, and then click or tap **OK**.

- To remove a column:
 - i. Click or tap the column that you want to remove.
 - ii. In the **Common Tasks** area, click or tap **Remove**.
 - iii. In the confirmation message, click or tap **OK**.

- To change the sort order of a column:
 - i. In the **Common Tasks** area, click or tap **Configure Sorting**.
 - ii. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, click or tap **Ascending Order** or **Descending Order**, and then click or tap **OK**.

- To enable online presence for instant messaging:
 - i. In the **View** form for the selected entity, click or tap the column you want to change. Only some columns have presence such as **Primary Contact** or **Potential Customer**.
 - ii. In the **Common Tasks** area, click or tap **Change Properties**.
 - iii. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click or tap **OK**.

- 7. Click or tap **Save** or **Save and Close**.
- 8. On the Actions toolbar, click or tap **Publish**.

When the customizations are published, a confirmation message appears.



Note

A customized business entity might have different properties than those described in Help; Help does not contain content that is specific to the custom entities your organization creates. However, Help does describe how to create and use custom entities.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Set the default view for an entity

In Microsoft Dynamics CRM, every entity, such as Appointments, Accounts, or Contacts, requires a default public view. However, you can change the default view for an entity to accommodate the specific needs of your business. For example, if your organization is set up so that users manage their own appointments, you can change the default view for Appointments from All Appointments to My Appointments.

You can make any public view the default public view for an entity.



Important

The default view for some entities is not configurable.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Customizations > Customize the System**.
3. Under **Components**, expand **Entities**, and then expand the entity you want to work with.
4. Click or tap **Views**, and in the list locate the view of type **Public View** that you want to set as the default, and then click or tap to select the entry for that view.
5. On the Actions toolbar, click or tap **More Actions**, and then click or tap **Set Default**.
6. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, under **Components**, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, under **Components**, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Export customized entity and field text for translation

After you create customized entity and field text, you may want to translate it into other languages.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**. Then click or tap **Customize the System**.
3. On the Actions toolbar, click or tap **Export Translations**.
 4. After completing the export, open or save the compressed (.zip) file that contains the exported labels to your local computer or network.
 5. Extract the XML file from the compressed (.zip) file and translate it.

See Also

Customization Area

Change custom entity icons

When you create a custom entity, it is automatically assigned a default icon, and all custom entities by default use the same icon. If your organization has several custom entities, it can be helpful to change the icon associated with one or more custom entities to help users differentiate them.



Note

You cannot modify the icons assigned to system entities.

You can upload two types of entity icons for each custom entity:

- **Icon in Web application.** This icon should be:
 - 16 x 16 pixels in size.
 - In .gif, .png, or .jpg format.
 - No larger than 10 kilobytes.

- **Icon for Entity Forms.** This icon should be:
 - 32 x 32 pixels in size.
 - 16 colors.
 - In .ico format.
 - No larger than 10 kilobytes.



Important

Before you begin this task, be sure that you have uploaded as web resources any custom icons that you intend to assign. More information: [Add or edit a form web resource](#)



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.


If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Customization > Customizations > Customize the System**.

3. Expand **Entities** if necessary, click or tap the custom entity you want to update the icon for, and then on the Actions toolbar, click or tap **Update Icons**.

In the **Select New Icons** dialog box, under **Icon in Web application** or **Icon for Entity Forms**, to the right of **New Icon**, click or tap the Browse icon , select the appropriate image file, and then click or tap **OK**.

5. On the Actions toolbar, on the **File** menu, click or tap **Save**.
6. When your customizations are complete, publish them:
 - To publish customizations for only the component that you are currently editing, in the Navigation Pane, click or tap the entity you have been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, in the Navigation Pane, click or tap **Entities**, and then on the Actions toolbar, click or tap

Publish All Customizations.

New icons might not display in Microsoft Dynamics CRM until you closed and reopened the Microsoft Dynamics CRM client.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Import translated entity and field text

If you have customized entity or field text, such as field labels or drop-down list values, you can provide the users in your organization who are not working with the base language version of your Microsoft Dynamics CRM implementation with this customized text in their own languages. To do so, you export the text strings for all your customizations so that they can be translated into the languages you use in your organization.

After the translation, you need to import the translated text strings into your Microsoft Dynamics CRM implementation before users can take advantage of the changes.



Important

The file that you import must be a compressed file that contains the CrmTranslations.xml and the [Content_Types].xml file at the root.



Important

Microsoft Dynamics CRM cannot import translated text that is over 500 characters long. If any of the items in your translation file are longer than 500 characters, the import process will fail. If the import process fails, review the line in the file that caused the failure, reduce the number of characters, and try to import again. Also note that after you import translated text, you must republish customizations.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Customization > Customizations**, then click or tap **Customize the System**.
3. In the solution explorer, on the Actions toolbar, click or tap **Import Translations**.
4. In the **Import Translated Text** dialog box, specify the file that contains the translated text, and then click or tap **Import**.
5. When Microsoft Dynamics CRM finishes importing the translated text, click or tap **Close**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

See Also

[Export customized entity and field text for translation](#)

Test an event script

Before you publish any customizations, you should thoroughly test your scripts. You can perform customization tasks only while you're online.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Then click or tap **Customization > Customize the System**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Setting > Customization > Customizations**. Then click or tap **Customize the System**.
3. Click or tap **Components > Entities**, and then expand the entity you want.
 4. Click or tap **Forms**. In the list, click or tap a form to edit if it has a **Form Type** of **Main**.
 5. On the **Home** tab, click or tap **Preview**, and then select **Create Form, Update Form, or Read-Only Form**.
 - a. If you have added an **OnLoad** event for the form, open the form in each mode, and verify that your event executed as expected.
 - b. If your code depends on data existing in the form when it loads, test your script in an **OnChange** or **OnSave** event to enter sample data into the form. The **Update Form** will open with no data.
 - i. If you have added an **OnChange** event for a field, for create and update modes, enter the data in the field and verify that your event executed as expected.
 - ii. If you have added an **OnSave** event for a field, for create and update modes, click or tap **Simulate Form Save** and verify that your event executed as expected.
 6. Click or tap **File > Close**.

About team templates

Using teams in Microsoft Dynamics CRM is optional, however, teams give you an easy way to share information and collaborate with users across business units. A team is a group of users. As a group, you will be able to track information about the records and perform assigned tasks in much more efficient and coordinated way. While a team belongs to only one business unit, it can include users from other business units. A user can be associated with more than one team.

There are two types of teams that you can work with: *owner* and *access*.

- An owner team owns records and has security roles assigned to the team. The team's privileges are defined by these security roles. In addition to privileges provided by the team's security roles, users have the privileges defined by their individual security roles and by the roles from other teams in which they are members. A team has full access rights on the records that the team owns.
- An access team doesn't own records and doesn't have security roles assigned to the team. The users have privileges defined by their individual security roles and by the roles from other teams in which they are members. The records are shared with an access team and the team members are granted access rights on the records, such as Read, Write, or Append.

An access team can be created manually (user-created) or automatically (system-managed). You can share multiple records with a user-created access team. A system-managed team is created for a specific record and other records can't be shared with this team. For system-managed teams, you have to provide a team template that the system uses to create a team. In this template, you define the entity type and the access rights on the record that are granted to the team members when the team is created. A team template is displayed on all record forms for the specified entity as a list. When you add the first user to the list, the actual access team for this record is created. You can add and remove members in the team using this list. The team template applies to the records of the specified entity type and the related entities, according to the cascading rules. To give team members different access on the record, you can provide several team templates, each template specifying different access rights. For example, you can create a team template for the account entity with the Read access right, which allows the team members to view the specified account. For another team that requires more access to the same account, you can create a team template with Read, Write, Share and other access rights. Only entities that are enabled for system-managed access teams can be specified in the template.

If you change access rights in the team template, the changes are only applied to new system-managed access teams. The existing teams aren't affected.

For information about how to create a team template, enable an entity for system-managed access teams and how to customize the entity form to add the team template, see [Create a team template and add to an entity form](#).

See Also

[Create a team template and add to an entity form](#)

[Create or edit a team](#)

[Access Teams with Microsoft Dynamics CRM 2013](#)

Create a team template and add to an entity form

A team template can be used for the entities that are enabled for automatically created access teams. In the team template, you have to specify the entity type and the access rights on the entity record. For example, you can create a team template for an account entity and specify the Read, Write, and Share access rights on the account record that the team members are granted when the team is automatically created. After you create a team template, you have to customize

the entity main form to include the new team template. After you publish customizations, the access team template is added in all record forms for the specified entity in a form of a list. For example, you created a team template called “Sales team” for the account entity. On all account record forms you’ll see the list called “Sales team”. You can add or remove team members using this list.

Enable an entity for access teams



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don’t have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you’re using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations**.

▶ If using CRM for Outlook

- a. In the navigation pane, expand your organization if necessary, and then select **Settings > Customizations**.
3. In the Customization window, click or tap **Customize the System**.
4. In the navigation pane, expand **Entities**, and then click or tap the entity you want to use in the team template.
5. On the **Entity Definition** form, in the **Communication & Collaboration** section, select the **Access Teams** checkbox.
6. On the Actions toolbar, click or tap **Save**.

Create a team template



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration**.

▶ If using CRM for Outlook

- a. In the navigation pane, expand your organization if necessary, and then click or tap **Settings > System > Administration**.
2. Click or tap **Access Team Templates**.
 3. On the Actions toolbar, click or tap **New**, complete the required fields, and then click or tap **Save**.

Add a team template to the entity form



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations**.

▶ **If using CRM for Outlook**

- a. In the navigation pane, expand your organization if necessary, and then click or tap **Settings > Customizations**.

3. In the Customization window, click or tap **Customize the System**.
4. In the navigation pane, expand **Entities**, expand the entity you want to use in the team template, and then click or tap **Forms**.
5. In **System Forms**, select **Active Forms > Main** form.
6. On the **Main** form, open the **Insert** tab.
7. On the ribbon, click or tap **Sub-Grid**.
The **Set Properties** dialog box appears.
8. In **Set Properties**, complete the required fields, and then select the **Display label on the Form** check box.
9. In the **Records** drop-down list, select **All Record Types**.
10. In the **Entity** drop-down list, select **Users**.
11. In the **Default View** drop-down list, select **Associated Record Team Members**.
12. In the **Team Template** drop-down list, select the desired template and click or tap **Set**.
The team template you selected now appears on the Main form.
13. On the Actions toolbar, click or tap **Save**, and then click or tap **Publish**.

See Also

[About team templates](#)

View or download developer resources

This page is designed for developers who want to link to the Microsoft Dynamics CRM SDK, developer tools, or want to know the service endpoint URLs.

Organization Unique Name

You need the unique name for your organization when you interact with the Discovery Service.

WindowsAzure AppFabric Issuer Certificate

This is the public certificate that is required to configure Windows Azure AppFabric ACS for Microsoft Dynamics CRM integration.

Developer Center

The [Microsoft Dynamics CRM Developer Center](#) on MSDN contains a wealth of information to help developers. Here you will find the SDK, which includes documentation, samples, and tools, as well as technical articles, ramp-up kits, videos, blogs, forums, and more. For more information

about using each item on this page, see the article "Using the Developer Resources Page" in the [SDK documentation](#).

Discovery Service

This is a Web service that provides information about the organizations that are available on the Microsoft Dynamics CRM server using the SOAP protocol. This information includes the URL for each organization.

Organization Service

This is a Web service that provides access to the business data and metadata for your organization using the SOAP protocol.

Organization Data Service

An Open Data (OData protocol) Web service that provides access to the business data for your organization using a RESTful API. This link opens the Conceptual Schema Definition Language (CSDL) document, which describes how to access your data using this API.

Create or edit a solution

Create a managed solution

Customizers and developers use *solutions* to author, package, and maintain units of software that extend the functionality of Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online. Solutions are distributed so that organizations can use Microsoft Dynamics CRM to install and uninstall the business functionality defined by the solution. A *managed solution* is a completed solution that is intended to be distributed and installed. An *unmanaged solution* is one that is still under development or is not intended to be distributed.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

You create a managed solution by exporting an unmanaged solution as a managed solution. The organizations that use your managed solution will install it and any updates that you create for it.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Solutions**.


▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Solutions**.

On the Actions toolbar, click or tap the New icon ().

4. Complete the required fields, and then on the **File** menu, click or tap **Save**.
By default, this saves an unmanaged solution.
5. To add a new or existing component to your solution, in the **Component Type** list, click or tap the type you want to add, and then click or tap **New** or **Add Existing**.
6. If you create a new component, fill in the required information, and then click or tap **Save** or **OK** (depending on the type of component you are creating) to save the component.
7. On the **File** menu, click or tap **Save and Close**.
Your new unmanaged solution displays in the **Solutions** list.
8. Click or tap the solution you want to export, and then follow the steps for the app you're using.

▶ **If using the CRM web application**

On the Actions bar, click or tap the Export icon (.

▶ **If using CRM for Outlook**

- a. On the Actions bar, click or tap **Export Solution**.

9. Select the options you want in the Export wizard. When you get to the **Package Type** page, select **Managed**.

10. Click or tap **Export**.
11. In the **File Download** dialog box, click or tap **Save**, choose a location for the solution .zip or .cab file, and then click or tap **Save** again.

**Note**

The regular scenario is for you to create a solution in a test Microsoft Dynamics CRM organization, export it, and then import it into a production Microsoft Dynamics CRM organization. If you want to import your managed solution into the same organization in which you created and exported it, you have to delete the unmanaged version and any components you created. You also have to delete child components, such as field relationships, that you created.

You now have a managed solution that you can import into another Microsoft Dynamics CRM organization.

See Also

[Create, Install, and Update a Managed Solution](#)

Import a solution

After developing and testing a custom solution on a development system, you can import the solution to your production environment.

**Important**

- Only import solutions that you've obtained from a trusted source. Customizations might include code that can send data to external sources.
- When you import customizations or settings that already exist on the target Microsoft Dynamics CRM system, the imported customizations will overwrite the existing ones. This situation can happen if you have already customized Microsoft Dynamics CRM, and then add new customizations provided by a third party.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. Then click or tap **Solutions**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Solutions > Customization > Customizations**. Then click or tap **Solutions**.

3. On the Actions toolbar, click or tap **Import**.
4. To browse through folders and locate a compressed (.zip) file or a cabinet (.cab) file that contains customizations and settings exported from Microsoft Dynamics CRM, click or tap **Browse**.

- OR -

In the text box next to the **Browse** button, type the path and file name of a compressed (.zip) file or a cabinet (.cab) file that contains exported customizations and settings.

5. Click or tap **Next**.

After the file is processed, click or tap **View solution package details** to see a list of the solution components that were imported. If any of the items could not be processed successfully, a dialog box displays error messages.
6. If you are updating an existing solution, the **Import Options** window is displayed. Here, select either **Maintain customization (recommended)** or **Overwrite customizations**. The two options are described in the window.
7. If you want to activate any workflows and enable any SDK message processing steps included in the solution, select the **Post Import Actions** check box. The workflows and SDK message processing steps will begin working as soon as the import is finished.
8. Click or tap **Next**.

When the solution import is done, a message appears notifying you if it was successful. If any of the items could not be processed successfully, the dialog box displays error messages.
9. If you have imported entity customizations, you must publish them before they will be available.
 - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, click or tap **Publish All Customizations**.

Export your customizations as a solution

If you want to export customizations you make to a Microsoft Dynamics CRM system, you export those customizations as a solution. For example, you might want to create a backup of all your customizations in case anything happens. To create a backup of your customizations, you export a special solution called the Default Solution. The Default Solution contains all the components in your system.

You might also want to export a solution if you're an ISV and you want to distribute CRM customizations as a package.

Export the Default Solution to create a backup



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

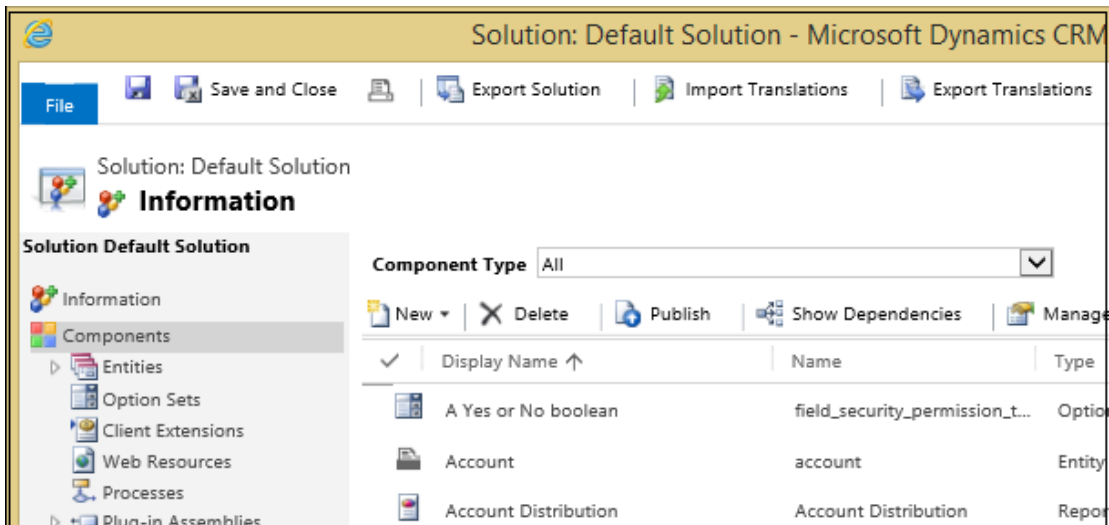
2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Customizations**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Customization > Customizations**.
3. Click or tap **Customize the System**.
4. In the solution explorer, click or tap **Export Solution**.



5. When you're prompted to open or save Default_1_0.zip, click or tap **Save**.

Important

Some user information may be exported when exporting workflows, for example, the domain logon, the forms authentication user name, or the Microsoft account unique user identifier (PUID) value.

Export a solution to create a custom package



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Solutions**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Customization > Solutions**.
3. In the list, select the solution you want to export, and then click or tap **Export**.
4. In the **Publish Customizations** step of the Export Solution wizard, you have the option to **Publish All Customizations**. Note that only published customizations are exported. When you're ready to proceed, click or tap **Next**.

**Note**

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you publish customizations when it's least disruptive to users.

5. If your solution contains any missing components that are required, you'll see the **Missing Required Components** step. Disregard this warning only if you intend to import the solution as an unmanaged solution back into the original organization. Otherwise, follow the instructions in the dialog box to cancel the export, and then add the required components. [Read more about managed and unmanaged solutions](#).
6. In the **Export System Settings (Advanced)** step, you can choose certain system settings to include in your solution. If your solution depends on any of the groups of system settings, select them, and then click or tap **Next**. For more information on these settings, see [Settings options for solution export](#).
7. In the **Package Type** step, choose whether to export the solution as an **Unmanaged** or **Managed** solution, and then click or tap **Next**.

**Note**

Export a solution as a managed solution only when it's complete and you're ready to distribute it. After exporting a managed solution, you can't import it back into the organization it was exported from; you can only import it into a different organization. [Read more about managed and unmanaged solutions](#).

8. In the **Source CRM Version** step, select the CRM version you want to export to. For example, you might want to test a solution that you intend to distribute to organizations using an earlier version of CRM. Note that if you add solution components after upgrading to a new version, and those solution components depend on features added with the upgrade, the components will be removed if you target a lower version for exporting. For example, if you install Microsoft Dynamics CRM 2013 Service Pack 1 (version 6.1), and you choose version 6.0 as the target for your solution export, solution components dependent on features added in Microsoft Dynamics CRM 2013 Service Pack 1 will be removed. [Learn more about exporting a solution for a specific CRM version](#).
9. Click or tap **Export** to download the solution file.
10. When prompted to open or save the compressed (.zip) file, click or tap **Save As**.
11. Choose a location to save your solution, and then click or tap **Save**.

**Important**

- Don't add files to a compressed (.zip) file that contains customizations and settings exported from Microsoft Dynamics CRM. CRM will attempt to import the first file in the compressed (.zip) file. If it's not a valid file, the import will fail.
- Some user information may be exported when exporting workflows, for example, the domain logon, the forms authentication user name, or the Microsoft account unique user identifier (PUID) value.

See Also

[Introduction to solutions](#)

[Package and distribute extensions with solutions](#)

Add a solution component

Adding a component to a solution extends the functionality or usefulness of that solution for users. You can add a component to an existing unmanaged solution, or you can create a new unmanaged solution and add a component to it. This procedure guides you through the process of creating an unmanaged solution and adding new or existing components. While you can add new or existing components for most component types, for the following types you can only add components that already exist in Microsoft Dynamics CRM:

- Client extensions
- Plug-in assemblies
- SDK message processing steps
- Service endpoints

Components can be created in the Customization area of Microsoft Dynamics CRM, or they can be developed outside of Microsoft Dynamics CRM. More information: [Introduction to Solutions](#)

Important

Customization tasks can be performed only while you're online.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Solutions**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > Customization > Solutions**.
3. On the Actions toolbar, click or tap **New**.
4. Complete the required fields, and then click or tap the **Save**.
By default, this saves an unmanaged solution.
5. To add a new or existing component to a solution, in the **Component Type** list, click or tap the type you want to add, and then, on the Actions toolbar, click or tap **New** or **Add Existing**.
The steps required for adding each type of component are available in the **Help on This Page** topic associated with the type of component you're adding.
6. After specifying the necessary details for the component, click or tap **Save** and close the window, or click or tap **Save and Close** (depending on the type of entity you created or added).
7. To set the managed properties for each component that you're adding, on the Actions toolbar click or tap **Managed Properties**. More information: [Edit or view managed properties](#)
8. Click or tap **Save and Close** to save your unmanaged solution and any components that you added to it.
9. When your customizations are complete, publish them:
 - To publish customizations for only the component that you're currently editing, click or tap the entity you've been working on, and then click or tap **Publish**.
 - To publish customizations for all unpublished components at one time, click or tap **Entities**, and then on the Actions toolbar, click or tap **Publish All Customizations**.



Note

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Edit or view managed properties

All solution components, except for plug-in assemblies, have an **IsCustomizable** managed property. This property appears in the interface with the label **Can be customized**. Managed properties only become effective after their associated components are installed as part of a managed solution.

While an entity has managed properties in addition to **IsCustomizable**, the value of the **IsCustomizable** property, the type of entity, and the type of solution all have an impact on the behavior of an entity, as follows:

- If the entity is part of a managed solution and the **IsCustomizable** managed property is set to **False**, you cannot edit any of the managed properties.
- If the entity is part of a managed solution and the **IsCustomizable** managed property is set to **True**, you can edit the managed properties.
- If the entity is part of the default solution or an unmanaged solution and it is a business entity, you can edit all managed properties except for **IsCustomizable**.
- If the entity is part of the default solution or an unmanaged solution and it is a custom entity, you can edit all managed properties including **IsCustomizable**.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Customizations > Customize the System**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Customization > Customizations > Customize the System**.

3. Under **Components**, click or tap the component and the record that you want to edit or view managed properties for.
4. On the Actions toolbar, click or tap **Managed Properties**.

**Note**

If **Managed Properties** does not appear on the Actions toolbar, you cannot edit or view the managed properties for that component and record.

5. In the **Set Managed Properties** dialog box, you can view all of the properties associated with the component, and you can edit selected properties based on the behaviors listed above.
6. Click or tap **Set** to save the settings.

View or edit default solution components

All components that make up a default solution or an unmanaged solution are listed in the window for that solution.

All components that comprise the managed solution are listed in the solution explorer. You can view all components and properties for a managed solution, but you can't edit the properties or perform any actions on the components.

**Warning**

If you attempt to install some solutions without first installing product updates, you'll receive a warning. This warning will give you the option to install a solution without the components that depend on product updates, but it's very likely the solution may not function as designed. When a solution is done importing, you can check the import log to see which components imported successfully and which didn't.

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

▶ View a managed solution in the solution explorer

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security roles

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
Then click or tap **Settings > Customizations > Solutions**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customizations > Solutions**.

▶ **Edit a customizable component for the default solution or an unmanaged solution**

1. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
Then click or tap **Settings > Customizations > Solutions**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > Customizations > Solutions**.

2. In the Solution window, click or tap **Components** to see a list of all default solution components in the main pane. To see components for an individual type, click or tap a type from the **Component Type** list.

The component type and the properties set by the creator of the component determines whether a component is customizable. This is indicated in the Customizable column.

The following table lists actions that you can perform on some components. These actions are available on the command bar.

Actions	Comments
---------	----------

New	Create a new component. You can create new components for most types. The exceptions are SDK message processing steps, client extensions, plug-in assemblies, and service endpoints.
Add Existing	(Applies to an unmanaged solution only.) Add a component from the default solution or other unmanaged solution to this solution.
Delete	Delete an existing component. You can delete unmanaged components or managed components that are customizable. You cannot delete any system entities. If the component has dependencies such as relationships, first you must remove the dependencies before you can delete the component. See Show Dependencies .
Remove	Remove a component from the solution. The component is available still in the default solution after you remove it from here.
Publish	This action applies to the entity component. Publish customizations to your Microsoft Dynamics CRM organization, including changes to forms, fields, views, charts, and relationships.
Activate or Deactivate	Do this for workflows, dialogues, and SDK message processing step.
Show Dependencies	Open a dialog box that lists the other components that are dependent on this component. If you want to delete this component, first you must remove the dependencies.
Managed Properties	This action lists the managed properties settings for the component.
Add Required Components	(Applies to an unmanaged solution only.) Add required components to your solution. This helps you avoid an error when you

	export the unmanaged solution.
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See Also

[Edit or view managed properties](#)

[Export your customizations as a solution](#)

[Export customized entity and field text for translation](#)

[Import translated entity and field text](#)

Edit a solution publisher

You can edit some of the properties in the publisher record of an unmanaged solution or the Microsoft Dynamics CRM default solution. You can't edit any properties for a publisher record that was imported as part of a managed solution. Customization tasks can be performed only while you are online.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. In the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears in the nav bar.
- b. Click or tap **Settings > Customizations > Publishers**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Customization > Customizations**, and then click or tap **Publishers**.

3. In the list, double-click the row for the publisher record that you want to edit.
4. Modify the **Display Name** for the publisher. The name that you enter here is added as an option to the **Publisher** list in a solution record. When someone creates a new solution, that person can select this publisher.

 **Note**

The value in the **Name** box was created with the record and can't be edited.

5. In the **Prefix** box, edit the text prefix that you want added to any entity or field created for a solution that has this publisher. This text prefix, plus an underscore, is added before the value in **Name**.
6. In the **Option Value Prefix** text box, edit the set of integers that are a prefix for any option set created in a solution for this publisher.
7. Click or tap **Save and Close**.

 **Note**

Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users.

Manage system settings

System Settings dialog box - Marketing tab

Use the settings on this page to configure marketing settings for Microsoft Dynamics CRM.

▶ Open the Marketing System Settings dialog box

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application


- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.

Settings appears on the nav bar.

- b. Click or tap **Settings > Administration > System Settings > Marketing** tab.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Marketing** tab.

Settings	Description
Set whether direct email through mail merge is enabled in campaigns	
Enable Direct Email via Mail Merge	<p>Default: Yes. If Yes, users can send email as a campaign activity using the mail merge feature.</p> <p> Note To enable this option, the security role assigned to users for whom you want to enable mail merge must also include the Mail Merge privilege.</p>
Set whether campaign responses are created for incoming campaign activity email (Available only if Email tracking is enabled)	
Create campaign responses for incoming email	Default: Yes. If Yes, Microsoft Dynamics CRM creates campaign response records automatically when email messages are received in response to a specific marketing campaign.
Set the auto-unsubscribe options (Available only if Email tracking is enabled)	
Set "Do Not Send Marketing Material" option when unsubscribe email is received	Default: No. If Yes, when an unsubscribe email is received, the preference setting for the account, contact, or lead from the marketing list gets updated automatically to not send

Settings	Description
	marketing materials.
Send acknowledgement to customers when they unsubscribe	If the previous setting Set “Do Not Send Marketing Material” is Yes, you can use this setting to send a response to customers when they unsubscribe.
Template for Acknowledgement Email	If the two previous settings are Yes, you must specify an email template to use to respond to customers when they unsubscribe.

System Settings dialog box - Reporting tab

Use the settings on this page to configure reporting settings for Microsoft Dynamics CRM.

▶ Open the Reporting System Settings dialog box

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.


2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Reporting** tab.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Reporting** tab.

Settings	Description
Specify report categories	Default categories: <ul style="list-style-type: none"> • Sales Reports • Service Reports • Marketing Reports • Administrative Reports  Note If you add a new category or change existing categories, you should also change the default views available for the Report record type. Otherwise, users won't have a way to see all reports in the new categories.
Default Value	Default: Unassigned Value. Select the default report category.

System Settings dialog box - Formats tab

You can control how Microsoft Dynamics CRM displays numbers, currencies, times, and dates for your organization.

▶ Open the Formats System Settings dialog box

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Formats** tab.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Formats** tab.

Settings	Description
Organizational Standards and Formats	
Current Format	Default: your organization's language and locale. Click or tap Customize to customize number, currency, time, and date formats for your organization.
Format Preview	Preview the settings for the selected language and locale.

See Also

[Customize regional options - system settings](#)

System Settings dialog box - Email tab

Use the settings on this page to configure email settings for Microsoft Dynamics CRM.

▶ **Open the Email System Settings dialog box**

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**


- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. click or tap **Settings > Email Configuration**
- c. Click or tap **Email Configuration Settings**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Email Configuration**
- b. Click or tap **Email Configuration Settings**.

3. Make changes to the following options:

Settings	Description
Configure email processing	
Process Email Using	Select whether you want to process email by using server-side synchronization or the Email Router.
Configure default synchronization method	For any mailbox that is automatically created in CRM when a user or queue is created, the default email settings as defined in this section will be applied
Server Profile	Select the email server profile that you want to use as default for processing.
Incoming Email	Select whether you want to use CRM for Outlook, the Email Router or server-side synchronization, or a forward mailbox for processing incoming email.
Outgoing Email	Select whether you want to use CRM for Outlook or the Email Router or server-side synchronization for processing outgoing

	email.
Appointments, Contacts, and Tasks	Select whether you want to use CRM for Outlook or server-side synchronization to synchronize appointments, contacts, and tasks between CRM for Outlook and Microsoft Dynamics CRM.
Email processing for unapproved users and queues	Select these check boxes if you want to allow email processing only for users and queues whose email address have been approved by the system administrator <ul style="list-style-type: none"> • Process email only for approved users • Process email only for approved queues
Configure email correlation	
Use Correlation	Select this check box if you want to link email activities with other related records using the information in the email headers. This method uses properties of email for correlation and is more accurate than smart matching. <p> Note Email correlation using email headers works only when email is processed using server-side synchronization.</p> <p>If you are using the Email Router to process email, you can use tracking tokens or smart matching to correlate email activities with the related records.</p>
Use tracking token	Select this check box to use tracking tokens and to configure how Microsoft Dynamics CRM displays them in the Subject line of the email messages. Use tracking tokens to more accurately determine if a new record is related to an existing, tracked record. When you change the email prefix, up to 256 characters are saved as history. Long prefixes or too many prefix changes may

	cause lost data in history.
Use smart matching	Select this check box to use smart matching to correlate email based on the similarity between email messages.
Set tracking options for emails between CRM users	
Track email sent between two CRM users as two activities	Select this option to create two email activities between Microsoft Dynamics CRM users, one for the sender and one for the recipient.
Set email form options	
Use secure frames to restrict email message content	If this is set to Yes , you may see an error message “This content cannot be displayed in a frame.” when you are reading email. Although this can make sending sensitive content in email less secure, changing the setting to No typically eliminates this error.
Allow messages with unresolved recipients to be sent	Set this to Yes if you want to send email messages that have unresolved recipients.
Set file size limit for attachments	
Maximum file size (in Kilobytes)	Increase or decrease the allowed size of files that can be attached to records.
Configure alerts	Select check boxes for the type of alerts that must be sent to CRM users: <ul style="list-style-type: none"> • Error • Warning • Information
Notify mailbox owner	By default, the system administrator is notified of any error that occurs for an email server profile. Select this check box if you also want to notify the mailbox owner.

4. To save your changes and close the dialog box, click or tap **OK**.

See Also

[Set up email through server-side synchronization](#)

System Settings dialog box - Customization tab

Use the settings on this page to configure customization settings for Microsoft Dynamics CRM.

▶ Open the Customization System Settings dialog box

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Customization** tab.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Customization** tab.

Settings	Description
Application Mode	
Set whether Microsoft Dynamics CRM can be opened in a browser window without menu, navigation, and command bars.	
Open Microsoft Dynamics CRM in Application mode	Default: Application mode is not enabled. If enabled, Microsoft Dynamics CRM can be opened in Application mode, which means it

Settings	Description
	can be opened in a browser without menus, navigation, or toolbars. Hiding these parts of the browser causes Microsoft Dynamics CRM to appear like a separate application rather than a website.

System Settings dialog box - Outlook tab

Use the settings on this page to configure how Microsoft Outlook interacts with Microsoft Dynamics CRM.

▶ Open the Outlook System Settings dialog box

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Outlook** tab.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Outlook** tab.

