Microsoft Dynamics CRM 2016 User Guide

Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2016 (on-premises)

Version 8.0.0

Contents

Welcome to the User Guide

This user's guide covers the following releases:

- Microsoft Dynamics CRM Online 2016 Update
- Microsoft Dynamics CRM 2016 (on-premises)

What's new

We're excited to tell you about the many new features available in Microsoft Dynamics CRM Online 2016 Update and Microsoft Dynamics CRM 2016 (on-premises).

Get started

Get around

Get around in Microsoft Dynamics CRM, CRM for Outlook, and mobile devices

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

Get back to (or pin) the records, views, or dashboards you used most recently

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Pick the app you’re using.

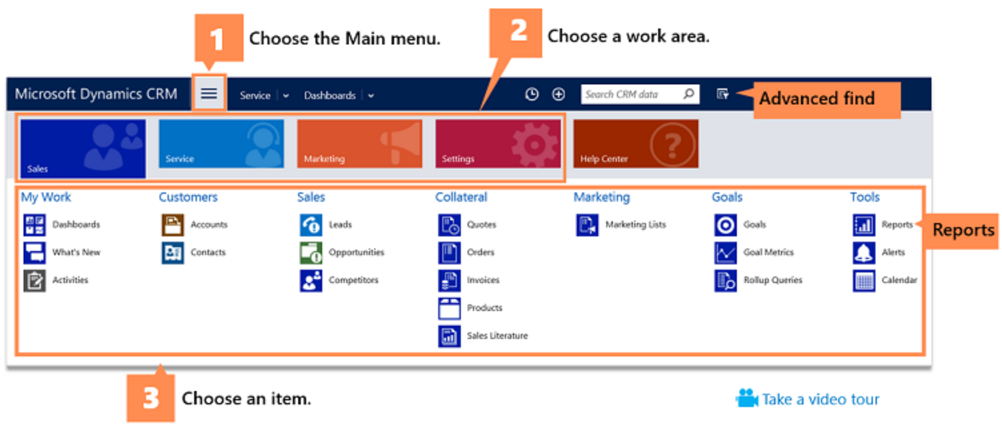
horizontaltabbed

Latest version

Main navigation

Want to take a [quick video tour] of the new navigation?

If your screen looks like this, you’re on the latest version of CRM Online.

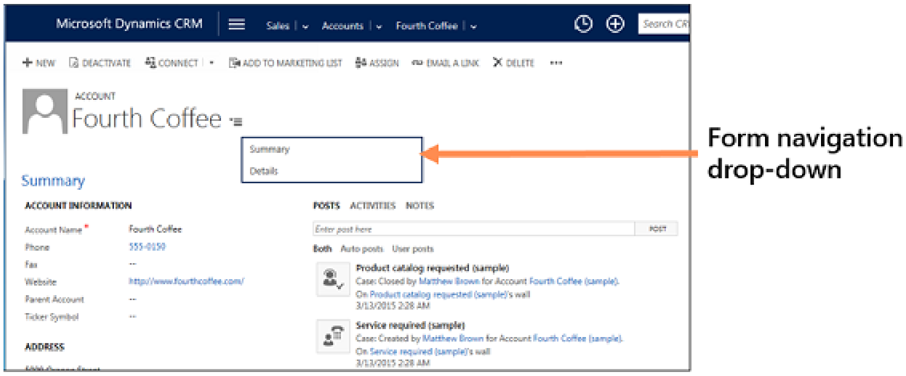


Quick access items

These items are always on the nav bar: Recently used, quick create, record search, advanced find, and personal options.

Form navigation

If you’re working in a complex form with lots of fields, the form navigation drop-down menu makes it easy to get to just the data you need.



The preceding illustration shows how to navigate in the latest version of CRM Online: choose the Main menu, choose a work area, and then choose an item.

Older versions

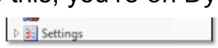
Want to take a [quick video tour] of the navigation?

If your screen looks like this, you're on an earlier version of CRM Online or on-premises CRM 2013 (or later).

The preceding illustration shows how to navigate in older versions of CRM: choose Microsoft Dynamics CRM, choose a work area, and then choose an item.

Outlook

If your screen looks like this, you're on Dynamics CRM for Outlook.



The preceding illustration shows how to navigate in Dynamics CRM for Outlook: choose a work area, choose a folder, and then choose an item.

Mobile

What to take a [quick video tour] of the navigation?

If your screen looks like this, you're on CRM for phones or CRM for tablets.

The preceding illustration shows how to navigate in CRM for phones and CRM for tablets: choose the menu to select different items or choose Home to go back to your Home screen.

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

In Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online 2015 Update or later, when you add a new sales opportunity to the system by using the **Create** command on the nav bar, you can now create a contact at the same time. In previous versions, you had to create the contact before using the Quick Create command to add an opportunity.

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

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

See Also

Create or edit an account

Create or edit a contact

Nurture sales from lead to order

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

Get back to (or pin) the records, views, or dashboards you used most recently

You probably work with the same records all the time. For example, you may access the same contact or account on a regular basis. Or you may work with the same lists (views) of data over and over. You can quickly get back to recently used records or views from the global navigation bar. You can also pin records and views to make them easier to find. You can even access and pin recently used dashboards.

Note

This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

Interested in getting this feature? [Find your CRM administrator or support person]() This feature is not available for Dynamics CRM for Outlook.

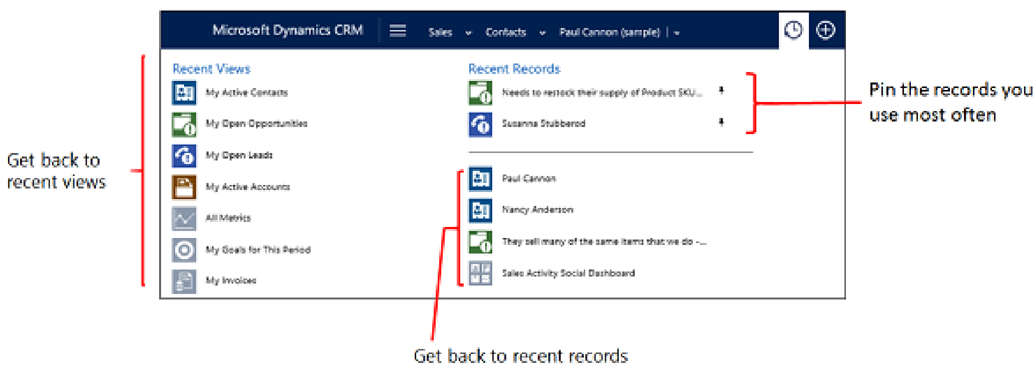
Get back to recently used items

On the global nav bar, click the **Recently Viewed Items** button.

2. Do one of the following:

Under **Recent Records**, choose the record or dashboard you want to go back to. To pin the dashboard or record to the top of the **Recent Records** list, point at the record or dashboard, and then click the **Pin** button.

Under **Recent Views**, choose the view you want to go back to. To pin the view to the top of the **Recent Views** list, point at the view, and then click the **Pin** button.



Note

Pinned items are sorted by when you pin them. Unpinned items are sorted by when you access them.

See Also

[Create or edit an account]()

[Create or edit a contact]()

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 **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 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 **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 the **More Command** (•••).

3. Click **Follow** or **Unfollow**.

Follow or unfollow a colleague

1. On your dashboard, click **Advanced Find**.
2. In the **Look for** drop-down list, click **Users**.
3. In the **Show** group, click **Results**.
4. Click the person's name.

Click the **More Command** (•••).

6. Click **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 **All records**.

Click **Modify this list** ( ).

3. In the **Filters My Filters** dialog box, select the record types you want to change.
4. Click **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**, choose **Edit** next to the gray image.
2. Choose **Upload a picture from your computer**.
3. Browse to the image file, select it, and then choose **Open**.
4. Choose **OK**.

See Also

Administer the activity feed

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

See account relationships in a hierarchical view

You can see how info is related or grouped by viewing accounts, products, or users in hierarchical charts. You can click a tile in the chart to get the full details and then navigate to the info you're interested in.

For example, from the hierarchical charts view for **accounts**, you can:

- See how an account is doing in overall revenue
- Drill into tiles for accounts to see where the deals are coming from and how revenue is distributed across sub-accounts
- Find out who is working an account and enlist help from others by sending email or sharing the account with other salespeople right from within the chart view
- View important details about each account, such as credit limit and latest activity posts for the account

Note

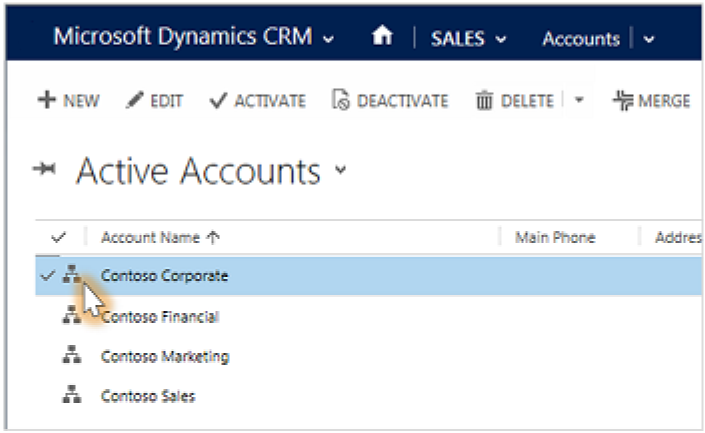
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

From the hierarchical charts view for **products**, you can see all the products available to sell, and how they're related in bundles or families. Salespeople can avoid missing a potential sale, because they can see all related products in one view.

From the hierarchical charts view for **users**, you can find out who another team member's boss is, or who else is on their team without switching to another app.

Hierarchical views are also available on mobile.

To see hierarchies that show the relationships between records, on the list of accounts, products, or users, choose the **Hierarchies** button. You can also choose the **View Hierarchy** command when you're viewing the screen for an individual account, product, or user.



See Also

Create or edit an account

Print leads, quotes, and other records

When you need a paper copy of a record such as a contact, lead, quote, or invoice, you can print records individually or in a list.

Print an individual record

1. Go to the record you want to print. For example, to print a lead, go to **Sales > Leads** and select a record.
2. Choose the **Options** button at the top right corner of the screen.

   (In Dynamics CRM for Outlook, choose **File > Print**.)
3. Choose **Print preview**.
4. Choose **Print.**…
5. Select the print options you want and then choose **Print**.

Print a list of records

1. Go to the list you want to print. For example, to print a list of invoices, go to **Sales > Invoices**.
2. Choose the **Options** button at the top right corner of the screen.

   (In Dynamics CRM for Outlook, choose **File > Print**.)
3. Choose **Print preview**.
4. Choose **Print…**
5. Select the print options you want and then choose **Print**.

Privacy notice

When Microsoft Dynamics CRM Online users print CRM data, they are effectively “exporting” that data from the security boundary provided by CRM Online to a less secure environment, in this case, to a piece of paper.

An administrator has full control (at the user security role or entity level) over the data that can be extracted. However, after the data has been extracted it is no longer protected by the security boundary provided by CRM Online and is instead controlled directly by the customer.

See Also

Run a report

Work with mail merge templates

Nurture sales from lead to order

Set personal options

Personalize your Microsoft Dynamics CRM workspace to suit your requirements or preferences. For example, you can choose the page that you want to see as soon as you sign in to CRM. You can also personalize many other options such as language, currency, and time zone.

- If you're using Microsoft Dynamics CRM for Outlook, you can set options that affect synchronization between CRM and Dynamics CRM for Outlook. More information: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange
- If you're an administrator, you can set system settings that affect all users in the organization. For more information, search for "System Settings dialog box."

Set personal options

Click the **Settings** button in the upper-right corner of the screen.

2. Click **Options**.
3. Fill in the information, as required.

Tab	Options	Description
General		
	Select your home page and settings for Get Started panes	
	Default Pane	Select the default home pane (page) that you want to see when you sign in to CRM. For example, you can make **Service** your default pane if you work

		mostly in that area. By default, the **Default based on user role** option is selected, which shows the default pane based on your user role. More information: [View your user profile]() You can only set panes and tabs that are available for your user role.
	Default Tab	Select the default tab that you want to see for the selected default pane. For example, select the **Accounts** tab for the **Services** pane.
	Set the number of records shown per page in any list of records	
	Records Per Page	Select the maximum number of records you want to see in a list on a page. You can set a value from 50 to 250.
	Select the default mode in Advanced Find	
	Advanced Find Mode	By default, every time you open the **Advanced Find Mode** dialog box, the query details are hidden. To see the query details every time, select **Detailed**. More information: [Create, edit, or save an Advanced Find search]()
	Set the time zone you are in	
	Time Zone	Select the time zone that you want to display for your region. **Note** If you use Dynamics CRM for Outlook, set the same time

		zone in CRM to help prevent a mismatch in dates and times.
	Select a default currency	
	Currency	Choose the default currency value to use in financial transactions. Click the **Lookup** button to search for a currency. More information: Manage transactions with multiple currencies
	Support high contrast settings	
	Enable high contrast	Select this check box to enable high contrast levels in your CRM display. **Tip** Set this option if you are using high contrast settings in your browser or operating system.
	Set the default country/region code	
	Enable country/region code prefixing	Select this check box to enable the default calling code for your region.
	Country/Region Code Prefix	Enter the value of your region's calling code in the text box. For example, enter **+1** for the United States.
	View your user information	Select this link to view details about you. These details are displayed to your entire organization and include your contact information and security role. More information: View your user profile

Synchronization		
	Synchronize Microsoft Dynamics CRM items with Outlook or Exchange	
	filters	Choose the records to synchronize between CRM and Dynamics CRM for Outlook or Exchange (using server-side synchronization). More information: Choose the records to synchronize between CRM and Outlook or Exchange
	synchronized fields	View the fields that are synchronized between CRM and Dynamics CRM for Outlook so you can see where the data is coming from. More information: • View the fields that are synchronized between CRM and Outlook • Create or modify synchronization filters or view synchronizing fields **Note** Only a system administrator can change the synchronizing fields.
	Manage your offline filters and take your information offline in CRM for Outlook	
	offline filters	Choose a subset of CRM data that you want to work with when you go offline with Dynamics CRM for Outlook. More information: Choose records to

		work with offline in CRM for Outlook
Activities		
	Default view	
	Default Calendar	Select the default view for your calendar: **Day**, **Week**, or **Month**.
	Set your default work hours	
	Start Time and End Time	Select the start and end time to indicate your availability for services or appointments.
Formats		
	Current Formats	
	Format preview	Shows the current region and its formats for **Number**, **Currency**, **Time**, and **Date**.
	Customize	Choose this option to add a new region and formats.
Email Templates		
	Create and modify personal email templates	
	New	Create an email template with custom values (such as a date or signature), so you don't have to enter the same information, repeatedly, when you send an email. On the command bar, click **New** and enter values for the template. More information: Create templates for email
Email		