Settings	Description
Set email promotion options for CRM for Outlook	
Perform checks as new email is received	Default: Yes. If Yes, email is checked for tracking as soon as it arrives.
Promote incoming email every	Default: 10 minutes. Looks for and links incoming email on the specified interval.
Send pending CRM email every	Default: 10 minutes. Sends pending Microsoft Dynamics CRM email on the specified interval.
Set whether users can schedule synchronization in CRM for Outlook	
Users can schedule synchronization	Default: Yes. If Yes, users can set whether or not CRM for Outlook synchronizes with Microsoft Dynamics CRM.
Minimum Time between synchronizations	Default: 15 minutes. Synchronizes CRM for Outlook and Microsoft Dynamics CRM on the specified interval.
Set whether users can update their local data in the background in CRM for Outlook	
Users can schedule background local data synchronization	Default: Yes. If Yes, users can update the data that is stored on their computer to use offline.
Minimum time between background local data synchronizations	Default: 15 minutes. Local data is synchronized with Microsoft Dynamics CRM on the specified interval.
Set schedule for address book synchronization in Microsoft Dynamics CRM for Outlook	
Users can schedule background address book synchronization	Default: Yes. If Yes, users can update the address book that is stored on their computer to use offline.
Minimum time between address book synchronizations	Default: 1 hour. The local address book is synchronized with Microsoft Dynamics CRM on the specified interval.
Set whether users see CRM for Outlook message	
Users see "Get CRM for Outlook" option	Default: Yes. If Yes, the Get CRM for Outlook

Settings	Description
displayed in the message bar	button is displayed in Microsoft Dynamics CRM.

System Settings dialog box - Auditing tab

Start auditing at the organization level to track changes to your organization's data and maintain a log of these changes.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings**.

3. In the **System Settings** dialog box, on the **Auditing** tab, under **Audit Settings**, you can start auditing and specify whether or not to audit user access, and you can stop auditing if it is currently enabled.

If you opt to enable auditing and audit user access, you will track when the user starts accessing Microsoft Dynamics CRM and whether or not the user accessed the

application by using the web application or CRM for Outlook.

4. Under **Enable Auditing in the following areas**, you can specify to audit specific areas of the product, as described in the following table:

Auditing area	Enable to start auditing for the following entities:
Common Entities	Account, Contact, Lead, Marketing List, Product, Quick Campaign, Report, Sales Literature, Security Role, and User
Sales Entities	Competitor, Invoice, Opportunity, Order, and Quote
Marketing Entities	Campaign
Customer Service Entities	Article, Case, Client Feedback, Contract, and Service

See Also

[Audit data changes](#)

System Settings dialog box - General tab

Use the settings on this page to configure general system-level settings for Microsoft Dynamics CRM.

▶ Open the General System Settings dialog box, if it isn't already open

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > General** tab.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > General** tab.

Settings	Description
Select the default save option for forms	
Enable auto save on all forms	Default: Yes. If Yes, after a record is created (initially saved), any changes made to a form will automatically be saved thirty seconds after the change is made. The 30-second period starts again after a change is made. If no changes are made, the automatic save doesn't happen. For more information, see Manage auto-save .
Set the IM presence option	
Enable presence for the system	Default: Yes. If Yes, instant messaging will display the current status for users, contacts, opportunities, or leads. This only applies to lists and sub-lists for entities with an updated user interface.
Set the full-name format	
Name Format	Default: First Name Last Name. Select the order in which you want customer and user names to be displayed.
Set the currency precision that is used for pricing throughout the system	
Pricing Decimal Precision	Default: 2. Select how many decimal points to use for a currency.

Settings	Description
Set whether reassigned records are shared with the original owner	
Share reassigned records with original owner	Default: No. Select whether or not a record is shared with the original owner of the record, or completely reassigned to another user.
Set blocked file extensions for attachments	Prevent users from attaching files with specific file name extensions.
Set the currency display option	
Display currencies by using	Default: Currency symbol. For example, Currency symbol: \$, Currency code: USD.
Set up Quick Find	
Enable Quick Find record limits	Default: Yes. If Yes, if more than 10,000 records are found, a message will be displayed that suggests a more selective search.
Select entities for search on Microsoft Dynamics CRM for tablets	Click or tap Select to choose the entities to include when users do a search in CRM for tablets.
Enable Bing Maps	
Show Bing Maps on forms	Default: Yes. Microsoft Dynamics CRM on-premises users will also need to enter a Bing Map key. CRM Online users do not need to enter a key.
Please enter Bing Maps key	On-premises users can obtain a Bing Map key from: https://www.bingmapsportal.com/
Set the default country/region code	
Enable country/region code prefixing	Default: Enabled. If enabled, CRM will prefix the country/region code to numbers users are trying to call.
Country/Region Code Prefix	Default: +1. +1 is the country/region calling code for North America.
Set the telephony provider	
Select provider for Click to call	Default: Skype. Choose which provider to enable outbound calls from within CRM. This setting does not apply to CRM for tablets or

Settings	Description
	Microsoft Dynamics CRM for phones.
Set whether users see CRM for tablets message	
Users see app download message	Default: Yes. If Yes, users will see a message regarding downloading the CRM for tablets app.
Disable SLAs	
Disable Service Level Agreements (SLAs) on Case records	Default: No. Choose whether you want to disable SLAs for cases in your organization. For example, you might want to disable SLAs for cases when you're doing maintenance activities or when you're importing cases and you don't want the SLAs to apply to the cases. When SLAs are disabled for an organization, the SLA records can still be created or modified. SLAs will not be applied to case records, however.
Disable Social Engagement	
Prevent feature from receiving social data in CRM	Default: No. If you don't want to receive social data in CRM, select Yes . If you disable social engagement, your organization will not be able to receive social data in CRM. Users can continue to work with existing social data, however.

System Settings dialog box - Goals tab

Set the duration and frequency of the automatic rollup of goals. These settings only affect the automatic handling of all goals set in Microsoft Dynamics CRM. You can always perform a manual rollup for any goal at any time.

► Open the Goals System Settings dialog box

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

► Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Goals** tab.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Goals** tab.

Settings	Description
Set the roll-up expiration time and the roll-up frequency.	
Days after the goal end date when the rollup will stop	Default: 30 days. Set the number of days after the ending date of a goal for Microsoft Dynamics CRM to stop including a goal in a rollup.
Roll-up recurrence frequency	Default: 24 hours. Set the number of hours between each Microsoft Dynamics CRM goal rollup.

System Settings dialog box - Calendar tab

Use the settings on this page to configure calendar settings for Microsoft Dynamics CRM.

▶ Open the Calendar System Settings dialog box if it isn't already open

1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the Microsoft Dynamics CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings > Calendar** tab.

▶ **If using Microsoft Dynamics CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings > Calendar** tab.

Settings	Description
Set scheduling options	
Maximum duration of an appointment in days	CRM users can create appointments to meet or talk to customers. Users create these appointments on the Service Calendar or in the Activities area. You can use this setting to control the maximum number of days that your users can schedule an appointment for. The default is 10 days.

See Also

[Create or edit an appointment](#)

Work with fiscal year settings

You can set the fiscal year period, and how it's displayed, for your organization.

Important

After you set the fiscal year options, you can't change them. Fiscal year options affect the way in which your organization's data is stored in Microsoft Dynamics CRM.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Business Management**. Then click or tap **Fiscal Year Settings**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > Business Management > Fiscal year Settings**.
3. Type information in the text boxes.
 - a. In the **Start Date** box, select the date to start the fiscal year.
 - b. In the **Fiscal Period Template** drop-down list, select how your fiscal year is divided.
 - c. In the **Fiscal Year** drop-down list, select how you want to display the fiscal year.
 - d. In **Name Based On** drop-down list, select whether the fiscal year name is displayed on the start or end of the fiscal year.
 - e. In the **Fiscal Period** drop-down list, select how you want to display the fiscal period.

- f. In the **Display As** drop-down list, select how you want the fiscal year abbreviation and the year to appear.
4. Click or tap **OK**.

See Also

Manage Business Management Settings

Work with salespeople

Work with Territories

Customize regional options - system settings

You can customize how numbers, currencies, times, and dates appear to everyone in your organization.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > System > Administration > System Settings**.

3. Click or tap the **Formats** tab.

4. From the **Current Format** list, select the language and country or region, and click or tap **Customize**.
5. In the **Customize Regional Options** dialog box, you can change the default settings for the selected format. View how the changes will look in the preview boxes.
 - Click or tap the **Number** tab to change the decimal symbol, digit grouping symbol, digit groups, and negative numbers.
 - Click or tap the **Currency** tab to change the currency format, negative currency amounts, and number of decimal places.
 - Click or tap the **Time** tab to change the time format, time separator, and notation for morning and afternoon.
 - Click or tap the **Date** tab to set the type of calendar, first day of the week, first week of the year, formats for long and short dates, and whether or not to show week numbers in calendar views.
 - Click or tap **Apply** to apply the changes and continue working in the dialog box, or click or tap **OK** to save the changes and close the dialog box.
6. Click or tap **OK**.

See Also

[System Settings dialog box - Formats tab](#)

Enable or disable languages

You can enable or disable languages in Microsoft Dynamics CRM to address your business requirements. However, you can't disable the base language.

Important

If you're running Microsoft Dynamics CRM for Microsoft Office Outlook, before you can enable additional languages, you must download one or more [Language Packs](#) on the same computer.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Administration > Languages**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Administration > Languages**.
3. Select the languages you want to enable and clear those you want to disable.
4. Click or tap **Apply**.
5. When you're finished enabling and disabling languages, click or tap **Close**.

Enable or manage auditing

Audit data changes

Track changes made to your business data by enabling auditing. Analyze the history of a particular record, view a summary of everything that changed, or track when a user accesses Microsoft Dynamics CRM. Keep track of the changes done to a record, a field, or by a user. Microsoft Dynamics CRM automatically creates logs for the changes that are tracked.

You can find detailed help about auditing in the [Administration Guide](#).

More information about how to view what changed in a record: [View the audit history of individual records](#)

View the audit history of individual records

Organizations often need to be in compliance with various regulations to ensure availability of customer interaction history, audit logs, access reports, and security incident tracking reports. You may want to track changes in Microsoft Dynamics CRM data for security and analytical purposes.

You can view the audit history of records only when auditing is enabled for the organization and enabled for the record types and fields.



1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the area name, and then select the record type you want, for example, accounts.
- c. In the list of records, open the record that you want to see the audit history for.
- d. On the nav bar, click or tap the down arrow beside the record name, and then select **Audit History**. The history is displayed.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary. Click or tap the area name, and then select the record type you want, for example, accounts.
- b. In any list of records, open the record for which you want to view the changes made.
- c. Under **Related**, click or tap **Audit History**.

3. Use the **Filter on** drop-down box to choose the field that you want to see the audit history for.
4. To open the change list for an item, double-click the item.

See Also

Auditing overview

[System Settings dialog box - Auditing tab](#)

Recover database space by deleting audit logs

When you enable auditing, Microsoft Dynamics CRM stores the change history for transactions in the form of audit logs in the database. It is important to delete the old or unwanted logs to clean up the database space.

Caution

When you delete an audit log, you can no longer view the audit history for the period covered by that audit log.



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions. More information: **Permissions required for customization tasks**

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Auditing > Audit Log Management**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Auditing > Audit Log Management**.

3. Select the oldest audit log. Then, on the Actions toolbar, click or tap **Delete Logs**.
4. In the confirmation message, click or tap **OK**.



Note

You can only delete the oldest audit log in the system. To delete more than one audit log, repeat deleting the oldest available audit log until you have deleted

enough logs.

See Also

Auditing data in Microsoft Dynamics CRM

Configure and Manage Auditing

Set up email processing through server-side synchronization

Set up email through server-side synchronization

[Email processing through server-side synchronization](#)

[Set the delivery method for incoming and outgoing email](#)

[Create email server profiles and add mailboxes using server-side synchronization](#)

[Create forward mailboxes or edit mailboxes](#)

[Test email configuration of mailboxes set up through server-side synchronization](#)

[Migrate settings from the Email Router to server-side synchronization](#)

[Monitor email processing errors](#)

[System Settings dialog box - Email tab](#)

Email processing through server-side synchronization

Centrally manage mailboxes and profiles, configure email for users and queues, and track errors about email processing using server-side synchronization in Microsoft Dynamics CRM. If you've been using the Email Router, but now want to use server-side synchronization, you can use the migration wizard to quickly move the configuration settings into Microsoft Dynamics CRM.

In addition to setting up email, you can use server-side synchronization to synchronize appointments, contacts, and tasks from Microsoft Exchange Server.

Server-side synchronization connects Microsoft Dynamics CRM with one or more Exchange servers or POP3 servers to set up incoming email, and one or more SMTP or Exchange servers to set up outgoing email. [See a list of supported email server types.](#)

What server-side synchronization provides

If you're an administrator, you can use server-side synchronization to:

1. Enable incoming and outgoing email for users and queues (through personal mailboxes).
2. Monitor and report errors regarding email to users and email server profile owners.
3. Enable contacts, tasks, and appointment synchronization from Exchange.

How server-side synchronization works

When Microsoft Dynamics CRM is set up, a mailbox record is created for each user and queue in the organization. These mailboxes are associated to an email server profile that defines the

settings for connecting to the email server. Server-side synchronization uses this information to process email for all mailboxes for a specific email server profile.



Note

If your organization has a large number of mailboxes to monitor, you can consider using a forward mailbox to reduce the administrative effort. [Learn about the difference between forward mailboxes and individual mailboxes.](#)

After you create the email server profile and associate the mailboxes, you must test incoming and outgoing email, and appointment, task, and contact synchronization, and enable the mailboxes for email processing. With server-side synchronization, you can do all this from within Microsoft Dynamics CRM. Once configured, incoming email messages are tracked in Microsoft Dynamics CRM and stored as activity records, and email messages created in Microsoft Dynamics CRM are also sent. The email activity records in Microsoft Dynamics CRM include the contents of the email message, such as the text of the message and its subject line, and also relevant associations with other Microsoft Dynamics CRM records. For example, when a salesperson replies to a customer about a case, an email activity record is created that includes the text of the message, plus the information associating the email activity record with the correct case record.



Note

Email sync using server-side synchronization works only when the **Process Email Using** has been set to **Server-Side Synchronization** in the **Email** tab of the **System Settings** dialog box. By default, the field is always set to **Server-Side Synchronization** for a new organization.

See Also

[Set up email through server-side synchronization](#)

[Migrate settings from the Email Router to server-side synchronization](#)

[System Settings dialog box - Email tab](#)

Set the delivery method for incoming and outgoing email

When a user or queue is created in Microsoft Dynamics CRM, a mailbox for each user and queue is also created. To process email for these mailboxes, the incoming and outgoing delivery method must be set.

1. Before you start, make sure you have the administrator permissions. You must also have Read and Write privileges on the Mailbox entity to edit mailboxes to set the delivery method.
2. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
3. On the nav bar, click or tap **Settings > Email Configuration**.
4. Click or tap **Mailboxes**.

5. For each user or queue whose email must be processed through server-side synchronization, set **Incoming Email** to **Email Router or Server-Side Synchronization** or **Forward Mailbox**, and **Outgoing Email** to **Email Router or Server-Side Synchronization**.

To set the default delivery methods for multiple mailboxes, in the list of mailboxes, select the mailboxes, and then click or tap the **More Commands (...)** icon > **Apply Default Email Settings**. [System Settings dialog box - Email tab](#).



Note

To open a mailbox associated to a specific queue or user, open the queue or user record, and in the **Mailbox** lookup, click or tap the mailbox name.

See Also

[System Settings dialog box - Email tab](#)

Create email server profiles and add mailboxes using server-side synchronization

Email server profiles in Microsoft Dynamics CRM store settings that are used by server-side synchronization to connect to an email server and process email for the associated mailboxes. You must configure at least one email server profile to process email for your CRM organization. Depending on the complexity of your organization's email system, you may have to create multiple email server profiles.

Create an email server profile



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.


2. Follow the steps for the app you're using.




▶ If using the CRM web application


- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Email Configuration > Email Server Profiles**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Email Configuration > Email Server Profiles**.
3. Click or tap **New > Exchange Profile** or **POP3-SMTP Profile**.
4. **For an Exchange email server profile, specify the following details:**

Fields	Description
General	
Name	Specify a meaningful name for the profile.
Description	Type a short description about the objective of the email server profile.
Auto Discover Server Location	<p>Click or tap Yes if you want to use the automatically discover service to determine the server location. This applies only if you're creating a profile for an Exchange Server. If you set this to No, you must specify the email server location manually.</p> <p> Note If the server location doesn't change for mailboxes, we recommend that you don't use auto discover because it may affect performance.</p>
Incoming Server Location and Outgoing Server Location	<p>If you select No in Auto Discover Server Location, enter the following URL for Incoming Server Location and Outgoing Server Location:</p> <p>https://outlook.office365.com/EWS/Exchange.asmx</p>
Credentials	
Authenticate Using	<p>Select the method to authenticate while connecting to the specified email server. You can select one of the following:</p> <ul style="list-style-type: none"> • Credentials Specified by a User or Queue. If you select this option, the credentials specified in the mailbox record of a user or queue are used for sending or receiving email for the respective user


	<p>or queue.</p> <p> Note To ensure the credentials are secured in Microsoft Dynamics CRM, SQL encryption is used to encrypt the credentials stored in the mailbox.</p> <ul style="list-style-type: none"> • Credentials Specified in Email Server Profile. If you select this option, the credentials specified in the email server profile are used for sending or receiving email for the mailboxes of all users and queues associated with this profile. The credentials must have impersonation or delegation permissions on the mailboxes associated with profile. This option requires some configuration on the email server, for example, configuring impersonation rights on Exchange for the mailboxes associated with the profile. <p> Note To ensure the credentials are secured in Microsoft Dynamics CRM, SQL encryption is used to encrypt the credentials stored in the email server profile if you're processing email by using server-side synchronization.</p> <ul style="list-style-type: none"> • Windows Integrated Authentication. This option applies only to Exchange and SMTP email server types. If you select this option, the credentials with which the Microsoft Dynamics CRM Asynchronous Service has been configured will be used. <p>The other options in the list aren't applicable for Exchange.</p>
User Name	<p>Type the user name used to connect to the email server for sending or receiving email for the mailboxes of all users and queues associated with this profile. This field is enabled and valid only if Authenticate Using is set to Credentials Specified in Email Server Profile. The user name that you specify must have permission to send and receive email from the mailboxes of users and queues associated with this profile.</p> <p> Note</p>

	<p>If you're using HTTP for Microsoft Dynamics CRM, the User Name and Password fields will be disabled. To enable the option, change the value of the deployment property AllowCredentialsEntryViaNonSecureChannels to 1. Read about the configuration settings</p>
Password	<p>Specify the password of the user that will be used together with the user name to connect to the email server for sending or receiving email for the mailboxes of users and queues associated with this profile. The password is stored securely.</p> <p> Note If you're using HTTP for Microsoft Dynamics CRM, the User Name and Password fields will be disabled. To enable the option, change the value of the deployment property AllowCredentialsEntryViaNonSecureChannels to 1. Read about the configuration settings</p>
Use Impersonation	<p>Click or tap Yes if you have configured Exchange impersonation rights to send or receive email on behalf of the other mailboxes. Click No if you have configured Exchange delegation rights to send or receive email on behalf of other mailboxes. Read how to configure Exchange impersonation.</p>
Use same settings for Outgoing	<p>If you want to use the same credential settings for the incoming and outgoing connections, click or tap Yes.</p>
Advanced	
Incoming Port	<p>This field shows the port on the email server for accessing the incoming email. This field is automatically populated when you save the record.</p>
Outgoing Port	<p>This field shows the port on the email server for accessing the outgoing email. This field is automatically populated when you save the record.</p>
Use SSL for Outgoing Connection	<p>Click or tap Yes if the email channel is on a secure channel and SSL must be used for sending email. In Microsoft Dynamics CRM (on-premises), this field is set to Yes by default, but the configuration database setting "AllowNonSSLEmail" allows you to override this and set the value to False. Read about the configuration settings.</p>

Use SSL for Incoming Connection	Click or tap Yes if the email channel is on a secure channel and SSL must be used for receiving email. In Microsoft Dynamics CRM (on-premises), this field is set to Yes by default, but the configuration database setting "AllowNonSSLEmail" allows you to override this and set the value to False.
Incoming Authentication Protocol and Outgoing Authentication Protocol	Select a protocol that will be used for authentication for incoming and outgoing email.
Move Failed Emails to Undeliverable Folder	To move the undelivered email to the Undeliverable folder, click or tap Yes . If there's an error in tracking email messages in CRM as email activities, and if this option is set to Yes , the email message will be moved to the Undeliverable folder. This option is available only for an Exchange email server profile.
Additional Settings	
Process Email From	Select a date and time. Email received after the date and time will be processed by server-side synchronization for all mailboxes associated with this profile. If you set a value less than the current date, the change will be applied to all newly associated mailboxes and their earlier processed emails will be pulled.
Maximum Concurrent Connections	Type the maximum number of simultaneous connections that can be made by CRM to the corresponding email server per mailbox. Increase the value to allow more parallel calls to Exchange to improve performance or reduce the value if there are errors on Exchange due to large number of calls from Microsoft Dynamics CRM. The default value of this field is 10. The maximum number is considered per mailbox or per email server profile depending on whether the credentials are specified in a mailbox or email server profile.
Minimum Polling Intervals in Minutes	Type the minimum polling interval, in minutes, for mailboxes that are associated with this email server profile. The polling interval determines how often server-side synchronization polls your mailboxes for new email messages.

-OR-

For a POP3/SMTP profile, specify the following:

Fields	Description
General	
Name	Specify a meaningful name for the profile.
Description	Type a short description about the objective of the email server profile.
Incoming Server Location and Outgoing Server Location	Type the location of the incoming and outgoing email server in the format "<server>".
Credentials	
Authenticate Using	<p>Select the method to authenticate while connecting to the specified email server. You can select one of the following:</p> <ul style="list-style-type: none">• Credentials Specified by a User or Queue. If you select this option, the credentials specified in the mailbox record of a user or queue are used for sending or receiving email for the user or queue. <p> Note To ensure the credentials are secured in Microsoft Dynamics CRM, SQL encryption is used to encrypt the credentials stored in the mailbox.</p> <ul style="list-style-type: none">• Windows Integrated Authentication. This option applies only to Exchange and SMTP email server types. If you select this option, the credentials with which the Microsoft Dynamics CRM Asynchronous Service has been configured will be used.• Windows Credentials

	(Anonymous). You can select this option when anonymous authentication has been enabled on the email server. This applies only to the SMTP email server type.
Use same settings for Outgoing	If you want to use the same credential settings for incoming and outgoing connections, click or tap Yes .
Advanced	
Incoming Port	This field shows the port on the email server for accessing the incoming email. This field is automatically populated when you save the record.
Outgoing Port	This field shows the port on the email server for accessing the outgoing email. This field is automatically populated when you save the record.
Use SSL for Outgoing Connection	Click or tap Yes if the email channel is on a secure channel and SSL must be used for sending email. In Microsoft Dynamics CRM (on-premises), this field is set to Yes by default, but the configuration database setting “AllowNonSSLEmail” allows you to override this and set the value to False. Read about the configuration settings.
Use SSL for Incoming Connection	Click or tap Yes if the email channel is on a secure channel and SSL must be used for receiving email. For Microsoft Dynamics CRM Online, this field can't be set to No . In Microsoft Dynamics CRM (on-premises), this field is set to Yes by default, but the configuration database setting “AllowNonSSLEmail” allows you to override this and set the value to False.
Incoming Authentication Protocol and Outgoing Authentication Protocol	Select a protocol to use for authentication for incoming and outgoing email.
Additional Settings	
Process Email From	Select a date and time. Email received after

	the date and time will be processed by server-side synchronization for all mailboxes associated with this profile. If you set a value less than the current date, the change will be applied to all newly associated mailboxes and their earlier processed emails will be pulled.
Maximum Concurrent Connections	Type the maximum number of simultaneous connections that can be made by CRM to the corresponding email server per mailbox. Increase the value to allow more parallel calls to Exchange to improve performance or reduce the value if there are errors on Exchange due to a large number of calls from Microsoft Dynamics CRM. The default value of this field is 10. The maximum number is considered per mailbox or per email server profile depending on whether the credentials are specified in a mailbox or email server profile.
Minimum Polling Intervals in Minutes	Type the minimum polling interval, in minutes, for mailboxes that are associated with this email server profile. The polling interval determines how often server-side synchronization polls your mailboxes for new email messages.

5. Click or tap **Save**.
6. On the left side of the email server profile form, under **Common**, click or tap **Mailboxes**.
7. Click or tap **Add New Forward Mailbox**.
8. Complete the details in the mailbox form and click or tap **Save**. See how to [Create forward mailboxes or edit mailboxes](#).
9. Click or tap **Save**.

Add mailboxes to an email server profile



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Email Configuration > Mailboxes**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Email Configuration > Mailboxes**.
3. Select all the mailboxes that you want to associate with the email server profile, and click or tap **Edit**.
4. In the **Change Multiple Records** form, under **Synchronization Method**, in **Server Profile**, select the email server profile that you want to add the mailboxes to, and then click or tap **Change**.
5. Alternately, select multiple mailboxes, and click or tap **More Commands (...) > Apply Default Email Settings**, and then click or tap **OK**. The mailboxes will be added to the email server profile that's selected as the default in the **System Settings** dialog box. Read about setting default email settings in [System Settings dialog box - Email tab](#).

See Also

[Test email configuration of mailboxes set up through server-side synchronization](#)

[Create forward mailboxes or edit mailboxes](#)

[Set up email through server-side synchronization](#)

Create forward mailboxes or edit mailboxes


By default, when users and queues are created in Microsoft Dynamics CRM, their respective mailbox records are also created. These mailbox records contain information that is specific to an individual mailbox on the email server, like email address, mailbox credentials, and email synchronization method. To process email messages using server-side synchronization for users

and queues, their respective mailbox records should be associated to an email server profile record in Microsoft Dynamics CRM.

If your organization wants to configure server-side synchronization using a forward mailbox, you can create a new forward mailbox record. A forward mailbox is used as a collection box for email messages that are transferred from each user's mailbox on the email system by a server-side rule. The forward mailbox must be dedicated to server-side synchronization, and must not be used as a working mailbox by an individual user. This can be used to process email messages for users and queues whose mailboxes have **Incoming Email Synchronization Method** set to **Forward Mailbox**. You must associate the forward mailbox record to an email server profile record to process email using server-side synchronization. [Learn more about forward mailboxes.](#)



1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.

 **Check your security role**

- a. Follow the steps in [View your user profile.](#)
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.



 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Email Configuration > Mailboxes**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Email Configuration > Mailboxes**.
3. Click or tap **New Forward Mailbox**, or to edit an existing mailbox record, open the mailbox record.
4. In the mailbox record, specify the following details.

Fields	Description
General	
Name	Type a meaningful name for the mailbox.
Owner	Shows the owner of the mailbox. For a user mailbox that is automatically populated, the owner of the mailbox is the user itself. For a queue mailbox that is automatically populated, the owner of the mailbox is the owner of the queue record.
Email address	Type the email address for the forward mailbox, such as forwardmailbox@contoso.com. For a user or a queue mailbox, the email address is the same as that specified in the corresponding user or queue record form. If you edit the email address here, the email address in the user or queue record is updated automatically.
Delete Emails After Processing	Specify if you want to delete email from the mailbox after processing. This field is available and can be set to Yes only for a forward mailbox and a queue mailbox.
Regarding	Select the user or queue that the mailbox is associated with. This field is empty and cannot be set for a forward mailbox.
Is Forward Mailbox	This field indicates whether the mailbox record is a forward mailbox. When set to No , it indicates that the mailbox record is associated to an individual user or queue in Microsoft Dynamics CRM.
Credentials	
Allow to Use Credentials for Email Processing	Click or tap Yes if the email server profile associated to this mailbox has Authenticate Using set to Credentials Specified by a User or Queue . You must provide the username and password when this field is set to Yes . These credentials will be used to send and receive email from the

	<p>mailbox on the email server.</p> <p> Note To ensure the credentials are secured in CRM, SQL encryption is used to encrypt the credentials stored in the mailbox if you're processing email by using server-side synchronization.</p>
Synchronization Method	
Server Profile	Select the email server profile that is used for email processing for this mailbox.
Incoming Email	<p>Select the delivery method for incoming email. This will determine how incoming email will be accessed for this mailbox.</p> <ul style="list-style-type: none"> • None. Email won't be received. • Forward Mailbox. Email will be received using a forward mailbox. • Microsoft Dynamics CRM for Outlook. Email is received by using CRM for Outlook. • Server-Side Synchronization or Email Router. Email is received by using server-side synchronization or the Email Router.
Outgoing Email	<p>Select the delivery method for outgoing email. This determines how outgoing email will be sent for this mailbox.</p> <ul style="list-style-type: none"> • None. Email won't be sent. • Microsoft Dynamics CRM for Outlook. Email is received by using CRM for Outlook. • Server-Side Synchronization or Email Router. Email is sent by using server-side synchronization or Email Router. <p> Note For a forward mailbox, only None is allowed.</p>

Appointments, Contacts, and Tasks	<p>Select whether you want to use CRM for Outlook or server-side synchronization to synchronize appointments, contacts, and tasks in CRM.</p> <p>If you select None, appointments, contacts, and tasks won't be synchronized.</p>
Configuration Test Results	
Incoming Email Status	<p>Show the result of the email configuration test for incoming email. The various statuses can be:</p> <ul style="list-style-type: none"> • Not Run. The email configuration test has not been run for this mailbox. • Success. The incoming email has been configured and email can be received for this mailbox. • Failure. The incoming email has been configured but it is not possible to pull email from the corresponding configured mailbox.
Outgoing Email Status	<p>Show the result of the email configuration test for outgoing email. The various statuses can be:</p> <ul style="list-style-type: none"> • Not Run. The email configuration test hasn't been run for this mailbox. • Success. The outgoing email has been configured and email can be sent from this mailbox. • Failure. The outgoing email has been configured but it's not possible to send email from the corresponding configured mailbox.
Appointments, Contacts, and Tasks Status	<p>Show the result of the synchronization of appointments, contacts, and tasks. The various statuses can be:</p> <ul style="list-style-type: none"> • Not Run. The synchronization has not been tested for this mailbox. • Success. Appointments, contacts, and tasks can be synchronized for this mailbox.

	<ul style="list-style-type: none"> • Failure. Appointments, contacts, and tasks can't be synchronized for this mailbox.
Mailbox Test Completed On	This field shows the date and time when the email configuration was tested for this mailbox record.

5. Click or tap **Save** or **Save & Close**.

See Also

[Set up email through server-side synchronization](#)

[Create email server profiles and add mailboxes using server-side synchronization](#)

[Test email configuration of mailboxes set up through server-side synchronization](#)

Test email configuration of mailboxes set up through server-side synchronization

After you associate mailboxes with an email server profile, you must test to make sure the email is correctly configured for the mailboxes, and then enable the mailboxes. The configuration test checks to make sure incoming and outgoing email messages are configured correctly and also to verify that appointments, contacts, and tasks are being correctly synchronized. When you run the test for outgoing email, a test email message is sent from the respective mailbox account to the email address of the mailbox. If an error occurs during the test, the mailbox owner or email server profile owner is notified about the nature of the error. More information: [Monitor email processing errors](#)

Test configuration of mailboxes



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.
2. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
3. On the nav bar, click or tap **Settings > Email Configuration**.
4. Click or tap **Mailboxes**.
5. Select the mailboxes you want to test, and then click or tap **Test & Enable Mailboxes**.
This tests the incoming and outgoing email configuration of the selected mailboxes and enables them for email processing. If an error occurs in a mailbox, an alert is shown on the Alerts wall of the mailbox and the profile owner. Depending on the nature of the error, Microsoft Dynamics CRM tries to process the email again after some time or disables the mailbox for email processing.

The result of the email configuration test is displayed in the **Incoming Email Status**, **Outgoing Email Status**, and **Appointments, Contacts, and Tasks Status** fields of a

mailbox record. An alert is also generated when the configuration is successfully completed for a mailbox. This alert is shown to the mailbox owner.



Tip

If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this CRM org only, even if Exchange was set to sync with a different org** check box. [Read more about this check box.](#)

Test email configuration for all mailboxes associated with an email server profile



1. Make sure you have administrator privileges.
2. On the nav bar, click or tap **Settings > Email Configuration > Email Server Profiles**.
3. Open an email server profile record, and then in the **Actions** group, click or tap **Test & Enable Mailboxes**.

–OR–

Select an email server profile, and then click or tap **Test & Enable Mailboxes**.

When you test the email configuration, an asynchronous job runs in the background. It may take a few minutes for the test to be completed. Microsoft Dynamics CRM tests the email configuration of all the mailboxes associated with the email server profile. For the mailboxes configured with server-side synchronization for synchronizing appointments, tasks, and contacts, it also checks to make sure they're configured properly.



Tip

If you're unable to synchronize contacts, appointments, and tasks for a mailbox, you may want to select the **Sync items with Exchange from this CRM org only, even if Exchange was set to sync with a different org** check box. [Read more about this check box.](#)

See Also

[Set up email through server-side synchronization](#)

[Create email server profiles and add mailboxes using server-side synchronization](#)

[Create forward mailboxes or edit mailboxes](#)

Migrate settings from the Email Router to server-side synchronization

Server-side synchronization is a method in Microsoft Dynamics CRM that you can use to set up email and synchronize your appointments, contacts, and tasks. With server-side synchronization, you can centrally manage mailboxes and profiles, and also track errors about email processing. If your organization is currently using the Email Router, but wants to start using server-side synchronization instead, you can easily migrate the configuration settings from the Email Router to server-side synchronization to set up email.



Note

An organization can only use either the Email Router or server-side synchronization to process email. You can define what to use in the **Email** tab of System Settings in Microsoft Dynamics CRM. If you select server-side synchronization, the Email Router stops functioning for the organization.

To switch from Microsoft Office Outlook synchronization to server-side synchronization, simply change the synchronization method in mailbox records to server-side synchronization. That's all you have to do to make the change from Outlook synchronization to server-side synchronization.

During migration, the old incoming and outgoing profiles for the user and queue mailboxes are merged to create a new email server profile that will be used by server-side synchronization.



1. Before you start, make sure you have Read, Write, and Create privileges on the Mailbox entity and Read, Write, and Create privileges on the Email Server Profile entity.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Email Configuration**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Email Configuration**.

3. Click or tap **Migrate Email Router Data**.
4. In the Email Router Data Migration wizard, in the three text boxes, click or tap **Browse**, and select the three files specified at the top of the page in the same order. If you must

migrate data from multiple email routers, click or tap **More Email Routers** and again select the three files. You can migrate data from up to four email routers at once.

 **Note**

The maximum combined size of all the files from all the email routers that you can upload at a time is 32 MB.

5. Click or tap **Next**.
6. On the **Select Email Server Profiles to Migrate** page, the incoming and outgoing email server profiles of the Email Router are listed and the details about the new email server profile for server-side synchronization is also listed. If you want to migrate the profile, in **Migrate Server Profile**, click or tap **Yes**.
In the Email Router, incoming and outgoing email server profiles are different and each user or queue is associated with both incoming and outgoing profiles. However, with server-side synchronization, the incoming and outgoing settings are defined in a single profile and a user or queue is associated with this profile. Thus, when you migrate the data, the data from two server profiles is combined into one. The **Select Email Server Profiles to Migrate** page shows details about the new email server profile that will be created. Read more about [merging email server profiles for migration](#).
7. Click or tap **Next**.
8. The **Migration Review Summary** page shows what data will be migrated. Click or tap **Start**.

After the migration is complete, you'll see the summary of the migrated data. You must test the email configuration for the mailboxes after the migration is complete. To be able to start email processing through server-side synchronization, in the **Process Email From** field in the **System Settings** dialog box, select **Server-Side Synchronization**. Read how to configure [System Settings dialog box - Email tab](#).

See Also

[Test email configuration of mailboxes set up through server-side synchronization](#)
[Monitor email processing errors](#)

Monitor email processing errors

Microsoft Dynamics CRM generates alerts if errors occur while email is being processed. An error can be classified based on the nature of the error and on whether the error is for an email, a mailbox, or an email server profile.

The following table lists the distinction between permanent and transient errors.

Permanent Errors	Transient Errors
These are of permanent nature and can occur when the transient errors aren't fixed after a	These are of temporary nature and may get fixed automatically after a few attempts.

Permanent Errors	Transient Errors
few attempts.	
When these errors occur, email processing for the affected mailboxes is stopped. These require a corrective action by the mailbox owner or a CRM administrator.	These errors don't necessarily require a corrective action by a CRM user, but we recommend that you look at these.
The administrators and users are alerted on their alert walls to take action and start email processing.	The administrators and users are notified on the alerts wall about these errors but no action is required for these errors.

The following table will help you distinguish between email-level, mailbox-level, and email server profile-level errors and whether a corrective action is needed.

Email-level errors	Mailbox-level errors	Email server profile-level errors
These are errors specific to an email message.	These are error specific to a mailbox.	These errors may occur for one or more mailboxes.
These don't have impact on the processing of other email.	The owner of the mailbox is notified on the alerts wall and the owner is required to take a corrective action.	The owner of the associated email server profile is notified on the alerts wall and the owner is required to take a corrective action.
The alerts for these are displayed in the alerts section of the email form.	The alert is also displayed in the respective mailbox form.	The owners of the mailbox that are affected are also notified on the alerts wall but no action is required by them.

View alerts

The alerts are shown on the Alerts wall or the Alerts section in the mailbox or email server profile records. The following table shows how to view the alerts and the actions you can take on these alerts.

To	Do this
View all alerts	<p>On the nav bar, click or tap Microsoft Dynamics CRM > Sales > Alerts.</p> <ul style="list-style-type: none"> To delete all alerts at once, click or tap the Delete all alerts icon on the alerts wall. To view just errors, warnings, or information, click or tap Errors, Warnings,

To	Do this
	<p>or Information respectively.</p> <p>If you are also synchronizing appointments, contacts, and tasks through server-side synchronization, you'll see alerts for the following:</p> <ul style="list-style-type: none"> • When one or more duplicate records are found in Microsoft Dynamics CRM when saving a record from Exchange to Microsoft Dynamics CRM. • When a scheduling conflict is found when saving an appointment from Exchange to Microsoft Dynamics CRM because a mailbox is unavailable at the time. • When previously linked items are found for a specific mailbox. <p>You'll be prompted to take actions on the errors about the appointment, contacts, and tasks synchronization.</p>
View alerts specific to mailbox	<ol style="list-style-type: none"> 1. On the nav bar, click or tap Microsoft Dynamics CRM > Settings > Email Configuration > Mailboxes. 2. Open a mailbox record, and on the left navigation bar, under Common, click or tap Alerts.
View alerts specific to an email server profile	<ol style="list-style-type: none"> 1. On the nav bar, click or tap Microsoft Dynamics CRM > Settings > Email Configuration > Email Server Profiles. 2. Open an email server profile record, and on the left navigation bar, under Common, click or tap Alerts.



Note

If you don't wish to get alerts, you can disable them from the [System Settings dialog box - Email tab](#) by clearing the check boxes for alerts.

See Also

[Test email configuration of mailboxes set up through server-side synchronization](#)

[Set up email through server-side synchronization](#)

Set up and use CRM for Outlook

Set up CRM for Outlook

If your organization uses Microsoft Outlook to manage email, appointments, contacts, and tasks, you may want to consider using Microsoft Dynamics CRM for Outlook. You can use CRM for Outlook to access Microsoft Dynamics CRM data while you're working within the familiar Outlook interface.

CRM for Outlook can also provide access to CRM data while you're offline.

Important

If you're using Microsoft Dynamics CRM 2011 (on-premises), don't update to the Microsoft Dynamics CRM 2013 for Outlook client; continue to use the CRM 2011 for Outlook client.

If you're using CRM 2013 (on-premises) or CRM Online, you can upgrade to the CRM 2013 for Outlook client or you can use the CRM 2011 for Outlook client if you're not ready to upgrade yet. If you use the CRM 2011 for Outlook client with CRM 2013 or CRM Online, you can't use the Outlook client in Offline mode, however. We recommend that you update to the CRM 2013 for Outlook client at your earliest convenience.

Step 1: Review installation prerequisites

Logging on as a Local Administrator

- To install CRM for Outlook, you must be able to log on to your computer as a user with Local Administrator privileges.



Note

In smaller companies, CRM for Outlook is often installed manually, on a computer-by-computer basis. Administrators or individual users who have Local Administrator privileges and who possess a general familiarity with installing software can do these installations.

Software requirements

- [Get information on software requirements](#)

Hardware and network requirements

- [Get information on hardware and network requirements](#)

Installing updates

- Install all the latest Microsoft Office updates, including all security updates, from Microsoft Update. [Go to Microsoft Update.](#)

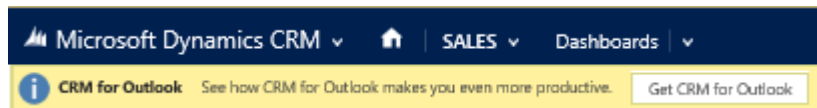
Step 2: Install CRM for Outlook

Important

Before you or your users install CRM for Outlook, make sure you have completed your desired CRM customizations. If your users will use CRM for Outlook in Offline mode, for best performance, enable only the minimum required record types (entities) and views for offline use. [See the Customization Guide for more information.](#)



1. Run the Microsoft Dynamics CRM 2013 for Outlook Setup Wizard to install CRM for Outlook. You can start the wizard from any of the following:
 - **From the message bar in CRM:** In the CRM user interface, click or tap **Get CRM for Outlook** on the message bar. If you see one or more **Security Warning** dialog boxes, click or tap **Run** in each.



- **From the web:** [Go to the download page](#), and then download and run the appropriate executable file (32-bit or 64-bit), depending on your system and the version of Outlook you use.
 - **From a DVD:** Double-click **SetupClient.exe** in the appropriate Microsoft Office installation folder (32-bit or 64-bit).
2. In the **Browse For Folder** dialog box, select a folder to store the extracted Outlook files. We recommend that you store the extracted files in a separate folder (choose the **Make New Folder** option in the dialog box to create a folder without exiting the wizard).
 3. On the **License Agreement** page, if you accept the license agreement, select **I accept the license agreement**, and then click or tap **Next**.
 4. If the **Get Recommended Updates** page appears, indicate whether you want to automatically obtain updates through Microsoft Update, and then click or tap **Next**.



Note

How the Outlook software is updated depends on how your CRM administrator handles updates from Microsoft Update.

5. In the **Select the installation** page, do one of the following:
 - To install CRM for Outlook with offline capability, click or tap **Options**, select the **Offline Capability** check box on the **Customize Installation** page, and then click or tap **Install Now**. If you don't install offline capability during installation, you can add it later by clicking **Go Offline** in CRM for Outlook.



Important

If the Microsoft Dynamics CRM Online Spring '14 update or Microsoft Dynamics CRM 2013 Service Pack 1 has been installed and applied on your system, you won't see any of the new features when you go offline if you

haven't upgraded to the new Outlook client. [Read more about upgrading to the latest client.](#)

[Group Policy Folder Redirection](#) with offline files is not supported in CRM for Outlook. If your CRM data is stored with redirected offline files, users may be unable to use CRM for Outlook.

- To install CRM for Outlook without offline capability, click or tap **Install Now**. CRM installs CRM for Outlook. You may need to restart your computer to complete the installation.
6. On the final page of the wizard, click or tap **Close**.

Step 3: Configure CRM for Outlook

You must configure CRM for Outlook after installing it. When you restart Outlook after installing, the Configuration Wizard starts automatically.



Note

If the Configuration Wizard doesn't start automatically, in the Start screen, search for **Configuration Wizard** and run it. In earlier versions of Windows, click or tap **Start > All Programs > Microsoft Dynamics CRM**, and then click or tap **Configuration Wizard**. You can also click or tap **Configure Microsoft Dynamics CRM for Outlook** on the **CRM** tab in Outlook.



1. In the Configuration Wizard, you'll see a **Server URL** drop-down list. Click or tap the arrow next to the drop-down list, and then do one of the following:
 - To connect to a CRM Online organization, select **CRM Online**. If you don't know if you're using the online or on-premises version of CRM, look in your browser at the web address for Microsoft Dynamics CRM. If the web address contains "dynamics.com" after the name of your organization, you're using the online version. Otherwise, it's the on-premises version.
 - To connect to a CRM 2013 (on-premises) organization, there are two types of URLs, depending on whether your computer is connected to the Internet or not:
 - i. For internal deployments (not connected over the Internet), type the Microsoft Dynamics CRM server or discovery service URL using the following format: **http://crmserver** or **http://crmserver:5555**.
 - ii. To connect over the Internet, use the discovery service URL using the following format: **https://dev.crmserver.contoso.com**.



Note

If you're unsure of what url to use, check with your CRM administrator.

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2. Click or tap **Test Connection**. This adds organizations to the **Organization Information** list. If you're prompted for credentials, select from the following options:

- For a CRM Online organization, do one of the following:
 - i. If your organization connects through Office 365, enter your Microsoft online services user name and password, and then click or tap **OK**. This information was sent to you in email when your account was created.
 - ii. If you're connecting with an earlier online services platform, enter your Microsoft account (formerly Windows Live ID) and password, and then click or tap **OK**. This information was sent to you in email when your account was created.
 - For a CRM on-premises organization, you may not be prompted because CRM uses your Active Directory domain credentials.
3. In the **Organization** list, select the CRM organization you want to connect to, and then click or tap **OK**. Then click or tap **Close**.



Tip

If you have problems installing and configuring CRM for Outlook, [try the Configuration Troubleshooting Wizard](#).

Step 4: Read about privacy

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Configuration Troubleshooting Wizard](#)

[Troubleshoot CRM for Outlook installation](#)

[Upgrade CRM 2011 for Outlook to CRM 2013 for Outlook](#)

[Do your CRM work in Outlook](#)

Do your CRM work in Outlook

CRM for Outlook is an add-in for Outlook that you install on your desktop or laptop computer. With CRM for Outlook, you can perform most of the same sales, marketing, and customer services in Outlook that you can in the Microsoft Dynamics CRM web application. This includes working with accounts, contacts, and campaigns.

Differences between working in Microsoft Dynamics CRM for Outlook and Microsoft Outlook

Because Microsoft Dynamics CRM uses standard Internet Explorer controls, some Outlook features aren't available in CRM for Outlook.

Not available in CRM for Outlook	Work around
Email signatures	Use a global email template.
Full-text editing features	Standard editing controls, such as press ENTER for double-spaced lines and SHIFT+ENTER for single-spaced lines.
Attach files during creation	Save an email activity before attaching files.
Move records by dragging and dropping.	None. This causes data loss.
Reminders	After synchronization with Outlook, 15-minute reminders are created for appointments and service activities created in the Microsoft Dynamics CRM folders or in the web application.
Microsoft Dynamics CRM Service calendar	You can request that your system administrator add it.

Work with views of Microsoft Dynamics CRM Data in Outlook

While you're working with Microsoft Dynamics CRM records in Outlook, you can change how and what records are displayed on the tabs. You can filter the information, sort, and group the records as you like.

A view defines how the information is displayed on a tab. If you have a lot of records, they can be displayed on several pages on a tab. You can pin the view, which in some cases moves the records from the pages into a single list on the tab. The list view of the records is stored on your computer.

Some views are server-only. This means that certain kinds of views, as defined by your system administrator, can't be stored on your computer. You can pin the view, but the records aren't moved into a single list.

Work offline

Before you go offline, you can select a portion of your CRM for Outlook data to take with you offline for use as local records. Whenever you go online again, your local records synchronize with the server so that your changed local records are then changed in the Microsoft Dynamics CRM database.

More information: [Work offline with CRM for Outlook](#)

Important

Any users who log on locally to a computer that has Microsoft Dynamics CRM for Outlook installed can potentially access Microsoft Dynamics CRM data that is stored in the offline database. Shared use of a computer running CRM for Outlook is not supported.

Synchronize Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM

While you're offline with Microsoft Dynamics CRM, you can use CRM for Outlook to create, delete, or update contacts, tasks, appointments, phone calls, letters, faxes, and service appointments. These changes update Outlook while you are offline, but don't update Microsoft Dynamics CRM until you go back online.

More information: [Synchronizing information](#)

Create Mail Merge documents with Word

You can use CRM for Outlook with Microsoft Office Word to create customer-ready documents for your customers that display Microsoft Dynamics CRM data.

- Create new templates or use an existing template to generate form letters for yourself or, with the appropriate permissions, for the whole organization.
- Send form letters or form email messages to contacts, accounts, or marketing mailing lists.
- Resend old letters to new recipients.
- Create faxes.
- Create quotes.

More information: [Send bulk email to customers](#)

Share a computer with multiple users

If your business has several people sharing the same computer with different user accounts, each can install and use CRM for Outlook when using their own account. Regular synchronization with Outlook and Microsoft Dynamics CRM still occurs.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off

the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Overview of tracking records in CRM for Outlook

Tracking email messages, contacts, tasks, and appointments (including recurring appointments), instantly adds the items to Microsoft Dynamics CRM. You can update the information in both Microsoft Dynamics CRM and Microsoft Dynamics CRM for Microsoft Office Outlook and you can also access it in both because the data synchronizes between the programs.

In CRM for Outlook, you can quickly choose the Outlook items that you want to track or stop tracking. Simply select one or more items to track, or select an item to stop tracking. Be sure to stop tracking items one at a time, rather than stopping tracking on multiple items at one time.

When you track Outlook items, you can perform the following actions:

- Select the regarding record for one or more items.
- Set the parent account or contact record for contacts.
- Add or edit connections.
- Convert email messages, appointments, meetings, and tasks into Microsoft Dynamics CRM opportunities, leads, and case records.
- Open the record in Microsoft Dynamics CRM and open the parent and regarding record in Microsoft Dynamics CRM.
- Create new contact or lead records (with the automatically create contact or lead records option selected).
- Insert and attach Microsoft Dynamics CRM email templates, articles, and sales literature to email messages.
- Track tasks as Microsoft Dynamics CRM tasks, phone calls, letters, or faxes.

When you track a new email message, Microsoft Dynamics CRM creates a new email activity record. You can link the email message to other Microsoft Dynamics CRM records if you select a record that the email message is regarding.

You can also automatically create new contact or lead records from email messages and meeting requests. The new contact or lead record contains the email address of the sender or meeting organizer, and the email message or meeting request links to the new contact or lead record.

Depending on the email tracking options that you select, some items may be synchronized with Microsoft Dynamics CRM automatically so that you do not have to select the items to track.

You can track email messages to and from distribution lists, also. If you do not expand the distribution list before you track and save the email message, and if the option that automatically creates new records is selected, a new Microsoft Dynamics CRM record is created for the distribution list.

More information: **Set Personal Options**

What you can do in the Microsoft Dynamics CRM pane with Outlook items

When CRM for Outlook is installed, email messages, contacts, tasks, and appointments include a Microsoft Dynamics CRM pane that displays information and links about the item and related records.

The Microsoft Dynamics CRM pane displays the following information:

- Whether the item is tracked.
- The name of the parent (for contacts) or regarding record.
- Related records, along with a symbol that identifies the record type in Microsoft Dynamics CRM.
- Whether the email addresses, names, or distribution lists in the email message are also Microsoft Dynamics CRM records.



Note

The Microsoft Dynamics CRM pane displays the name of the distribution list if you track an email message without expanding the distribution list. If you expand a distribution list before you track and save an email message, the individual email addresses that comprise the distribution list are tracked, instead.

The Microsoft Dynamics CRM pane also includes an **Options** button that provides quick access to the email tracking options that you can select. More information: **Set Personal Options**

Tracking and synchronization on multiple computers

You can use multiple computers to run Outlook and to do work in Microsoft Dynamics CRM. Changes or updates to synchronized records will not show up in Microsoft Dynamics CRM until your synchronizing computer is connected to the Microsoft Dynamics CRM server again.

More information: [Connect to another organization in CRM for Outlook](#)

Delegate access and tracking

If you have delegated access to your Outlook account, the delegate can track items on your behalf. These items will not synchronize with Microsoft Dynamics CRM until you connect to the Microsoft Dynamics CRM server again. More information: [Allow someone else to manage your mail and calendar](#)

How deletion works for tracked items

Email messages

- Deleting a tracked email message in Outlook does not delete the email message from Microsoft Dynamics CRM.
- Deleting an email message in Microsoft Dynamics CRM does not delete the tracked message from Outlook.
- If you stop tracking an email message in Outlook, CRM for Outlook asks whether you want to delete the email message in Microsoft Dynamics CRM.

Contacts

- Deleting a tracked contact in Outlook does not delete the contact record from Microsoft Dynamics CRM.
- If you are not the owner of the contact record, deleting a contact from Microsoft Dynamics CRM deletes the tracked contact from Outlook.
- If you are the owner of the contact record, deleting a contact from Microsoft Dynamics CRM, does not delete the contact from Outlook.
- If you are the owner of the contact record, and you stop tracking the contact, CRM for Outlook asks whether you want to delete the contact record from Microsoft Dynamics CRM.
- If you are not the owner of the contact record and you stop tracking the contact, Microsoft Dynamics CRM deletes the contact record.

Appointments

Deleting a tracked appointment in Outlook deletes the appointment in Microsoft Dynamics CRM; and deleting a tracked appointment in Microsoft Dynamics CRM deletes the appointment in Outlook if the following is true:

- The appointment is current.
- You are the owner or organizer of the appointment record.

If you stop tracking an appointment, CRM for Outlook asks whether you want to delete the appointment from Microsoft Dynamics CRM. The appointment record is deleted in Microsoft Dynamics CRM if the following is true:

- The appointment is current.
- You are the owner of the appointment record.

Tasks

- Deleting a tracked task in Outlook deletes the task activity record in Microsoft Dynamics CRM.
- Deleting the task activity record in Microsoft Dynamics CRM deletes the task in Outlook, if the task is current.
- If you stop tracking the task, CRM for Outlook asks whether you want to delete the task in Microsoft Dynamics CRM.

Synchronizing Microsoft Dynamics CRM and local data

Your local data is defined by Outlook Synchronization Filters and Offline Synchronization Filters. The Outlook filters specify the data that is synchronized between Microsoft Dynamics CRM and your Outlook folders. The offline filters specify the data that is stored and synchronized between your local copy of the Microsoft Dynamics CRM database and the Microsoft Dynamics CRM server.

The default filters can be edited, deactivated, and deleted. You can add new filters if you want to specify additional criteria for the data that you want to synchronize and store locally.

Updating and synchronizing your local data can take an extended period of time. To synchronize, go online and offline more quickly, you can decrease the interval for automatic synchronization.

More information: **Set Personal Options**

The address book synchronizes with Microsoft Dynamics CRM automatically when you start Outlook and then once every 24 hours.

More information: [Synchronize data in CRM for Outlook](#)

Data loss prevention during the synchronization process

To prevent data loss, when you go offline Microsoft Dynamics CRM synchronizes data from the server to your local data, and then applies all of your changes to the server. All server transactions post completely before records are erased from your local data.

When you run a synchronization process, Microsoft Dynamics CRM overwrites existing information without verifying or comparing the last saved date.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.


If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your

organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Send and receive email in CRM for Outlook

When you are working in CRM for Outlook, you can use all the familiar Outlook buttons and toolbars with the Microsoft Dynamics CRM toolbar, menu, or tab to manage e-mail messages and most other activities.

At any time, you can track an Outlook e-mail message in Microsoft Dynamics CRM. Tracked messages still appear in the Outlook mail folders. By default, tracked messages display a Microsoft Dynamics CRM  symbol. A copy of the e-mail message is saved as an activity and is available in the Microsoft Dynamics CRM Activities area. You can link the activity to a record in Microsoft Dynamics CRM. You can also set your personal options so that all incoming e-mail is tracked in Microsoft Dynamics CRM.

Important

Because Microsoft Dynamics CRM shares data between users, many of the default privacy assumptions of a full e-mail system do not apply. This means that an e-mail activity that is associated with a Microsoft Dynamics CRM record (for example, a case, account, or contact) has the same visibility as any other activity associated with that record. Any user who has access to the record and its associated activities also has access to the e-mail message.

Managing incoming e-mail

When you use CRM for Outlook, all the e-mail you receive arrives in your Outlook Inbox. Only e-mail messages that originated as a Microsoft Dynamics CRM e-mail activity (that is, a response to an e-mail message you send from Microsoft Dynamics CRM) or that is marked as tracked in Microsoft Dynamics CRM, arrives in the Microsoft Dynamics CRM Activities and My Work: Queues area. If you prefer, you can:

- Track all incoming e-mail messages as Microsoft Dynamics CRM e-mail activities.
- Track only e-mail messages that originated in Microsoft Dynamics CRM (that is, e-mail sent in response to a Microsoft Dynamics CRM e-mail activity) into Microsoft Dynamics CRM e-mail activities.
- Track only e-mail messages related to your accounts, contacts, or leads.
- Track e-mail messages related to all Microsoft Dynamics CRM and custom record types that contain an e-mail field.

Note

More than one custom record type could contain the same e-mail address. When this happens, Microsoft Dynamics CRM links the e-mail messages that are received from this e-mail address to the custom record type that was created first. For example, a Patient record type that was created in January lists the e-mail address `someone@example.com`. A Doctor record type created in February also lists the

same e-mail address. Microsoft Dynamics CRM links the e-mail messages received from someone@example.com only to the Patient record type. Sending an e-mail message to someone@example.com links the e-mail message to the Patient record type and the Doctor record type.

If you choose not to track all incoming e-mail messages, you can manually track selected messages in Outlook as e-mail activities in Microsoft Dynamics CRM.

If you track all your e-mail messages as Microsoft Dynamics CRM e-mail activities, they can be accessed by anyone who has permission to view or work with your activities. Also, when you track an e-mail message with attachments to a Microsoft Dynamics CRM activity, the attachments are included in the activity. If you do not want these attachments to be available to other users, delete them from the e-mail activity.

Sending and replying to e-mail messages

You can link Microsoft Dynamics CRM e-mail activities to active contacts, accounts, leads, facilities, equipment, queues, or users in Microsoft Dynamics CRM. You can select active Microsoft Dynamics CRM records with e-mail addresses from the Microsoft Dynamics CRM address book, which is installed automatically when you install CRM for Outlook. You can also track e-mail activities in Microsoft Dynamics CRM without being related to another record.

When you send, reply, or forward an e-mail message that is tracked as an e-mail activity, a closed activity is created for each account and contact referenced and displayed in the Activities area. Closed e-mail activities cannot be updated except to link them to a related Microsoft Dynamics CRM record. If a related record has not already been selected, you have the option to select one.

Working with CRM for Outlook offline and synchronizing with Microsoft Dynamics CRM

If you install CRM for Outlook, you have the option of working offline from the Microsoft Dynamics CRM server. You can create Microsoft Dynamics CRM e-mail messages that are sent when you go back online with the Microsoft Dynamics CRM server. If you send Outlook e-mail messages, those are sent immediately if you have network access for sending e-mail.

When you work with CRM for Outlook offline, a sent e-mail message can fail to be delivered or can be blocked. This can happen because the recipient does not want to receive the e-mail message or the mail server is down. If this happens, Outlook saves the e-mail message to your **Drafts** folder, but Microsoft Dynamics CRM creates a closed activity. In Microsoft Dynamics CRM, use the **Pending E-mail** view to see unsent messages.

When you are working offline, Microsoft Dynamics CRM e-mail messages that you send are saved to your Outlook offline queue. When you go online, Microsoft Dynamics CRM automatically tries to send them and create the activities. If an e-mail message cannot be sent, Microsoft Dynamics CRM saves it as a draft activity, but it does not appear in your **Drafts** folder in Outlook.

Using the Microsoft Dynamics CRM address book

Use the Microsoft Dynamics CRM address book to select Microsoft Dynamics CRM records in Outlook. The address book includes accounts, contacts, facilities and equipment, leads, queues, and users. Access and use the Microsoft Dynamics CRM address book by using the same menu as your other Outlook address books.

The address book is used to reconcile e-mail recipients in incoming messages to Microsoft Dynamics CRM contacts and link them automatically. How the contacts are matched is set in your personal options.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Track Outlook email as activities in CRM for Outlook

When CRM for Outlook is installed, email messages, as well as contacts, appointments, and tasks, include a Microsoft Dynamics CRM pane that displays information about the sender and recipients. An icon is displayed that shows the record type of the sender and recipients in Microsoft Dynamics CRM. The pane also includes links to the parent, regarding, and related Microsoft Dynamics CRM records. Click or tap the links to open the records in Microsoft Dynamics CRM. More information: [Overview of tracking records in CRM for Outlook](#)

You can save Outlook email messages as new Microsoft Dynamics CRM email activities. You can also set the **Regarding** field for any email activity.

Your administrator can block messages from being saved if they contain attachments of specific file types, such as .exe files. Any messages that are stored in locations other than the default Microsoft Exchange location cannot be linked. After you save your email message as a Microsoft Dynamics CRM email activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.




1. Follow the steps for the app you're using.

 **In Microsoft Outlook 2010**

- a. In your **Inbox**, click or tap to select the email message that you want to track in Microsoft Dynamics CRM.
- b. In the **CRM** group, click or tap **Track**.

 **In Microsoft Outlook 2013**

- a. In your **Inbox**, click or tap to select the email message that you want to track in Microsoft Dynamics CRM.
- b. In the **CRM** group, click or tap **Track**.

In the **Microsoft Outlook** folder, the symbol beside the records changes to the Tracked in CRM icon .



Note

You can set whether replies to tracked messages are also tracked. More information: **Set Personal Options**

Email messages appear as activities in the **Activities** area of Microsoft Dynamics CRM.

2. To modify the Microsoft Dynamics CRM email activity form, open the email message in Outlook, and then, in the **CRM** group, click or tap **View in CRM**.

The Microsoft Dynamics CRM record form opens.

You cannot edit an email message after it has been sent, except to include the record to which the email message relates.

3. To link the email message to a Microsoft Dynamics CRM record, such as an account or contact, open the email message in Outlook, and then, in the **CRM** group, click or tap **Set Regarding**.



Tip

Click or tap **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM**

is automatically activated.



Note

In Outlook, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Open the Outlook item. In the **CRM** group, click or tap **Untrack**, and then in the confirmation message box, click or tap **Yes**.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Create templates for email](#)

Set an option to automatically track incoming Outlook email as activities in CRM for Outlook

When you track email messages, CRM for Outlook creates email message activity records in Microsoft Dynamics CRM that are linked to the original messages in Microsoft Office Outlook. The email address of the sender must match the email address of a Microsoft Dynamics CRM record.



Important

After you save your email message as a Microsoft Dynamics CRM email activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.



1. Follow the steps for the app you're using.

▶ **In Microsoft Outlook 2010**

- a. On the **File** tab, click or tap **CRM**, and then click or tap **Options**.

▶ **In Microsoft Outlook 2013**

- a. On the **File** tab, click or tap **CRM**, and then click or tap **Options**.
-
2. In the **Set Personal Options** dialog box, on the **Email** tab, in the **Select how CRM for Outlook should integrate email with Microsoft Dynamics CRM** section, select one of the following options:
 - **Check incoming email in Outlook and determine whether an email should be linked and saved as a Microsoft Dynamics CRM record.** Automatically links and saves incoming email messages as Microsoft Dynamics CRM records.
 - **Allow Microsoft Dynamics CRM to send email using CRM for Outlook.** Sends email messages from Microsoft Dynamics CRM by using Outlook.
 3. To specify whether to track and save all email messages or only certain types, in the **Select the email messages to track in Microsoft Dynamics CRM** section, in the **Track** list, select one of the following options:
 - **All email messages.** Tracks all email messages.
 - **Email messages in response to CRM email.** Tracks email messages only if the person has a record in Microsoft Dynamics CRM.
 - **Email messages from CRM Leads, Contacts, and Accounts.** Tracks email messages only if they originate from someone with a Microsoft Dynamics CRM lead, contact, or account record.
 - **Email messages from Microsoft Dynamics CRM records that are email enabled.** Tracks email messages from all record types (including custom record types) that contain an email address field.

In the **Automatically create records in Microsoft Dynamics CRM** section, select **Microsoft Dynamics CRM icon** to have tracked items display the  icon, or select **Outlook icon**, and then click or tap **OK**.



Note

- When CRM for Outlook is installed, email messages, as well as contacts, appointments, and tasks, include a Microsoft Dynamics CRM pane that displays information about the sender and recipients. An icon is displayed that shows the record type of the sender and recipients in Microsoft Dynamics CRM. The pane also includes links to the parent, regarding, and related Microsoft Dynamics CRM records. Click the links to open the records in Microsoft Dynamics CRM. More information: [Overview of tracking records in CRM for Outlook](#)
- You can also open a record that is being tracked in Microsoft Dynamics CRM. In the CRM group, click or tap **View in CRM**.
- More than one custom record type could contain the same email address. When this happens, Microsoft Dynamics CRM links the email messages that are received from this email address to the custom record type that was created first. For example, a Patient record type that was created in January lists the email address someone@example.com. A Doctor record type created in February also lists the same email address. Microsoft Dynamics CRM links the email messages received from someone@example.com only to the Patient record type. Sending an email message to someone@example.com links the email message to the Patient record type and the Doctor record type.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Synchronizing information](#)

[Send and receive email in CRM for Outlook](#)

Connect to another organization in CRM for Outlook

When you're in Microsoft Office Outlook, if you're a member of more than one Microsoft Dynamics CRM organization, you can change your organization. This feature isn't available if you're offline.



Tip

You can manually synchronize information between Outlook and Microsoft Dynamics CRM on your primary computer. More information: [Synchronize records manually with CRM for Outlook](#)



1. Close Outlook.
2. Click or tap **Start**, point to **All Programs**, click or tap **Microsoft Dynamics CRM 2013 > Configuration Wizard**.
3. In the wizard, click or tap **Add**.
4. In the **Server URL** box, type the URL address for the Microsoft Dynamics CRM server, for example, `http://adventure-works`.
5. Click or tap **Test Connection**.
6. If necessary, click or tap **Change** to type your user name and password for the server. Then, click or tap **Test Connection** again.
7. In the **Organization** box, select the name of your organization.
If you want, type a different name for your organization.
8. If you want to automatically synchronize email messages, tasks, appointments, and other Microsoft Dynamics CRM activities with the organization, select the **Synchronize with this Organization** check box.
If you're prompted about whether you want to change your synchronizing or primary organization, click or tap **OK** to change the organization.



Note

You can synchronize information with only one organization. You can connect to or work with more than one organization. If you connect to more than one organization, they are both listed in the Navigation Pane.

9. Click or tap **OK**.
10. In the wizard, click or tap **Close**.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Do your CRM work in Outlook](#)


Track Outlook contacts in CRM for Outlook

You can save Microsoft Outlook contacts as new Microsoft Dynamics CRM contacts. You can link a newly saved record to another Microsoft Dynamics CRM record, such as an account or contact.



1. In CRM for Outlook, in the **Microsoft Outlook** contacts folder, select up to 20 contacts.
2. On the **Home** tab, in the **CRM** group, click or tap **Track**.

The contacts appear in the **Contacts** area in Microsoft Dynamics CRM.

In the **Microsoft Outlook Contacts** folder, the **Tracked in CRM** icon  is displayed to indicate that each contact is tracked.

3. To link the contacts to a parent record, in Microsoft Outlook, in the **CRM** group, click or tap **Set Parent**, and then click or tap the type of record.
4. In the **Look Up Record** dialog box, click or tap the record that you want, and then click or tap **OK**.



Tip

Click or tap **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** will automatically be activated.



Note

Duplicate detection identifies duplicate records when a record is tracked.