	Select if other users can send emails for you	
	Allow other Microsoft Dynamics CRM users to send email on your behalf. **Note** This option is not available in Microsoft Dynamics CRM (on-premises).	Select this option to allow other users of CRM to send email on your behalf. **Caution** If you select this option, other users can send email on your behalf with or without your consent. Your email name will appear as the sender.
	Select the email messages to track in Microsoft Dynamics CRM	
	Track	Select the email messages that you want to automatically track in CRM. **Options:** • All Email messages • Email messages in response to CRM email • Email messages from CRM Leads, Contacts and Accounts • Email messages from CRM records that are email enabled More information: Set an option to automatically track incoming Outlook email in CRM for Outlook
	Configure Folder Tracking Rules	Set up folders to automatically track incoming email. More information: Track Outlook

<table>
<tr><td></td><td></td><td>email by moving it to a tracked Exchange folder</td></tr>
<tr><td></td><td>Automatically create records in Microsoft Dynamics CRM</td><td></td></tr>
<tr><td></td><td>Create</td><td>Select this option to allow CRM to create leads or contacts automatically from the information in tracked email messages.</td></tr>
<tr><td></td><td>View your Mailbox</td><td>Click this link to see your mailbox details.</td></tr>
<tr><td colspan="3">Privacy

Note
This tab is available only in Microsoft Dynamics CRM Online. This tab isn’t available if your system administrator has selected the privacy preference for the entire organization in System Settings. Talk to your administrator. More information: Find your CRM administrator or support person</td></tr>
<tr><td></td><td>Select your error notification preference</td><td></td></tr>
<tr><td></td><td>Options:
Ask me for permission to send an error report to Microsoft.
Automatically send report to Microsoft without asking me for permission.
Never send an error report to Microsoft about Microsoft Dynamics CRM.</td><td>Specify what you want CRM to do when an error occurs. Based on your selection, the error reports are shared with and used by Microsoft for product improvements. More information: Set privacy preferences for an organization

We recommend that you send the error reports to Microsoft so that Microsoft can use the information for product improvements.</td></tr>
<tr><td colspan="3">Languages</td></tr>
<tr><td></td><td>Select the language you prefer to see Microsoft</td><td></td></tr>
</table>

	Dynamics CRM displayed in	
	Base Language	Shows the base language. The base language is set during the CRM installation process. You can't edit this option.
	User Interface Language	Select the language that you want to see for labels and dialog boxes in the CRM user interface.
	Help Language	Select the language for Help. To add an additional language other than the base language, your admin must install the required language packs and enable them. Talk to your administrator. More information: Find your CRM administrator or support person

4. When you're done, click **OK**.

See Also

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Synchronizing data with Outlook or Exchange FAQ

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. Go to **Options**.

In the web app: In the upper-right corner of the screen, choose the **Settings** button > **Options**.

- In CRM for Outlook: Choose **File** > **CRM** > **Options**.

2. Scroll down to the very bottom of the **Set Personal Options** dialog box, and then choose **View your user information**.

To check your security role, on the nav bar, choose the down arrow next to your name, and then choose **Security Roles**.

To view other profile information, such as Work Hours, Connections, and Services, on the nav bar, choose the down arrow next to your name.

Search

[Create, edit, or save an Advanced Find search]

[How inline lookup works]

[Search for records]

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. Go to **Advanced Find**. (How do I get there?)
2. Specify what to search for.

    a. In the **Look for** list, select a record type.

    b. Click **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 **Edit Columns**, and then click **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 **OK**.

4. Specify the sort order.

a. Click **Edit Columns**.
b. Click **Configure Sorting**.
c. Specify the column to sort on, specify the sort order, and then click **OK**.
d. Click **OK**.

5. Click **Results**.

See Also

[Search for records]

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: TechNet: Create and edit 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.

See Also

[TechNet: Create and edit views]

Search for records

To find your records quickly in Microsoft Dynamics CRM, you can search across multiple record types all at the same time.

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]

There are two ways to search.

Normal quick find:

Begins with - results include records that begin with a specific word. 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.

Wildcard - for example: *ski or *ski*

Full text quick find:

- **Search within** - results include records that contain a field with all of the words in the search term. The individual words can appear anywhere in the string and in any order. For example, if you search for "Alpine Ski House", you could find results for "I left the house today to go skiing in the Alpine Meadows." since all of the search words appear somewhere in the string.
- Wildcards are not required.

For more information see, [TechNet: Configure Quick Find options for the organization].

Start a search

1. From the top nav bar, type one or more characters in the search box.
2. Choose the **Search** button next to the search box.

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

See Also

Create, edit, or save an Advanced Find search

Edit the quick find view

Accessibility

Accessibility for people with disabilities

Move around CRM by using keyboard shortcuts

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: Move around CRM by using 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 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

Move around CRM by using 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

The following keyboard shortcuts are included in Microsoft Dynamics CRM.

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
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
Open the lookup menu with the most recently	Alt+Down Arrow

To	Press
used items in alphabetical order	
Open lookup drop-down list	Enter
Close lookup drop-down list	Esc
Open a new instance of Microsoft Dynamics CRM	Ctrl+K
Open a record found in lookup with forms in Edit mode	Enter
Add a step in the business process editor	Alt+Shift+N
Tab to the Command Bar when in the updated user experience	Ctrl+[or Ctrl+]
Tab to the Navigation bar	Ctrl+Shift+3
Add an article to an email	Shift+Alt+A
Apply email template (when editing an email message)	Shift+Alt+T

Access submenus if you use a screen reader

If you use a screen reader, this section shows you how to access any of the submenus that are displayed when you hover the mouse over a navigation link.

1. Navigate between the menu options using standard link navigation.
2. Activate the link by pressing Enter or the space key as you would usually do. A list of submenus will be displayed.
3. To access these submenu options, use the accessibility technology (AT) shortcut key to navigate to the next button. For example, if you use the NVDA screen reader, you would use the “b” shortcut key (NVDA+b). To navigate through all the options, press the key repeatedly.

   Important
   There are several areas in the UI that have auto-collapse built in for menus. This includes the Navigation Bar and Form Navigation. Both are click to expand, but after 30 seconds of inactivity, the items collapse.

Navigate through stages in a process using the keyboard

If you’re in a record, a lead, for example, this section shows you the keyboard shortcuts to navigate through the different stages in the process to qualify the lead, and how to make selections in those stages. For example, if you want to move easily from the Qualify stage through to the Close stage, try these keyboard actions:

- After you select a stage, get to the fields by pressing the down arrow.
- If a stage is collapsed, just press Enter to expand it.

Note

The process name is an icon at the bottom of the page, not the top.

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 Shift+Tab	Enable Tabbing in System Preferences and Safari Preferences (refer to Apple and Safari documentation).
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

Action	Windows Keys	Mac Keys	Notes
			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

Manage customer records

Create accounts and contacts

Communicate with customers

Collaborate with your team

Import and export data

Use Bing Maps to view a location

Use OneDrive for Business to manage your private documents

Create accounts and contacts

Create or edit an account

Create or edit a contact

Assign a record to a user or team

Deactivate or activate an account or contact

Create or edit a goal

Create or edit a competitor record

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.

Create an account

1. Go to **Sales** > **Accounts**. (How do I get there?)

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

Edit an account

1. Go to **Sales** > **Accounts**. (How do I get there?)

2. Open the account and change the information that you want.
3. Click **Save**.

See Also

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

Assign a record to a user or team

Run a report

Use Bing Maps to view a location

Create or edit a contact

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

View a contact

1. Go to **Contacts**. (How do I get there?)

2. 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**, choose . Choose a name, and then get right back to what you were doing.

3. Click or tap a person's name to see the details for the contact.

Create a contact

1. Go to **Contacts**. (How do I get there?)

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

Edit a contact

1. Go to **Contacts**. (How do I get there?)

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

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. Go to **Accounts** or **Contacts**. How do I get there?

2. In the list of records, select the record that you want.

In the command bar, click the **More Commands** button•••, and then click **Assign**.

3. If using the CRM web application:

In the command bar, click More Commands (•••), and then click **Assign**.

If using CRM for Outlook:

- In the **Collaborate** group, click **Assign**.

4. In the **Assign** dialog box, click:
   - **Assign to me**

     - OR -

   - **Assign to another user or team**

     Click **Lookup**, and then click **Look Up More Records**. From the **Look for** drop-down list, select **User** or **Team**. In the **Search** box, type the name, click the search icon, and then click the name to select it. Click **Add**.

5. Choose **OK**.

Deactivate or activate an account or contact

In Microsoft Dynamics CRM, 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. Go to **Accounts** or **Contacts**. How do I get there?

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. Go to **Accounts** or **Contacts**. How do I get there?

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 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. Go to **Goals**. (How do I get there?)

3. Do one of the following:
   - If you are using the CRM application, click **New**.
   - If you are using CRM for Outlook, in the **Records** tab, click **New**.
4. On the **New Goal** form, enter information or observe any noted restrictions or requirements as needed. Use the handy tooltips as a guide.
5. 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.

   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. Go to **Goals**. (How do I get there?)
3. Do one of the following:
   - If you are using the CRM web application, click **Edit**.
   - If you are using CRM for Outlook, in the **Records** group, click **Edit**.
4. Fill in your information. Use the handy tooltips as a guide.
5. Click **Save and Close**.

See Also

Create or edit a rollup query

Progress Against Goals report

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. Choose **Sales** > **Competitors**.

If using the CRM web application

   a. On the command bar, choose **+ New**.

If using CRM for Outlook

   a. In the **Records** group, choose **New**.

2. Fill in your information. Use the handy tooltips as a guide.
3. Choose **Save**.

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

See Also

Competitor Win Loss report

Communicate with customers

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

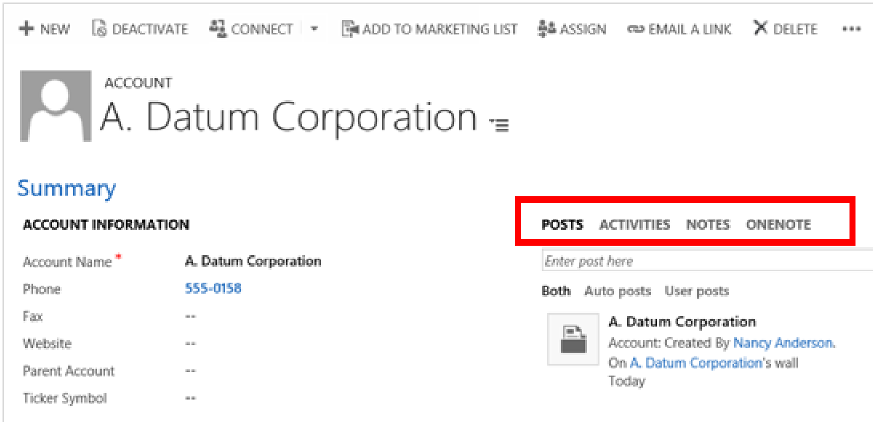
Place calls with Skype or Skype for Business

OneNote in CRM FAQs

Send bulk email to customers

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

In Microsoft Dynamics CRM, you use **Activities** to keep track of all your customer communications. For example, you can take notes, send email, make phone calls, set up appointments, assign yourself tasks as you resolve a service case, and stay up-to-date with customer news. These actions are all considered types of activities.



- To add phone call details, tasks, notes, and more see: [Add a phone call, task, email, or appointment activity to a case or record].
- To stay up-to-date with your activity feeds, see: [Stay up-to-date with customer news with the activity feed].

See Also

Collaborate and communicate with Yammer

Place calls with Skype or Skype for Business

If your organization is set up to use Skype or Skype for Business, you can click a phone number to call your contacts from within Microsoft Dynamics CRM. This capability is called “click to call.”

Note

Lync has been rebranded as Skype for Business. Currently, you’ll still see references to “Lync” in Microsoft Dynamics CRM, but CRM will work with Skype for Business.

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 Skype for Business.

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

See Also

Set up Microsoft Dynamics CRM to make calls with Skype or Skype for Business

OneNote in CRM FAQs

Why do OneNote files show a folder icon?

This is a known issue. Click the file name to open the OneNote as expected.

Why aren't my OneNote notebooks showing up in the OneDrive documents area?

OneNote notebooks saved to the Office 365 Groups OneDrive won't be shown in Microsoft Dynamics CRM Online.

I get this error message: We can't find the notebook. The OneNote notebook might have been removed or moved to another location. Check the notebook location or contact your administrator to update the location record stored in CRM. (Error: 0x80060729)

1. To fix the issue, go to **Settings** > **Document Management** > **Document Location Records**.
2. Go to the OneNote view and search for the document location record that is regarding your account.
3. Open that document location record, and then change the corresponding URL to match your notebook location.

Can I edit a OneNote file from with CRM?

No. This can be done only from the OneNote app that opens when you click the OneNote link.

I can't access my CRM OneNote notebook.

Don't delete any OneNote .onetoc2 or .one file types in the OneNote section in CRM. If you do, you won't be able to access your CRM OneNote notebook.

Are section groups supported in CRM?

Sections groups that keep related sections together in OneNote aren't supported in CRM.

Can I rename a section in OneNote Online?

No. You can only rename a section in the desktop version of OneNote. If you rename a section in OneNote Online, you won't see the updated section name in CRM.

Why do I see records that should be in the OneNote tab?

This happens if you deleted all of the sections in the notebook. It's recommended that you have at least one section in your OneNote notebook. To fix the issue do this:

1. Go to the record where you see the issue. For example, from the main menu click, **Sales** > **Accounts** > click an account record.
2. From the main menu click the drop down menu next to the record name, and then click **Documents**.
3. Click **Open in SharePoint** and then create a new section using the desktop version of OneNote.

See Also

Set up and use OneNote in CRM

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. Go to your work area. (How do I get there?)
2. Choose the record type you want. For example, choose **Contacts**.
3. In the list of records, select the contacts you want to send email to.
4. Do one of the following:

In the web app: Click the **More Commands** button, and then click **Send Direct Email**.