Microsoft Dynamics CRM also checks for duplicates when you synchronize or go online.

Resolve potential duplicate records

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

- a. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click or tap the record.
- b. If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
- c. If your new or updated record is not a duplicate, to create the new record, click or tap **Save Record**.

- OR -

If your new or updated record is a duplicate, to cancel your changes, click or tap **Cancel**.



Important

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: **Avoiding Duplicate Records**

- To add additional information to the **Contact** form in Microsoft Dynamics CRM, click or tap the contact in Microsoft Outlook, and then in the **CRM** group, click or tap **View in CRM**.
- If the contact is linked to a parent record, you can open the parent record from the Microsoft Outlook contact record. In the Microsoft Outlook contacts list, click or tap to open the record. In the **CRM** group, click or tap **View Parent**.
- The **Company** field in a Microsoft Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information: **Set Personal Options**

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Send and receive email in CRM for Outlook](#)

[Create templates for email](#)

Use a wizard to add and track multiple Outlook contacts in CRM for Outlook

To keep all your customer info organized and accessible within Outlook, you'll probably want to link your Outlook contacts to Microsoft Dynamics CRM so you can track customer-related messages, appointments, and tasks in one place.

You'll use the Add Contacts wizard to bring in your contacts and link them to Microsoft Dynamics CRM.

After your contacts are linked, in Outlook you'll see the email, tasks, and appointments associated with any Microsoft Dynamics CRM contact or account.

In Microsoft Dynamics CRM, when you view details for a contact or account, you'll see any associated email messages, appointments, or tasks in the list of activities.

Step 1: Get ready

Before you add your Outlook contacts:

- If you haven't already, install CRM for Outlook. For steps, see [Set up CRM for Outlook](#).
- For best results, make sure your Outlook contact data is as complete and accurate as possible. Fill in any missing info, and verify that people's names are spelled correctly.
- Because you will have the opportunity to "map" the company names in your Outlook contact list to an account name in Microsoft Dynamics CRM, make sure the accounts have the same spelling in both applications.

Step 2: Run the wizard



1. Start the **Add Contacts** wizard.

 **If using Outlook 2010**

- a. Click or tap **File > CRM > Import Contacts > Add Contacts**.

 **If using Outlook 2013**

- a. Click or tap **File > CRM > Import Contacts > Add Contacts**.

2. Click or tap **Next**.
3. Confirm the folder where your Outlook contacts are stored, and then click or tap **Next**.



Note

- The wizard determines the folder, usually called **Contacts**. You can select or clear subfolders in the **Contacts** folder.
 - If you allow someone else to manage your email (called a “delegate”), you can’t add contacts from that person’s contacts folder.
4. Select how to group your contacts. The groups are:
 - **Company Name**. Group the contacts by the matching account name in Microsoft Dynamics CRM. The wizard lists the number of contacts associated with each account. Click or tap the link to verify the list of names for each account.
 - **Email Domain**. Group the contacts by email domain. The email domain is the part of the address after the @ symbol. For example, in the email address someone@example.com, "example.com" is the domain. Click or tap the link to verify the list of names in each domain.
 - **Categories**. Group the contacts by the category you use to organize contacts in Outlook, if applicable. Click or tap the link to verify the list of names for each category.

If you don’t want to add all the groups, clear the check boxes to the left of any groups you don’t want.



Note

The **Number of Contacts** column displays a color to indicate how many of the contacts are already linked to Microsoft Dynamics CRM:

Green. All of the contacts are already in Microsoft Dynamics CRM.

Yellow. More than 50% of the contacts are already in Microsoft Dynamics CRM.

Red. At least one contact is already in Microsoft Dynamics CRM.



Tip

You may find that the groupings have many variations if the company names don’t match exactly. If so, it may be best to cancel the wizard, correct the

company names in Outlook, and then run the wizard again.

5. Verify that **Use Company Name to be the Account** is selected (recommended). Otherwise, if you want to associate an account name with each contact later in Microsoft Dynamics CRM, clear this check box.
6. Select **Track all communications for added contacts** to track the messages, appointments, and tasks associated with these Outlook contacts in Microsoft Dynamics CRM.
7. To manually select the accounts to associate the contacts with, click or tap **Advanced**. In the **Set Account** column, click or tap the row for the contact. From the drop-down list, select one of the following:
 - Leave the field blank (**Not Set**) to associate the contacts with an account later in Microsoft Dynamics CRM.
 - Select **Use Company Name** to associate the contacts with a Microsoft Dynamics CRM account using the company name.
 - Select **Pick Existing Account**, select an account or contact, and then click or tap **OK**.
8. In the **Include Communication** column, clear the check box for any grouping you don't want to track email messages, appointments, or tasks in Microsoft Dynamics CRM.
9. Click or tap **Add Contacts**.
10. Review the Summary page and view any errors, if applicable. Then, click or tap **Close**.

Synchronizing information

While you are online with Microsoft Dynamics CRM for Microsoft Office Outlook, changes you make to tracked records in Outlook or Microsoft Dynamics CRM are visible to others as soon as you save the record. Changes that others make to Microsoft Dynamics CRM are visible to you after they save the record. Changes that others make to records you are tracking in Outlook may not be visible in Outlook for up to 15 minutes.

If you are working offline, your changes are kept in your local data, which was updated last when you went offline. When you go back online, your changes are made to the Microsoft Dynamics CRM server and are visible to everyone.

The Microsoft Dynamics CRM address book is synchronized separately and on a different schedule.


Synchronizing and tracking Microsoft Dynamics CRM data with Outlook

You can set your synchronization options so that incoming and outgoing Microsoft Dynamics CRM e-mail messages are recognized as an e-mail activity.

Track e-mail messages, contacts, tasks, meetings, and appointments in Outlook to create a corresponding activity or contact record in Microsoft Dynamics CRM.

You can also link the items. To link a Outlook item to a Microsoft Dynamics CRM record, click or tap the **Set Regarding** or **Set Parent** button, and then select an account or contact. Clicking or tapping **Set Regarding** or **Set Parent** automatically tracks the record.

Linking also tracks all replies to linked e-mail messages. Tracked e-mail messages, contacts, tasks, and appointments are updated to Microsoft Dynamics CRM immediately while you are online. If you are offline, these items are stored in your local data to be synchronized with the Microsoft Dynamics CRM server when you go back online.

By default, tracked items display a **Tracked in CRM** icon  rather than the standard Outlook symbols for e-mail messages, contacts, and tasks.

More information: [Set an option to automatically track incoming Outlook email as activities in CRM for Outlook](#)

You can choose to automatically create Microsoft Dynamics CRM contact or lead records from the sender of tracked e-mail messages and the organizer of tracked meetings when you are online.

While you are offline, contact and lead records are not created automatically from tracked e-mail messages or the organizer of tracked meetings. You must manually create the records.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Synchronize data in CRM for Outlook

There are several ways to synchronize data in Microsoft Dynamics CRM for Microsoft Office Outlook:

- Synchronization between Outlook appointments, contacts, tasks, and emails, and Microsoft Dynamics CRM.
- Synchronization of local data between Outlook and CRM so that you can go offline.

When you choose to go offline, Microsoft Dynamics CRM copies data to your computer. The amount of data copied locally to your computer is defined by a filter and by the synchronization options set in your personal options.

After you return online, changes you made to local data are updated on the CRM server. If you encounter problems during synchronization, you are given choices about how to continue. CRM notifies you of any duplicate records.



Note

In Microsoft Dynamics CRM 2011, you can only use Microsoft Dynamics CRM for Microsoft Office Outlook to perform the Outlook synchronization. In Microsoft Dynamics CRM 2013, you can synchronize using CRM for Outlook or server-side synchronization. If server-side synchronization is selected, the synchronization does not require running CRM for Outlook. For more information, see [Introducing server-side synchronization](#).

Any users who log on locally to a computer that has Microsoft Dynamics CRM for Outlook installed can potentially access Microsoft Dynamics CRM data that is stored in the offline database. Shared use of a computer running CRM for Outlook is not supported.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Synchronize records manually with CRM for Outlook

You can use your personal options in Microsoft Dynamics CRM for Microsoft Office Outlook to change what Outlook and Microsoft Dynamics CRM synchronize and how often they synchronize linked data.



1. This task requires permissions that are found in all default security roles.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. In CRM for Outlook, click or tap **File > CRM > Synchronize > Synchronize**.



Warning

If you receive the error message "CRM server Not Found", verify that you have Internet connectivity and that the Microsoft Dynamics CRM server is running. Then try synchronizing again.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is

automatically deleted from the CRM service only if you own the item.

See Also

[Create a synchronization filter to sync certain types of records in CRM for Outlook](#)

Create a synchronization filter to sync certain types of records in CRM for Outlook

Microsoft Dynamics CRM for Microsoft Office Outlook provides filters that you can use to determine which contacts and other items are synchronized between Microsoft Dynamics CRM and Outlook. Microsoft Dynamics CRM provides users with a default set of Outlook synchronization filters that can be modified to address specific scenarios. User can also create new filters to control the data that is synchronized between CRM and Outlook.



1. In Outlook on the **File** tab, click or tap **CRM > Synchronize > Filters**.


The existing filters for Users are listed.

2. To create a new filter, on the Actions toolbar, click or tap **New**.
3. In the **New Filter** dialog box, click or tap **Edit Properties**, in the **Data Group Properties** dialog box, type in the name and description for the filter, and then click or tap **Save**.

You also use the **New Filter** dialog box to specify the criteria associated with a filter. For example, you can include the criteria, *Owner Contains Jesper*.

Each row in the criteria list represents a single criterion and contains three values: the field to use in the filter (for example, **Account Name** or **City**), the query relational operator (for example, **Equals** or **Contains**), and the value to filter on (for example, *Open*).

4. To set the filter criteria, in the **New Filter** dialog box:
 - a. To add a criteria row:
 - i. Click or tap **Select**, and then click or tap the field to filter on.
 - ii. Click or tap the query relational operator, and then select an operator.
 - iii. Enter a value to filter on.

For some values, you can click or tap the **Select or change the values for this field** button  to open the **Select Values** dialog box, and then select the value you want.



Note

Edit a filter criteria row by clicking the field and selecting a different field, or clicking the query relational operator and selecting a different operator, or clicking the value and entering a new value.

- b. To group criteria, select multiple rows for the same record type.

For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and the two rows specifying filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, can't be grouped.

- For each row you want to group, in detailed mode, click or tap the Options menu button for that row, and then click or tap **Select Row**.
- On the Filter toolbar, select **Group AND** or **Group OR**.
- To remove a row from a group, click or tap the Options menu button for that row, and then click or tap **Delete**.
- To select a group, click or tap the Options menu button for that group, and then click or tap **Select Group**.
- To add a criteria clause to a group, click or tap the Options menu button for that group, click or tap **Add Clause**, and then select the field, query relational operator, and value.
- To unselect a group that has been previously selected, click or tap the Options menu button for that group, and then click or tap **Deselect Group**.
- To ungroup a group, click or tap the Options menu button for that group, and then click or tap **Ungroup**.
- To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click or tap the Options menu button for that group, and then click or tap **Change to OR** or **Change to AND**.



Note

You can also access the Outlook filters from the **Set Personal Options** dialog box, on the **Synchronization** tab, under **Synchronize Microsoft Dynamics CRM items with my Microsoft Dynamics CRM Online or Exchange**, by clicking or tapping the **Your Filters** link. More information: [\[SP\] Set personal options](#)

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the

connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Synchronize data in CRM for Outlook](#)

[Synchronize records manually with CRM for Outlook](#)

Set synchronization options in CRM for Outlook

You can use filters to select the record types that you want to synchronize between Outlook and CRM for Outlook and specify how often you want the synchronization to occur. Filters enable you to specify the types of items that are synchronized.

The filters that are provided with CRM for Outlook synchronize the following items for users that own the items:

- Recurring Appointments
- Faxes
- Tasks
- Service Activities and Appointments (in which a user is a participant and has accepted the appointment)
- Phone Calls
- Letters
- Contacts



1. In CRM for Outlook, on the **File** menu, click or tap **CRM > Options**.
2. In the **Set Personal Options** dialog box, click or tap the **Synchronization** tab.



Note

This tab is not available in the web application.

3. To choose other record types to be synchronized, such as Accounts, under **Synchronize Microsoft Dynamics CRM items with Outlook or Exchange**, click or tap the **Filters**

link, and then modify or add the appropriate filters. More information: [Create a synchronization filter to sync certain types of records in CRM for Outlook](#)

4. If you want to include company names in Outlook contacts, select the **Update Company fields with parent account names** check box.

 **Important**

Subsequent changes to the company name field are not synchronized.

5. If you have multiple computers running CRM for Outlook and the computer you are performing this task on is online most often, select the **Set this computer to be the Synchronizing client** check box to specify that information between Outlook and Microsoft Dynamics CRM is automatically synchronized to this computer.
6. If you want to limit the frequency of synchronization between Microsoft Dynamics CRM and Outlook, select the **Synchronize the CRM items in my Outlook folders every** check box, and then enter the number of minutes between each synchronization cycle.

 **Important**

The administrator of your CRM organization sets the minimum time allowed between synchronization cycles and can also prevent users for making changes to synchronization interval. As a result, users may be unable to configure this setting.

7. To save your changes and close the dialog box, click or tap **OK**.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Synchronizing information](#)

Work offline with CRM for Outlook

If you install CRM for Outlook, you can work offline with the Microsoft Dynamics CRM records that you own. When working offline, you can enter new information and edit existing records and activities. For an example of how you might work offline, see [Example of going offline with CRM for Outlook](#).



Important

The first time you go offline, it can take a significant amount of time to synchronize your local data with the Microsoft Dynamics CRM server. For example, in customer service situations where a parent case may have thousands of child cases, offline synchronization can take much longer. While CRM for Outlook is synchronizing, Microsoft Dynamics CRM is not available. You can shorten the time by using filters (see below) to limit the amount of data to synchronize.

Any users who log on locally to a computer that has Microsoft Dynamics CRM for Outlook installed can potentially access Microsoft Dynamics CRM data that is stored in the offline database. Shared use of a computer running CRM for Outlook is not supported.

How to tell if you are offline

- The Microsoft Dynamics CRM toolbar displays the **Go Online** button.
- The Microsoft Dynamics CRM menu bar displays the **Go Online** option.
- If you have installed Outlook 2010 or Outlook 2013, the **CRM** tab displays the **Go Online** button.

Offline availability

The following list shows the features that are unavailable when you are offline.

Not available offline

- Assigning records (except activities and cases)
- Converting quotes to sales orders
- Converting sales orders to invoices
- Managing system administration
- Updating system configuration
- Managing service activities
- Managing services
- Using the Service calendar and Workplace calendar
- Editing articles
- Editing or managing sales literature
- Changing organizations

- Sharing records
- Detecting duplicate records
- Managing system jobs
- Running some diagnostic tests
- Running workflow rules
- Create quick campaign and related activities from a Mail Merge

Limited availability

- Creating or viewing reports (based on local data groups and offline data)
- Running some custom business process automating (plug-ins)

Can be viewed, but cannot be edited offline

- Articles
- Sales literature
- Mail merge templates

Microsoft Dynamics CRM applies all your additions and changes to the Microsoft Dynamics CRM server in the same order that you entered or updated it. If you made a change to a record while you are offline, and another user changes the same record during that time, when you go back online, your change will overwrite the changes that they made while you were offline.

Workflows

When you are working offline, workflow notifications are not generated until you go back online.

Also, if the changes you've made to offline accounts are set to trigger an automated workflow process or system job, the process is automatically triggered after you go back online.

Duplicate detection

There is no duplicate detection while you are working offline. Duplicate detection is triggered automatically when you go back online or synchronize. You can set a personal option to determine whether or not duplicates are created when they are identified.

Offline security permissions

You have the same security permissions and rights offline as when you are online.

Using filters

Before you go offline, use filters to select a subset of Microsoft Dynamics CRM data to be available on your local computer. Any changes you make to this data when you work offline are saved to the local copy of your data.

You can reset these filters every time that you go offline, so you have the flexibility to download only the data you need. If you choose to remove large amounts of data from your local copy, this can cause a longer synchronization.

You use filters to define what data is taken offline. You can edit the filters to suit your business needs.

1. This task requires permissions that are found in all default security roles.
2. If you have Outlook 2013 or Outlook 2010 installed, click or tap **File**. Click or tap the **CRM** tab. Click or tap **Go Offline**, and then click or tap **Offline Filters**.






If you have Outlook 2007 installed, on the **CRM** menu, click or tap **Offline Filters**.

The **Offline Synchronization Filters** are displayed by default.

3. On the **User Filters** tab, click or tap the filter that you want to edit. To create a new filter, on the Actions toolbar, click or tap **New**.

The **New Filter** dialog box lists the name and criteria of the filter. You can use this dialog box to edit the properties of the filter, such as the name and description, and you can add or change the criteria of the filter. For example, you can add the criteria, *Owner Contains Gabriela*.

Each row represents one set of filter criteria, and contains three columns: the field to use in the filter (for example, **Account Name** or **City**), the query relational operator (for example, **Equals** or **Contains**), and the value to filter on (for example, *Open*).

4. Change the criteria in the **New Filter** dialog box:
 - a. To edit a filter criteria row, click or tap the field and select a different field, or click or tap the query relational operator and select a different operator, or click or tap the value, and enter a new value. For some values, you can click or tap the **Select or change the values for this field** button  to open the **Select Values** dialog box and select the value you want.
 - i. To add a criteria row:
 - i. Click or tap **Select**, and specify the field to filter on.
 - ii. Click the query relational operator, and select an operator.
 - iii. Click or tap **Enter Value**, and enter a value to filter on. For some values, you can click or tap the **Select or change the values for this field** button  to open the **Select Values** dialog box and select the value you want.
 - c. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.
- For each row you want to group, in detailed mode, click or tap the **Options menu** button  for that row, and then click or tap **Select Row**.
 - On the Filter toolbar, select **Group AND** or **Group OR**.
- To remove a row from a group, click or tap the **Options menu** button  for that row, and then click or tap **Delete**.
- To select a group, click or tap the **Options menu** button  for that group, and then click or tap **Select Group**.

- To add a criteria clause to a group, click or tap the **Options menu** button ▼ for that group, click or tap **Add Clause**, and then select the field, query relational operator, and value.
- To unselect a group that has been previously selected, click or tap the **Options menu** button ▼ for that group, and then click or tap **Deselect Group**.
- To ungroup a group, click or tap the **Options menu** button ▼ for that group, and then click or tap **Ungroup**.
- To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click or tap the **Options menu** button ▼ for that group, and then click or tap **Change to OR** or **Change to AND**.



Tip

- To clear all criteria and start over, on the Filter toolbar, click or tap **Clear**, and then click or tap **Confirm**.
- To delete a row, click or tap the **Options menu** button ▼ for that row, and then click or tap **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click or tap the **Options menu** button ▼ for that row, and then click or tap **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click or tap the **Options menu** button ▼ for that row, and then click or tap **Show in Simple Mode**.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Example of going offline with CRM for Outlook

Salespeople can make critical customer information available and up-to-date on business trips with filters. By specifying only the data you need to synchronize with your laptop, you can avoid wasting valuable laptop memory, stay current with the head office, and keep information on your laptop fresh. Meanwhile, managers and co-workers are up-to-date.

Using CRM for Outlook, you can set up and activate filters with criteria similar to Advanced Find by specifying the criteria for the Microsoft Dynamics CRM records that you want to be available when you go offline. In addition, you can change what data will be available when you synchronize by activating and deactivating the filters.

To see what data filters are being applied to your offline synchronization, in Outlook, on the **File** tab, click or tap **CRM > Go Offline > Offline Filters**.



Note

You can have more than one active filter so you can take larger, combined sets of data offline.

Select the data you need with filters

To leverage local data, consider a trip to regional offices in the USA in Washington and Oregon. You would want to define needed information in the Microsoft Dynamics CRM database that applies to customers in these states.

First, create a filter of the data for a record type. Save this filter as your “master,” and call it “My Active Accounts”, for example. Second, modify this filter to create different versions for your business needs.

- To edit an existing filter, on either tab, double-click or tap the item in the list. To keep the original data group, make a copy using **Save As**, and add additional criteria, such as “Address 1: State/Province equals WA”. Save it with a new name such as “My Accounts in Washington.”
- Using **Save As** again, change the criteria to “Address 1: State/Province equals OR”, and name your new data group “My Accounts in Oregon.”



Important

Before your trip, deactivate all filters, except those that apply to the customers in the first area you are visiting.

Deactivate or activate filters

- To deactivate a filter, on the **User Filters** tab, select one or more filters. On the tool bar, click or tap the **Deactivate** button (a red circle with a red square).
- To activate a filter, on the **User Filters** tab, select one or more filters and then click or tap the **Activate** button (a green circle with a green triangle).

Take your data offline and synchronize your data

- In Outlook, on the **CRM** menu, click or tap **Go Offline**.

While you are offline, you can add new contacts and accounts or update the accounts and contacts on your laptop. When connecting to your company's network again, you can synchronize your data.

Important

Any users who log on locally to a computer that has Microsoft Dynamics CRM for Outlook installed can potentially access Microsoft Dynamics CRM data that is stored in the offline database. Shared use of a computer running CRM for Outlook is not supported.

Go back online and synchronize your data

- In Outlook, on the **CRM** menu, click or tap **Go Online**.

Any updated data from your laptop will be synchronized with your company's Microsoft Dynamics CRM database. You can now deactivate and activate a new set of filters for your next visits, using the procedures explained earlier in this article.

Combine data filters to take more information with you

Because filters are additive, you can have more than one active filter. For example, if you are going to the Northwest United States, you can activate the Washington and Oregon data filters you created and take both sets of data with you.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your

organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

Set address book options in CRM for Outlook

You can link email messages to contacts and other Microsoft Dynamics CRM record types based on the names and email addresses that are in your Outlook address book.

When you send or receive an email message, the names and email addresses in the From and recipient fields are compared to the names and email addresses in the Microsoft Dynamics CRM record types that you select. If there's a match, the email messages are included as an activity for the records.



1. Follow the steps for the app you're using.

In Microsoft Outlook 2010

- a. On the **File** tab, click or tap **CRM > Options**.

In Microsoft Outlook 2013

- a. On the **File** tab, click or tap **CRM > Options**.

2. In the **Set Personal Options** dialog box, click or tap the **Address Book** tab.



Note

This tab is not available in the web application.

3. For **Contacts**, specify whether names and email addresses from the address book are compared to some or all of your Microsoft Dynamics CRM contacts.
 - **Match only against contacts synchronized to Microsoft Dynamics CRM.** This option is selected by default. If you want to link e-mail messages to the Microsoft Dynamics CRM contact records that you have chosen to synchronize and also match a name or e-mail address in your address book, leave this option selected. More information: [Create a synchronization filter to sync certain types of records in CRM for Outlook](#)
 - **Match all contacts in Microsoft Dynamics CRM.** Select this option to link email messages to any Microsoft Dynamics CRM contact record that also matches a name or email address in the address book.

4. For **Other record types**, choose whether you want to link e-mail messages to other record types if the names and e-mail addresses in the other record types match those in the address book.
 - **Do not match.** Select this option if you do not want to link email messages to other record types.
 - **Match only the items I own** or **Match all items in Microsoft Dynamics CRM.**
Select one of these options if you want to link email messages to other records types.

Under **Change the record types being synchronized to your Address Book**, click or tap the **Select or change the values for this field** button .

6. Add or remove record types, and then click or tap **OK**.
7. To save your changes and close the dialog box, click or tap **OK**.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

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For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Synchronizing information](#)

Customize the Reading Pane in CRM for Outlook

When you use Microsoft Dynamics CRM for Microsoft Office Outlook, you can choose the sections in Microsoft Dynamics CRM records that are displayed in the Reading Pane so that you don't have to open the record to see the details.



1. In the CRM for Outlook Navigation Pane, click or tap your organization.
2. Click or tap the area that contains the records with which you want to work (for example, Service), and then click or tap the record type.
3. If you have Outlook 2007 installed, on the **View** menu, click or tap **Customize Reading Pane**.

- OR -

If you have Outlook 2010 or Outlook 2013 installed, click or tap the **View** tab. In the **List** group, click or tap **Customize Reading Pane**.

By default, all the sections that you can add or remove are listed in the **Displayed Sections** box.

4. To remove a section, in the **Displayed Sections** box, click or tap the section and then click or tap **Remove**.
5. To add a section, in the **Available Sections** box, click or tap the section and then click or tap **Add**.
6. To change the order of the sections in the Reading Pane, in the **Displayed Sections** box, click or tap the section and then click or tap the **Move Up** or **Move Down** button.
7. Click or tap **OK**.

Customize your regional settings (number, currency, time, and date) in CRM for Outlook

You can change how Microsoft Dynamics CRM displays number, currency, time, and date formats to match your company's regional settings.



Note

The **Set Personal Options** dialog box is only accessible in CRM for Outlook.



1. In Outlook 2010 or Outlook 2013, on the **File** tab, click or tap **CRM > Options**.
2. In the **Set Personal Options** dialog box, on the **Formats** tab, in the **Current Format** list, select the name of the language and country or region for the format that you want to personalize, and then click or tap **Customize**.

In the **Customize Regional Options** dialog box, you can change the default settings for

the format that you selected by selecting one of the following tabs:

- **Number.** Set options for the decimal symbol, digit grouping symbol, digit groups, and negative numbers.



Important

Some negative numbering options always display numbers within parentheses, for example (100.00), regardless of the preferred setting in some countries/regions. Additionally, some long numbers will not appear with commas as they should, for example 10000. This issue will be corrected in a future release.

- **Currency.** Set options for the currency format, negative currency amounts, and number of decimal places.
 - **Time.** Set options for the time format, time separator, and notation for morning and afternoon.
 - **Date.** Set options for the type of calendar, whether or not to show week numbers in calendar views, and formats for long and short dates.
3. On each of the tabs, use the lists to change the default settings for the format that you selected, viewing the changes that you make in the preview boxes.
 4. To apply the changes you have made to the default formats and continue working in the dialog box, click or tap **Apply**.
 - OR -
 - To apply the changes you have made to the default formats and close the dialog box, click or tap **OK**.

Set up an activity feed

Administer the activity feed

Enable Activity Feeds to let users see their most recent activities on the wall. When you first install Microsoft Dynamics CRM, Activity Feeds is available and turned on by default, though it is a solution and you'll administer it as you would any other solution.

Your organization also can use Yammer, which is an alternative to using activity feeds—you can use either one, but not both.

Many record types allow for activities to be associated with them. For example, for an opportunity, you might have an associated phone call activity. If you want to stay up to date with what's happening in your organization, viewing all the activities you and your colleagues have recorded in the system is an effective way to do that. With activity feeds, you'll see the most recent news about everything you're interested in—colleagues and records alike—in one single-page view.

You can do the following in Activity Feeds:

- Create a personal page. Here, you can post a profile picture along with other personal data about you and the work you do.
- View recent news in one view. On your personal page, you'll see a feed of updates from colleagues as well as updates about records.
- Follow your colleagues. When a colleague you follow posts a comment, you'll see it on your feed page. If the colleague changes a record, you'll see that on your feed page as well.
- Follow records. You can stay up to date on records by following them in activity feeds. Even if you're not following the user who changes them, your feed page will display posts about opportunities, leads, and cases that you follow.

See Also

[Stay up-to-date with customer news with the activity feed](#)

[Display your picture on the activity feed](#)

Set up SharePoint document management

Manage SharePoint documents from within Microsoft Dynamics CRM

Store your documents on Microsoft SharePoint and manage these from within Microsoft Dynamics CRM by using the document management capabilities of SharePoint.

Integrate Microsoft Dynamics CRM with SharePoint to access, share, and collaborate more effectively. You can protect your stored documents in SharePoint from unauthorized access or use. More information: [Manage permissions for a list, library, folder, document, or list item](#)

Enable document management on entities

To manage documents for an entity, you must enable document management for that entity. You can manage documents for any entities on SharePoint. By default, document management is automatically enabled on the following entities when you enable document management for the organization:

- Account
- Article
- Lead
- Opportunity
- Product
- Quote
- Sales Literature

Define which entities manage documents on Microsoft Dynamics CRM in the **Document Management Settings** dialog box. More information: [Enable document management on entities](#)

When you set up document management, SharePoint creates document libraries and folders in the context of the Microsoft Dynamics CRM entities and records.

How document management works

When you set up document management, you specify a SharePoint site collection or site URL where the documents will be stored. More information: [Sites and site collections overview](#)

Microsoft Dynamics CRM uses the specified site collection or site to create document libraries for entities and folders for records on SharePoint.

When the document libraries and folders are created automatically on SharePoint, corresponding document location records are created on Microsoft Dynamics CRM that point to the newly created folders.

If you do not want to use the automatic creation feature, you can manually create document libraries and folders on SharePoint. Then, create document location records in Microsoft Dynamics CRM that point to the document libraries and folders on SharePoint, and then associate the document location records with the entity records.

After the folder structure to store the documents is in place, you can start using all the document management capabilities.

How document libraries and folders are created automatically

There are two ways to create a folder structure:

- Manually create document libraries and folders in the context of Microsoft Dynamics CRM entities and records. Then, associate the SharePoint folders with Microsoft Dynamics CRM records.
- Let Microsoft Dynamics CRM automatically create the document libraries and folders in SharePoint.

Microsoft Dynamics CRM automatically creates document libraries and folders on SharePoint if the URL you specify is for one of the following:

- A site collection that is on Microsoft SharePoint Server 2010 or Microsoft SharePoint Server 2013, and has the Microsoft Dynamics CRM List Component installed on it.
- A site under a site collection that is on Microsoft SharePoint Server 2010 or Microsoft SharePoint Server 2013, and the site collection has the Microsoft Dynamics CRM List Component installed.

When you choose to have Microsoft Dynamics CRM automatically create folders for you, you must specify whether you want the folders to be created based on the default (generic) structure or based on the entity.

- **Default structure.** A folder is created for each record in the document library for the entity. This is the default folder structure.

For example, you have *100 bikes* and *250 bikes* opportunity records. These are opportunities for *Margie's Travel*. Microsoft Dynamics CRM creates this folder structure:

`../opportunity/100 Bikes.`

In this structure:

- *opportunity* is the document library.
- *100 bikes* and *250 bikes* are opportunity record folders.
- **Structure based on entity.** A folder is created so that folders for primary entities (for which you want to manage documents) and their records are created under the document library of the related entity that you select. To create folders using this structure, select the **Based on entity** check box and then select an entity from the list (such as Account or Contact).

For example, you have *100 bikes* and *250 bikes* opportunity records. These opportunities are associated with *Margie's Travel* as the parent customer. You select **Account** for the entity.

This is the created folder structure:

`../account/Margie's Travel/opportunity/100 bikes`

In this structure:

- *account* is the document library.
- *Margie's Travel* is the folder for the related records.
- *opportunity* is the folder for the related opportunity records.
- *100 bikes* and *250 bikes* are related opportunity record folders for the main entity.

Microsoft Dynamics CRM creates the document library when you set up document management. However, Microsoft Dynamics CRM creates the various folders in the document library only when you open the **Documents** list for a record.

Set up SharePoint document management

You can store the documents related to your CRM records in Microsoft SharePoint folders and manage the folders and documents from within Microsoft Dynamics CRM. Integrating SharePoint document management with CRM makes it easier to access and share documents associated with your CRM records.

When you set up SharePoint document management, you specify a SharePoint collection or site URL where the documents will be stored. CRM uses the specified site collection or site to create document libraries for record types (entities) and folders associated with records in SharePoint. More information: [Manage SharePoint documents from within Microsoft Dynamics CRM.](#)

There are two ways to create a SharePoint structure in CRM:

- Create the SharePoint libraries and folders manually, and then associate the libraries and folders with your CRM records.
- Have CRM automatically create the structure for you. If you have CRM create the structure, the method you choose depends on which combinations of products you're using, as shown in the following table:

Product combination	Method to use
CRM Online and SharePoint Online	You have the option to enable server-based SharePoint integration (available if Microsoft Dynamics CRM Online Spring '14 is installed on your system) or you can install the

	Microsoft Dynamics CRM List Component. Server-based SharePoint integration provides an immersive document management experience consistent with the look and feel of CRM. Documents are displayed in the native CRM grids and users can access SharePoint actions directly from the CRM command bar.
CRM Online and SharePoint 2013 (on-prem)	Install the Microsoft Dynamics CRM List Component
CRM 2013 (on-prem) and SharePoint 2013 (on-prem)	Install the Microsoft Dynamics CRM List Component
CRM 2013 (on-prem) and CRM Online	Install the Microsoft Dynamics CRM List Component

[Read more about enabling server-based SharePoint integration or installing the List Component.](#)

See Also

[Manage SharePoint documents from within Microsoft Dynamics CRM](#)

[Enable server-based SharePoint integration or install the List Component](#)

[SharePoint document management software requirements](#)

[Enable document management on entities](#)

Enable document management on entities

Store the documents related to Microsoft Dynamics CRM entity records in Microsoft SharePoint and quickly access, share, and manage these documents from Microsoft Dynamics CRM by enabling document management on the specific entities.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM. Or that you have Read and Write privileges on all record types that are customizable.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Document Management**.

▶ **If using CRM for Outlook**

- a. Click or tap your organization.
- b. Click or tap **Settings > System > Document Management**.
- c. Click or tap **Document Management Settings**.

3. Select the entities for which you want to manage documents in SharePoint.
4. Specify the URL of the site where the document locations and folders for storing documents must be created, and click or tap **Next**.

▶ **If you're on CRM Online with server-based integration turned on**

- a. If you want the document libraries and folders to be automatically created, specify a valid SharePoint Online URL, and make sure the site is under the same Office 365 tenant as your Dynamics CRM instances.