In CRM for Outlook: In the **Collaborate** group, click **Send Direct Email**. Or, just click **Send Direct Email** to send email to everyone on the list.

5. In the **Send Direct Email** dialog box, select the template you want to use.
6. Click **Send**.

See Also

Create templates for email

Work with mail merge templates

Collaborate with your team

Collaborate and communicate with Yammer

Collaborate with your colleagues using Office 365 Groups

Office 365 Groups in CRM FAQs

View relevant and trending information with Office Delve

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

Collaborate with your colleagues using Office 365 Groups

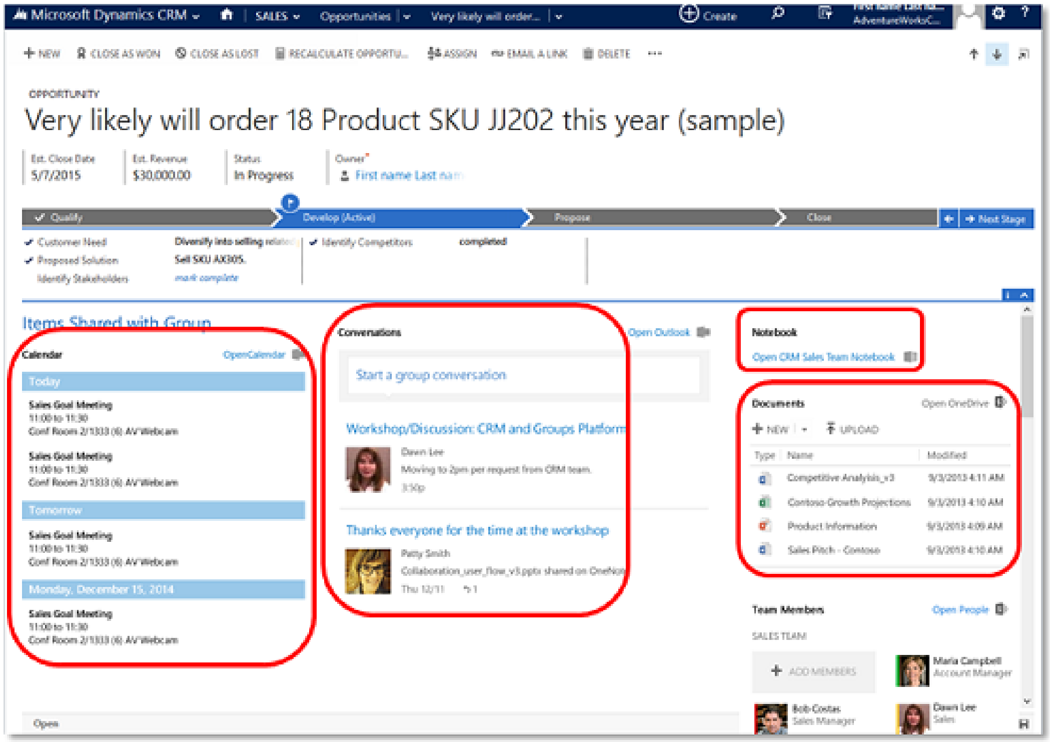
Office 365 Groups are a shared workspace for email, conversations, files, and events where group members can collectively get stuff done.

You can use groups to collaborate with people across your company – even if they don't have access to Microsoft Dynamics CRM Online. For example, you can create a group for your sales team and invite other Office 365 users to join the group, and then share documents, conversations, meeting notes, and OneNote information related to specific accounts or opportunities.

The groups solution works with any entities, even custom ones.

Important

This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to CRM Online?



Collaborate through meetings, conversations, notes, or documents.

Prerequisites

- You need to have an Office 365 subscription which includes Exchange Online and SharePoint Online.
- Before you can start using Office 365 Groups, the groups solution needs to be deployed and turned on for your CRM CRM entities. For more information, see TechNet: Deploy Office 365 Groups.

Create a group

1. Go to the record that you want to create a group for. For example, Go to **Sales** > **Accounts**. (How do I get there?)
2. Choose an account.
3. On the nav bar, choose the drop down menu next to the account name, and then click **Office 365 Groups**.
4. In the **Welcome to Office Groups!** section, click **Create Group**.

Join a meeting

Group meetings help all members coordinate their schedules. Everyone in the group automatically sees meeting invites and other events.

- Choose the meeting title to view meeting details.

Start a conversation

Having a group conversation is a way to communicate with group members. The conversations section displays each message, where you can read, reply to, and create new conversations.

- To start a new conversion, in the **Start a group conversion** box, type in your message.
- In the **Conversations** section choose a conversion to read and reply to it.

Add notes

Share notes with everyone in your group using the shared OneNote notebook. OneNote lets multiple people write in the same notebook, on the same page, at the same time, and it automatically merges everyone's changes.

- In the **Notebook** section, choose the group's notebook. When OneNote opens, add your notes.

Share documents

When you create or upload a file in the group's OneDrive for Business page, it's automatically shared with all members of the group. When you add members to the group, they automatically get shared access to the files. By default, only group members have view and edit access to the files. When you create a group in Microsoft Dynamics CRM, it's set to private, so only the group members can see information about the group including files, conversations, or even the group itself.

- To see the latest list of documents, refresh the list using by choosing the refresh icon.
- To upload or manage all of your documents in OneDrive for Business, click **Open OneDrive**.

See Also

Office 365 Groups in CRM FAQs

Find more help about Office 365 Groups

TechNet: Deploy Office 365 Groups

Office 365 Groups in CRM FAQs

Where is the Office 365 Groups data stored?

The Office 365 Groups data is stored in Office 365, not Microsoft Dynamics CRM Online.

Why can't I create Office 365 Groups using bulk import?

Office 365 Groups will only be automatically created if your system administrator has turned on auto-create for the record type that you're attempting to bulk import. In addition, to ensure performance and stability for others, Microsoft Dynamics CRM won't create groups if you try to import a large number of records at once. We recommend a maximum of 20 records at a time if you need groups to be auto-created. If you import more than this, we can't guarantee that a group is created. If a group wasn't created due to a large bulk-import, you can manually create a group by navigating to that record's groups page.

Why don’t I see all of my group's meetings in CRM?

At this time we’re unable to show meetings that someone from outside of your company has set up and has invited your group to attend. We are working on a solution to this issue, but in the meantime you can use the **Open Calendar** link to check your group's calendar in Microsoft Outlook on the web (Outlook Online).

Why do I get a RetrieveOfficeSettings: 1 error when I navigate to the Office 365 Groups page?

This is a known issue. Refresh the page and the error message will go away.

Why do I get a (500) Internal Server Error when I navigate to the Office 365 Groups page?

This is a generic error which could have multiple causes. One common case is that the user who is attempting to view the group doesn’t have a valid Office 365 license.

When should we use Office 365 Groups versus Yammer?

Groups are a great way to collaborate across your organization. They’re also integrated with Microsoft Office 365 products, providing you quick and easy access to all of your conversations, meetings, documents, and Microsoft OneNote.

We recommend using groups for collaborations that requires lots of document sharing and quick access to other Office 365 products.

See Also

Collaborate with your colleagues using Office 365 Groups

Find more help about Office 365 Groups

TechNet: Deploy Office 365 Groups

Import and export data

Import data

Export data

Import data

Import contacts

Import accounts, leads, or other data

Download a template for data import

Upload a data import file

Review the file upload summary

Select a data map

Map record types

Map fields

Review the mapping summary

Review settings and import data

Import contacts

horizontaltabbed

How to

Whether your contacts are stored in an email program, a spreadsheet, or on your phone, here's how to import them into Microsoft Dynamics CRM so you have all your business contact information in CRM.

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 MSDN: Import Data 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. Go to **Settings** > **Data Management**. (How do I get there?)

2. Click **Imports**.
3. Click **Import Data**.
4. Browse to the folder where you saved the file that contains the export of your contacts. Select the file, and then click **Open**. Click **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.
5. Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Click **Next**.

   Note
   In most cases, you can accept the default delimiters.
6. Select **Default (Automatic Mapping)** for the System Data Map. Click **Next**.
7. In the Microsoft Dynamics CRM **Record Types** drop-down list, select **Contacts**. Click **Next**.
8. For any record type with an alert icon, map the column from your contacts file to the corresponding field in Microsoft Dynamics CRM. Click **OK**, and then click **Next**.
9. Review the summary, and then click **Next**.
10. Click **Submit**.
11. To verify that the wizard was successful, click **Imports**, then review the report. Otherwise, click **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. Select your role (either Sales, Service, or Marketing). Go to **Contacts**. (How do I get there?)
2. Scroll through the contact list. Check that each person is listed and verify the contents of the fields for accuracy.

Read this eBook

Want to see visuals of importing contacts? Check out this eBook.

See Also

Import accounts, leads, or other data

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

Your import will fail if you use a template that you exported from CRM, add a new column to it, and then try to import the data back into CRM Online.

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)
- Excel Workbook (.xlsx)

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 MSDN: Import data 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. Go to **Settings** > **Data Management**. (How do I get there?)
2. Choose **Imports** > **Import Data**.
3. Browse to the folder where you saved the file that contains the import file. Select the file,

and then choose **Open**. Then, choose **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 .xlsx, .xml, .csv, .txt or .zip format, verify that the field and data delimiters are correct. Then, choose **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. Choose **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, choose **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, choose **Next**.
9. Review the summary, and then choose **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, choose the **Lookup** button. Select **Look Up More Records**, type the person's name, and then choose **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. Choose **Submit**.
12. To verify that the wizard was successful, choose **Imports**, and then review the report. Otherwise, choose **Finish**.

See Also

Import contacts

MSDN: Import data

Download a template for data import

Whether your data is stored in spreadsheets, databases, or other systems, you'll want to import the data into Microsoft Dynamics CRM so you can keep track of all your customer information in one place. You use templates for importing many types of records, such as accounts, leads or cases. There is a complete list in the Templates for Data Import wizard.

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. Go to **Settings** > **Data Management**. (How do I get there?)
3. Choose **Templates for Data Import**.
4. In the **Templates for Data Import** dialog box, choose the record type that you want to download the template for, and then select **Download**.
5. In the file download box, click **Save** or **Save as** and navigate to a location for the file.
6. Choose **Close**.

See Also

Import accounts, leads, or other data

Import contacts

Upload a data import file

Export data

Export data to Excel

Export to an Excel PivotTable

Export to an Excel dynamic worksheet

Export to an Excel static worksheet

Analyze your CRM data in Excel Online

Export data to Excel

Do you need to analyze your data from Microsoft Dynamics CRM and convert that data into actionable items that help you drive more sales? Now you can do this when you export your data to Microsoft Excel or Excel Online to do a quick data analysis. Also, analyzing large datasets is not a problem because you can export up to 100,000 rows of data.

You can choose to export static worksheets or dynamic worksheets, which you can import back into CRM. If you need more advanced functions, you can export a dynamic PivotTable, which makes it very easy to organize and summarize data.

Export data to a standard Excel file that that you can use on any device such as your phone, tablet, or desktop computer. The data is exported in the same format as you see in CRM. Text will remain text, numbers will remain numbers, and dates will remain dates. However, when you export data from CRM to Excel the some cell format may change. The table below summarizes how you'll see the data in CRM and how the cell format changes when you export the data to Excel.

Cell format when data is exported from CRM to Excel

Data format in CRM	**Cell format in Excel**
Text, Ticker Symbol, Phone, Options set, and Look Up	Shows as Text and option set becomes drop-down list
Email, URL	Shows as General
Number	Shows as Number without group separator
Currency	Shows as Number and does not include “$” symbol
Date only, Date and Time	Shows as Date only
Calculated and Roll up fields	Editable in Excel but can’t be imported back to CRM
Secured fields	Editable in Excel but can’t be imported back to CRM

See which type of export works best for you

Task	**Learn more**
Do an *ad-hoc* or *what if* analysis without modifying CRM data. Or, quick bulk edit to multiple CRM records.	Analyze your CRM data in Excel Online
Get a snapshot of the data at the current data and time or you want to share it with others.	Export to an Excel static worksheet
Get the most update-to-date information and be able to refresh it in Excel and match what you see in CRM at any time.	Export to an Excel dynamic worksheet
View CRM data in a pivot table.	Export to an Excel PivotTable

- When you export data in Excel (.xlsx format) and then add or modify columns, you can’t import the data back in to CRM. This is not support for .xlsx file format.
- If you’re using Excel 2010, \ you may get this error message when you export data from Accounts area: “The file is corrupt and cannot be opened.”

  The error message occurs due to a setting in Excel. To fix the issue, do this:

  a. Open Excel 2010

  b. Choose **File** > **Options**.

c. Choose **Trust Center** > **Trust center settings**.
d. Choose **Protected view**. Then clear the check boxes for the first two options.
e. Choose **OK** and then close the **Options** dialog box.

Privacy notice

If you use Microsoft Dynamics CRM Online, exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and no connection is maintained between this local copy and CRM Online.

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and CRM Online. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with CRM Online using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization's users are permitted to export data to Excel by using security roles.

See Also

[Analyze your data with Excel templates]()

Use the pre-configured Excel templates to analyze your sales data

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. You can export up to 100,000 records at a time.

Prerequisites

- Microsoft Dynamics CRM for Outlook is required to export data to a PivotTable.
- 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, choose **Properties**, choose **Connections**, and then select the **Allow remote connections to this server** check box.

- Windows Firewall allows remote SQL Server connections. More information: [How to: Configure a Windows Firewall for Database Engine Access]().

Export to an Excel PivotTable

The option to export data to an Excel PivotTable isn't available in all CRM record types. If you don't see the option, it's not available for that record.

1. Open a list of records in the CRM web application or in Dynamics CRM for Outlook. Choose **Export to Excel**.
2. Choose **Dynamic PivotTable**.
3. In the **Select PivotTable Columns** list, select or clear the check boxes for the fields as needed, and then choose **Export**.

   By default, the **PivotTable Field List** includes only fields that are displayed in the **Select PivotTable Columns** list.
4. Choose **Save** and then save the . xlsx file. Make note of the location where you saved the file.

   Note

   If you're going to edit the data file later, it's recommended that you save the file before you open it. Otherwise, you may get this error message: **Excel cannot open or save any more documents because there is not enough available memory or disk space**.

   To fix the issue do this:

   a. Open Excel and go to **File** > **Options** > **Trust Center**
   b. Choose **Trust Center Settings**, and then choose **Protected View**.
   c. Under **Protected View**, clear the check boxes for all three items.
   d. Choose **OK**, and then **OK**.