▶ **If you're on CRM 2013 on-premises or CRM Online without server-based integration**

- a. If you want the document libraries and folders to be created automatically, specify a valid SharePoint Server 2010 or SharePoint Server 2013 site URL, and make sure the site has the Microsoft Dynamics CRM List Component for SharePoint Server installed. Note, this will also work if you specify a SharePoint online site URL.
- b. The remaining steps are described assuming that the specified site is on SharePoint Server 2010 or SharePoint Server 2013 and the site collection for this site has the Microsoft Dynamics CRM List Component installed.

Learn how folders and document libraries are created in SharePoint in [Manage SharePoint documents from within Microsoft Dynamics CRM](#).

By default, a folder for each record is created under the corresponding document library for the entity. For example, for an opportunity record “100 Bikes”, a document library “opportunity” is created, and in it, a folder “100 Bikes” is created. The path is ../opportunity/100 Bikes.

5. To have the folders created under the parent account or contact, click or tap the **Based on entity** check box. In the list next to the check box, click or tap **Account** or **Contact**. When you select this option, the folders are created under the related account or contact folder.

The structure is:../account/Margie's Travel/opportunity/100 Bikes where “account” is the document library for the referenced entity that you selected from the list, and “Margie's Travel” is the folder for the referenced record of the selected entity, in this case opportunity.

6. Click or tap **Next**.

Microsoft Dynamics CRM creates document libraries for the selected entities on SharePoint. Microsoft Dynamics CRM also creates the corresponding document location records that contain the links to these document libraries. The **Document Management Settings** wizard shows the creation status of the document libraries.

See Also

[Create or edit site records](#)

[Create or edit document location records](#)


Create or add a location for the first time

Before you can manage documents for a record from Microsoft Dynamics CRM, you must create a location record in Microsoft Dynamics CRM that points to libraries and folders on SharePoint where the documents will be stored.



1. Open the Microsoft Dynamics CRM record that has the documents you want to manage.
2. Under **Related**, click or tap **Documents**.
3. If a location isn't associated, CRM displays the **Add Document Location** dialog box or **Create SharePoint Location** dialog box. The following table shows the possible scenarios. Depending upon what you see, perform the steps in the “Next steps” column.

Scenario	What appears	Next steps
There is at least one site record in Microsoft Dynamics CRM that points to a site	Add Document Location opens with an option to specify either an absolute	1. In the Name box, verify or type the name. The document location record is created in Microsoft

Scenario	What appears	Next steps
<p>collection in SharePoint, and the site record has the List component is installed check box selected.</p>	<p>URL or a relative URL.</p>	<p>Dynamics CRM with this name.</p> <p>2. In the Document Location box, enter the URL of the SharePoint folder to which the location record points. This location is associated with the Microsoft Dynamics CRM record to store the documents.</p> <p>- OR -</p> <p>Click or tap Create a new folder. In the Parent Site or Location box, click or tap the Lookup button  to select an existing document location record under which the folder will be created on SharePoint. In the Folder Name box, verify or change the name, and click or tap OK. A folder with this name is created in SharePoint.</p> <p>3. Click or tap Save.</p>
<p>There is one site record in Microsoft Dynamics CRM but the List component is installed check box is not selected.</p>	<p>Add Document Location appears with only the absolute URL option.</p>	<p>1. In the Name box, verify or type a name. The document location record is created in Microsoft Dynamics CRM with this name.</p> <p>2. In the Document Location box, enter the URL of the SharePoint folder to which the location record points. This location record is associated with the Microsoft Dynamics CRM record to store the documents.</p> <p>3. Click or tap Save.</p>
<p>There is no existing location</p>	<p>Create SharePoint Location</p>	<p>Microsoft Dynamics CRM tries</p>

Scenario	What appears	Next steps
<p>associated with the record, the URL specified in the Document Management Settings wizard is for a site collection on SharePoint Server 2010 or SharePoint Server 2013, and this site record has the List component is installed check box selected.</p>	<p>appears.</p>	<p>to automatically create a folder in SharePoint. If the folder is created successfully, Microsoft Dynamics CRM opens Create SharePoint Location with the URL of the new folder. Microsoft Dynamics CRM creates a document location record that contains the URL of this new folder and associates the document location record with the Microsoft Dynamics CRM record.</p> <p>Click or tap OK.</p>

A new document location record is created in Microsoft Dynamics CRM that contains the links to the folders in SharePoint. The location that you just associated is added to the **Document Locations** list.

See Also

[Manage SharePoint documents from within Microsoft Dynamics CRM](#)

[Create or edit document location records](#)

Create or edit site records

Sites in Microsoft Dynamics CRM are records that point to a site or site collection on SharePoint. Sites and site collections in SharePoint contain document libraries and folders that are used to store documents for Microsoft Dynamics CRM records.

▶ Create site records

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the step for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Document Management**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings**.
- b. Under **System**, click or tap **Document Management**.

3. Click or tap **SharePoint Sites > New**.

4. Enter the following information:

- **Name**. Specify a descriptive and useful name for the site.
- **Owner**. By default, you are added as the owner of the site record.
- **Description**. Specify a description for the site. For example, specify what documents the site contains.
- **URL Type**. Choose whether you want to add an absolute (full) or relative URL for the site.
 - **Absolute URL**. To point this site record to a site collection or site in SharePoint, specify the fully qualified URL of the site collection or site. You can use this record as a parent site to create other site records with relative URLs for sites inside the site collection or sites on the same SharePoint site.
 - **Relative URL**. Use this option when you have at least one site record pointing to a site collection in SharePoint. In the Parent Site box, select an existing Microsoft Dynamics CRM site record. If the site record that you selected as a parent site points to a site collection on SharePoint, specify the name of an existing site in the second box. If the site record that you selected as a parent site points to a site on SharePoint, specify the name of an existing subordinate site on SharePoint.
- **List component is installed**. Click or tap this check box if the URL that you specified is a site collection on SharePoint Server 2010 or SharePoint Server 2013 and if the site collection has the Microsoft Dynamics CRM List component installed.

This check box is available only if you used the **Absolute URL** option.

The URL Validation section displays the validation status and the date when the URL was last validated

5. Click or tap **Save**.

6. To validate the URL of the site, in the **Actions** group, click or tap **Validate**. Click or tap **Save and Close**.

7. Click or tap **Save and Close**.

▶ **Edit site records**

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the step for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Document Management**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings**.
- b. Under **System**, click or tap **Document Management**.

3. To edit a site record, on the **SharePoint Sites** page, select the site record, and in the **Records** group, click or tap **Edit**.
4. Click or tap **Save**.
5. To validate the URL of the site, in the **Actions** group, click or tap **Validate**
6. Click or tap **Save and Close**.



Note

To activate or deactivate a site record, on the SharePoint Sites page, select the site record and in the **Records** group, click or tap **Activate** or **Deactivate**.

See Also

[Manage SharePoint documents from within Microsoft Dynamics CRM](#)

Create or edit document location records

SharePoint document locations are records in Microsoft Dynamics CRM that point to a SharePoint document library or folder.

To store documents for Microsoft Dynamics CRM records, the document libraries or folders must be in place. If Microsoft Dynamics CRM is unable to create the document libraries and folders automatically, you can manually create these in SharePoint. After you create the document libraries and folders in SharePoint, you must create document location records in Microsoft Dynamics CRM to point to these SharePoint document libraries and folders.



1. Follow the steps for the app you're using.


If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings**, and then click or tap **Document Management**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings**, and then under **System**, click or tap **Document Management**.
2. Click or tap **SharePoint Document Locations**.
 3. Click or tap **New**.
 4. Specify the following information as required:
 - **Name**. Type a name for the document location. This name displays in the location list in the entity record.
 - **Owner**. By default, you are added as the owner of this location record.
 - **Description**. Type a description for the document location.
 - **URL Type**. Select whether you want to create the location with an absolute URL or relative URL.
 - Select **Absolute URL**, and in the **Absolute URL** box, specify the fully qualified URL of the location of the folder in SharePoint.
 - OR -
 - Select **Relative URL**. In **Relative URL**, to create a relative document location to the existing site or document location record, select the existing SharePoint site

or document location record. In the second box, enter the name of the SharePoint folder.

Regarding. Click or tap the **Lookup** button . In the **Look Up Record** dialog box, in the **Look for** list, select the type of records you want to find. Search and select the record for which you want to create the location record in Microsoft Dynamics CRM, and click or tap **OK**.

5. Click or tap **Save and Close**.



Note

To activate or deactivate a document location, on the **Document Locations** page, select the document location record, and click or tap **Activate** or **Deactivate**.

See Also

[Set up SharePoint document management](#)

[Create or add a location for the first time](#)

Upgrade to server-based SharePoint integration

If you're using the Microsoft Dynamics CRM List Component to integrate SharePoint document management with CRM Online, you can upgrade to server-based SharePoint and use CRM Online with SharePoint Online. Server-based SharePoint integration provides an immersive document management experience consistent with the look and feel of Microsoft Dynamics CRM. The new integration displays the documents in the native CRM grids and users can access SharePoint actions directly from the CRM command bar. [Read more about server-based SharePoint integration](#).



Note

This feature is available if the Microsoft Dynamics CRM Online Spring '14 update is installed on your system.

See Also

[Enable server-based SharePoint integration](#)

[Manage SharePoint documents from within Microsoft Dynamics CRM](#)

[Enable document management on entities](#)

Work with templates

Save time by creating templates for common tasks like email, KB articles, and contracts. Templates contain prefilled data that you specify, so you don't have to reenter the same information.

[Create templates for articles](#)

[Create templates for contracts](#)

[Work with mail merge templates](#)

[Create or edit a campaign template in the CRM marketing work area](#)

[Set up entitlements quickly with templates](#)

See Also

[eBook: What's new in customer service](#)

[eBook: Use KB articles to help your customers](#)

Create templates for articles

Article templates help you create new articles for your organization's knowledge base library. You can also create templates with boilerplate text to help article writers use consistent language and messaging.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management > Article Templates**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Articles Templates**.

3. To create a new article template, click or tap **New**.
4. In the **Article Template Properties** dialog box, type the new article title, select the language, and then click **OK**.
5. To add a section, in the **Common Tasks** area, click **Add a Section**, and specify the following:
 - a. In the **Title** box, type a title.
 - b. In the **Instructions** box, type a description of the information that users should provide in this section when they use this template.

When a user creates a new article with this template, these instructions appear in the body text for this section, and disappear when the user starts typing.

6. To reposition a section from the template, select the section you want to reposition, and in the **Common Tasks** area, click the green arrows to move the section to the position you want.

When you select a section, its border turns green and the border lines become solid.

7. To remove the section, select the section you want to remove, and in the **Common Tasks** area, click **Remove a Section**.
8. To edit a section, select the section you want to edit, and in the **Common Tasks** area, click **Section Properties**. Edit the title and description.
9. To format the text, font, and color of the article title, headings, and body text of each section, use the tools on the **Modify** toolbar.
10. When you're done, click or tap **Save** or **Save and close**.

After you save the template, it is immediately available for use. If the template is not complete and you want to finish it later, you can save the template, deactivate it (make it ready-only), and then complete it later. When the template is complete, you can reactivate it.



Note

If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#).

See Also

[Create or edit a contract](#)

[eBook: Use KB articles to help your customers](#)

Create templates for contracts

Quickly create consistent contracts prefilled with basic information like the service level and discount, and the time and days when you'll provide support, by using a contract template in

Microsoft Dynamics CRM. For example, create a template for gold members, and then use this template to create contracts for every gold customer in your organization.

After a contract template is saved, the template is read-only and cannot be changed.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management > Contract Templates**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Contract Templates**.

3. To create a new contract template, click or tap **New**.

4. Type information in the fields:

- a. **Name:** Enter a name. When you create a new contract, this name will appear in the list of available contract templates.
- b. **Abbreviation:** Enter an abbreviated name. The name will be displayed as the abbreviated contract template name.
- c. **Billing Frequency:** Select how often the customer should be billed.
- d. **Allotment Type:** Select the criteria needed to track the cases. You cannot change the allotment type for contract lines in contracts that are created from a contract template.
- e. **Calendar:** Mark the days and times your organization offers customer support. Green

dots indicate when the support is offered.

- f. **Contract Service Level:** Select the service level that will be allocated to the customer.
 - g. **Description:** Enter a description of the template or any notes about how this template is to be used.
 - h. **Use Discount as Percentage:** If you want the discount to be calculated in a percentage, select **Yes**.
5. Click or tap **Save** or **Save and Close**.



Note

If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#).

See Also

[Create or edit a contract](#)

Create templates for email

Save time when creating multiple email messages by making email templates. Email templates contain prefilled data that you specify, so you don't have to reenter the same information for each article.

An email template is attached to an email activity after the activity is created. Typically, each type of email activity has its own email template type; for example, an email activity created from a case record would use a case email template. You can also create global templates that are available for any record type, or personal templates available only to you, or organizational templates available to anyone in your organization.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. In the Navigation Pane, click or tap **Settings**, click or tap **Templates**, and then click or tap **Email Templates**.
 3. On the Actions toolbar, click or tap **New**.

4. In the **Email Template Type** dialog box, in the **Template Type** list, select the type, and then click or tap **OK**.

 **Important**

If you choose a specific record type, such as lead or opportunity, the template is available only for that record type. This cannot be changed. To use the same content for another record type, create a new template.

5. On the **Email Templates** form, enter a **Title** and **Subject**.
6. You can type a description of the template. This is not displayed to the recipient.
7. Type the text you want to send in this message. Use the Formatting toolbar to edit the text.

 **Tip**


- Although you cannot insert images or HTML directly into pn_Microsoft_Dynamics_CRM email messages or email templates, you can use the copy feature in Internet Explorer to copy an image from a website and paste it into the email message or email template. The image is available as long as the website is accessible.
 - To include a hyperlink in an email template, type the URL including the http://, for example, <http://www.microsoft.com>, and then press **Enter**. Do not include a period or comma or a space after the URL or the link will break. A link is automatically added to the URL and the text is underlined and changed to blue.
 - There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit [Microsoft Dynamics CRM Solution Finder](#).
 - The Formatting toolbar has limited fonts and font sizes. However, you can copy and paste content from Microsoft Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press **Shift+Enter**.
8. To insert data fields to display information such as a customer's name or data from a quote, from a pn_Microsoft_Dynamics_CRM record, click or tap **Insert/Update**, and then in the **Data Field Values** dialog box, click or tap **Add**.
 9. In the **Add Data Value** dialog box, select the **Record type** and **Field**, and then click or tap **OK**.
 10. Click or tap **OK** again to insert the data.
 11. To enter customers' first and last names, you'll need to repeat these three data-insertion steps; first and last names are separate data values.

 **Tip**

Use the **Default Text** box to define what text is displayed if the record does not have data for the field.

12. Click or tap **Save** or **Save and Close**.

 **Note**

- To change a shared template to a personal one or a personal template to a shared one, on the template form, on the **Actions**  menu, click or tap **Revert to Personal Template**, or click or tap **Make Template Available to Organization**.
 - If you use an email template as a signature in another template, insert the signature template first. Otherwise, the Subject line will be overwritten.
 - If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#).

See Also

[Work with templates](#)

Work with mail merge templates

You can use mail merge templates with Microsoft Office Word to create customer-ready letters, faxes, e-mail messages, and quotes.

Microsoft Office Word templates are created and edited in Microsoft Office Word, but can be uploaded to Microsoft Dynamics CRM to use with mail merge and share with other users. Only Microsoft Office Word .xml documents can be used as templates. To learn more about how to create mail merge templates, see the online Help for Microsoft Office Word.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Templates**.

If using CRM for Outlook

- a. In the Navigation Pane, click **Settings**, click **Templates**.

3. Click **Mail Merge Templates**.
4. To create a new mail merge template, click or tap **New**.
5. In the **Mail Merge Templates** form, enter a **Name** and an **Associated Entity** (record type).
6. You can enter a description of the template. This is not displayed to the recipient.
7. Enter the **Ownership** and **Owner** information. Use the handy tooltips as a guide.
8. If you have enabled additional languages, you can select one for the template.
9. To attach the template, click or tap **Browse**, search for the template on your computer, and then click or tap **Attach**. Only .xml documents can be uploaded.
10. When you're done, click **Save and close**.



Note

To change a personal template to a shared one, after you save the record on the template form, on the **More Actions** menu, click **Make Available to Organization**. To revert the template to a personal one, click **Make Personal**.

See Also

[Work with templates](#)

Create or edit a campaign template in the CRM marketing work area

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The CRM Marketing work area provides a way for your sales force to run sales-driven marketing activities. If you use Microsoft Dynamics Marketing along with CRM, you might be looking for a similar topic for that product. Microsoft Dynamics Marketing provides a full-scale, integrated set of functionality, automation, and analytical insights for multistage and multichannel campaigns. More information: [Microsoft Dynamics Marketing Help Center](#)

Save time when creating multiple campaigns by creating a campaign template. Campaign templates contain prefilled data that you specify, so you don't have to reenter the same information for each campaign. You can either create a new campaign template or copy an existing campaign to use as a template.

Create a campaign template



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Marketing**.
- b. Click or tap **Marketing > Campaigns**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand **Marketing**, and then click or tap **Campaigns**.

2. Click or tap **New Template**.
- OR -
- Open the campaign you want to edit.
3. Add information in the template form just as you do when creating a campaign. In the template form, enter the information you want to appear in campaigns based on this template, and add items such as planning tasks, campaign activities, and marketing lists.
4. Click or tap **Save** or **Save and Close**.

Copy an existing campaign as a template



- Open the campaign that you want to copy. Click or tap **Copy as Template**, type a name for the template, and click or tap **Save**.

If you need to back up your templates, or use them in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: [Export your customizations as a solution](#)

See Also

[Get started with CRM marketing](#)

[Create a marketing list in the CRM marketing work area](#)

[Create or edit a campaign in the CRM marketing work area](#)

[Create a quick campaign in the CRM marketing work area](#)

[Add an activity to a campaign in the CRM marketing work area](#)

[Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area](#)

[Track a campaign response in the CRM marketing work area](#)

[Microsoft Dynamics Marketing Help Center](#)

Set up entitlements quickly with templates

Quickly create other entitlements prefilled with the basic information like the start and end date, service level agreement (SLA), allocation type, and total term by using an entitlement template in Microsoft Dynamics CRM. For example, create a template for a standard entitlement, and then apply this template for every standard customer in your organization.



Note

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)

Create an entitlement template



1. Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.

▶ Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
- b. Click or tap **Settings > Service Management**.
- c. Click or tap **Entitlement Templates**.

▶ If using CRM for Outlook

- a. In the Navigation Pane, expand your organization, and then click or tap **Settings > Business > Service Management**.
- b. Click or tap **Entitlement Templates**.

3. To create a new entitlement template, click **+ New**.

-OR-

To edit an entitlement template, in the list of records, select the template, and on the command bar, click **Edit**.

4. Type or modify information in the text boxes.

Hovertips provide hints about what to enter.

- **Entitlement Template Name**
- **Start Date.** Select the date from which the entitlement will be valid.
- **End Date.** Select the date until which the entitlement will be valid.
- **Restrict based on entitlement terms.** To restrict creating case when the entitlement term is over, select Yes. Otherwise, Select **No**.
- **SLA.** Select an SLA record to associate the service levels or key performance indicators for the support you are providing with this entitlement.

Under **Entitlement Terms**, specify the term details for the entitlement.

- **Allocation Type.** Select whether the entitlement is for number of hours or number of cases.
- **Decrease Remaining On.** Select whether to decrease the remaining term on case creation or resolution.
- **Total Term.** Specify the total amount of support the customer is entitled for with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total term, then the customer is entitled for support up to 100 cases.

5. Click or tap **Save**.

Add entitlement channels

Use the **Entitlement Channels** section to define the channels your customers are entitled to, and track the customer support term for each channel separately. For example, to use phone and email as support channels, and restrict them to 80 and 20 hours respectively, create an entitlement channel for each of them.



Note

You must save the template record before you can add entitlement channels to the template.



1. In the **Entitlement Channel** section, click **+**.
2. Specify the total terms that you want to allot to the particular channel.
The remaining term is auto-calculated and shows the total number of hours or cases remaining for the customer's entitlement.

Associate a product with the entitlement template

If you want the entitlement template to be applicable to specific products for an individual customer, associate a product to the template.



1. While in the template record, in the **Products** section, click **+**.
2. In the **Search** box, type the first few letters of the name of the product that you want to associate with the template.

If a product isn't available, click **New** to create a new product record.

See Also

[Define service level agreements \(SLAs\)](#)

[Create an entitlement to define the support terms for a customer](#)

Create a Microsoft Office Word mail merge document

You can use Microsoft Dynamics CRM for Outlook with Microsoft Office Word to create documents for your customers that display Microsoft Dynamics CRM data.

With mail merge, you can:

- Create new templates or use an existing template to generate form letters for yourself or, with the appropriate permissions, for the whole organization.
- Send form letters or form email messages to contacts, accounts, or marketing mailing lists.
- Resend old letters to new recipients.
- Create faxes.
- Create quotes.

In CRM for Outlook, only one mail merge can be run at a time. If you receive the message "Microsoft Dynamics CRM Mail Merge is already running" and want to discontinue a mail merge, close and then reopen Microsoft Office Word or Internet Explorer.

To use mail merge, your email format must be HTML.

Record types that use mail merge:

- Account
- Campaign

To use mail merge with a campaign, you must first distribute a mail campaign activity to a selected marketing list.

- Contact
- Lead
- Opportunity
- List Member in Marketing List
- Quick Campaign

In CRM for Outlook, you can create a mail merge, and then at the end of the process, create a quick campaign.

- Quote

With mail merge, you can print only one quote at a time.

▶ Create a mail merge document


1. In CRM for Outlook, open the list of records you want.

Tip

This list can be the results of an [Advanced Find search](#).

2. In the list, select the record you want to add to the mail-merge recipient list.
3. On the **Add** tab, in the **Marketing** group, click or tap **Mail Merge**.
4. If you have other languages installed, you can select a language to filter the list of templates.

In the **Mail Merge** dialog box, select the type of document you want to use.

Choose whether you want to start with a blank document or a template. If you select a template option, click or tap the **Lookup** button  to select a template.

New mail merge templates are created in the Settings area. More information: [Work with mail merge templates](#)

6. If necessary, you can add or delete data fields.

Microsoft Office Word supports up to 62 data fields, of which CRM for Outlook reserves two data fields to store the primary key and the record owner.

7. Click or tap **Download**.

Microsoft Dynamics CRM automatically opens a Word document. You may need to select Microsoft Office Word in the task bar.

This is not your mail-merge document. This is an interim page.

8. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click or tap **OK**.
9. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation for mail merge.

Tip

- To display the information you want and select the format, in the Mail Merge wizard, click or tap **Address Block** and then **Greeting Line**.
 - To add data fields to display more information, click or tap **More Items**. You can use up to 62 data fields.
10. If you have either created a new template or updated an existing template, you can upload the template.
 - To save the document as a template, on the **Complete the merge** pane, click or tap **Upload Template to CRM**.
 11. If you have saved the document as a template, you can go back and edit the template with **Settings > Business > Templates**. Click or tap your template to review and edit it.

Microsoft Dynamics CRM for Microsoft Office Outlook privacy information

To use CRM for Outlook, you must sign in with your credentials (an email address and password). You may choose to save this information locally so that you aren't asked for your credentials each time you open Outlook. If you choose to save this information, CRM for Outlook will automatically connect to Microsoft Dynamics CRM every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM by setting an option. If you turn off the connection, CRM for Outlook may exhibit decreased performance.

If you use CRM for Outlook to track email, the email thread will be visible to users in your organization who have permission to view it.

For every email you receive, CRM for Outlook will send CRM the sender's email address, the recipient's email address, and the subject line of the message. This enables CRM to validate whether any particular mail should be stored by the CRM service. When you track an item, a copy of that item will be maintained by the CRM service and will be visible to other users in your organization who have the right permissions. When you untrack an item, that copy is automatically deleted from the CRM service only if you own the item.

See Also

[Work with templates](#)

[Send bulk email to customers](#)

Go mobile

Get started with CRM for phones


Microsoft Dynamics CRM for phones is the essential business tool to help you stay connected and productive wherever you are. Stay up to date with your customer info—even when you're on the go. Arrive prepared for every appointment, and update your notes, tasks, contacts, accounts, leads, and opportunities while the details are still fresh in your mind.

You can do the following with the CRM for phones app:

- See your CRM data quickly displayed and optimized for a mobile screen.
- Add and modify contacts, tasks, and notes as well as other relevant sales data.
- View activity feeds and see addresses on Bing Maps (Windows Phone only).
- Get back to recently viewed records even when you're not connected (Windows Phone only).

You can also access your CRM data with your phone's browser, but the CRM for phones app makes your data easier to view and edit.

The following articles provide more information about how to install and use CRM for phones:

- [Install the CRM for phones app](#)
- [Take a tour of CRM for phones](#)
-  [eBook: Go mobile with CRM for phones](#)

See Also

[Known issues for CRM for tablets and phones](#)

[Information for admins: Set up CRM for phones](#)

[Create and edit mobile forms](#)

Install the CRM for phones app

While on the go, you can use Microsoft Dynamics CRM 2013 on your mobile phone with the CRM for phones app.

Before you can use the app, you need to check to make sure your CRM 2013 admin has set up CRM for phones for you. Your admin might have provided you with instructions on how to install and start the app, but if not, you can use these instructions.

Install CRM for phones

If your admins have told you to download the CRM for phones app, click the link in the following table for your phone. The link will take you to the app in your phone's app store.

Phone	App link
Windows Phone	Windows Store
Apple iPhone	Apple App store
Android phone	Google Play

Start CRM for phones



1. Open the CRM for phones app.
2. On the **Get Started** screen, type your company's CRM web address.



3. Tap **Go** to continue.

Having trouble with your app?

If you're having trouble with your CRM for phones app, it's a good idea to contact your IT department. If you want to do some troubleshooting on your own, try these resources:

- If your app isn't working well on your phone, be sure to check the compatibility information in [Mobile phone support for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#).
- For specific problems and error messages, see [Known issues for CRM for tablets and phones](#).

See Also

[Get started with CRM for phones](#)

[Take a tour of CRM for phones](#)

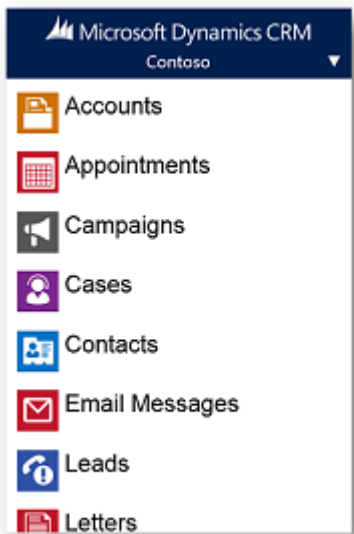
[Known issues for CRM for tablets and phones](#)

[CRM for phones: Information for admins](#)

Take a tour of CRM for phones

If you're new to Microsoft Dynamics CRM for phones, check out this quick tour to see how to navigate or work in the app.

When you first open CRM for phones, you'll see a list of record types such as accounts, contacts, and leads.

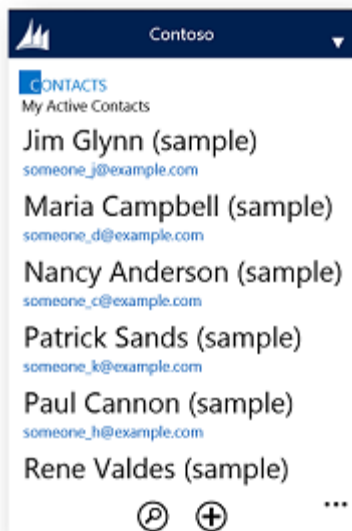


Follow the instructions here to navigate, search, and do other common tasks.

Display a list of records



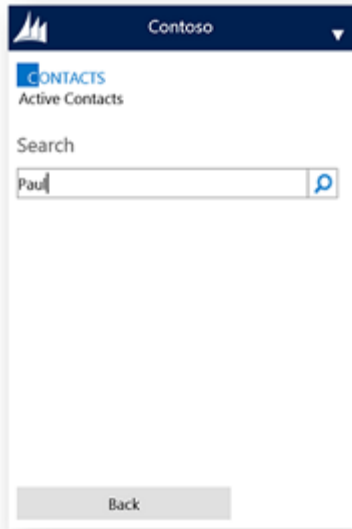
- From the list of record types, tap the one you want, for example **Contacts**.




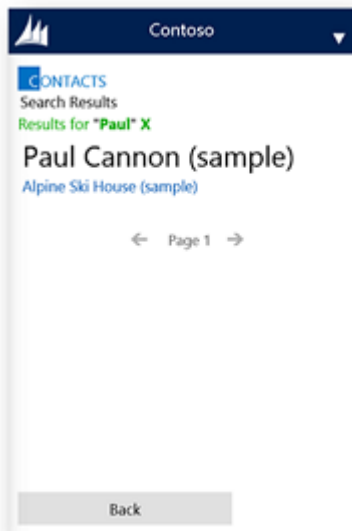
Search for records from a list



Tap the **Search** button  at the bottom of the screen. Enter text to search.




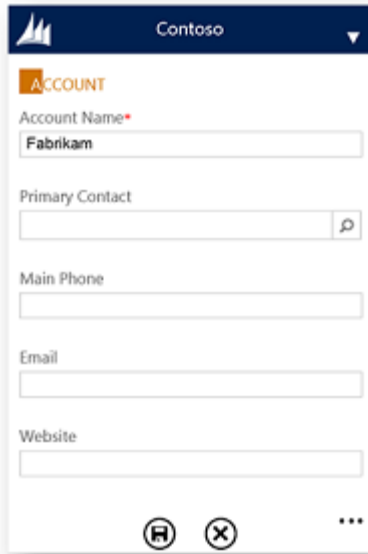
Tap the **Search** button .



Search for records from a lookup field

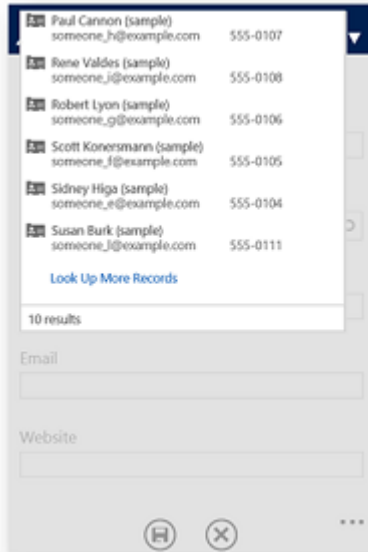


In a lookup field, tap the **Search** button ()



The screenshot shows a mobile application interface for a 'Contoso' account. The title bar is dark blue with the 'Contoso' logo and a dropdown arrow. Below the title bar, the word 'ACCOUNT' is displayed in orange. The form contains several fields: 'Account Name' with the value 'Fabrikam', 'Primary Contact' with a search icon, 'Main Phone', 'Email', and 'Website'. At the bottom, there are three icons: a home icon, a close icon, and a more options icon.

2. Tap **Look Up More Records**.



The screenshot shows a mobile application interface displaying a list of search results for a lookup field. The list contains six entries, each with a name (sample), email address, and phone number. Below the list is a 'Look Up More Records' link. The form below the list is dimmed, showing 'Email' and 'Website' fields. At the bottom, there are three icons: a home icon, a close icon, and a more options icon.

Name (sample)	Email	Phone
Paul Cannon	someone_h@example.com	555-0107
Rene Valdes	someone_i@example.com	555-0108
Robert Lyon	someone_g@example.com	555-0106
Scott Konermann	someone_f@example.com	555-0105
Sidney Higa	someone_e@example.com	555-0104
Susan Burk	someone_j@example.com	555-0111

3. Enter a few characters to search and tap **find**.

Lookup

Look for
Contact

View
Contacts Lookup View

Search
pa

find cancel

4. Select the record and tap **done**.

Search results for pa

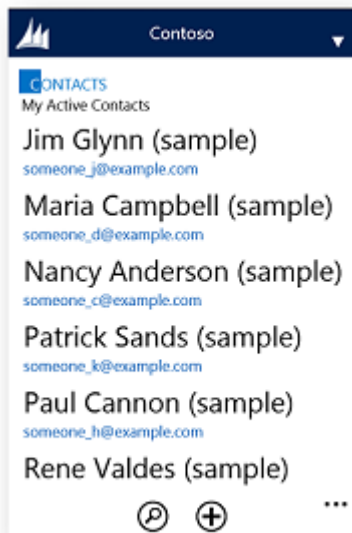
- Patrick Sands (sample)
someone_k@example.com
- Paul Cannon (sample)
someone_h@example.com

back done

Change the current view



- Tap the view name and select the view you want.

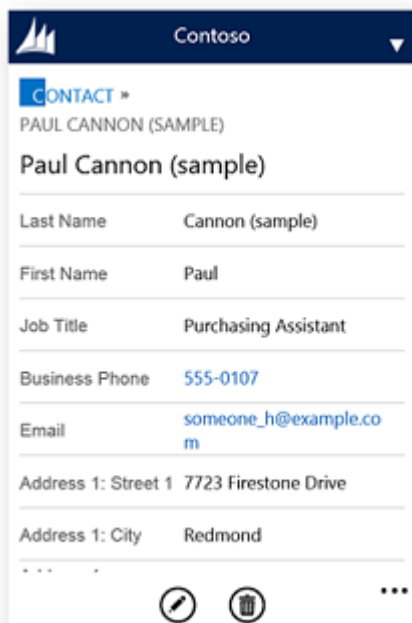


Initially, 10 records display. Scroll down to retrieve more records.

Start a call or email



- Tap a phone number or email address to start a call or launch your email app.