   We still strongly recommend that you save and then open the data file, rather than disabling protected view, which may put your computer at risk.
5. Open Microsoft Office Excel and then open the . xlsx file you saved in the previous step.
6. If you see the security warning **External Data Connections have been disabled**, choose **Enable Content**.
7. To refresh data in the file, on the **Data** tab choose **Refresh All**.
8. Drag the fields from the PivotTable Field List to the PivotTable. For more information, see Microsoft Office Excel Help.

Tips

- 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.

- 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.”
- The data and time values that you see in Microsoft Dynamics CRM show up as “Date” only when you export the file to Microsoft Office Excel but the cell actually shows both the date and time.
- If you’re going to make changes and import the data file back in to CRM, remember that secured, calculated, and composite fields (such as Full Name) are read-only and can’t be imported in to CRM. You’ll be able to edit these fields in Excel but when you import the data back in to CRM these fields won’t be updated. If you want to update these fields such as a contact’s name, it’s recommend that you use that view to export your data, update them in Excel, and import them back to CRM for changes.
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.
- For anyone who is not on CRM Online 2015 Update 1 or Microsoft Dynamics CRM 2016 and 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. You can then reopen the Excel document in Excel Online.

Privacy notice

If you use Microsoft Dynamics CRM Online, exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and no connection is maintained between this local copy and CRM Online.

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and CRM Online. Every time a dynamic worksheet or PivotTable is refreshed, you’ll be authenticated with CRM Online using your credentials. You’ll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization’s users are permitted to export data to Excel by using security roles.

See Also

[Export data to Excel]

Running reports and analyzing data

[Data management top links]

[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. You can export up to 100,000 records at a time.

Prerequisites

Dynamics CRM for Outlook is required to export data to a Dynamic PivotTable.

Export data to an Excel dynamic worksheet

You can't export data to a dynamic worksheet in Excel for all CRM record types. If you don't see the option, it's not available for that record.

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. Choose **Dynamic worksheet**.
3. Under **Common Tasks**, configure the column settings and then choose **Export**.
4. Choose **Save** and then save the . xlsx file. Make note of the location where you saved the file.

   Note

   If you're going to edit the data file later, it's recommended that you save the file before you open it. Otherwise, you may get this error message: Microsoft **Excel cannot open or save any more documents because there is not enough available memory or disk space**.

   To fix the issue do this:

   a. Open Excel and go to **File** > **Options** > **Trust Center Settings Center Settings…** > **Protected View**.
   b. In **Protected View**, uncheck all three items.
   c. Then choose **OK** > **OK**.

   We still strongly recommend that you save and then open the data file, rather than disabling protected view which may put your computer at risk.
5. Open Microsoft Office Excel and then open the . xlsx file you saved in the previous step.
6. If you see the security warning **External Data Connections have been disabled**, choose **Enable Content**.
7. To refresh data in the file, on the **Data** tab, choose **Refresh All**.

   Note

   If you have a phone numbers that starts with **+** or **–**, for example +1-123-456-7890, when you refresh the dynamic worksheet the phone number field will not display the number correctly.

To avoid the issue, use a space or parentheses **()**, like this: +1 123-456-7890 or +1 (123)-456-7890

Tips

- You can email a dynamic Excel file or store it as a shared file if the recipients are in the same domain as you. When recipients open the dynamic file, they'll see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.
- 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."
- The data and time values that you see in Microsoft Dynamics CRM show up as Date only when you export the file to Microsoft Office Excel but the cell actually shows both the date and time.
- If you're going to make changes and import the data file back in to CRM, remember that secured, calculated, and composite fields (e.g. Full Name) are read-only and can't be imported in to CRM. You'll be able to edit these fields in Excel but when you import the data back in to CRM these fields will not be updated. If you want to update these fields such as a contact's name then it's recommend that you use that view to export your data, update them in Excel, and import them back to CRM for changes.
- If you're not on CRM Online 2015 Update 1 or Microsoft Dynamics CRM 2016 and 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. You can then reopen the Excel document in Excel Online.

Privacy notice

If you use Microsoft Dynamics CRM Online, exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and no connection is maintained between this local copy and CRM Online.

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and CRM Online. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with CRM Online using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization's users are permitted to export data to Excel by using security roles.

See Also

[Export data to Excel](#)

Running Reports and Analyzing Data

[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.

If you're on CRM Online 2015 Update 1, you can export up to 100,000 records at a time. And by default, CRM lists up to 50 records per page. Choose the **Page** arrows at the bottom of the list to view any additional pages.

Export data to an Excel static worksheet

You may have the option to export data to an Excel static worksheet in all record types however, in some cases the format may be legacy, or the data may not be filtered by what you see in CRM view.

1. Open a list of records in the CRM web application or in Microsoft Dynamics CRM for Outlook. Choose **Export to Excel**, and then choose **Static worksheet (Page only)**.
2. 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, choose **Edit Columns**. More information: [Create, edit, or save an Advanced Find search](#)
3. Choose **Save** and then save the . xlsm file. Make note of the location where you saved the file.

   Note

   If you're going to edit the data file later, it's recommended that you save the file before you open it. Otherwise, you may get this error message: **Excel cannot open or save any more documents because there is not enough available memory or disk space**.

   To fix the issue do this:

   a. Open Excel and go to **File** > **Options** > **Trust Center Settings Center Settings…** > **Protected View**.
   b. In **Protected View**, uncheck all three items.
   c. Then choose **OK** > **OK**.

   We still strongly recommend that you save and then open the data file, rather than disabling protected view, which may put your computer at risk.
4. Open Microsoft Office Excel and then open the . xlsm file you saved in the previous step.

By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

Tips

- 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.
- You can't 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're not on CRM Online 2015 Update 1 and you're 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. You can then reopen the Excel document in Excel Online.
- 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."
- The data and time values that you see in Microsoft Dynamics CRM show up as Date only when you export the file to Microsoft Office Excel but the cell actually shows both the date and time.
- If you're going to make changes and import the data file back in to CRM, remember that secured, calculated, and composite fields (e.g. Full Name) are read-only and can't be imported in to CRM. You'll be able to edit these fields in Excel but when you import the data back in to CRM these fields will not be updated. If you want to update these fields such as a contact's name then it's recommend that you use that view to export your data, update them in Excel, and import them back to CRM for changes.

Privacy notice

If you use Microsoft Dynamics CRM Online, exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and no connection is maintained between this local copy and CRM Online.

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and CRM Online. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with CRM Online using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization's users are permitted to export data to Excel by using security roles.

See Also

Running Reports and Analyzing Data

Create, edit, or save an Advanced Find search

Analyze your CRM data in Excel Online

horizontaltabbed

How to

No need to leave Microsoft Dynamics CRM to analyze your data. Now you can do a quick *ad-hoc* analysis using Microsoft Excel Online in Microsoft Dynamics CRM Online.

For example, if you're a sales manager, you might want to analyze the opportunities your team owns and review key performance indicators (KPIs) to see how you can assist your team members. If you're a sales rep, you can open your opportunities in Excel and conduct what-if analysis for different incentive scenarios. Or, you may want to quickly open the data in Excel Online so that you can copy it somewhere else such as an email.

When you make changes to your data in Excel Online, you can save the updated information in CRM. Remember to keep the existing format of the Excel cells to prevent problems during import. Adding additional information to the spreadsheet, such as graphs, charts, or colors, will not be saved.

Prerequisites

- This feature requires CRM Online 2015 Update 1 or later.
- This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to CRM Online?
- You need a Microsoft account.
- You need export to Excel privileges in CRM.

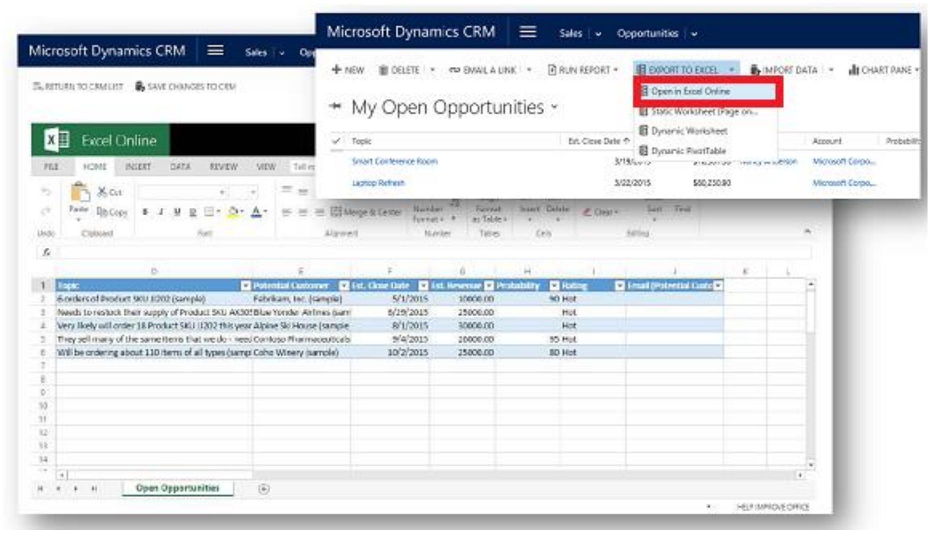
Open CRM data in Excel Online

The option to open data in Excel Online isn't available in all CRM record types. If you don't see the option, it's not available for that record.

Note

Updated data in CRM won't immediately be reflected in Excel Online if the same view was opened in the last two minutes in Excel Online. After that timeframe, any updated data should show in Excel Online.

- Open a list of records in CRM Online. Click **Export to Excel** > **Open in Excel Online**.



Note

By default, you can't open your CRM data in Excel Online in the **Advanced Find** view. However, you can save your advanced find as a personal view and then go to your personal view to do an ad-hoc analysis in Excel Online.

Save your data and import it back to CRM

1. On the top right, click **Save Changes to CRM**.

   Note

   - The data for *ad-hoc* analysis with Excel Online is stored temporarily. Any additions, such as charts, calculations, and columns won't be saved from the ad-hoc analysis that you do in Excel Online back to CRM. If you need to make lots of changes to your data and import it back to CRM, it's recommended that you export the worksheet in Microsoft Excel.
   - The file import might fail if you made a lot of changes or changed the format of the Excel file. If you need to make lots of changes to your data and import it back to CRM, it's recommended that you export the worksheet in Excel.
   - By design, you can't do a **File** > **Save As** in Excel Online. If you do, you'll get a **Can't Save Workbook** error message.
2. On the **Data Submitted for Import** dialog box, click **Close**.

Check the status of the data import

After you save your changes from Excel Online to CRM, verify that the data has been imported back in to CRM Online.

1. In the **Data Submitted for Import** dialog box, click **Imports**.

   -OR-

   Go to **Settings** > **Data Management**. (How do I get there?) Then click **Imports**.
2. In the list of imported files, look for your imported file and check the status.

Watch this video

Find out how to analyze your data and transform it into meaningful knowledge with CRM Online Excel integration.

<iframe width="500" height="364" src="https://www.youtube.com/embed/NZNvWz9xuZ0" frameborder="0" allowfullscreen></iframe>

To see video captions, click the **Closed Caption (CC)** button in the lower-right corner of the YouTube window.

Read video transcript

Do you need to analyze your data from Microsoft Dynamics CRM and transform that data into meaningful knowledge that helps to drive sales?

Dynamics CRM allows you to do just that with your CRM Excel integrations. Quickly export your data to either Microsoft Excel for Rich Client or Microsoft Excel Online for easy consumption. The new Export to Excel feature is very simple. With a single click you can export data to a standard Excel file that can be used on any client: Phone, tablet, desktop, as well as Excel Online. Data is exported in the same format as it is in CRM. You don't need to worry about data formats getting lost in translation; text will remain text, numbers will remain numbers, and dates will remain dates. You can export static or dynamic worksheets, both of which are importable. But what if you need more advanced functions?

You can also export a Dynamic Pivot Table, which makes it very easy to tabulate and summarize data. Also, analyzing large data sets is not a problem - CRM can export up to 100,000 rows. Sometimes you may need more reports that are not in your standard business analytics tool box. You can now quickly perform data analysis on CRM data by using the ad hoc analysis with Excel Online.

Let's demonstrate a quick example.

Select **Export to Excel**, open Excel Online, and your data will be immediately available in Excel Online. Now let's perform a quick analysis on the data. Let's determine the expected revenue for open opportunities. 0h, and my colleague just informed me that the estimated revenue for one opportunity went up ten thousand dollars. Let's make the change and send it back to CRM. Okay, now let's cover the details about this functionality. Ad hoc analysis with Excel Online is only available for CRM Online and does require an Office 365 license. In addition, the user will require Export to Excel privileges in CRM. The data for *ad hoc* analysis with Excel Online is stored only temporarily. Any additions, such as charts, calculations, and columns won’t be saved from the Ad hoc Analysis Excel Online Editor back to CRM. If you need to perform heavy lifting with the CRM data, we recommend you export the worksheet for use in Excel Desktop.

Enjoy the new data analysis features in Dynamics CRM. We hope that you can leverage your data to bring you new insights about your business. Thanks for watching.

See Also

[Export data to Excel]

[Import accounts, leads, or other data]

Use Bing Maps to view a location

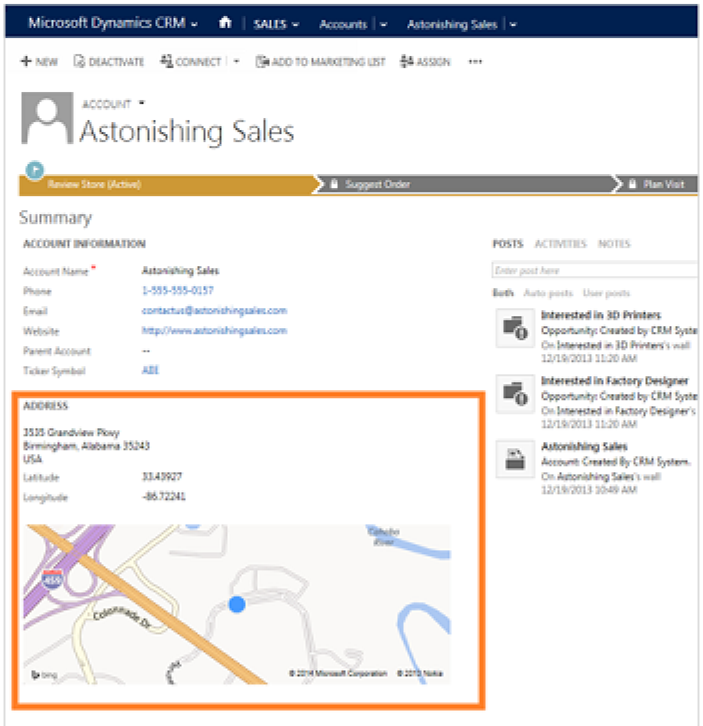
Bing Maps help you plan customer visits, optimize your routes, calculate mileage for expense reports, and see nearby services. When you view the details for contacts, leads, or accounts, you'll see a map that shows where their address is located. Click or tap a map to explore aerial and satellite images,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



Privacy notice

If you use Microsoft Dynamics CRM, the Bing Maps feature automatically sends the address over the Internet to the Bing Maps service to display an online map of the address within CRM. If you click on the Bing Maps within CRM, you will be redirected to www.bing.com/maps. Your use of Bing Maps is also governed by the Bing Maps End User Terms of Use.