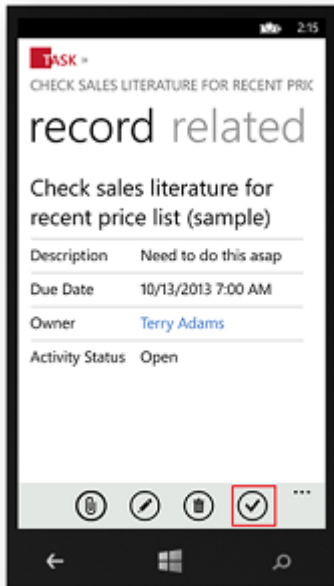


Mark activities complete

Follow the steps for the app you're using.

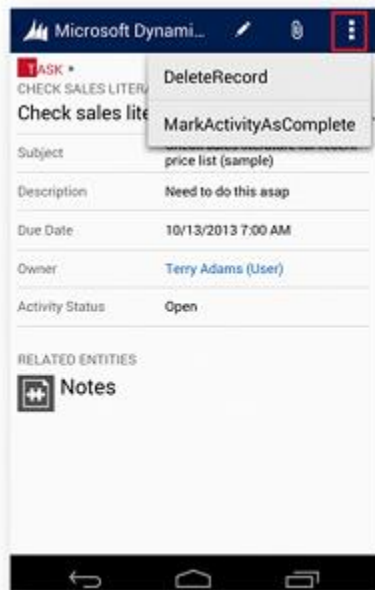
▶ Windows Phone

- On a Windows Phone, tap the **check** button.



▶ iPhone or Android phone

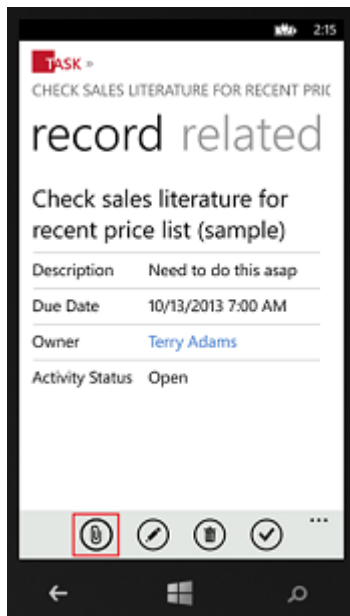
- On an iPhone or Android, tap the **more** button, and then tap **MarkActivityAsComplete**.



Add an attachment to a record



- Tap the **attachment** button and select the document, picture, or other item that you want to attach.



Use additional features in the Windows Phone app

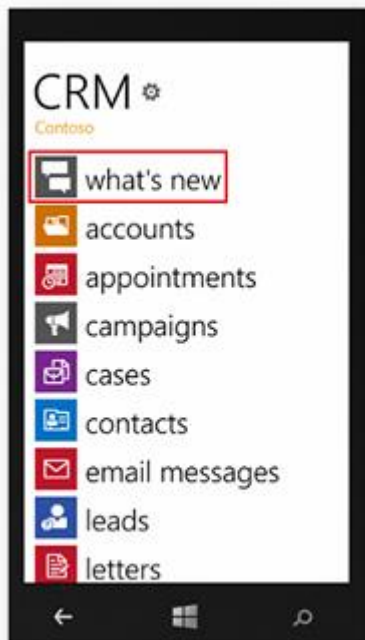
The CRM for phones app for Windows Phone includes the following added features:

- Activity feeds
- Record panorama (you can swipe to view additional information or related records)
- Offline experience (you can see recently viewed data while disconnected from the network, but you can't edit it)
- Ability to synchronize customizations by clearing the local cache

View activity feeds



- Tap **what's new** and view the posts.



Use the record panorama



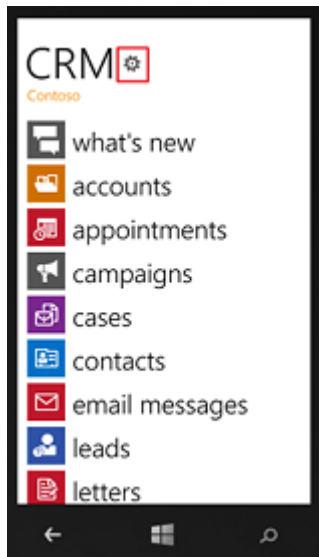
- To view additional information, swipe left and right.



Synchronize customizations by clearing the local cache



1. From time to time, your CRM administrator might make changes to the system. While the app will automatically check for changes every eight hours or so and synchronize them, you can manually start a synchronization if you need it sooner. To synchronize customizations to the app, tap the **gear** button on the home page.



2. Tap **clear local cache**.



See Also

[eBook: Go mobile with CRM for phones](#)

[Get started with CRM for phones](#)

[Install the CRM for phones app](#)

[Known issues for CRM for tablets and phones](#)

[CRM for phones: Information for admins](#)

Get started with CRM for tablets

Access your CRM data on the go with the Microsoft Dynamics CRM for tablets app. You can easily look up records, edit them, create new ones, and keep in touch with colleagues. Click these links to get started with installing and using CRM for tablets.



[Install the CRM for tablets app](#)

[View a list of compatible tablets](#)

[Take a tour of CRM for tablets](#)

[Track customer service status on the go with CRM for tablets](#)

[Work offline with CRM for tablets](#)

[Sign out or reconfigure CRM for tablets](#)

See Also

[Known issues for CRM for tablets and phones](#)

[CRM for tablets information for admins](#)

[Troubleshoot a CRM for Windows 8.1 app start-up error](#)

Install the CRM for tablets app

While on the go, you can use Microsoft Dynamics CRM 2013 on your mobile device with the Microsoft Dynamics CRM for tablets app. Before you can use the app, you need to check to make sure your CRM 2013 admin has set up CRM for tablets for you. Your admin might have provided you with instructions on how to install the app, but if not, you can use these instructions to download the app from your tablet's app store.

Review the list of compatible tablets

Before installing the app, it's important to determine if the app is supported on your tablet. More information: [Tablet support for Microsoft Dynamics CRM 2013 and CRM Online](#)

Install CRM for tablets

To install the CRM for tablets app on your tablet, click the link in the following table for your tablet. The link will take you to the app on your tablet's app store.

App	App link
Microsoft Dynamics CRM for Windows 8.1	Windows Store
Microsoft Dynamics CRM for Windows 8	Windows Store
Microsoft Dynamics CRM for iPad	Apple App store
Microsoft Dynamics CRM for Android	Google Play

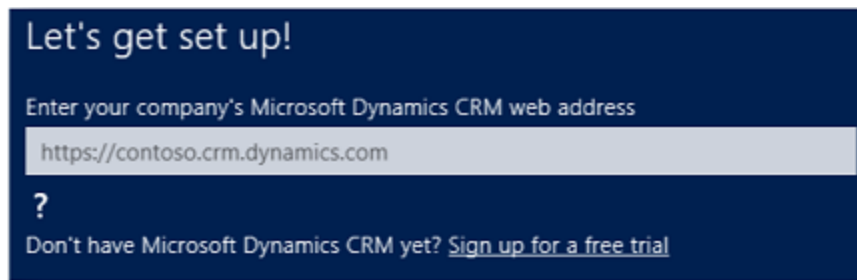
The Windows 8.1 app only works on Windows 8.1, but either the Windows 8 or the Windows 8.1 app works on Windows 8.1 tablets.

If your organization has an on-premises deployment of CRM, you need to make sure that your organization is ready for you to install the Windows 8.1 app before you install it. More information: [Troubleshoot a CRM for Windows 8.1 app start-up error](#)

Start the app



1. Open the CRM for tablets app.
2. On the **Let's get set up!** screen, enter your company's CRM web address.



3. Tap the arrow button in the lower right corner to continue.

Having trouble with your app?

If you're having trouble with your CRM for tablets app, it's a good idea to contact your IT department. If you want to do some troubleshooting on your own, try these resources:

- If your app isn't working well on your tablet, be sure to check the compatibility information in [Tablet support for Microsoft Dynamics CRM 2013 and CRM Online](#).
- If you have installed the Windows 8.1 app and your organization has an on-premises CRM deployment, see [Troubleshoot a CRM for Windows 8.1 app start-up error](#).
- For all other problems, see [Known issues for CRM for tablets and phones](#).

See Also

[Get started with CRM for tablets](#)

[Tablet support for Microsoft Dynamics CRM 2013 and CRM Online](#)

[Known issues for CRM for tablets and phones](#)

[CRM for tablets: Information for admins](#)

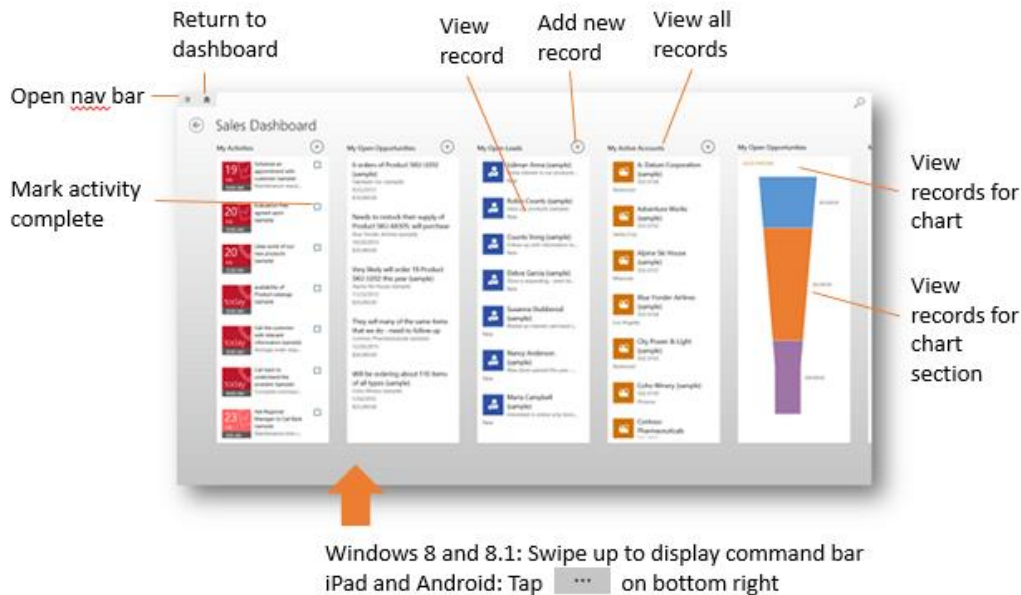
[Work offline with CRM for tablets](#)

[Troubleshoot a CRM for Windows 8.1 app start-up error](#)

Take a tour of CRM for tablets

The Microsoft Dynamics CRM for tablets app is the best way to view CRM data on a tablet. The app is intuitive and uses familiar tablet gestures, but this tour offers useful tips about the CRM for tablets app that you might not know.

When you first open CRM for tablets and sign in, you'll see the Sales Dashboard. Your CRM admin has probably customized it to fit the needs of your organization, so your dashboard might look different than the one shown here—and possibly have a different name. The dashboard is the home page for CRM for tablets and provides a quick overview of your CRM data, including different views and charts.



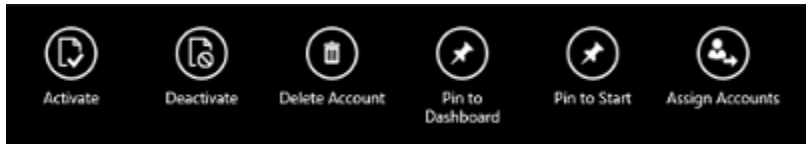
Follow the instructions here to navigate, search, and do other common tasks.

Navigate the dashboard

Navigation is intuitive, and it's easy to view or create new records from the dashboard. Here are a few quick tips.

Display the command bar

You can add a new record, change views, or do other tasks from the command bar.



Follow the steps for the app you're using.

▶ **Windows 8 app and Windows 8.1 app**

- Swipe up from the bottom of the screen.

▶ **iPad app and Android app**

1. Tap the **More Commands** button (...) on the bottom right of the screen.

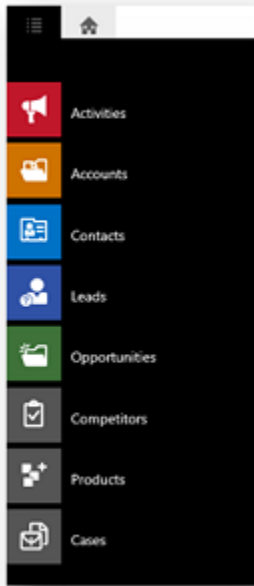
The command bar is context-sensitive, and the available commands change depending on where you are in the app. When you display the command bar for a specific record, the available commands are relevant to that record.

▶ **Display the command bar for a specific record or from a list or grid**

- Press and hold the record or the list or grid header.

Display the nav bar

The nav bar gives you a full list of the record types you can view.



- Tap the list icon on the top left corner of the screen.

Work with records on the dashboard

To do this:	Do this:
View all the records for a record type on the dashboard.	Tap the header of the list.
Open the form for a record on the dashboard.	Tap the record.
Create a new record from the dashboard.	Tap the New Item button (+) on the right side of the header of the type of record you want to create (for example, My Activities).

Change views for a list on the dashboard



1. Press and hold the name of the list to display the command bar.
2. To select a different view, tap the **Select View** button on the command bar.

View activities and mark them complete

On the dashboard, if your admin chose to put it there, **My Activities** shows your activities that are past due or due today in a darker color than those that aren't.

▶ Mark an activity complete

- Tap the check box next to the activity in the list to mark it complete.

Create or edit stakeholders or sales team members

On the dashboard, **Stakeholders** and **Sales Team** allow you to look up or create a new stakeholder or sales team member without leaving the dashboard.



1. In **Stakeholders** or **Sales Team**, tap the new item button (+).
2. Enter a contact name to look up in the dropdown that appears in the simple list.
3. Either select from the contacts that appear or, if it's a new contact, tap the **Add** button and complete the information in the form that appears.
4. Select a role for the contact.

STAKEHOLDERS (+)

Contact name

Role

OK

No data available.

Robert Lyon (sample)
Influencer ▾

Susan Burk (sample)
Decision Maker ▾

Navigating on Android tablets

Navigation on Android tablets is a little different than on iPad or Windows 8 tablets.

When you scroll on an Android tablet by swiping left or right, the app scrolls a whole page at a time instead of a partial page. You can also use the arrow buttons at the bottom of the screen to scroll left or right.




Depending on where you are in the app, the Android **Back** button takes you to the previous form, cancels dialog boxes or error messages, closes the keyboard, or performs other actions depending on context.

Search for records

To quickly find your records in Microsoft Dynamics CRM for tablets, you can search across multiple record types (up to 10) at once.

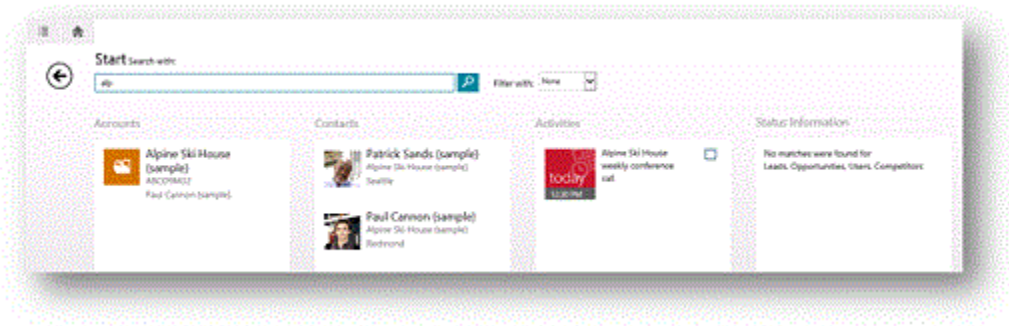
Start a search



Tap the **Search** button  in the upper right corner of the screen. Type one or more characters in the search box.

2. Tap the **Search** button next to the search box.

The search results include only records that begin with the letters you type. For example, if you want to search for “Alpine Ski House”, type **alp** in the search box; if you type **ski**, the record won’t show up.



Important

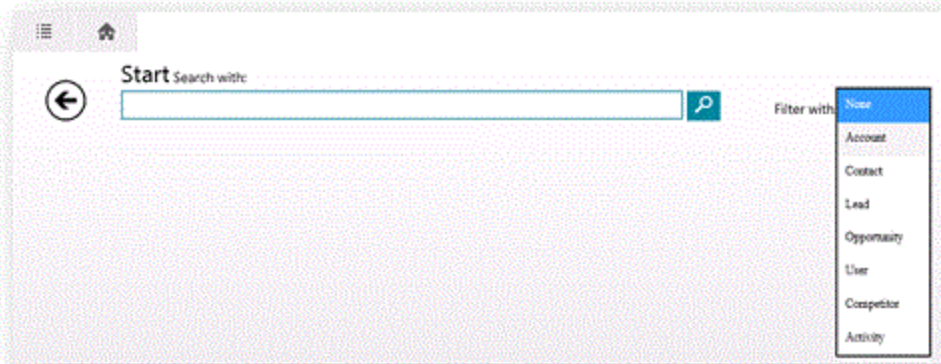
Although you can use wildcard characters in your search (such as ***ski**), it’s best

to avoid wildcards due to possible performance issues.

Filter search results



- To filter results by one record type, on the search screen choose a record type from the **Filter with:** drop-down box.



- To search against all record types, choose **None** in the **Filter with:** drop-down box



Pin tiles to the dashboard and create a communication card

Pinned tiles provide quick access to your records, contacts, and views. You can pin as many tiles as you want to the Pinned Tiles section of the dashboard.

▶ Pin a tile

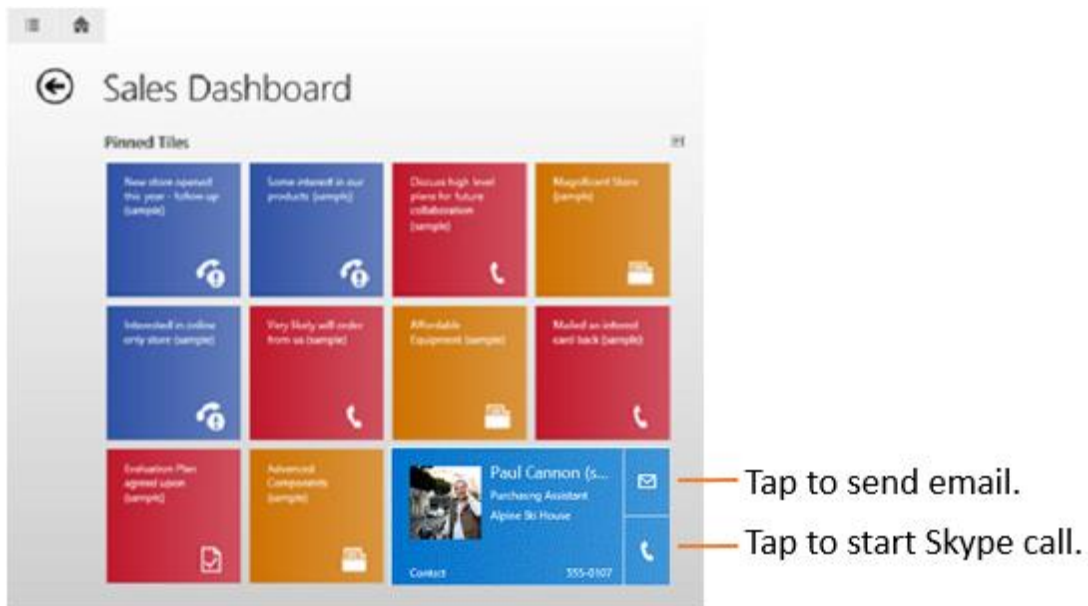
1. To pin a tile from a grid or list, press and hold the item you want to pin to show the command bar. To pin a tile from a record form, swipe up from the bottom on Windows 8 tablets or tap the **More** button on iPad or Android tablets to show the command bar.
2. Tap **Pin to Dashboard** on the command bar. The item appears as a tile in the Pinned Tiles section of the dashboard.



Communication cards provide a quick way to email or call your contact just by tapping the email address or phone number on the card. Communication cards appear on contact forms, but you can also create a communication card from a contact in the Pinned Tiles section of the dashboard by expanding the pinned tile.

► **Create a communication card from a pinned tile**

1. Press and hold a contact or user tile that is pinned to the dashboard.
2. Tap **Larger** on the command bar. The contact information becomes a communication card.



Work with lists

Resize columns in a list

You can resize columns in a list, and the CRM for tablets app will remember your settings the next time you view that list. Follow the steps for the app you're using.

▶ Windows 8 app or Windows 8.1 app

1. Swipe up from the bottom to open the command bar.
2. Tap **Resize Columns**.
3. Drag the column handles that appear above the form to the width you want.

▶ iPad app or Android app

1. Tap the **More Commands** icon on the bottom right of the screen to open the command bar.
2. Tap **Resize Columns**.
3. Drag the column handles that appear above the form to the width you want.



Regarding	Priority	Start Date	Due Date	Rec
Basic Company (sample)	Normal	---	---	No
---	Normal	1/22/2012	1/22/2012	No

Sort a list



- To sort in ascending order by a column, tap that column's header.
- To sort in descending order, tap the column's header again.

Work with charts

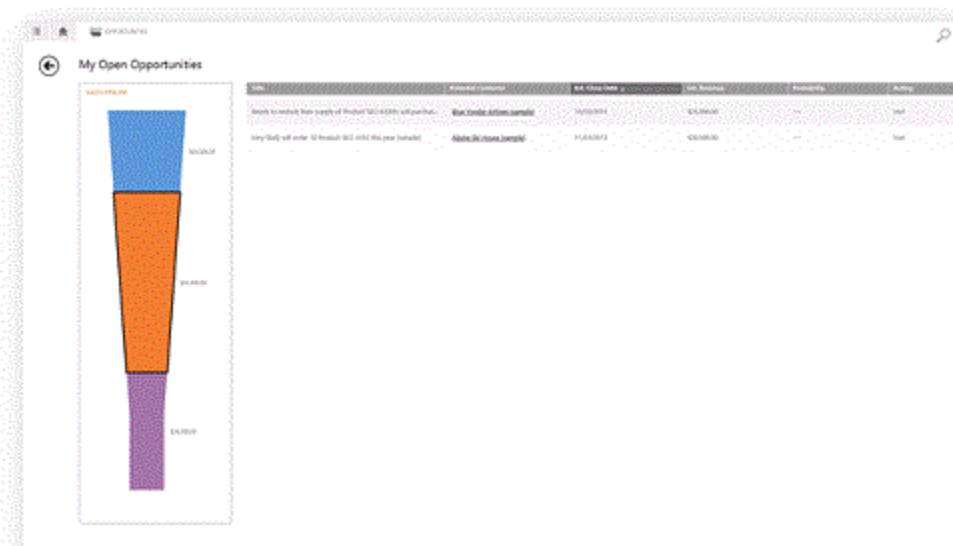
Drill through to see the records for a chart



- To see the records that represent a certain part of a chart, tap that section of the chart.



- To see all records for the chart, tap the area surrounding the chart.



- Tap any of the records to display its form.

 **Note**

You can see charts alongside a list only if you tap a chart from the sales dashboard. You can't display a chart to appear next to a list if you don't start from a chart on the dashboard.

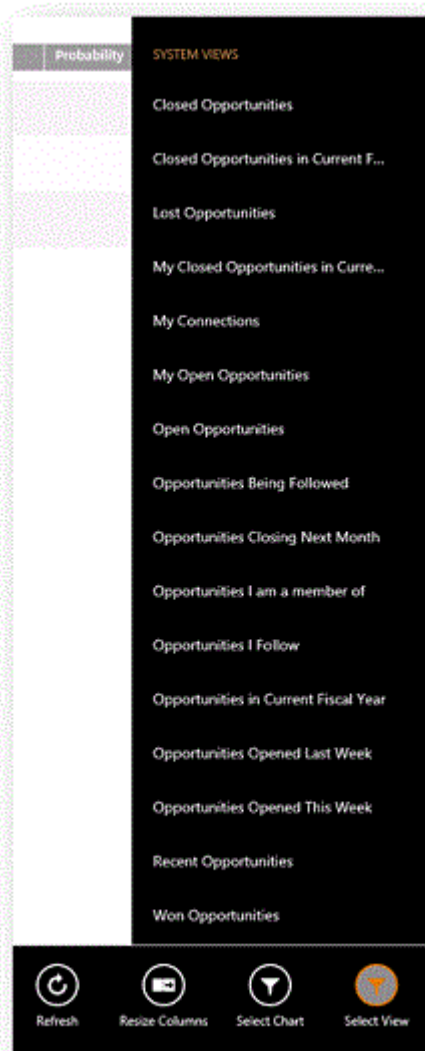
Change the chart view



1. Tap **Select View** button on the command bar.



2. Tap the view you want.



Change the chart to display



1. Tap **Select Chart** on the command bar.
2. Tap the chart you want to display.

Limitations

The following features in the web application aren't available in CRM for tablets:

- Yammer and activity feeds
- Bing Maps integration

- SharePoint document libraries
- Custom web resources and iFrames

However, if you need to use these features or want to view a record in the web application, you can do that in your tablet's browser.



1. Press and hold the record or view you want to see.
2. Tap **Open in browser**.
3. Sign in to the web application when it appears. The web app goes right to the record that you were working on in the CRM for tablets app.

See Also

[Install the CRM for tablets app](#)

[Get started with CRM for tablets](#)

[Work offline with CRM for tablets](#)

[Known issues for CRM for tablets and phones](#)

[CRM for tablets information for admins](#)

Track customer service status on the go with CRM for tablets

As a Customer Service Manager, use the Microsoft Dynamics CRM for tablets app to keep track of activities in your customer service organization while on the go. The app's dashboard lets you track your team's performance, monitor high priority cases, and route cases from your tablet.

You can set up your dashboard to see the data that is most useful to you. More information:

[Customize CRM for tablets](#)

Pin your most important cases to your dashboard

Keep urgent cases at your fingertips by pinning them to the **Pinned Tiles** area of your dashboard.



1. Press and hold the case.
2. On the command bar, tap **Pin to Dashboard**.

Open a case in the web app to work on it in more detail

If you need to perform more actions on a case than you can in the CRM for tablets app, you can easily open the case in your browser.



1. On the case screen, open the command bar.
2. Tap **Open in browser**.
3. Sign in to the web application when it appears. The web app goes right to the case you

had open in the CRM for tablets app.

Differences in the customer service area between CRM for tablets and the web app

The CRM for tablets app is optimized for Customer Service Managers who are always on the move and need to keep track of activities in their customer service organization. Due to these optimizations, the service areas in the CRM for tablets app have a different appearance and functionality than the web app in some cases, as shown in the following table:

Web app feature	Difference in CRM for tablets app
Merge cases	Not available.
KB article lookup	Not available (appears as locked in the app).
Queue filter in Queue Items list	Not available. However, you can change the view so that it filters items by queues. More information: Customize CRM for tablets
Queue Item Details button on forms for items that you can route to a queue; for example, cases	Not available.
Similar Cases area on the case form	Not available.
Customer contact card on the case form	Tap the customer name on the case form to view the customer record and contact card.
Case origin icons on the Cases list	The Cases list shows the list of cases without the icons. The case origin appears on the individual case form.
Subject lookup in Case Details area	Instead of selecting from a tree view, type in letters to start a search.
Find Case step in Identify , Similar Cases step in Research , and Resolve Case step in Resolve case business process flow	These actions do not appear in the case process. However, to resolve a case, you can use Resolve in the command bar.
Entitlement lookup	You can't filter results in entitlement lookup.

See Also

Service best bets

[Get started with service management](#)

Work offline with CRM for tablets

When you're on the go and can't connect your tablet to the Microsoft Dynamics CRM server, you can still access cached data (data you've recently accessed) with Microsoft Dynamics CRM for tablets.



Note

Cached data is not encrypted. You can use BitLocker to encrypt the entire hard drive on a Windows 8 device.

Work offline and reconnect

When your tablet is disconnected, you can still see your recently-accessed data. The data cached on your tablet is read-only, and you cannot create any new records until you reconnect to the CRM server. Charts aren't available offline, and some images might also be unavailable. To remind you that you're working offline, CRM displays an alert.

▶ Reconnect to the CRM server

- When the connection to the Microsoft Dynamics CRM server is available, tap the offline indicator and then tap the **Reconnect** link.

Sign in while disconnected

When your current session expires, you need to sign back in to CRM. If this happens while you're disconnected, and if you tap the **Back** button on the sign-in page, you'll still be able to work in offline mode on iPad and Windows 8 tablets until you can reconnect. On Android tablets, however, you can no longer work in offline mode and will be redirected to the configuration page until you can reconnect and sign in again.

Work offline with on-premises CRM deployments

If you're using your CRM for tablets app with Microsoft Dynamics CRM 2013 (on-premises), you can continue to use CRM for tablets while disconnected. However, with the Windows 8 app, once you close CRM for tablets (like when you start another app), you will be unable to use CRM for tablets until you can connect to the Internet. With the Windows 8.1 app, you can continue to access your data even if you close the app.



Note

Before installing the Windows 8.1 app, you need to make sure that your organization is ready for you to install it. If your organization isn't ready, you can still use the Windows 8 app on a Windows 8.1 tablet. More information: [Troubleshoot a CRM for Windows 8.1 app start-up error](#)

See Also

[Get started with CRM for tablets](#)

[Take a tour of CRM for tablets](#)

[Install the CRM for tablets app](#)

[Known issues for CRM for tablets and phones](#)

[CRM for tablets information for admins](#)

Sign out or reconfigure CRM for tablets

If you share a tablet with another person, or if you need to sign in to a different organization (for example, if you need to sign in to a test installation), you don't have to uninstall and reinstall the Microsoft Dynamics CRM for tablets app. You can use either the sign out or the reconfigure options instead.

Applies to

This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises). More information: [Install product updates](#)
You also need the latest versions of the Microsoft Dynamics CRM for tablets apps.

Sign out of the CRM for tablets app

▶ Windows 8 or Windows 8.1 apps

1. Swipe in from the right to open the command bar.
2. Tap **Settings**.
3. Tap **Sign Out**.

▶ iPad or Android apps

1. Tap the **More Commands** icon on the bottom of the screen to open the command bar.
2. Tap **Settings**.
3. Tap **Sign Out**.

You can sign in again as the same or different user, or you can sign in to a different organization.

Reconfigure the CRM for tablets app

▶ Windows 8 or Windows 8.1 apps

1. Swipe in from the right to open the command bar.
2. Tap **Settings**.
3. Tap **Reconfigure**.

▶ iPad or Android apps

1. Tap the **More Commands** icon on the bottom of the screen to open the command bar.
2. Tap **Settings**.
3. Tap **Reconfigure**.

You can now sign in to a different server or organization.

What's the difference between sign out and reconfigure?

Sign out

Signing out deletes data and authentication tokens from the cache, and it also deletes cookies on iPad and Android tablets. Signing out does not delete metadata. This means that if a user signs in again after signing out, a metadata sync is not required before using the application again, which can save a few minutes when you sign in.

Caution

CRM for tablets makes a best effort to delete data and authentication tokens from the cache; it is not guaranteed that this will occur in every situation.

Reconfigure

Reconfiguring deletes all data and metadata from the cache.

If you sign out from one organization and sign in to another, and use the **Reconfigure** option on the second one, your metadata will still remain for the first organization. If you want to remove your metadata from the first one, you'll need to sign in to it and use the **Reconfigure** option there, as well.

Caution

CRM for tablets makes a best effort to delete data and metadata from the cache; it is not guaranteed that this will occur in every situation.

Note about pinned tiles

If you're using a Windows 8 or Windows 8.1 tablet and had pinned tiles to your **Start** screen, those tiles will remain whether you use the **Sign Out** or **Reconfigure** option. These tiles will only work for users who have access to that record or view, however. For example, if you sign in as **user1** from **org1** and pinned a tile to **Start**, someone who signs in as **user2** from **org2** and taps that tile will receive an error message saying the record isn't available.

See Also

[Get started with CRM for tablets](#)

[Install the CRM for tablets app](#)

[Work offline with CRM for tablets](#)

[Known issues for CRM for tablets and phones](#)

[CRM for tablets information for admins](#)

Admin and troubleshooting for CRM for phones and tablets

Customize CRM for phones

You can select which entities are available to Microsoft Dynamics CRM for phones users. For each entity, you can define which attributes are available on the form for the entity.

Edit the entity to show or hide it in CRM for phones. For more information, see [Create and edit entities](#) in the Customization Guide.

Edit the mobile form to select which fields you want to display and in what order you want them to appear. For more information, see [Create and edit mobile forms](#) in the Customization Guide.

You can also define who has permission to use CRM for phones by setting the **CRM for phones** privilege. All default security roles include this privilege. If a user's security role gives them access to an entity in Microsoft Dynamics CRM, they have the same permission in CRM for phones. For more information, see [Create or edit a security role](#).

Troubleshoot a CRM for Windows 8.1 app start-up error

Chances are that you're reading this because you got the following error while trying to configure the Microsoft Dynamics CRM for Windows 8.1 app after installing it:

Additional steps may be needed to configure Microsoft Dynamics CRM for this organization. Please contact your system administrator.

If you got this error, you should contact the IT department for your organization to see if they are ready for you to install the Windows 8.1 app. In the meantime, you can continue to use the Microsoft Dynamics CRM for Windows 8 app.

Two apps for Windows 8 and 8.1 tablets

There are two Microsoft Dynamics CRM for tablets apps in the Windows store, one for Windows 8 and one for Windows 8.1. You can use either app on a Windows 8.1 tablet.

To use the Windows 8.1 app with an on-premises CRM deployment, your system administrator must first make configuration changes, or you will receive the above error while trying to configure the app after installing it. In the meantime, you can still use the pn___windows8 app. More information: [CRM for Windows 8 in the Windows Store](#)

For information on how to install either the CRM for Windows 8 app or the CRM for Windows 8.1 app, see [Install the CRM for tablets app](#).