Your administrator can turn the Bing Maps feature on or off in the **Settings** > **Administration** > **System Settings** area. Turning the Bing Maps app off disables the feature within CRM.

Information sent to Bing Maps is subject to the Bing Maps Privacy Statement.

See Also

Create or edit a lead

Create or edit a contact

Create or edit an account

Use OneDrive for Business to manage your private documents

With CRM Online, you can use the right storage option for the right situation. For example, store your private documents using the new OneDrive for Business option. For collaborative storage, you can use Office 365 Groups, and for public documents use SharePoint.

You might use OneDrive for Business to start and work on a document privately such as for a draft sales pitch. When the draft is far enough along, move it to an Office 365 group for team collaboration. You have lots of storage space (1 TB or more) with OneDrive for Business and documents stored there are automatically synced to your desktop and mobile devices. For example, if you put a presentation in CRM that's stored on OneDrive linked with an opportunity, that presentation is synced to all devices running OneDrive.

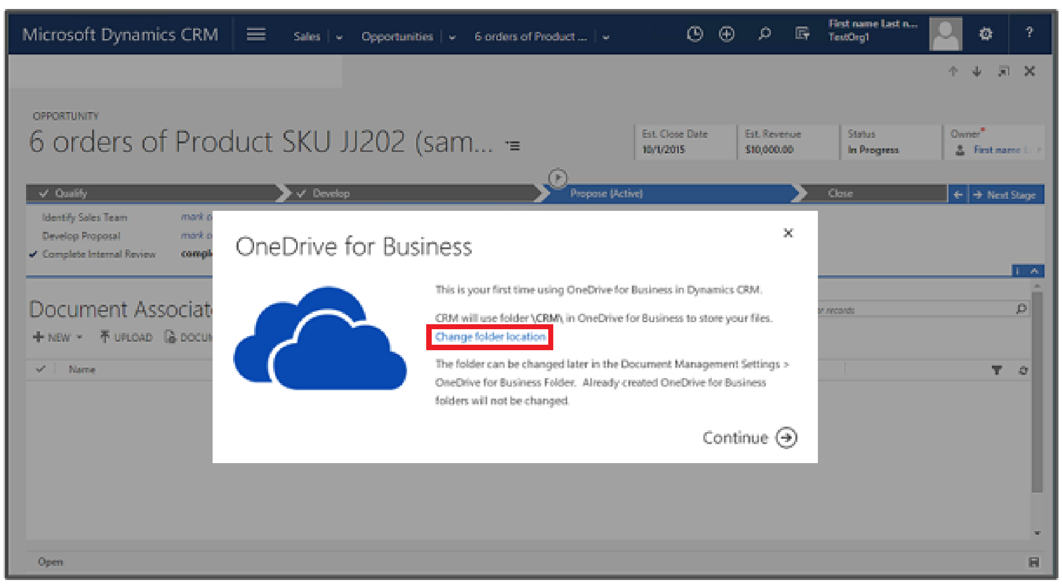
Before you can use OneDrive for Business, it must be enabled by your system administrator. For more information, see:

- Find your CRM administrator or support person
- TechNet: Enable OneDrive for Business

Important
This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see What is Office 365 and how does it relate to CRM Online?

The first time you view your documents

After OneDrive for Business is enabled, you'll see the following dialog box when you go to a document list to view documents in CRM.



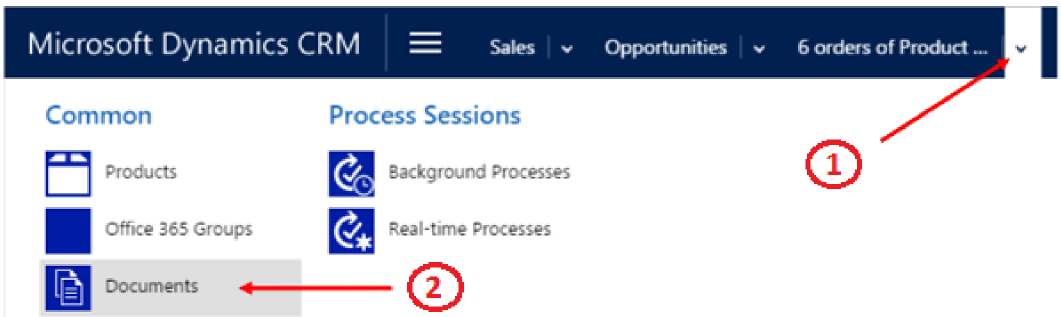
Click **Change folder location** to pick a new location to store OneDrive documents or click **Continue** to accept the default folder location: \CRM

View existing OneDrive documents

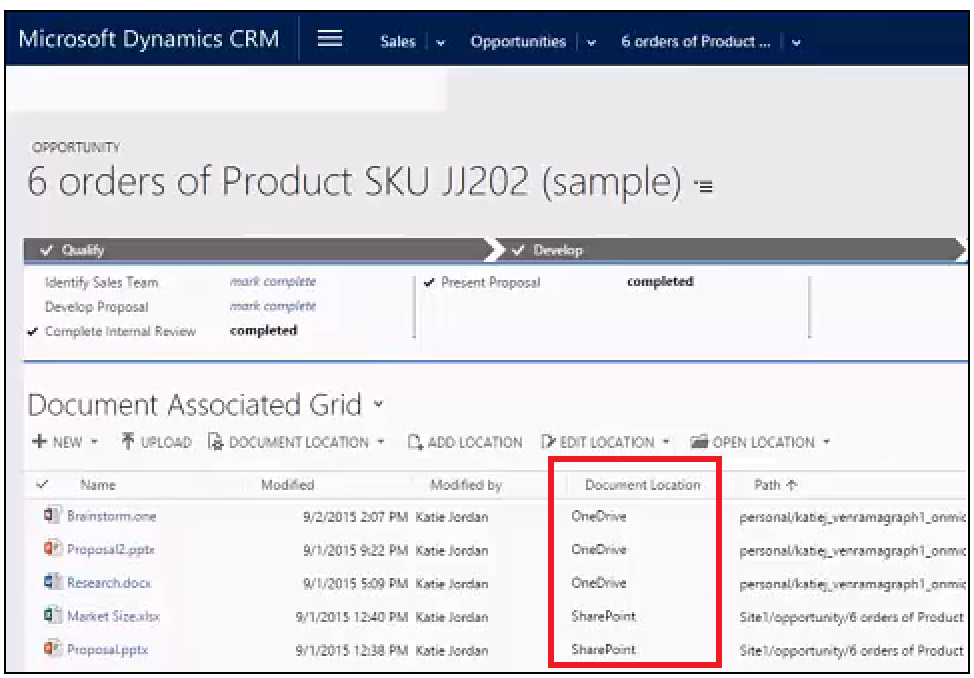
Open a view with a document grid.

For example,

1. Click **Sales** > **Opportunities**
2. Choose an opportunity from the drop-down menu, and then click **Documents**.

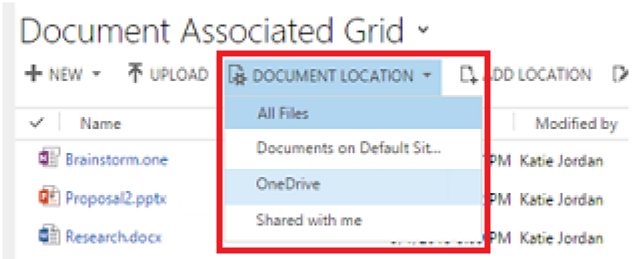


CRM now organizes documents in a consolidated view.



Documents stored in SharePoint and OneDrive are viewed in one list.

Click **Document Location** to filter the document list.



Select a location as described in the following table.

Document Location	Description
All files	All document locations associated with this CRM record
SharePoint site	Documents stored in your default SharePoint site
OneDrive	Documents stored in OneDrive for Business
Shared with me	Documents others shared with you that are associated with this CRM record

Create a new document

To create a new SharePoint or OneDrive document in CRM:

1. Open a view with a document grid.
2. Click New and then choose a document type such as Microsoft PowerPoint or Word.
3. Enter a document name, choose a location, and then click **Save**.

The document is created and opened in the Office 365 Online application.

Change your OneDrive folder settings

You can change the location of your OneDrive documents and rename the folder used for OneDrive.

1. Click **Settings** > **Document Management** > **OneDrive for Business Folder Settings**
2. Enter a new location for CRM to store OneDrive files, and then click **OK**.

Note
The OneDrive folder is renamed and all the existing files will now be associated with the new folder.

Considerations

Be aware of the following regarding OneDrive for Business in CRM.

- OneDrive storage folders are created in the user's current CRM language. If the language changes, new folders will be created in the new language. Old folders will remain in the previous language.
- Folders aren't supported. Documents in shared folders won't appear in the document grid.
- There may be a delay between when the documents are shared in OneDrive and when they're available to other users.

See Also

[What is OneDrive for Business?]

[TechNet: Enable OneDrive for Business]

Work with reports and dashboards

View reports

Get a list of available reports

Microsoft Dynamics CRM includes many system reports that you can use to gain insights into how your business is doing. You can use these reports as is or customize them for your needs. For more information about customized reports, see **Customize and organize reports**.

Reports in CRM

Category	Description	More information
Account insights	Top revenue-generating accounts	Account Distribution report
	Overview of an account	Account Overview report
	Chronological account summary	Account Summary report
	Accounts that haven't been contacted	Neglected Accounts report
Marketing insights	Summary of activities in a campaign	Campaign Activity Status report
	Compare campaigns	Campaign Comparison report
	Progress and status of campaigns	Campaign Performance report
Sales insights	Sales team performance against competitors	Competitor Win Loss report
	Activity patterns	Activities report
	Sales progress against goals	Progress Against Goals report
	Sales performance of reps	Sales History report
	Potential sales opportunities	Sales Pipeline report
	Compare effectiveness of lead sources for generating opportunities	Lead Source Effectiveness report
	Leads that haven't been contacted	Neglected Leads report
Product insights	Products used by an account	Products by Account report
	Products used by a contact	Products by Contact report
Invoices, quotes, and orders details	Line items of an invoice	Invoices report
	Accounts receivable	Invoice Status report
	Line items of a quote	Quotes report
	Line items of an order	Orders report
Service insights	Types of opened and resolved cases	Case Summary Table report

Category	Description	More information
	Cases with no recent activity	Neglected Cases report
	Amount and length of service activities	Service Activity Volume report
	Most searched knowledge base articles	Top knowledge base articles report
Administrator reports	List of users	User Summary report

See Also

Run a report

Share a report with other users or teams

Download a report

Create, edit, or copy a report using the Report Wizard

Edit the default filter of a report

Troubleshoot problems with data not displaying in a report

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

1. Go to **Reports**. (How do I get there?)
2. In the list of reports, select the report.

   If using the CRM web application:

Click **More Commands** ..., and then click **Share**.

   b. In the **Share Report dialog** box, click **Add User/Team**.
   c. In the **Look Up Records** dialog box, select the users or team you want to share the report with, and click **OK**.
   d. 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:

   a. In the list of reports, select a report, and in the **Collaborate** group, click **Share**.

b. 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.

1. Go to **Reports**. (How do I get there?)
2. In the list of reports, select the report, and on the command bar, click **Edit**.

   If using the CRM web application:

   a. On the command bar, click **Edit**.

On the **Actions** menu, click **Make Report Available to Organization**.

   If using CRM for Outlook:

   a. In the **Records** group, click **Edit**.

On the **Actions** menu, click **Make Report Available to Organization**.

See Also

Get a list of available reports

Run a report

Run a report

Reports help you manage your progress towards your goals by helping you see how you're doing. You can also track trends - which can give you an advantage over your competitors.

For example it's important for a sales team to know which product or service is selling and which is not doing so well. For a customer service team, it's important to track the average time it takes to resolve an issue.

To run a report

1. Go to **Reports**. (How do I get there?)
2. Choose the report you want > **Run Report**.

   Note

   In **Report Viewer** dialog box, you can leave the search criteria as is, or change it as needed.

Privacy notice

When Microsoft Dynamics CRM Online users print CRM data, they are effectively "exporting" that data from the security boundary provided by CRM Online to a less secure environment, in this case, to a piece of paper.

An administrator has full control (at the user security role or entity level) over the data that can be extracted. However, after the data has been extracted it is no longer protected by the security boundary provided by CRM Online and is instead controlled directly by the customer.

See Also

Get a list of available reports

Customizing and Organizing Reports

Customize your regional settings (number, currency, time, and date) in CRM for Outlook

Report Writers Guide for Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online

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. Go to **Reports**. (How do I get there?)

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

Add a report from outside CRM

If you've created a custom report outside of Microsoft Dynamics CRM, you can easily add it to CRM.

1. Go to **Reports**. [(How do I get there?)]

2. Choose **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 choose **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. Choose 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, choose the **Select or change the values for this field** ... button, and then select record types.

Display In. To specify where reports should be visible, choose 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. Choose **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

Customizing and organizing reports

[Report writing with CRM 2015 for online and on-premises](#)

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 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](#)

Available reports

[Account Distribution report](#)

[Account Overview report](#)

[Account Summary report](#)

[Activities report](#)

[Campaign Activity Status report](#)

[Campaign Comparison report](#)

[Campaign Performance report](#)

[Case Summary Table report](#)

[Competitor Win Loss report](#)

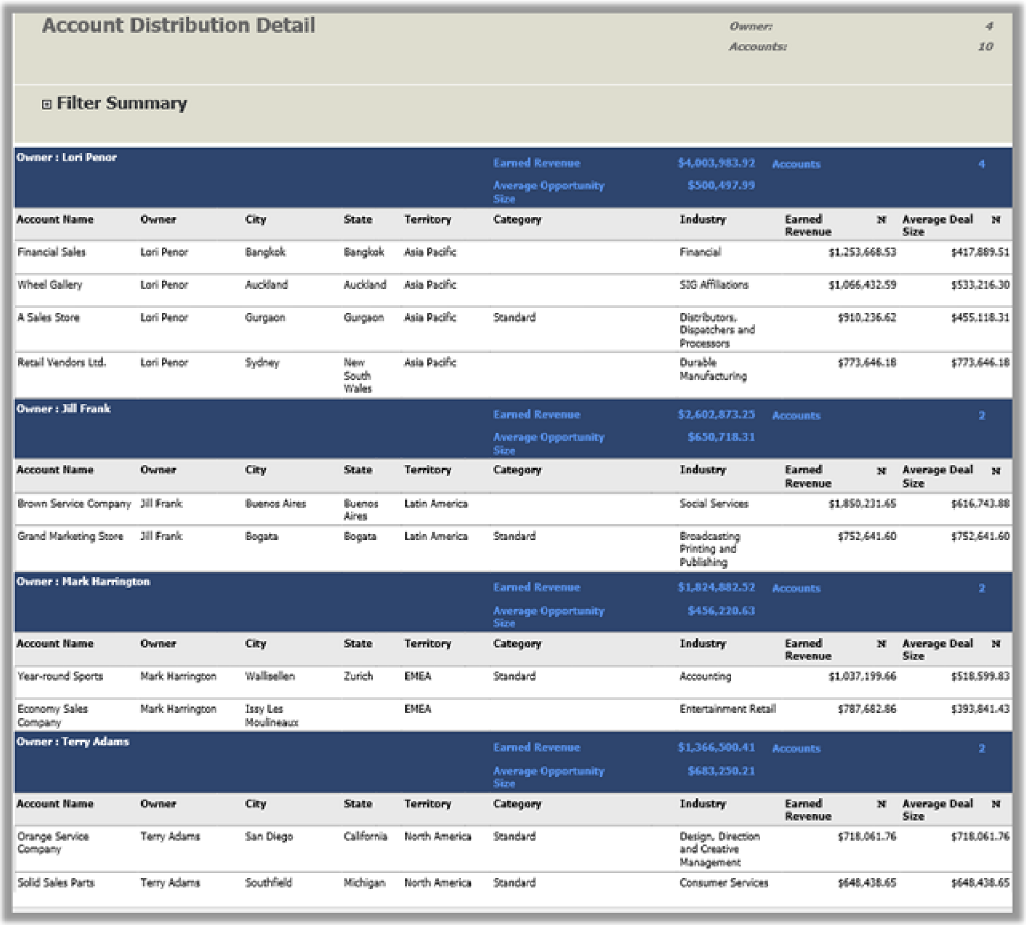
[Invoice Status report](#)

[Invoices report](#)

Account Distribution report

See which account generates the most revenue for your business. Then use the information to identify patterns – so that you leverage the information and apply it to accounts that are not so doing well.

This report is generated from revenue based on opportunities that have been won.



Account Distribution Detail

Owner: 4
Accounts: 10

⊞ **Filter Summary**

Account Name	Owner	City	State	Territory	Category	Industry	Earned Revenue	Average Deal Size
Owner : Lori Penor					Earned Revenue / Average Opportunity Size	$4,003,983.92 / $500,497.99	Accounts	4
Financial Sales	Lori Penor	Bangkok	Bangkok	Asia Pacific		Financial	$1,253,668.53	$417,889.51
Wheel Gallery	Lori Penor	Auckland	Auckland	Asia Pacific		SIG Affiliations	$1,066,432.59	$533,216.30
A Sales Store	Lori Penor	Gurgaon	Gurgaon	Asia Pacific	Standard	Distributors, Dispatchers and Processors	$910,236.62	$455,118.31
Retail Vendors Ltd.	Lori Penor	Sydney	New South Wales	Asia Pacific		Durable Manufacturing	$773,646.18	$773,646.18
Owner : Jill Frank					Earned Revenue / Average Opportunity Size	$2,602,873.25 / $650,718.31	Accounts	2
Brown Service Company	Jill Frank	Buenos Aires	Buenos Aires	Latin America		Social Services	$1,850,231.65	$616,743.88
Grand Marketing Store	Jill Frank	Bogata	Bogata	Latin America	Standard	Broadcasting Printing and Publishing	$752,641.60	$752,641.60
Owner : Mark Harrington					Earned Revenue / Average Opportunity Size	$1,824,882.52 / $456,220.63	Accounts	2
Year-round Sports	Mark Harrington	Wallisellen	Zurich	EMEA	Standard	Accounting	$1,037,199.66	$518,599.83
Economy Sales Company	Mark Harrington	Issy Les Moulineaux		EMEA		Entertainment Retail	$787,682.86	$393,841.43
Owner : Terry Adams					Earned Revenue / Average Opportunity Size	$1,366,500.41 / $683,250.21	Accounts	2
Orange Service Company	Terry Adams	San Diego	California	North America	Standard	Design, Direction and Creative Management	$718,061.76	$718,061.76
Solid Sales Parts	Terry Adams	Southfield	Michigan	North America	Standard	Consumer Services	$648,438.65	$648,438.65

See Also

[Run a report]

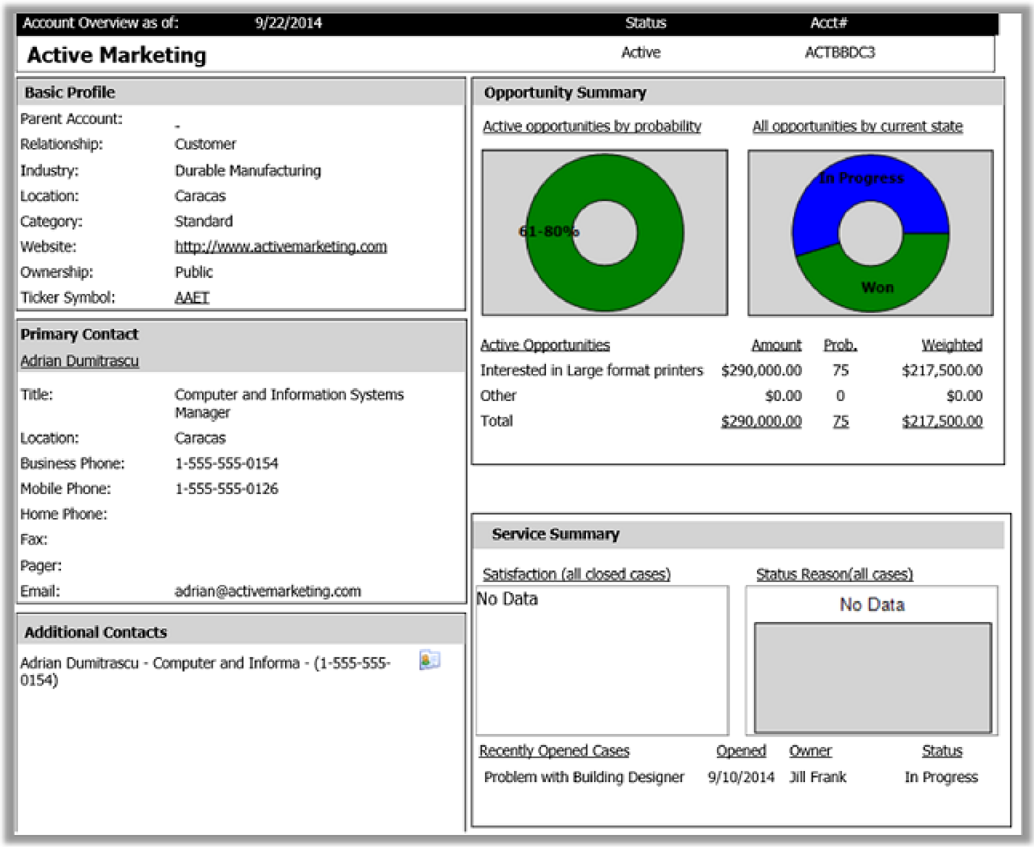
[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Account Overview report

Get a one-page overview of everything that's happening with an account. The report shows a profile of the account, contact information, and a summary of opportunities and case activities.

- For opportunities, the report shows charts with active opportunities grouped by the probability of the opportunities turning into a sale and the state the opportunities are currently in.
- For support cases, the report shows a chart with closed cases grouped by customer satisfaction level and also by the case status.



See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Account Summary report

Use this report to see what has happened with an account. This report also shows what is scheduled to happen in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

Tip

To 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**.

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

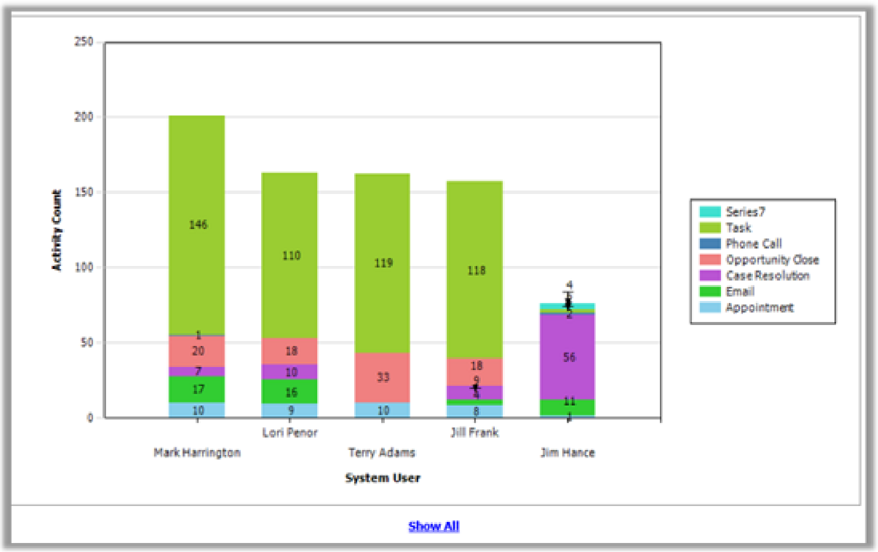
Customizing and Organizing Reports

Activities report

Improve communication for future opportunities and provide better service to your customers. Get a quick view of all the activities associated with support cases and opportunities such as phone calls, tasks, emails, appointments, closed opportunities,

and case resolution. Use the information in this report to look at the details of each activity and identify patterns to make improvements in how you communicate with your customers.

When you run the report, choose **Show All** to get a detail view of all the activity. Activities can be grouped by owner or activity type, or by the record the activity is associated to.



See Also

[Run a report]()

[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Campaign Activity Status report

Track the details of your campaign. Get a summary of each campaign activity, including planned and actual time limits, parent campaign details, and definition status.

When you run the report, it only displays campaigns with activities or notes that were created within the dates that you specified in the report.

See Also

[Run a report]()

[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Campaign Comparison report

Find out which of your marketing campaign was more successful.
Use this report to compare the cost effectiveness and number of responses of two different campaigns.

When you run the report, select the two campaigns that you want to compare.

Campaign Details		
Campaign Name	Content Marketing Drip Campaign Drip Campaign	Customer Retention Nuture Campaign
Campaign Code	CMP-01013-D9V4H2	CMP-01017-Y2L9H7
Owner	Adam Barr	Adam Barr
Status	Active	Active
Type	Advertisement	Advertisement
Target Marketing Lists	N/A	N/A
Target Products	N/A	N/A
Campaign Delivery		
Actual Start Date	10/3/2013	9/1/2013
Delay in Campaign Completion	N/A	N/A
Total Active Time (days)	N/A	N/A
Total Actual Cost	$161,100.85	$221,826.54
Cost Increase	-83.88 %	-77.81 %
Return On Investment (ROI)		
Total No. Of Responses	174	185
Response Rate	N/A	N/A
Cost Per Response	$925.87	$1,199.06
Estimated Opportunity Revenue	$8,340,000.00	$10,770,000.00
Actual Opportunity Revenue	$3,458,194.98	$6,723,043.38
Value of Placed Orders	$0.00	$0.00
Revenue ROI Per $100	N/A	N/A

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Campaign Performance report

Find out what's working and what you need to change in your campaigns. Use the campaign performance report to track the progress and status of your campaigns. The report provides a detailed view of all the dates, targets, definitions, responses, and financial returns from each campaign that has been modified – so you can quickly see the progress of your campaigns.

See Also

[Run a report](#)

[Troubleshoot problems with data not displaying in a report](#)

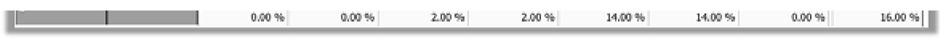
Customizing and Organizing Reports

Case Summary Table report

Lower support calls and improve your product or service.
This report tracks service cases and tells you why customers are contacting support.

For example, if your company sells cell phones and you find out that majority of the support calls are due to a faulty phone battery, you can take this information to the team that makes the phone battery so they can fix the issue. This will improve your product and drive support calls down.

The report provides a list of cases that you can group by owner, customer, status reason, product, priority, subject, origin, case type, satisfaction, service level, or severity.



See Also

[Run a report](#)

[Troubleshoot problems with data not displaying in a report](#)

Customizing and Organizing Reports

Competitor Win Loss report

Use this report to compare how your sales team performs against your competitors. The report displays opportunities that have competitors associated, with information on open, closed, won, and lost opportunities.

The report displays only opportunities that have competitors associated that you have permission to see, in the country/region and time period that you specify.

See Also

[Run a report](#)

[Troubleshoot problems with data not displaying in a report](#)

Customizing and Organizing Reports

Invoice Status report

Use this report to view your accounts receivable for your active accounts. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

See Also

[Run a report](#)

[Troubleshoot problems with data not displaying in a report](#)

Customizing and Organizing Reports

Invoices report

Get a quick overview of an invoice and its line items to see what was ordered. You can also use this report to print invoices.

When you run the invoice report, it returns a report of all invoices. You can also select a specific record to get an invoice report for that selected record.