For Microsoft Dynamics CRM Online users

If you use CRM Online and have received an error (this one or otherwise), contact your IT department for help. More information: [Known issues for CRM for tablets](#).

For admins

If you're an IT admin trying to troubleshoot why users are getting this error, see [For admins: Prepare CRM servers for the Windows 8.1 app](#).

See Also

[Install the CRM for tablets app](#)

[Get started with CRM for tablets](#)

[Known issues for CRM for tablets](#)

[For admins: Prepare CRM servers for the Windows 8.1 app](#)

Monitor social media

Add social listening visuals to a dashboard or account

Microsoft Social Listening scours social networks like Facebook and Twitter to help you monitor what people are saying about your products or brand, and then analyzes the data and presents it to you in easy-to-read charts and graphs.

These visuals help you spot emerging trends in people's comments, respond to service issues before they escalate, track marketing campaigns, gain insights about your competitors, and more.

CRM Online users can add Microsoft Social Listening charts and visuals to dashboards, or you can add them to account, contact, or competitor screens. You can also add Microsoft Social Listening charts and visuals to other types of records.

To help you get up and running quickly with Microsoft Social Listening, a system administrator sets up lists of common search terms for your organization in advance. Everyone shares and can select from the same pre-set lists of search terms to listen for on social networks like Facebook and Twitter.

Or, you can [Set up your own searches for Social Listening](#) for Microsoft Social Listening to monitor on social networks.



Tip

Want to know more about Microsoft Social Listening before you set it up? Check out the [eBook: Microsoft Social Listening for CRM](#). This eBook shows you how Microsoft Social Listening can help you quickly analyze what people are *really* saying on vast social networks like Facebook and Twitter. Includes a gallery of all available charts and visuals with examples so you can get an idea of what's possible.



Important

Microsoft Social Listening is available on dashboards and for accounts (and other record types) for CRM Online Spring '14. CRM 2013 Service Pack 1 (on-premises) organizations can access Microsoft Social Listening via a [website](#) for a discounted rate. For more info about pricing and licensing, see **Get ready for the spring wave of releases**.


Create a social listening dashboard

You'll use a wizard to set up the search terms to listen for on social networks like Facebook and Twitter, and to select the charts or visuals you want to include on a dashboard.

People in sales, service, or marketing can create their own dashboards. CRM admins can create dashboards to share with the entire organization.



1. To start the social listening wizard are different, follow the steps for your role.

 **If you're in sales, service, or marketing**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Dashboards**.

 **If you're a CRM admin**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Customizations**.
- c. Click or tap **Customize the System > Dashboards**.

2. Click or tap **New**.
3. Choose the layout to use for the dashboard, and then click or tap **Create**.



Tip

The 2-column regular dashboard layout is a good place to start because it gives you a simple design for up to four different charts.

4. Type a name for the dashboard.

To start the wizard, click or tap  on the dashboard layout.

6. On the **Set up Social Insights** page, click or tap **Search topic**, and then click or tap **Next**.
7. In the **Search topics list**, select the list of terms to listen for, and then click or tap **Next**.
8. From the **Visual name** drop-down list, select the name of the chart or visual. Each one includes a brief description to help you select the one you want.



Tip

To add more than one chart or visual, click or tap **Add visual**, and then select another chart or visual from the list.

9. Click or tap **Finish**.
10. Click or tap **Save**, and then click or tap **Close**. If you're the CRM admin, on the command bar, click or tap **Publish** so that other people can use the dashboard.

Add a social listening chart or visual to an account or other type of record

You'll use a wizard to set up the search terms to listen for on social networks like Facebook and Twitter, and to select the charts or visuals you want to include for an account.

You can also add social listening charts or visuals to contacts, competitors, or other types of records.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Accounts**.
You'll see a list of accounts. You may need to scroll to see the whole list.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Accounts**.
You'll see a list of accounts. You may need to scroll to see the whole list.

2. Click or tap the account you want.
3. To start the social listening wizard, click or tap **Configure Social Insights**.
4. On the **Set up Social Insights** page, click or tap **Search topic**, and then click or tap **Next**.
5. In the **Search topics list**, select the list of terms to listen for, and then click or tap **Next**.
6. From the **Visual name** drop-down list, select the name of the chart or visual. Each one includes a brief description to help you find the one you want.



Tip

To add more than one chart or visual, click or tap **Add visual**, and then select another chart or visual from the list.

7. Click or tap **Finish**.

See Also

[eBook: Microsoft Social Listening for CRM](#)

[Set up your own searches for Social Listening](#)

Get ready for the spring wave of releases

Set up your own searches for Social Listening

To help you get up and running quickly with Microsoft Social Listening, a system administrator sets up lists of common search terms (also referred to as “search topics”) for your organization in advance. Everyone shares and can select from the same pre-set lists of search terms to listen for on social networks like Facebook and Twitter.

However, if you want Microsoft Social Listening to monitor different search terms, you can use a wizard to set up your own searches.



Tip

Want to know more about Microsoft Social Listening before you set it up? Check out the [eBook: Microsoft Social Listening for CRM](#). This eBook shows you how Social Listening can help you quickly analyze what people are *really* saying on vast social networks like Facebook and Twitter. The eBook includes a gallery of all available charts and visuals with examples so you can get an idea of what’s possible.



Important

Microsoft Social Listening is available on dashboards and for accounts (and other record types) for CRM Online Spring ‘14. CRM 2013 Service Pack 1 (on-premises) organizations can access Microsoft Social Listening via a [website](#) for a discounted rate. For more info about pricing and licensing, see **Get ready for the spring wave of releases**.

Set up your own search on a social listening dashboard

You’ll use a wizard to set up your own search terms to monitor on social networks, and to select the charts or visuals you want to include on a dashboard.



1. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
2. Click or tap the work area name, and then click or tap **Dashboards**.
3. Click or tap **New**.
4. Choose the layout to use for the dashboard, and then click or tap **Create**.



Tip

The **2-column regular dashboard** layout is a good place to start because it gives you a simple design for up to four different charts.

5. Type a name for the dashboard.

To start the wizard, click or tap the **Social Listening** button () on the dashboard.

7. On the **Set up Social Insights** page, click or tap **Search topic > Create a new search topic**. Complete the fields on the screens.

To group this search by the type of record (for example, accounts, competitors, or contacts), in the **Select a category for this search topic** drop-down list, select the record type.

In the **Keywords to search for** field, enter the terms to search for, separated by commas. Social Listening finds exact matches, but the terms aren't case-sensitive. For best results, include variations on the terms (for example, "phone" and "phones").

In the **Keywords that must be INCLUDED in results** field, enter additional terms that are required in results. These additional terms will narrow your search (think "AND").

In the **Keywords that must be EXCLUDED from results** field, enter terms you don't want in results. Use exclusions to avoid overwhelming your results with irrelevant keywords (think "NOT").

8. Click or tap **Next**.
9. From the **Visual name** drop-down list, select the name of the chart or visual. Each one includes a brief description to help you find the one you want.

 **Tip**

To add more than one chart or visual, click or tap **Add visual**, and then select another chart or visual from the list.

10. Click or tap **Finish**.
11. Click or tap **Save**, and then click or tap **Close**.

Set up your own search for an account or other type of record

If you want to monitor emerging trends on social media for an account, you can use a wizard to set that up.

You can also add social listening charts or visuals to contacts, competitors, or other types of records.



1. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.

- b. Click or tap the work area name, and then click or tap **Accounts**.
You'll see a list of accounts. You may need to scroll to see the whole list.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Accounts**.
You'll see a list of accounts. You may need to scroll to see the whole list.

2. Click or tap the account you want.
3. To start the wizard, click or tap **Configure Social Insights**.
4. On the **Set up Social Insights** page, click or tap **Search topic**, and then click or tap **Create a new search topic**. Complete the fields on the screens.

To group this search by the type of record (for example, accounts, competitors, or contacts), in the **Select a category for this search topic** drop-down list, select the record type.

In the **Keywords to search for** field, enter the terms to search for, separated by commas. Social Listening finds exact matches, but the terms aren't case-sensitive. For best results, include variations on the terms (for example, "phone" and "phones").

In the **Keywords that must be INCLUDED in results** field, enter additional terms that are required in results. These additional terms will narrow your search (think "AND").

In the **Keywords that must be EXCLUDED from results** field, enter terms you don't want in results. Use exclusions to avoid overwhelming your results with irrelevant keywords (think "NOT").

5. Click or tap **Next**.
6. From the **Visual name** drop-down list, select the name of the chart or visual. Each one includes a brief description to help you find the one you want.



Tip

To add more than one chart or visual, click or tap **Add visual**, and then select another chart or visual from the list.

7. Click or tap **Finish**.

See Also

[eBook: Microsoft Social Listening for CRM](#)

[Add social listening visuals to a dashboard or account](#)

Get ready for the spring wave of releases

Disable or enable social data for an organization

If your organization has installed and applied updates from Microsoft Dynamics CRM Online Spring '14 or Microsoft Dynamics CRM 2013 Service Pack 1, you can receive social data in CRM to track what people are saying about your company, product, or brand across social channels like Facebook or Twitter. To receive social data in CRM, you must set up the Social Care sample application to listen to a social account and you must configure the application for your organization. More information: [Receive social data in Microsoft Dynamics CRM](#)

After you set up and configure the Social Care sample application, social engagement is enabled. You can disable social engagement at any time, if desired. If you disable social engagement, your organization will not be able to receive social data, but users can continue to work with existing social data in CRM. More information: [Control social data](#)

See Also

[Control social data](#)

[Receive social data in Microsoft Dynamics CRM](#)

[Automatically create cases from email or social monitoring](#)

Receive social data in Microsoft Dynamics CRM

Receive your customers' social posts by enabling the social engagement feature in Microsoft Dynamics CRM! Using this feature, you can identify and track what customers are saying about your company, product, or brand across the social channels such as Twitter and Facebook. You can collect and track these posts as social data in Microsoft Dynamics CRM by using the Social Care sample application.

The Social Care sample application allows you to view the feedback, grievances, or any other input that the customer provides as social posts over social channels. You can receive these posts as social activities in CRM, convert them to cases as required, resolve these cases in specified time lines, and finally enhance the user experience for your product!

The Social Care sample application is a generic framework to route the social data that you obtain from various social channels into your CRM Online system. You can use this application to automatically convert social posts to cases, and create social profiles and contact records for the author of the posts in Microsoft Dynamics CRM. You can also search the existing contact records in CRM Online, and associate these social posts and profiles to them. More information: [Social Care Sample Application Readme](#)

For example, you can configure watch lists with keywords, #tags, and @mentions to identify the social buzz around your brand, product, or service on social channels like Twitter or Facebook. Then, associate the watch list with a Microsoft Dynamics CRM queue, which is set up to automatically create cases from social posts. More information: [Automatically create cases from email or social monitoring](#)



Note

You can receive social data in Microsoft Dynamics CRM only when social engagement is enabled for your organization. More information: **Control social data**. To work with the social data, you must be a user of the social care sample and have permissions to create records in Microsoft Dynamics CRM.

You can work with the social data even from a mobile device or from Microsoft Outlook. Upgrade CRM for Outlook to v6.1 to view social activities and ensure that you are online.



Warning

Social engagement functionality is unavailable when Outlook is offline as the CRM Online entities for the feature are not enabled for Microsoft Dynamics CRM for Microsoft Office Outlook with Offline Access.

See Also

[View a social activity](#)

[View, block, or deactivate a social profile](#)

View a social activity

Listen to what your customers are saying about your product or company in the social media by tracking their social posts as social activities in Microsoft Dynamics CRM.

For example, a post like “I got excellent customer support for CRM” on Facebook or Twitter is a social post on social channels. The details of these posts, such as the author of the post, date posted, and the URL of the post are captured and created as a Social Activity in Microsoft Dynamics CRM, by using the Social Care sample application. You can listen to observations, suggestions, grievances that are available as social posts, capture the required posts, and convert them as social activities in Microsoft Dynamics CRM. You can further convert these activities as cases for tracking purposes or for resolving the issues, if any. You can also associate an activity to an existing case in Microsoft Dynamics CRM. The social activities created for the social posts appear in the **Activity** area of the case record.

You can customize these activities and extend the social care sample to pull in additional data, when the relevant details are available in the social feed. More information: [Social Care Sample Application Readme](#)



Note

If you disable the social engagement, social data cannot be created or updated in CRM. If you try to convert a social activity to a case while social engagement is disabled, the following error message appears: “ **This action can’t be completed because of a setting that prevents updates to the record. Contact your CRM administrator**”. The error occurs because the **Convert To Case** action tries to update the social activity **Regarding** field. The same error occurs if you try to assign a social activity record or a social profile record to another user.

More information: [Control social data](#)

View a social activity in Microsoft Dynamics CRM



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area > **Activities**.

If using CRM for Outlook

- a. Click or tap your organization.
- b. In the Navigation Pane, expand your organization, and then click or tap work area: **Sales**, **Service**, or **Marketing**.
- c. Under **My Work**, click or tap **Activities**.



Important

Social activities are not available in Microsoft Dynamics CRM for Outlook with Offline Access.

2. Under the selected area, in the view list, click or tap **Social Activity > All Social Activities**.
3. Double-click the activity that you want to view.

The activity record shows details such as:

- Author of the post
- Description of the post
- The case the activity is associated with
- Record creation status in Microsoft Dynamics CRM (Failed, Processing, Completed)
- Influencer score, if this is a part of social feed



Note

The social activity data in Microsoft Dynamics CRM, which you receive through a social post, is read-only. However, you can create a case for the social activity to track any needed work on the issue, mark the case as complete, delete an activity, add an activity to a queue, or run a workflow for the activity.

Hover over the field labels to view helpful information.

Convert the activity to a case

You can create a separate case to track the activity or convert the activity to a case.

- To do this, open the activity, and on the command bar, click **Convert to Case**.

See Also

[View, block, or deactivate a social profile](#)

[Receive social data in Microsoft Dynamics CRM](#)

View, block, or deactivate a social profile

Track the high influencers, and the customers for your business, and save them as contacts in Microsoft Dynamics CRM with their social profile information. You may want to get in touch with these resources later, for marketing or brand building purposes.

With the social care sample, you can create a social profile and a corresponding contact automatically, every time you create a case. You can also choose to create social profiles for the authors of the posts who have large number of followers or likes. These social profiles can be viewed in the **Services** area. If a social profile exists for the author of the post, a new profile is not created.

Every social profile has a corresponding contact in Microsoft Dynamics CRM. A contact can have several social profiles, but a social profile can't have several contacts.



Note

The social profile data in Microsoft Dynamics CRM is read-only. You can only view, block, define a workflow, or change the owner of the record.

View a social profile



1. Follow the steps for the app you're using.

▶ If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Service**.
- b. Click or tap **Service > Social Profiles**.

▶ If using CRM for Outlook

- a. Click or tap your organization.
- b. In the Navigation Pane, expand your organization, and then click or tap **Service > Customers**.
- c. Click or tap **Social Profile**.

The list of social profiles that are created in Microsoft Dynamics CRM appears.



Note

Social profiles aren't available in Microsoft Dynamics CRM for Outlook with Offline Access.

2. Double-click any social profile to view the complete details.

The social profile form shows the name, profile link of the contact and the cases associated with this social profile. You can also view the influencer score if it is included as part of the social feed.

Block a social profile

To make sure that you receive only actionable social posts and avoid case creation for any unnecessary information, based on the social posts, you can block certain social profiles in Microsoft Dynamics CRM.



1. Open the social profile that you want to block.
2. In the **Blocked** drop-down menu, select **Yes**.
3. Click or tap the **Save** icon at the bottom-right corner of the window.

Deactivate a social profile

If you no longer work with a social profile, you can deactivate the profile temporarily. To do this, from the list of social profiles, select a profile, and click **Deactivate** on the command bar.

You can reactivate the profile by selecting it and clicking **Activate** on the command bar.

See Also

[View a social activity](#)

[Receive social data in Microsoft Dynamics CRM](#)

Collaborate with Skype, Lync, and Yammer

Set up Microsoft Dynamics CRM to make calls with Skype or Lync

If your organization is set up to use Skype or Lync, you can call your contacts from within Microsoft Dynamics CRM by clicking or tapping the person's phone number. This capability is called "click to call."

There are a few areas where system administrators configure settings for this feature.

For users to place calls from within Microsoft Dynamics CRM on their computer, they either need to [install Skype](#); or you will need to setup and make available [Lync](#).

Supported versions of Skype or Lync

These versions of Lync and Skype are supported:

- Microsoft Lync 2010 or Microsoft Lync 2013
- Skype 6.0

Set whether your organization uses Skype or Lync

You can configure which telephony provider your organization uses for click to call.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration > System Settings**.
3. On the **General** tab, under **Set the telephony provider**, for **Select provider for Click to call**, select **Skype** or **Lync**.
 4. Click or tap **OK**.

Set your organization's prefix for phone numbers

For people to place Skype or Lync calls from within Microsoft Dynamics CRM, the phone numbers must be entered and stored in a valid number format: <country/region code><area code><number>. However, when entering data in Microsoft Dynamics CRM, users may not include the required country or region prefix in a phone number.

To solve this, you can enable country/region code prefixing, and the system will prefix the code to the number that you are trying to call. This prefixing can be done for the entire organization, or users can set the country or region code in their personal options. If a user has specified a different code than what is set for the organization, the user's setting overrides the organization's setting.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Administration > System Settings**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then click or tap **Settings > System > Administration**, and then click or tap **System Settings**.
3. On the **General** tab, in the **Set the default country/region code** section, select the **Enable country/region code prefixing** check box, and then in the **Country/Region Code Prefix**, specify the country/region code, such as +01181 (81 is the country code for Japan).
4. Click or tap **OK**.

Place calls with Skype or Lync

If your organization is set up to use Skype or Lync, you can click or tap a phone number to call your contacts from within Microsoft Dynamics CRM. This capability is called “click to call.”

To place calls from within Microsoft Dynamics CRM on your computer, you either need to [install Skype](#); or you need to check with your system administrator for steps to install Lync.

To place calls from within CRM for tablets, you’ll need to download the Skype app. If you don’t already have the app when you tap a phone number, you’ll have the opportunity to download the app before the call is placed.

These versions of Lync and Skype are supported:

- Microsoft Lync 2010 or Microsoft Lync 2013
- Skype 6.0

Collaborate and communicate with Yammer

Yammer gives you one place to have conversations, create and edit documents, and share information with your colleagues without sending a single email or attending any meetings.

If your organization is set up to work with Yammer, you’ll see posts on your Microsoft Dynamics CRM dashboard when colleagues update customer info and you can comment on their posts—asking questions, offering congratulations, and so on.

Important

Before you can use Yammer within Microsoft Dynamics CRM, your organization needs to buy Yammer enterprise licenses.

When you use Yammer within Microsoft Dynamics CRM, here’s what you’ll be able to do:

- **The Yammer newsfeed displays on your dashboard.** As you and your colleagues work with customers, you’ll stay up to date with the latest news about what’s happening, and you’ll

be able to join in the conversation. Discuss project deadlines, share the latest files, gather feedback – and more.

- **Colleagues receive updates on your customer interactions automatically.** When you create a new lead, convert it to an opportunity, close it, and so on, Yammer displays this news in your organization's newsfeed automatically.
- **You can share files and discuss content without ever leaving your browser.** Share documents, PDFs, images, and videos across teams quickly and easily.

See Also

[Visit the Yammer website](#)

Connect Microsoft Dynamics CRM to Yammer

Yammer gives colleagues at your organization a central place to have conversations, create and edit documents, and share information without sending a single email or attending any meetings. After you set up your organization to work with Yammer, employees will see posts in a newsfeed on their Microsoft Dynamics CRM dashboard whenever people update customer info, and they'll be able to join in the conversation with their own posts.

Important

Before your organization can use Yammer in CRM, your organization needs to buy Yammer enterprise licenses.

Connect your organization to Yammer

Step 1: Connect to Yammer

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Note

You'll also need to have verified system administrator privileges for your organization's Yammer account, plus both the `prvWriteOrganization` and `PrvConfigureYammer` privileges. If you're not an administrator, by default these privileges aren't available, and must be added.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Install the most recent product updates.
3. Sign up for a Yammer Enterprise account, and note the name of the network you receive. More information: [Visit the Yammer website](#)
4. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
5. Click or tap **Settings > Administration**.
6. Click or tap **Get Yammer**.
7. Read the disclaimer, and then click or tap **Continue**.
8. Click or tap **Authorize Microsoft Dynamics CRM Online to connect to Yammer**.
9. Sign in to your enterprise Yammer account using your administrator credentials.
10. Follow the on-screen instructions to accept the Yammer terms of service, note which Yammer network has been set up for you, and connect your organization to it. After your organization is connected, you'll see a confirmation message at the bottom of the screen.
11. If desired, stay signed in to your Yammer account and set your organization's preferences for Yammer posts.

► **Step 2: Set your organization's preferences for Yammer posts (optional)**

1. Make sure you're signed in to your enterprise Yammer account using your administrator credentials.
2. If desired, select whether Yammer posts are **public** (everyone sees Microsoft Dynamics CRM posts in the newsfeed, or **private** (people must "follow" a record to see posts about that record in the newsfeed).
3. If desired, select the default group where you would like Microsoft Dynamics CRM posts to appear.
4. If desired, select which record types trigger automatic posts to the Yammer newsfeed.

What triggers automatic posts to the Yammer newsfeed?

The record types and rules in the following list can be enabled to trigger a Yammer post automatically. Record types that are enabled by default are marked "Yes." If you want to enable an entity or rule type, make sure that the entity or rule is activated and that the types of auto-posts you want are enabled.

Post Entity Id	Name	Enabled to Post Automatically
Case	New Case for an Account	Yes

Post Entity Id	Name	Enabled to Post Automatically
Case	New Case for a Contact	Yes
Case	Case Closed for an Account	
Case	Case closed for a Contact	
Case	Case Assigned to User/Team	
Case	Case Routed to Queue	
Lead	New Lead created	
Lead	A Lead has been qualified	
Opportunity	New opportunity for an Account	Yes
Opportunity	New opportunity for a Contact	Yes
Opportunity	Probability for an Opportunity Updated for an account	
Opportunity	Probability for an Opportunity Updated for a contact	
Opportunity	Opportunity Won for an Account	Yes
Opportunity	Opportunity Won for a Contact	Yes
Opportunity	Opportunity Lost for an Account	
Opportunity	Opportunity Lost for a Contact	
Account	New Account Created	Yes
Contact	New Contact Created	
Competitor	New Competitor Created	Yes

When you have Yammer set up, keep these things in mind:

- All user posts (conversations) are stored in Yammer, not in Microsoft Dynamics CRM.
- All system posts are stored in Microsoft Dynamics CRM.
- If the Post to Yammer Activity Stream rule (or posttoyammer attribute) is set to True in Post Rules Configuration, that activity will post to Yammer.

See Also

[Collaborate and communicate with Yammer](#)

[Visit the Yammer website](#)

Follow best practices with business processes

Guide staff through common tasks with processes

To help you automate common business tasks and ensure that people handle customers consistently, Microsoft Dynamics CRM includes *processes*.

There are four types of processes, each designed for a different purpose:

- **Business process flow.** Use when you want staff to move through the same stages and follow the same steps to interact with a customer. For example, use a business process flow if you want everyone to handle customer service requests the same way, or to require staff to gain approval for an invoice before submitting an order.

Microsoft Dynamics CRM includes several ready-to-use business process flows for common sales, service, and marketing tasks that you can use with little or no changes required. Or, you can create your own.

More information:

- [Create a new business process](#)
- [Activate a business process](#)
- [Add ready-to-use business processes](#)
- [Assign a security role to a business process](#)

- **Dialog.** Use when you have a step-by-step script you want staff to read through when talking to customers. For example, create a dialog to guide customer service reps through a customer call to resolve a case.

More information: [Customization Guide: Work with dialogs](#)

- **Workflow.** Use when you want to automate common tasks, such as automatically sending a confirmation email to a customer when an order ships.

More information: [Customization Guide: Set up workflows](#)

- **Action.** Use when you want to automate a series of commands in the system.

More information: [Customization Guide: Automate actions programmatically](#)

Create a new business process

You can help ensure that people enter data consistently and follow the same steps every time they work with a customer by creating a business process. For example, you might want to create

a business process to have everyone handle customer service requests the same way, or to require people to gain approval for an invoice before submitting an order.


The system comes with several ready-to-use business processes for common business scenarios. All you have to do is add them to the system. More information: [Add ready-to-use business processes](#)

Or, you can create your own business process if you need to cover a scenario that is unique to your organization.

When a business process is activated for a record type, people are prompted to enter required data and follow required steps to move a record through the process successfully.



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information: **Permissions required for customization tasks**

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears on the nav bar.
- b. Click or tap **Settings > Processes**.

 **If using CRM for Outlook**




- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Process Center**, and then click or tap **Processes**.

3. On the Actions toolbar, click or tap **New**.

4. Complete the required fields.

For the **Category**, select **Business Process Flow** from the drop-down list.

For the **Entity**, select the type of record from the drop-down list.

5. Select **New blank process**.
6. Click or tap **OK**.
7. Type a description for the process. You can use up to 2000 characters.
If people will progress from one type of record to another in order, click or tap , and then select the next type of record in the process. Select more types of records to use in the process, if desired.
9. Type a name for the stage in the process.
10. If desired, select a category for the stage, either **Qualify, Develop, Propose, Close, Identify, Research, or Resolve**.
Type a name for the first step in the stage. To add more steps, click or tap , and then type a name.
12. If you want people to enter data to complete a step, select the field from the drop-down list. Select **Required** if people must fill in the field to complete the step and move to the next stage of the process.
If desired, click or tap  to add another stage. Repeat steps 9 through 12 until you have added all the stages and steps to the process.
14. To save the process as a draft, click or tap **Save** at the top of the screen. (As long as a process is a draft, people won't be able to use it.) To activate it so that people can use it, click or tap **Activate**.

See Also

[Activate a business process](#)

[Assign a security role to a business process](#)

[Add ready-to-use business processes](#)

Activate a business process

Before people can follow the stages and steps in a business process, you'll need to activate it.



Note

If the business process includes workflows or portable business logic rules, you'll need to activate those separately. More information: [Customization Guide](#)



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information: **Permissions required for customization tasks**

 **Check your security role**

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
2. Follow the steps for the app you're using.

 **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Processes**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Process Center**, and then click or tap **Processes**.
3. On the list of processes, click or tap on the left of the process name to select it.
 4. Click or tap **Activate**.

See Also

[Create a new business process](#)

[Assign a security role to a business process](#)

[Add ready-to-use business processes](#)

Assign a security role to a business process

So that people can handle customers according to the stages and steps required in a business process, you need to enable their security role for the process. After you enable a security role, the people with the role can assign the process to new records, and can switch to this process on an existing record.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

▶ **Check your security role**

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

2. Follow the steps for the app you're using.

▶ **If using the CRM web application**

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
- b. Click or tap **Settings > Processes**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, expand your organization if necessary, click or tap **Settings > Process Center**, and then click or tap **Processes**.

3. On the list of your processes, click or tap the process name.
4. Click or tap **Enable Security Roles**.
5. Select **Enable for everyone** or **select Enable only for the selected security roles**, and then select the security role.
6. Click or tap **OK**.

See Also

[Activate a business process](#)

[Create a new business process](#)

[Add ready-to-use business processes](#)

[Overview of security for Microsoft Dynamics CRM](#)

Add ready-to-use business processes

Microsoft Dynamics CRM includes several ready-to-use business processes for common sales, service, and marketing scenarios – to help you ensure that staff follow consistent steps every time they work with customers.

Before you can use these processes, you need to add them to the system.

**Note**

Ready-to-use business processes are activated automatically when you add them. If a ready-to-use business process includes workflows or portable business logic rules, you'll need to activate those separately. More information: [Customization Guide](#)

The following table shows a list of ready-to-use business processes and what they help you do.

This ready-to-use process	Helps you...
Phone sales campaign	Call prospects, create and qualify leads, develop opportunities, and then close deals.
Email sales campaign	Email prospects, create and qualify leads, develop opportunities, and then close deals.
Multichannel sales campaign	Contact prospects by phone and email, create and qualify leads, and then close deals.
Marketing list builder	Create targeted marketing lists for accounts, contacts, or leads, add prospects, and gain manager approval.
Service appointment scheduling	Schedule service appointments, set up reminders, and make sure service activities are completed.
Service case upsell	Upsell additional products or services while resolving a customer's service request.
Guided service case	Make sure that data is entered consistently for service cases, and that required activities are completed to resolve a case.
Opportunity to invoice (Business-to-Business)	Follow a standard process for assessing needs, negotiating outcomes, fulfilling orders, and closing opportunities when selling to other businesses.
Contact to order	Target sales by using a consistent method to interact with customers.
Upsell after service interaction	Turn a good service experience into an opportunity to upsell more products and services to the customer.
In store excellence	Suggest orders for store owners and field personnel and gain acceptance from store managers for those orders.

Add ready-to-use business processes



1. Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

Check your security role

- a. Follow the steps in [View your user profile](#).
 - b. Don't have the correct permissions? Contact your system administrator.
-
2. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.
 3. Click or tap **Settings > Data Management**.
 4. Click or tap **Add Ready-to-Use Business Processes**.
 5. Click or tap **Add**.

See Also

[Create a new business process](#)

[Assign a security role to a business process](#)

[Guide staff through common tasks with processes](#)

Business process solutions available for download

Check out the [Microsoft Dynamics Marketplace](#) for several business process solutions that help organizations like yours follow best practices for common scenarios in your industry. These solutions help you save time by giving you a great starting point for creating business processes that match the way you do business.

Before you can use these processes, you need to download them from the Microsoft Dynamics Marketplace, and then import the solution into the system. Many solutions include demo data so that you can experiment with them and see how they work.



Important

These solutions are not supported by Microsoft. They are intended to serve only as templates for customizations in Microsoft Dynamics CRM. More information:

[Customization Guide](#)

Industry	Business Process Solution	Description
Financial Services	Deal, On-boarding and Account	Follow best practices through the complete client lifecycle for

Industry	Business Process Solution	Description
	Planning Process	new and existing customers – from initial data gathering and on-boarding to account planning and running.
	Wealth Management Process	Gather required information from clients, develop investment proposals, and close transactions successfully. Doesn't include demo data.
	Health Plan Sales Management Process	Capture information from marketing campaign responses, convert leads into opportunities, send price quotes, and create policies. Customer service reps can also follow the process to cross-sell insurance products during service calls.
	Life Insurance Sales Process	Capture information from prospects, convert leads into opportunities, send price quotes, and create policies. Customer service reps can also follow the process to cross-sell insurance products during service calls. Doesn't include demo data.
Public Sector	Healthcare Management Process	Screen patients, provide appropriate counseling, and schedule follow-up appointments for patients. Doesn't include demo data.
	License and Permit Compliance Process	Oversee the collection of licensing and permitting fees from businesses and citizens.
	Public Sector Case Management Process	Follow standardized steps to assess cases, define and approve mitigation plans,

Industry	Business Process Solution	Description
		provide management reports, and ensure all required activities are completed to close a case.
	Citizen Service Request Process	Prioritize and assign service requests, estimate time and costs, and track progress until requests are resolved.
	Grant Management Process	Manage and track grant awards to individuals, businesses, or other governments from application to the allocation of funds.
	Microsoft Dynamics CRM for Nonprofits	Track donation requests from ask to thank you, store templates for receipts, letters, and sign-up sheets, and gather information about potential donors, sponsors, and volunteers. Doesn't include demo data.
	Higher Education Admissions Sample Process	Manage admissions and enrollment for prospective students, including collecting student information, tracking receipt of application documents, and monitoring applications under consideration. Doesn't include demo data.
Manufacturing and Resources	Service Call – Repair and Return Process	Standardize how customer service reps (CSRs) assist customers with product fixes by phone, and manage product returns, replacements, and repairs.
	Collaborative Marketing for Automotive Process	Designed for OEMs and dealers to help with collaboration on marketing

Industry	Business Process Solution	Description
		campaigns. Define targeted marketing program requirements, follow up on responses, and submit proof of compliance with reimbursement terms.
	Design Win for Manufacturing Process	For semi-conductor and electronic component manufacturers. Execute the design process successfully from prototyping to signed contract. Define the design, identify parts suppliers, generate a proposal, gather the right information from the customer, and close the contract.
	Proactive Service to Cross Sell Process	Armed with sensor data, service representatives can diagnose issues and then reach out to customers to cross-sell products – all before a service interruption occurs. Review the sensor data, identify a product to cross-sell, and handle the service case.
	Sales Targeting in New Markets for Manufacturing Process	Create targeted marketing campaigns for products, and nurture campaign responses through the sales cycle to shipping an order. Guide sales representatives through each step to collaborate with the engineering team to create prototypes and manage change orders.
	Warranty Claims Management for Automotive Process	Simplify handling of warranty claims, including capturing key information from the customer, creating work orders for

Industry	Business Process Solution	Description
		repairs, coordinating OEM review and approval of claims, and submitting required documentation.
Professional Services	Complex Opportunity Management Process	Respond to a Request for Proposal (RFP) or Request for Quote (RFQ). Create proposals, assess risks, conduct cost-benefit analysis, and make bid/no bid decisions based on relevant data.
	Solution Selling® – Short Sales Cycle	Guide sales representatives through a simple sales cycle with two or three meetings with prospective customers or decision makers.
	Solution Selling® – Strategic/Complex Sales Cycle	Guide sales representatives through a complex sales cycle with five or more meetings with prospective customers, decision makers, or sponsors.
	Solution Selling® – Transactional Cycle	Guide sales representatives through a highly scripted, “one call” sales cycle. Covers inbound and outbound calling scenarios.
	Sports Management Process	Designed for professional sports teams. Manage the sale of tickets and merchandise, and track players and teams, including injuries, scouting reports, drug testing results, and contracts. Doesn't include demo data.

See Also

[Customization Guide](#)

[Activate a business process](#)

[Create a new business process](#)

[Assign a security role to a business process](#)

[Import a business process solution from the Microsoft Dynamics Marketplace](#)

Import a business process solution from the Microsoft Dynamics Marketplace

Before you follow these steps, download the files for the business process solution from the Microsoft Dynamics Marketplace. The files are in cabinet format (.cab), so you'll need to extract them into compressed file (.zip) first, then extract all files you need for the solution.

Important

These solutions are not supported by Microsoft. They are intended to serve only as templates for customizations in Microsoft Dynamics CRM. Installing a solution or publishing customizations can interfere with normal system operation. We recommend that you schedule a solution import when it's least disruptive to users. More information: [Customization Guide](#)

Step 1: Import the business process solution



1. Download the solution from the Microsoft Dynamics Marketplace. Extract the compressed (.zip) file from the download (.cab) file, and then extract all the files included with the solution.
2. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

Check your security role

- a. Follow the steps in [View your user profile](#).
- b. Don't have the correct permissions? Contact your system administrator.

3. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. Click or tap **Settings > Customizations**. Click or tap **Solutions**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Solutions > Customization > Customizations**. Then click or tap **Solutions**.
4. On the Actions toolbar, click or tap **Import**.
5. Browse to the folder that contains the compressed (.zip) file, select it, and then click or tap **Open**.
6. Click or tap **Next**. Wait until the file processes.
7. Click or tap **View solution package details** to review the list of imported solution components. When you're finished reviewing the list, click or tap **Close**.
8. Click or tap **Next**.
9. To activate any workflows and enable any SDK message processing steps included in the solution, under **Post Import Actions**, select the check box. The workflows and SDK message processing steps begin working as soon as the import finishes.

**Note**

If you don't activate any workflows or SDK message processes steps on import, you'll need to activate them later for them to work. More information:

[Customization Guide: Set up workflows](#)

10. Click or tap **Import**. Wait while the solution imports. You'll see a message that notifies you when the import is completed.
11. Click or tap **Close**.

**Note**

- You cannot import a custom entity with the same name as an existing entity. Microsoft Dynamics CRM allows duplicate display names, however.
- You can import only items that you have organization-level access to create, read, and update.
- Any imported security roles are associated with the root business unit.

Step 2: Import demo data

You'll use the **Import Data** wizard to import the demo data that comes with the business process solution.



1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.
2. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.

Settings appears on the nav bar.

- b. Click or tap **Settings > Data Management**.
- c. Click or tap **Imports**.

▶ **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > System > Data Management > Imports**.
3. Click or tap **Import Data**.
4. Browse to the folder with the compressed (.zip) file of demo data, select it, and then click or tap **Open**. Click or tap **Next**.
5. Review the files listed on the upload summary. Click or tap **Next**.
6. Select **Default (Automatic Mapping)** for the System Data Map. Click or tap **Next**.
7. On the **Map Record Types** screen, for any record type with an alert icon, map the type of data to the corresponding field in Microsoft Dynamics CRM. Click or tap **Next**.
8. On the **Map Fields** screen, for any fields with an alert icon, map the field name to the corresponding field in Microsoft Dynamics CRM. Click or tap **Next**.
9. Review the summary, then click or tap **Next**.
10. Review the fields, and then click or tap **Submit**.
11. To verify that the wizard was successful, click or tap **Imports**, and then review the status screen. Otherwise, click or tap **Finish**.

See Also

[Create a new business process](#)

[Activate a business process](#)

[Add ready-to-use business processes](#)

[Assign a security role to a business process](#)

[Business process solutions available for download](#)

Import data

Import contacts

Whether your contacts are stored in an email program, a spreadsheet, or on your phone, you'll probably want to import them into Microsoft Dynamics CRM so you can keep track of the people you do business with all in one place.

Step 1: Get your import file ready

First, you export your contacts into a file.

These file formats are supported:

- Comma-separated values (.csv)
- Text (.txt)
- Compressed (.zip)
- Excel Spreadsheet 2003 (.xml)

The maximum file size allowed for .zip files is 32 MB. For the other file formats, the maximum file size allowed is 8 MB.



Tip

If you need to import a larger amount of data, see the [Developer Toolkit for Microsoft Dynamics CRM](#) for additional details.

If you store contacts in more than one program, add your import files to a single .zip file. Then import the .zip file to bring in all the files at once.

Follow the procedure for the program or location where your contacts are stored:

▶ Export contacts from an email program

1. Export the contacts into a comma separated values file (.csv).

To find specific steps to export contacts from your email program, open the program's Help, and search for "export." Look for topics that include "exporting contacts" or "exporting your address book" or "export wizard" in the title.

2. Save the file in a location where you can find it easily later.

▶ Export contacts from a spreadsheet

1. Open the spreadsheet.
2. If necessary, edit any column name in the spreadsheet to match exactly with the corresponding name shown here.



Warning

If the spreadsheet doesn't include all the column names listed, that's okay. However, if a column name does exist, it must match exactly with the corresponding name in the list or the import won't work. Spaces are required.

Note that the word “Email” doesn’t contain a hyphen.

Column Name in Spreadsheet (spelling must match exactly)
First Name
Middle Name
Last Name
Business Phone
Mobile Phone
Job Title
Business Street
Business City
Business State
Business Postal Code
Business Country/Region
Email Address

3. Save the file.

Export contacts from your phone

1. Use a USB cable or an app to export your contacts from your phone to your computer.
To find specific steps to export contacts for your brand of phone, search for “export contacts from my phone” in your favorite search engine (like Bing).
To find an app, search your phone’s online store.

Step 2: Import the file

You’ll use the **Import Data** wizard to import your contacts.



1. Follow the steps for the app you’re using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**.
Settings appears on the nav bar.

- b. Click or tap **Settings > Data Management**.
- c. Click or tap **Imports**.

 **If using CRM for Outlook**

- a. In the Navigation Pane, click or tap **Settings > System > Data Management > Imports**.

2. Click or tap **Import Data**.
3. Browse to the folder where you saved the file that contains the export of your contacts. Select the file, then click or tap **Open**. Click or tap **Next**.



Tip

You can import only one file at a time. To bring in more files, run the wizard again later, or add all your contacts files to a single .zip file.

4. Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Click or tap **Next**.



Note

In most cases, you can accept the default delimiters.

5. Select **Default (Automatic Mapping)** for the System Data Map. Click or tap **Next**.
6. In the Microsoft Dynamics CRM **Record Types** drop-down list, select **Contacts**. Click or tap **Next**.
7. For any record type with an alert icon, map the column from your contacts file to the corresponding field in Microsoft Dynamics CRM. Click or tap **OK**, then click or tap **Next**.
8. Review the summary, then click or tap **Next**.
9. Click or tap **Submit**.
10. To verify that the wizard was successful, click or tap **Imports**, then review the report. Otherwise, click or tap **Finish**.

Step 3: Check that the contacts imported successfully

After the wizard finishes, check your list of contacts to make sure they imported correctly.



1. Click or tap **Microsoft Dynamics CRM**, then click or tap your role (either Sales, Service, or Marketing).
2. Click or tap **Contacts**.
3. Scroll through the contact list. Check that each person is listed and verify the contents of the fields for accuracy.

See Also

[Import accounts, leads, or other data](#)

Review the file upload summary



1. Verify that the files you want to import are listed. For .zip files, the list includes each file added to the .zip file.
2. Click or tap **Delimiter Settings**, then select the characters used to separate the contents of fields and pieces of data. (These characters are called “delimiters.”)
 - The default delimiter for fields is a comma (.). The other supported delimiters for fields are colon (:), semicolon (;), and tab character (/t).

Example of field delimiter:

Company Name,Address,City,State

- The default delimiter for data is double quotation marks ("). The other supported delimiters for data are single quotation mark ('), and **None**.

Examples of data delimiter:

Company Name,Address

"Fabrikam, Inc.,"150 A Street"



Note

Because an XML file does not use delimiters, if you upload a file that is in XML Spreadsheet 2003 format, or a .zip file that contains XML Spreadsheet 2003 files, the delimiter information won't be available.

3. Click or tap **Next**.

See Also

[Import contacts](#)

Import data

Create custom fields with the Import Data wizard

Select a data map




1. Select a data map to tell the Import Data wizard how to organize your imported data into the right columns and fields in Microsoft Dynamics CRM.

Select the default data map to let the wizard automatically map your data, or select a data map to match the type of information you're importing.

The following table helps you decide which data map to use.

2. Click or tap **Next**.

System Data Maps	When to Use
Default (Automatic Mapping)	<p>Recommended. Use when you want the wizard to map the imported data to the columns and fields in Microsoft Dynamics CRM automatically.</p> <p>If the wizard can't determine how to map your data, you'll have an opportunity to map it manually later.</p> <p> Important Import files can only contain one type of data, such as contacts, leads, accounts, or cases. Also, the column headings in the source file must match exactly with the field names in Microsoft Dynamics CRM.</p>
For Generic Contact and Account Data	Use when the import file contains contacts or accounts.

Data Maps for Salesforce.com	When to Use
For Contact and Account Report Export	Use this map when your import file contains contacts or accounts from Salesforce.com.
For Full Data Export	Use this map when your import file is exported from Salesforce.com using Full Data Export.
For Report Export	Use this map when your import file is exported from Salesforce.com using Report Export.

Data Maps for Microsoft Outlook Business Contact Manager	When to Use
For BCM 2010	Use this map when your import file contains

	data from Microsoft Outlook 2010 with Business Contact Manager.
--	---

Custom Maps(optional)	When to Use
Custom maps	If available, custom data maps created for your organization are listed here.

See Also

[Import contacts](#)

Import data

Create custom fields with the **Import Data wizard**

Review settings and import data

Set whether the Import Data wizard checks for and handles duplicate data on import, decide who can edit or share the imported data, and save the settings you used for this import so you can use them again later.


▶ Check for duplicate data

1. Make sure there is a duplicate detection rule for the type of information you're importing. By default, the system includes rules for contacts, accounts, and leads. If you're importing a different type of data and need to set up duplicate detection rules, follow the steps in [Set up duplicate detection rules to keep your data clean](#).
2. If it's okay for the Import Data wizard to import duplicate records, in the **Allow Duplicates** section, select **Yes**.

Caution

In most cases, to avoid importing duplicate information, you should keep this option set to **No**.

▶ Set who owns the imported data


To set who owns the imported records, in the **Select Owner for the Imported Records** section, click or tap the **Lookup** button .

Important

Who should "own" the imported data? Most security roles allow people to view the data. However, the owner is also allowed to edit and share it. Here's an example: If your import file contains contacts you collected at a trade show and you want to assign a user to follow up with these contacts, select that person for the owner.

To assign someone other than yourself as the owner of the imported records, your security role must include permissions to create records for the user. If you don't have sufficient permissions, the wizard assigns you as the owner of the imported records by default.

Also, if applicable, ownership is assigned to the person defined in the data map metadata and users.csv file.

In the search box, type the person's name, then click or tap the **Lookup** button .

3. Select the name, then click or tap **Add**.

▶ Save these import settings to use again

1. To save these import settings so you can use them again, enter a name for the settings (called a "data map").

The next time you run the Import Data wizard, you'll see the new data map listed under **Custom Maps**.

2. To import the data, click or tap **Submit**.

See Also

[Import contacts](#)

[Import accounts, leads, or other data](#)

Map record types



1. For each import file, confirm that the Import Data wizard has identified the correct type of information (called a "record type") contained in the file.

For example, if an import file contains contacts, the record type should be **Contact**. An import file containing accounts should have the record type **Account**, and so on.

2. For any import file marked **Not Mapped** or that has an incorrect record type, from the **Microsoft Dynamics CRM Record Types** drop-down list, select the record type contained in the import file.

3. Click or tap **Next**.

See Also

[Import contacts](#)

Import data

Create custom fields with the Import Data wizard

Review the mapping summary

Click or tap **Edit** if you want to change any record type or field mappings. Otherwise, click or tap **Next**.

See Also

[Import contacts](#)

Import data

Create custom fields with the Import Data wizard

Map fields



1. Confirm that the Import Data wizard has mapped all the pieces of info (called “fields”) in the import file to the correct fields in Microsoft Dynamics CRM. You may need to scroll down to see all the fields in the import file.

For example, an import file containing contacts may have a field for First Name, Last Name, and Job Title. Make sure those fields are mapped correctly to the corresponding fields in Microsoft Dynamics CRM.

2. For any field in the import file that is marked **Not Mapped**, go to the **CRM Field Types** drop-down list and select the field name to use in Microsoft Dynamics CRM. You may need to scroll down to see all available fields.
3. Click or tap **Next**.

See Also

[Import contacts](#)

Import data

Create custom fields with the Import Data wizard

Upload a data import file



1. Before you run the Import Data wizard, create a file that contains the data you want to import. Follow the steps in [Import contacts](#). Or to import other types of data such as leads, accounts, or cases, see **Import data**.
2. Browse to the folder where you saved the file containing the import file. Select the file, then click or tap **Open**. Click or tap **Next**.



Note

File types that are supported are comma-separated values (.csv), text (.txt), compressed (.zip), and XML spreadsheet 2003 (.xml).

The maximum file size allowed is 32 MB for .zip files (200 MB total for files added to the .zip file), and 8 MB for other supported file types.

See Also

[Import contacts](#)

Import data

Create custom fields with the Import Data wizard

Import accounts, leads, or other data

Whether your data is stored in spreadsheets, databases, or other systems, you'll probably want to import the data into Microsoft Dynamics CRM so you can keep track of all your customer information in one place.

You can import any type of information, such as accounts, leads, or opportunities – even activities or cases. (The different types of information are called “record types.”)



Note

Want to import contacts? More information: [Import contacts](#)

Step 1: Get your import file ready

First, you'll need to get your data into a file.

Make sure your data is as complete and accurate as possible when you create the import file. Fill in any missing info, and verify that names and other information are spelled correctly.

These file formats are supported:

- Comma-separated values (.csv)
- Text (.txt)
- Compressed (.zip)
- Excel Spreadsheet 2003 (.xml)

The maximum file size allowed for .zip files is 32 MB. For the other file formats, the maximum file size allowed is 8 MB.



Tip

If you need to import a larger amount of data, check out the [Developer Toolkit for Microsoft Dynamics CRM](#) for additional details.

You can add multiple import files to a single .zip file, and then import the .zip file to bring in all the files at once. For example, if several salespeople enter leads from a tradeshow into different spreadsheets, you can gather them into one .zip file for import.

For best results, it's a good idea to make sure you (or your CRM admin, if that's someone else) have some rules in place to reduce any duplicates when you import the data (called "duplicate detection rules"). More information: [Set up duplicate detection rules to keep your data clean](#)

Step 2: Run the Import Data wizard

You'll use the **Import Data** wizard to import the file.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM > Settings**. **Settings** appears in the nav bar.
- b. Click or tap **Settings > Data Management**.

If using CRM for Outlook

- a. In the Navigation Pane, click or tap **Settings > System > Data Management**.

2. Click or tap **Imports > Import Data**.
3. Browse to the folder where you saved the file that contains the import file. Select the file, and then click or tap **Open**. Then, click or tap **Next**.



Tip

You can import only one file at a time. To bring in more files, run the wizard again later, or add all your import files to a single .zip file.

4. Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Then, click or tap **Next**.



Note

In most cases, you can accept the default delimiters.

5. Select how the wizard determines which fields to use for the data.
 - Select **Default (Automatic Mapping)** if you want the wizard to determine the corresponding fields in Microsoft Dynamics CRM automatically. If the wizard can't find a field, you'll have the opportunity to "map" it yourself.

-- OR --

- Select **For Generic Contact and Account Data** if your import file contains contacts and accounts (and contacts are the main type of data).

-- OR --

- Select **For BCM 2010** if your import file contains your contacts from Microsoft Outlook 2010 with Business Contact Manager.


-- OR --

- If available for your organization, select a custom data map. (You'll see them in the list if they're available to you.)

6. Click or tap **Next**.
7. If prompted, in the Microsoft Dynamics CRM **Record Types** drop-down list, select the type of records you are importing, for example **Account** or **Lead**. Then, click or tap **Next**.
8. For any record type with an alert icon, map the field from your import file to a corresponding field in Microsoft Dynamics CRM. Scroll to see the whole list. Then, click or tap **Next**.
9. Review the summary, and then click or tap **Next**.
10. Select additional import settings.
 - If it's okay for the Import Data wizard to import duplicate records, in the **Allow Duplicates** section, select **Yes**.

 **Caution**

In most cases, to avoid importing duplicate information, you should keep this option set to **No**.

To set who owns the imported records, in the **Select Owner for the Imported Records** section, click or tap the **Lookup** button . Select **Look Up More Records**, type the person's name, and then click or tap **Add**.

 **Note**

How do you decide who should "own" the imported data? Usually, the owner is the person responsible for taking action on the data. Here's an example: If your import file contains contacts you collected at a trade show and you want to assign a user to follow up with these contacts, select that person for the owner. To assign someone other than yourself as the owner of the imported records, your security role must include permissions to create records for the user. If you don't have sufficient permissions, the wizard assigns you as the owner of the imported records by default.

- To save these import settings so you can use them again, enter a name for the settings (called a "data map").

The next time you run the Import Data wizard, you'll see the new data map listed under **Custom Maps**.

11. Click or tap **Submit**.
12. To verify that the wizard was successful, click or tap **Imports**, and then review the report. Otherwise, click or tap **Finish**.

See Also

[Import contacts](#)

Assign a record to a user or team

If you would like another person in your organization to handle an account or contact for you, you can assign the record to that person.

You can also assign a record to a team, or to yourself.



1. Follow the steps for the app you're using.

If using the CRM web application

- a. On the nav bar, click or tap **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the nav bar.
- b. Click or tap the work area name, and then click or tap **Accounts** or **Contacts**.
- c. In the list of records, select the record that you want.

In the command bar, click or tap More Commands (**), and then click or tap **Assign**.

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then select your work area: **Sales**, **Service**, or **Marketing**.
- b. Expand **Customers**, and then click or tap **Contacts** or **Accounts**.
- c. In the list of records, click or tap the record that you want.
- d. In the **Collaborate** group, click or tap **Assign**.

2. In the **Assign** dialog box, click or tap:

- **Assign to me**

- OR -

- **Assign to another user or team**

Click or tap **Lookup**, and then click or tap **Look Up More Records**. From the **Look for** drop-down list, select **User** or **Team**. In the **Search** box, type the name, click or tap the search icon, and then click or tap the name to select it. Click or tap **Add**.

3. Click or tap **OK**.

Export data to Excel

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

Export to a static or dynamic Microsoft Office Excel worksheet or to a PivotTable.

[Export to an Excel static worksheet](#)

[Export to an Excel PivotTable](#)

[Export to an Excel dynamic worksheet](#)

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.

When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with Microsoft Dynamics CRM using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether your organization's users are permitted to export the data to Excel by changing the users' security roles.

Export to an Excel PivotTable

You can export Microsoft Dynamics CRM data to a Microsoft Office Excel PivotTable to see patterns and trends in data. An Excel PivotTable is a great way to summarize, analyze, explore, and present your CRM data.

Important

On a default Microsoft Dynamics CRM installation, before you export data to an Excel PivotTable, make sure that:

- Your Microsoft SQL Server allows remote connections.

Allow remote connections to SQL Server

- a. Start Microsoft SQL Server Management Studio.
 - b. Connect to the SQL Server instance.
 - c. Right-click the SQL Server instance name, click or tap **Properties**, click or tap **Connections**, and then select the **Allow remote connections to this server** check box.
- Windows Firewall allows remote SQL Server connections. See [How to: Configure a Windows Firewall for Database Engine Access](#).

Export to an Excel PivotTable

1. Open a list of records in the CRM web application or in CRM for Outlook. Click or tap **Export to Excel**.
2. Click or tap **Dynamic PivotTable**.
3. In the **Select PivotTable Columns** list, select or clear the check boxes for the fields as needed, and then click or tap **Export**.
By default, the **PivotTable Field List** includes only fields that are displayed in the **Select PivotTable Columns** list.
4. Click or tap **Save** and then save the .xml file. Make note of the location where you saved the file.
5. Open Microsoft Office Excel and then open the .xml file you saved in the previous step.
6. If you see the security warning **External Data Connections have been disabled**, click or tap **Enable Content**.
7. To refresh data in the file, on the **Data** tab click or tap **Refresh All**.
8. Drag the fields from the **PivotTable Field List** to the PivotTable. For more information, see Microsoft Office Excel Help.
9. To refresh data in the file, on the **Data** tab click or tap **Refresh All**.

Tip

If you export a list to a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others or make it available to all Microsoft Dynamics CRM users.

If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can email a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.



Note

In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”

Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

If you are using the Office 365 Excel web app, you must save the file, open the file using the Excel desktop application, and then resave the file to the .xlsx format. Then you can reopen the Excel document in Excel Online.

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.

When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with Microsoft Dynamics CRM using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether your organization's users are permitted to export the data to Excel by changing the users' security roles.

See Also

[Export Data to Excel](#)

[Edit the default filter of a report](#)

[Importing data best bets](#)

[Create, edit, or save an Advanced Find search](#)

Export to an Excel dynamic worksheet

Export data to a Microsoft Office Excel worksheet so users can have the latest Microsoft Dynamics CRM information any time they view the worksheet. Imagine the CEO of your company

getting the critical information they need without having to navigate Microsoft Dynamics CRM but instead, merely opening the Excel link on their desktop.



1. Open a list of records in the CRM web application or in Microsoft Dynamics CRM for Outlook. Click or tap **Export to Excel**.
2. Click or tap **Dynamic worksheet**.
3. Click or tap **Next**.
4. Under **Common Tasks**, configure the column settings and then click or tap **Export**.
5. Click or tap **Save** and then save the .xml file. Make note of the location where you saved the file.



Note

If you are using the Office 365 Excel web app, you must save the file, open the file using the Excel desktop application, and then resave the file to the .xlsx format. Then you can reopen the Excel document in Excel Online.

6. Open Microsoft Office Excel and then open the .xml file you saved in the previous step.
7. If you see the security warning **External Data Connections have been disabled**, click or tap **Enable Content**.
8. To refresh data in the file, on the **Data** tab, click or tap **Refresh All**.
9. Save the exported data to an Excel file.



Tip

If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can email a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.



Note

- In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.

When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is

refreshed, you'll be authenticated with Microsoft Dynamics CRM using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether your organization's users are permitted to export the data to Excel by changing the users' security roles.

See Also

[Export Data to Excel](#)

[Edit the default filter of a report](#)

[Create, edit, or save an Advanced Find search](#)

Export to an Excel static worksheet

When you want to present CRM information to an individual who doesn't have access to Microsoft Dynamics CRM, or you have data that doesn't change often, consider exporting your CRM data to a Microsoft Office Excel static worksheet.



Note

- By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.
- You cannot change the columns for a system view, such as **All Active Accounts**. You must either customize the view, which requires the System Administrator or System Customizer security role, or use Advanced Find to create your own view based on the current view.
- If you are using the Office 365 Excel web app, you must save the file, open the file using the Excel desktop application, and then resave the file to the .xlsx format. Then you can reopen the Excel document in Excel Online.



1. Open a list of records in the CRM web application or in Microsoft Dynamics CRM for Outlook. Click or tap **Export to Excel**.
2. In the **Export Data to Excel** dialog box, click or tap **Static worksheet with records from this page**.

- OR -

In the **Export Data to Excel** dialog box, click or tap **Static worksheet with records from all pages in the current view**.

The second option is visible only when your view includes more than one page of records.



Tip

If you are exporting the data so that you can make changes and import it back into Microsoft Dynamics CRM, select the **Make this data available for re-importing by including required column headings** check box.

By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths. To make changes to the columns in an Advanced Find View, click **Edit Columns**. More information: [Create, edit, or save an Advanced Find search](#)

3. Click or tap **Export**.
4. To view the static worksheet, click or tap **Open**.

You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click or tap **Yes**.

5. In Excel, save the exported data to a file.



Tip

You can email a static exported worksheet to anyone, or store it in a shared file. Anyone who opens the file will see all the data in the file, whether or not they are a Microsoft Dynamics CRM user or have privileges to view the data in Microsoft Dynamics CRM.



Note

- In Microsoft Dynamics CRM, money values are exported to Excel as numbers. After you have completed the export, to format the data as currency, see the Microsoft Office Excel Help topic titled “Display numbers as currency.”
- By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet.
- By default, Microsoft Dynamics CRM lists up to 50 records per page. Click the **Page** arrows at the bottom of the list to view any additional pages.

Exporting to Excel in Microsoft Dynamics CRM privacy information

If you use Microsoft Dynamics CRM, when you export to a static worksheet, a local copy of the data being exported is created and stored on your computer. No connection is maintained between this local copy and Microsoft Dynamics CRM. The data is transferred from Microsoft Dynamics CRM to your computer through a secure SSL connection.

When you export to a dynamic worksheet or PivotTable, a link is maintained between the Excel worksheet and Microsoft Dynamics CRM. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with Microsoft Dynamics CRM using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether your organization's users are permitted to export the data to Excel by changing the users' security roles.

See Also

[Export Data to Excel](#)

[Importing data best bets](#)

[Edit the default filter of a report](#)

[Create, edit, or save an Advanced Find search](#)

Search

Sub

Create, edit, or save an Advanced Find search

Find the records you want in Microsoft Dynamics CRM by using the Advanced Find command. You can also use Advanced Find to prepare data for export to Microsoft Office Excel so that you analyze, summarize, or aggregate data, or create PivotTables to view your data from different perspectives.



1. Follow the steps for the app you're using.

If using the CRM web application

Navigate to the list of records you want to query, and on the command bar, click or tap **More Commands** icon *******, and then click or tap **Advanced Find**. For example, if you want to search for account records, do this:

- i. On the nav bar, click or tap **Microsoft Dynamics CRM > Sales**.
- ii. Click or tap **Sales > Accounts**.

On the command bar, click or tap **More Commands *****, and then click or tap **Advanced Find**

If using CRM for Outlook

- a. In the Navigation Pane, expand your organization if necessary, and then navigate to the list of records you want to query, and then in the **Data** group, click or tap **Advanced Find**.

2.

Specify what to search for.



- a. In the **Look for** list, select a record type.
- b. Click or tap **Select** to define search criteria: field (for example, Account Name or City), the query relational operator (Part of an expression (for example "is equal to" or "contains") that defines how a specified attribute should be compared with a value.), and the values to locate (for example, "Seattle" or "Email").

You can select fields from the current record type, or from related records. For example, an account might have many related contact records.

At the bottom of the **Select** list, the **Related** section shows related record types. For example, most record types have a related Notes record type. To select fields from a related record type, select field, and a new **Select** link appears.

3. Specify the columns to include in the search results.



- a. Click or tap **Edit Columns**, and then click or tap **Add Columns**.
- b. Select the record type that includes the columns you want to add.
- c. Select the columns you want to add, and then click or tap **OK**.

4. Specify the sort order.



- a. Click or tap **Edit Columns**.
- b. Click or tap **Configure Sorting**.
- c. Specify the column to sort on, specify the sort order, and then click or tap **OK**.
- d. Click or tap **OK**.

5. Click or tap **Results**.

How inline lookup works

Quickly find the record you are looking for by using the inline lookup in Microsoft Dynamics CRM. By default, when you click or tap the Lookup button, you see the first 10 results for the specific record type.

You can use the inline lookup fields to search for records by using keywords. As you type, the inline lookup shows you the most recently used (recently searched, updated, or created) records in the list. The lookup resolves automatically if you enter partial text and tab out of the lookup field, and if a single matching record is found. If multiple matching records are found, you'll see a list of matching results you can select a record from.



Note

The recently used records are shown only in the classic forms.

When you press **Enter** or click or tap the Lookup button, the search results that match your keyword are shown. Microsoft Dynamics CRM looks for matching records by searching for the keyword in columns defined in the quick find view of the entity or in the view that's set as the default view of the entity. Lookup search results show the first three columns that are defined in the lookup view of the entity or the view that's set as the default view of that lookup, including the primary field of that entity. More information: [Creating and editing views](#)

If a lookup field, such as **Find Customer**, points to two or more record types, the inline lookup results will include the results for accounts and contacts because a customer can be an account or a contact. You can click or tap **Look Up More Records** to open the standard **Look Up Records** dialog box to search for more records.

If you don't find a record, you can create a new record by clicking or tapping **New** in the inline lookup area. This lets you quickly create a new record.



Note

The lookup fields on the classic forms don't have the option to create a new record.

Accessibility

Accessibility for people with disabilities

Microsoft is committed to making its products and services easier for everyone. More information: [Microsoft Accessibility](#)

Keyboard shortcuts in Microsoft Dynamics CRM

Microsoft Dynamics CRM offers keyboard shortcuts to address issues faced by people with limited dexterity or motion disabilities. Also, people who don't use a mouse can use a keyboard to navigate and complete actions.

More information: [Keyboard shortcuts](#)


Accessibility info for browsers

For accessibility information about your browser, visit the following websites:

- [Internet Explorer 9 accessibility](#)
- [Internet Explorer 10 accessibility](#)
- [Firefox accessibility features](#)
- [Safari accessibility features](#)
- [Google Chrome accessibility technical documentation](#)

Heighten color contrast of some text and images

The high contrast setting in Microsoft Windows heightens the color contrast of some text and images on your computer screen, making those items more distinct and easier to identify. You'll find this setting on the **Ease of Access** page in [Windows 8](#) and [Windows 7](#).

If you're using the high contrast setting in Microsoft Windows, you should also select **Enable high contrast** in your Microsoft Dynamics CRM personal options. On your dashboard, click or tap  > **Options**. Click or tap the **General** tab, click or tap **Enable high contrast**, and then click or tap **OK**.

Accessibility for users of Microsoft Dynamics CRM Deployment Manager (on-premises)

Administrators who manage the day-to-day operation of on-premises deployments of Microsoft Dynamics CRM 2013 using Microsoft Dynamics CRM Deployment Manager, a Microsoft Management Console (MMC) application, can find accessibility info in these topics:

- [Navigation in MMC Using the Keyboard and Mouse](#)
- [MMC Keyboard Shortcuts](#)

See Also

[Microsoft Accessibility](#)

Keyboard shortcuts

Keyboard shortcuts give you an alternate way to do common tasks, instead of using your mouse or tapping with your finger. And because many keyboard shortcuts are the same across all Microsoft products, some of these might already be familiar to you.



Note

The shortcut keys described in this section refer to the U.S. keyboard layout. Depending on your country/region and layout, you may not have the same keys.

Form keyboard shortcuts

To	Press
Move to the next option, option group, or field	Tab
Move to the previous option, option group, or field	Shift+Tab
Complete the command for the active option or button	Enter
Move between options in an open list, or between options in a group of options	Arrow keys
Cancel a command, or close a selected list or dialog box	Esc
Save	Ctrl+S or Shift+F12
Save and Close	Alt+S
Cancel edits and close (Close)	Esc
Open search	Spacebar or Enter
Delete text from a field	Backspace
Delete the record (when forms are in Edit mode)	Ctrl+D
Save and then open a new form (Save and New) (when forms are in Edit mode)	Ctrl+Shift+S
Move to another field or command	Tab
Open the lookup menu with the most recently used items in alphabetical order	Alt+Down Arrow
Open the list menu (when forms are in Edit mode)	Ctrl+Shift+2
Navigate to the next item on the list (when forms are in Edit mode)	Ctrl+>
Navigate to the previous item on the list (when forms are in Edit mode)	Ctrl+<
Open lookup drop-down list	Enter
Close lookup drop-down list	Esc
Auto-resolve lookup value	Ctrl+K
Open a record found in lookup with forms in Edit mode	Enter

To	Press
Open a record found in lookup with forms in Read-optimized mode	Ctrl+Enter
Add a step in the business process editor	Alt+Shift+N
Tab to Command Bar when in the updated user experience	Ctrl + [
Tab to process control when in the updated user experience	Ctrl +]
Tab to the Navigation Pane	Ctrl + Shift + 3

Accessibility keyboard shortcuts

If you're running Microsoft Windows, you can set system accessibility options to match the way you work. For example, you can use Windows Sticky Keys if you have difficulty holding down two or more keys at a time, such as Ctrl+P. Sticky Keys enable you to press the Ctrl key and have it remain active until you press the P.

To	Press
Switch Sticky Keys on and off	Shift five times
Switch Filter Keys on and off	Right Shift for eight seconds
Switch Toggle Keys on and off	Num Lock for five seconds
Switch High Contrast on and off	Left Alt+Left Shift+Print Screen
Switch Mouse Keys on and off	Left Alt+Left Shift+Num Lock
Tab into an Active X control	Alt+Shift+F10

Mac keyboard shortcuts

These keyboard shortcuts apply when using a Mac.

Action	Windows Keys	Mac Keys	Notes
Tab	Tab Shift+Tab	Tab Shoft+Tab	Enable Tabbing in System Preferences and Safari Preferences (refer to Apple and Safari documentation).

Action	Windows Keys	Mac Keys	Notes
Access keys	Alt + Access key	Ctrl + Alt + Access key	For example, the Next button uses N as its access key.
Microsoft Dynamics CRM Shortcut keys	Ctrl + key	Ctrl + key	For example, move to the first tab in the ribbon control with Ctrl + {. Save using Ctrl + S.
Activate Control	Space / Enter	Space / Enter	
Close topmost window	Window + W	Command + W	Refer to Apple support documentation.

See Also

[Accessibility for people with disabilities](#)