See Also

[Run a report]()

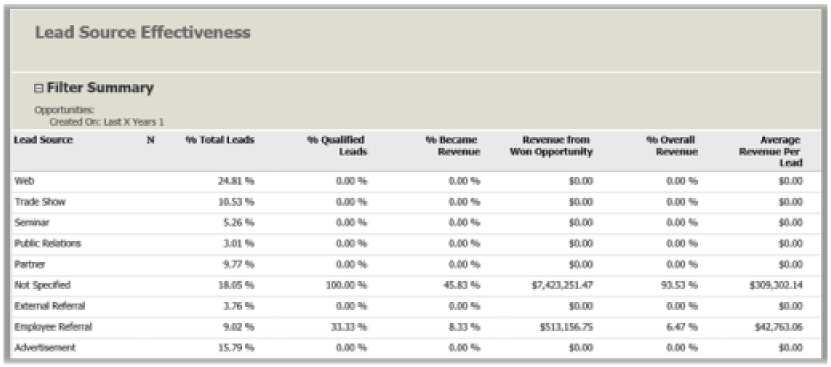
[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Lead Source Effectiveness report

Find out which type of lead is most beneficial in helping you grow your business. This report helps you 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.


Lead Source Effectiveness

Filter Summary

Opportunities:
Created On: Last X Years 1

Lead Source	N	% Total Leads	% Qualified Leads	% Became Revenue	Revenue from Won Opportunity	% Overall Revenue	Average Revenue Per Lead
Web		24.81 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00
Trade Show		10.53 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00
Seminar		5.26 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00
Public Relations		3.01 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00
Partner		9.77 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00
Not Specified		18.05 %	100.00 %	45.83 %	$7,423,251.47	93.53 %	$309,302.14
External Referral		3.76 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00
Employee Referral		9.02 %	33.33 %	8.33 %	$513,156.75	6.47 %	$42,763.06
Advertisement		15.79 %	0.00 %	0.00 %	$0.00	0.00 %	$0.00

See Also

[Run a report]()

[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Neglected Cases report

Improve your service team's KPIs and get your cases closed. Quickly identify and take action on cases that haven't been updated recently. The report also shows the name of the service agent assigned to the case - use this information to follow-up with your team and to start resolving these cases.

When you run the report, choose the number of days that cases haven't been updated. The report shows a list of open cases that have no changes to activities, including scheduled activities and notes.

See Also

[Run a report]()

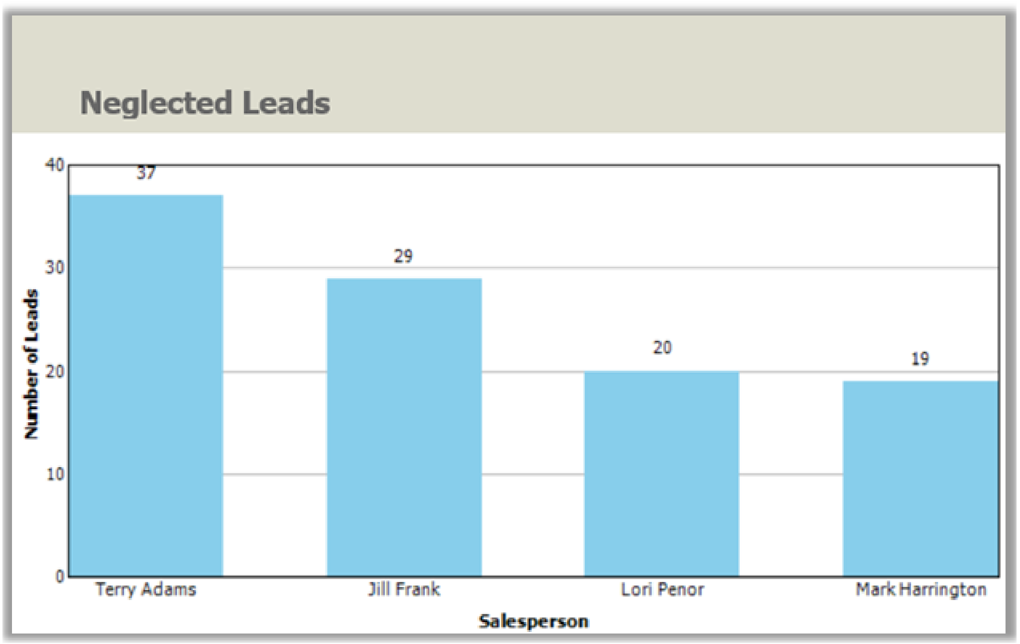
[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Neglected Leads report

Keep your sales teams on the alert for possible business opportunities.
Use this report to have your sales team follow-up on leads that they haven't contacted in a while.

When you run the report, specify the number of days that leads have been neglected.
The report displays a chart of active leads that have had no activities or notes.
Click **Show All** to drill down into the report.



See Also

[Run a report]()

[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Orders report

Use this report see an order and its line items. You can also 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.

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Products by Account report

Use this report to see which products are used by an account. For each account, the report lists the products associated with the account.

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**.

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Products by Contact report

Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

The report shows orders that have not been cancelled and opportunities that you have won.

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

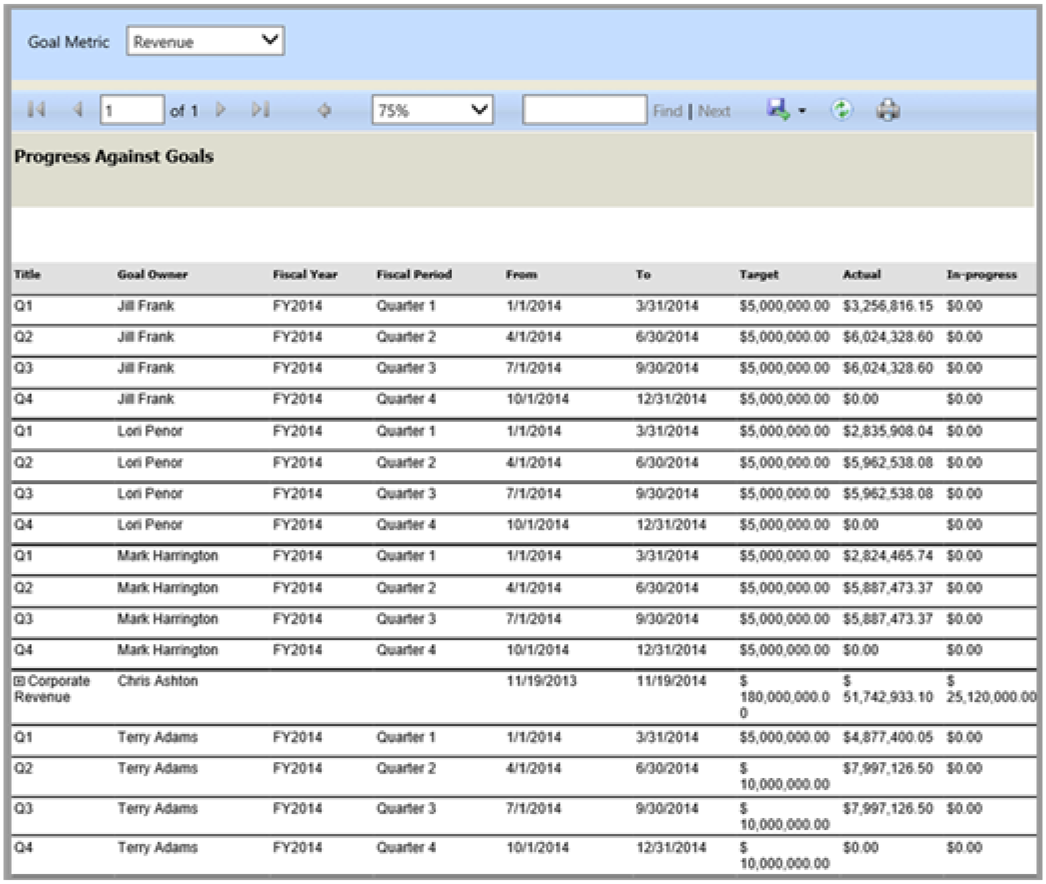
Customizing and Organizing Reports

Progress Against Goals report

The information in this report helps you see how your sales team is performing against their sales goals. This report displays a chart of your target goals and your actual goals.

Note

> The report is generated from data that is rolled up to the goals at a set time. If the data is not up-to-date, then wait until the next time the data is rolled up. For more information, contact your CRM admin.



Progress Against Goals

Title	Goal Owner	Fiscal Year	Fiscal Period	From	To	Target	Actual	In-progress
Q1	Jill Frank	FY2014	Quarter 1	1/1/2014	3/31/2014	$5,000,000.00	$3,256,816.15	$0.00
Q2	Jill Frank	FY2014	Quarter 2	4/1/2014	6/30/2014	$5,000,000.00	$6,024,328.60	$0.00
Q3	Jill Frank	FY2014	Quarter 3	7/1/2014	9/30/2014	$5,000,000.00	$6,024,328.60	$0.00
Q4	Jill Frank	FY2014	Quarter 4	10/1/2014	12/31/2014	$5,000,000.00	$0.00	$0.00
Q1	Lori Penor	FY2014	Quarter 1	1/1/2014	3/31/2014	$5,000,000.00	$2,835,908.04	$0.00
Q2	Lori Penor	FY2014	Quarter 2	4/1/2014	6/30/2014	$5,000,000.00	$5,962,538.08	$0.00
Q3	Lori Penor	FY2014	Quarter 3	7/1/2014	9/30/2014	$5,000,000.00	$5,962,538.08	$0.00
Q4	Lori Penor	FY2014	Quarter 4	10/1/2014	12/31/2014	$5,000,000.00	$0.00	$0.00
Q1	Mark Harrington	FY2014	Quarter 1	1/1/2014	3/31/2014	$5,000,000.00	$2,824,465.74	$0.00
Q2	Mark Harrington	FY2014	Quarter 2	4/1/2014	6/30/2014	$5,000,000.00	$5,887,473.37	$0.00
Q3	Mark Harrington	FY2014	Quarter 3	7/1/2014	9/30/2014	$5,000,000.00	$5,887,473.37	$0.00
Q4	Mark Harrington	FY2014	Quarter 4	10/1/2014	12/31/2014	$5,000,000.00	$0.00	$0.00
⊞ Corporate Revenue	Chris Ashton			11/19/2013	11/19/2014	$ 180,000,000.00	$ 51,742,933.10	$ 25,120,000.00
Q1	Terry Adams	FY2014	Quarter 1	1/1/2014	3/31/2014	$5,000,000.00	$4,877,400.05	$0.00
Q2	Terry Adams	FY2014	Quarter 2	4/1/2014	6/30/2014	$ 10,000,000.00	$7,997,126.50	$0.00
Q3	Terry Adams	FY2014	Quarter 3	7/1/2014	9/30/2014	$ 10,000,000.00	$7,997,126.50	$0.00
Q4	Terry Adams	FY2014	Quarter 4	10/1/2014	12/31/2014	$ 10,000,000.00	$0.00	$0.00

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Quotes report

Use this report to view quotes and its line items. You can also use this report to print quotes.

When you run this, results will show a report of all quotes in the system. You can select a specific record to get a report for that selected record.

See Also

[Run a report]

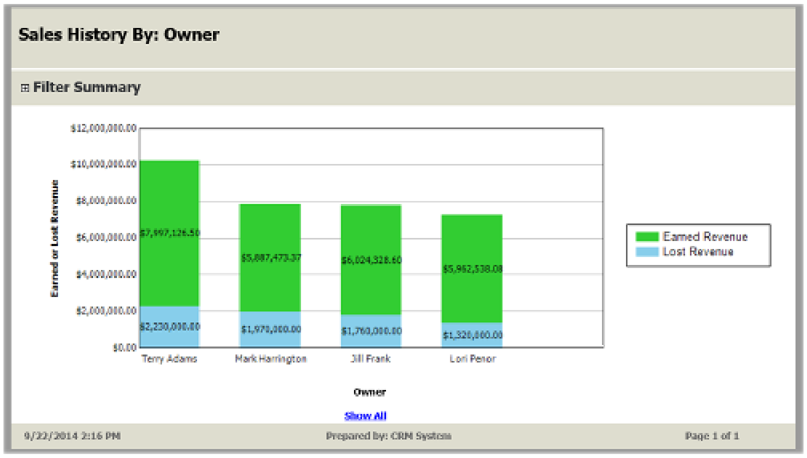
[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Sales History report

Use this report to see how your sales reps have performed and how much revenue they have generated for your business. See which sales reps closed the most sales – so you can award them for their great work. And also see which opportunities were lost so you can help your sales team do better next time.

The report uses data from closed opportunities that were either won or lost and then calculates earned and lost revenue.



See Also

[Run a report]()

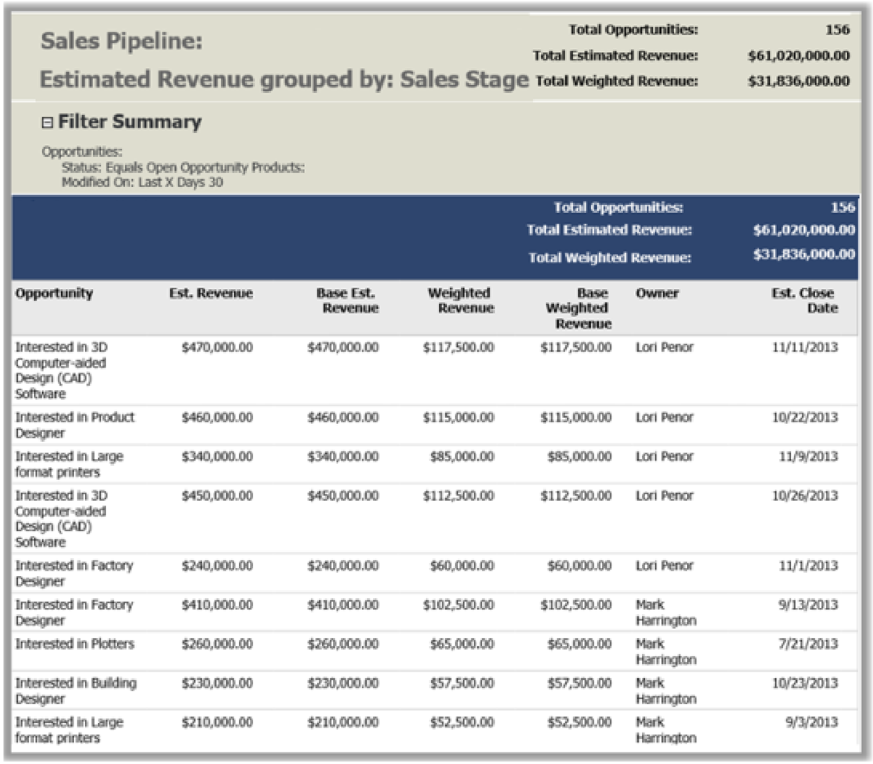
[Troubleshoot problems with data not displaying in a report]()

Customizing and Organizing Reports

Sales Pipeline report

Use the information in this report to forecast future revenue and set goals for your sales team. The report helps you see expected potential sales opportunities. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

When you run the report, on the chart, click **Show All** to get a detail view of the report.



Sales Pipeline:
Estimated Revenue grouped by: Sales Stage

Total Opportunities:	156
Total Estimated Revenue:	$61,020,000.00
Total Weighted Revenue:	$31,836,000.00

⊟ Filter Summary

Opportunities:
Status: Equals Open Opportunity Products:
Modified On: Last X Days 30

Total Opportunities:	156
Total Estimated Revenue:	$61,020,000.00
Total Weighted Revenue:	$31,836,000.00

Opportunity	Est. Revenue	Base Est. Revenue	Weighted Revenue	Base Weighted Revenue	Owner	Est. Close Date
Interested in 3D Computer-aided Design (CAD) Software	$470,000.00	$470,000.00	$117,500.00	$117,500.00	Lori Penor	11/11/2013
Interested in Product Designer	$460,000.00	$460,000.00	$115,000.00	$115,000.00	Lori Penor	10/22/2013
Interested in Large format printers	$340,000.00	$340,000.00	$85,000.00	$85,000.00	Lori Penor	11/9/2013
Interested in 3D Computer-aided Design (CAD) Software	$450,000.00	$450,000.00	$112,500.00	$112,500.00	Lori Penor	10/26/2013
Interested in Factory Designer	$240,000.00	$240,000.00	$60,000.00	$60,000.00	Lori Penor	11/1/2013
Interested in Factory Designer	$410,000.00	$410,000.00	$102,500.00	$102,500.00	Mark Harrington	9/13/2013
Interested in Plotters	$260,000.00	$260,000.00	$65,000.00	$65,000.00	Mark Harrington	7/21/2013
Interested in Building Designer	$230,000.00	$230,000.00	$57,500.00	$57,500.00	Mark Harrington	10/23/2013
Interested in Large format printers	$210,000.00	$210,000.00	$52,500.00	$52,500.00	Mark Harrington	9/3/2013

See Also

Run a report

Troubleshoot problems with data not displaying in a report

Customizing and Organizing Reports

Service Activity Volume report

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.

See Also

Run a report

Troubleshoot problems with data not displaying in a report

Customizing and Organizing Reports

Top knowledge base articles report

The information in the report helps you identify which issues your customers are asking about so that you can address those problems and improve your product or service. When a service agent receives a support call or email, the agent searches the knowledge base to see if there is a KB article that can answer the customer’s question. This report tells you which of those KB articles are being used the most.

You can change the **Group by** filter to see knowledge base articles grouped by subject of the article or case, or by the product associated with the case.

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

[eBook: Use KB articles to help your customers]

User Summary report

Keep user information up to date by running a User Summary report.
Get a list of all your users, including their contact information and security role in Microsoft Dynamics CRM.

See Also

[Run a report]

Create, edit, or copy a report using the Report Wizard

[Troubleshoot problems with data not displaying in a report]

Neglected Accounts report

Use this report to find accounts that haven’t been contacted recently so that you can follow up on those accounts.

When you run the report, select how many days the account has been neglected for. The report shows accounts that have no recent activity, including notes.

See Also

[Run a report]

[Troubleshoot problems with data not displaying in a report]

Customizing and Organizing Reports

Charts and dashboards

[Create or edit a chart]

[Drill down in a chart]

[View relevant and trending information with Office Delve]

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. Go to your work area. (How do I get there?)
2. Open the chart designer:

   If using the CRM web application:

   a. On the right side, choose the **Charts** pane.
   b. In the **Charts** area, choose **New Chart +**.

   If using CRM for Outlook:

   - On the **Charts** tab, in the **Charts** group, choose **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, choose 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 wasn't used. The average for Account 2 is 125 because the zero was used.

To create a chart with multiple series, choose 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, choose the **Current chart type** icon for that series, and then select a chart type.

e. To stack items in a chart, choose the chart type, and then choose **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, choose 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, choose the **Top/Bottom Rules** icon > **Top X Rule** icon > **3**.

   -OR-

   To display only the bottom items on the chart, choose the **Top/Bottom Rules** icon > **Bottom X Rule** icon > choose **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, choose 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, choose 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, choose the chart name to edit it.
5. To save the chart, in the chart designer, choose **Save**.

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 choose **Refresh Chart** on the **Charts** tab, so that the chart and the list of records show the synchronized data.

Edit a chart

1. Go to your work area. (How do I get there?)
2. Open the chart designer:

   If using the CRM web application:

   a. On the right side, choose the **Charts** pane.

   b. In the chart area, choose the chart list, choose the chart you want to edit, and then choose the **Edit Chart** button.

If using CRM for Outlook:

a. On the **Charts** tab, in the **Layout** group, choose **Chart Pane** > **Right** or **Top**.
b. In the chart area, choose the chart list, choose the chart you want to edit, and then in the **Charts** group, choose **Edit Chart**.

3. Modify the properties of the chart. For details, see Step 3 in the **Create a chart** section.

See Also

Manage User Dashboards

[Drill down in a chart]

Drill down in a chart

You can drill down into a segment on a chart to filter chart data for that segment. For example, you can drill down on one segment of a sales pipeline chart. You can also change the chart type as you drill down.

1. Open the list of records you want to chart, and then click the chart bar to the right of or above the list of records.
2. Follow the steps for the app you're using.

If using the CRM web application

a. Click the **Charts** area.

If using CRM for Outlook

a. In the ribbon, click **Chart Pane**, and then select where you want the chart to be displayed.

3. In the chart area, click the arrow next to the chart name, and then click the name of a chart.
4. Click the category area of the chart you want to drill down into.
5. In the shortcut menu, click **Select Field**, and then click the field to group by.
6. Click the button for a chart type.

7. Click **OK**.

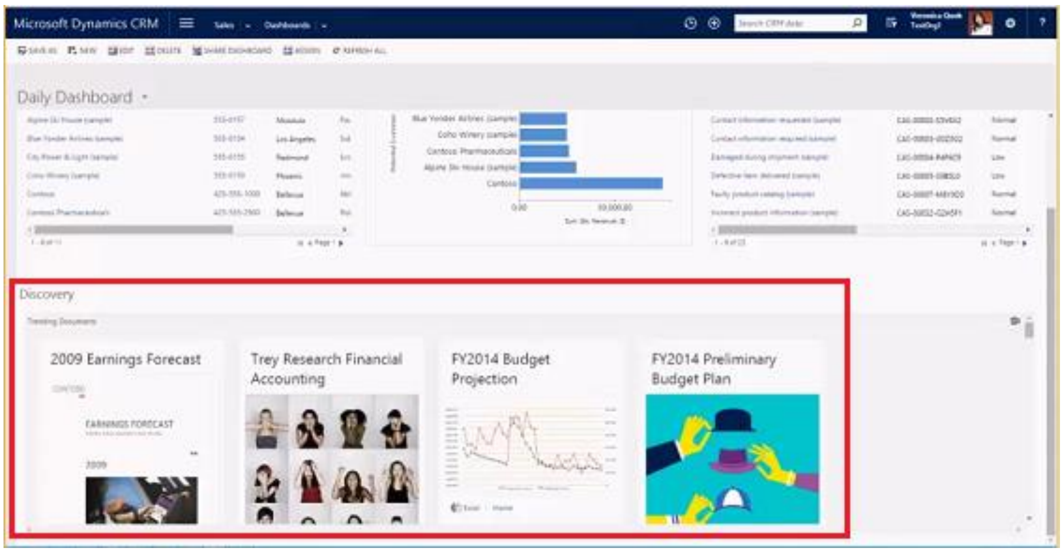
   Note
   To go back to the previous chart, click **Back**.

See Also

[Create or edit a chart]

View relevant and trending information with Office Delve

Office Delve in CRM is a new way to find and discover relevant and trending documents across your organization. Delve searches across your company and uses Azure Machine Learning to provide a view of the documents you are most interested in based on who created, viewed, edited, or shared the documents. Delveis a new dashboard component that can be added to any user or system dashboard so you can view trending information from within CRM.



View trending information important to you.

To use Delve, the system administrator must first enable it. More information: [Enable Office Delve].

Important
This feature requires that you have an Office 365 subscription or a subscription to an online service such as SharePoint Online or Exchange Online. For more information, see [What is Office 365 and how does it relate to CRM Online?]

Add Delve to a dashboard

You can add Delve to an existing dashboard or create a new dashboard and add it.

New dashboard

To add Delve to a new dashboard, follow these steps.

1. On any dashboard page, click **New**.
2. Choose a layout, and then click **Create**.
3. Click **DELVE**, and then drag the **DELVE** component onto the dashboard and double-click it to set the properties.
4. Add other web components as desired.
5. Save the dashboard.

Existing user dashboard

To add Delve to an existing user-created dashboard, follow these steps.

1. Open the user dashboard.
2. Click **Edit**.
3. Click **DELVE**, and then drag the **DELVE** component onto the dashboard and double-click it to set the properties.
4. Save the dashboard.

Existing system dashboard

To add Delve to an existing system dashboard, follow these steps.

Note

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

1. Click **Settings** > **Customizations** > **Customize the System**
2. Under **Components**, click **Dashboards**. Select a dashboard and then double-click it to view the dashboard components.
3. Click **DELVE**, and then drag the **DELVE** component onto the dashboard and double-click it to set the properties.
4. Save the dashboard.

Open Office Delve

From any dashboard with the Delve web component installed, you can open Office Delve in a separate browser page.

1. Open a dashboard with the Delve component installed.
2. Double-click the **Open Office Delve** icon.

See Also

[Enable Office Delve]

[What is Office Delve?]

[How does Office Delve know what's relevant to me?]

[Office Delve for Office 365 admins]

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. Go to **Rollup Queries**. How do I get there?

3. To create a new rollup query, in the **Records** group, click **New**.

   -OR-

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

Select the goal you want, and then click **More Commands** •••, and then click **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**.

See Also

Create or edit a goal

Progress Against Goals report

Drive more sales

Nurture sales from lead to order

The sales process in Microsoft Dynamics CRM can help you close more sales and achieve higher customer satisfaction. You can achieve more consistent sales interactions by following the sales process as it takes you through each stage, from creating a lead to closing the sale. You also end up with a more complete history, which you can refer to later on if you plan to work with your customer again in the future, or if your customer needs support.

Your sales process begins with a lead—someone who is interested in the products or services you provide. Your leads might be automatically generated by Microsoft Dynamics Marketing, or they might come from other sources, such as website opt-in pages, email queries, or business cards you gather at trade shows.

	Great job! You've got your lead…now what? If your lead isn't already in CRM, start by creating your lead in the system. After you've determined that your lead is interested in your solution and has the appropriate purchasing power, qualify your lead. Qualifying a lead in CRM converts it to an opportunity.	Create or edit a lead Qualify a lead and convert it to an opportunity
	In this stage, you identify stakeholders, competitors, and	Create or edit an opportunity

	sales team members and come up with a proposed solution.	
	Now it’s time to present your proposal to your potential customer.	[Create or edit an opportunity](#) [Create or edit a quote](#)
	Did your opportunity accept or reject your proposal? Hopefully, congratulations are in order! Either way, at this stage you need to close your opportunity. This can include filling orders, preparing invoices, and sending follow-up messages, depending on how your organization handles the end game.	[Create or edit an order](#) [Create or edit an invoice](#) [Close an opportunity as won or lost](#)

Note

Your CRM system might look different because it was customized. This walkthrough guides you through the basic sales process, but your organization might offer further training for your system.

Create or edit a lead

In Microsoft Dynamics CRM, you use leads to keep track of business prospects that you haven't yet qualified through your sales process. A lead can be someone you’ve never done business with before, or it could be an existing client. You might get leads from different sources, such as advertising, networking, or email campaigns.

On this page:

Create a lead

1. Go to **Sales** > **Leads**. [(How do I get there?)](#)

2. Click **New**.
3. In the **Summary** area of the **Lead** screen, type your lead's company and contact information.
4. In the **Details** area of the **Lead** screen, type information about your lead's industry and preferred contact method.
5. Add any notes and activities (for example, phone calls or emails) related to this lead. More information: Keep track of notes, tasks, calls, or email with activities
6. Click the **Save** button on the bottom right of the screen.

Edit a lead

1. Go to **Sales** > **Leads**. (How do I get there?)
2. Click the lead you want to edit.
3. Add any extra details you have about your lead.
4. Click the **Save** button on the bottom right of the screen.

Additional considerations

- Nurture your leads through a CRM marketing campaign. More information: Get started with CRM marketing
- Automate your lead generation with coordinated marketing campaigns. More information: Microsoft Dynamics Marketing
- Research leads through social media channels like LinkedIn and Twitter. More information: InsideView

Tips and tricks

Need a faster way to enter leads? Try one of these:

- Quick create--Enter new contacts (or other data)--fast!
- Import accounts, leads, or other data

Typical next steps

Qualify a lead and convert it to an opportunity

Nurture sales from lead to order—learn about the sales process

See Also

Print leads, quotes, and other records

Qualify a lead and convert it to an opportunity

Does your lead have what you're looking for—and vice versa? Once you've identified the timeframe, budget, purchase process, and decision makers for the sale, it's time to qualify your lead. Qualifying a lead in Microsoft Dynamics CRM converts it to an opportunity.

Ideally, your leads or prospects should have a need that you can provide a solution for, and have the budget and influence necessary for making the purchasing decision. In addition, you should be able to provide their solution within the time frame they need it.

On this page:

Qualify a single lead

1. Go to **Sales** > **Leads**. (How do I get there?)
2. Select the lead you want to qualify.
3. In the **Qualify** section of the sales process bar, type in all applicable information.
4. Click **Qualify** at the top of the **Lead** screen.
5. Click the **Save** button at the bottom right of the screen.

Qualify multiple leads

1. Go to **Sales** > **Leads**. (How do I get there?)
2. Select the check box next to all leads that you want to qualify.
3. Click **Qualify** at the top of the screen.

Additional considerations

- Nurture your leads through a CRM marketing campaign. More information: Get started with CRM marketing
- Automate your lead qualification process with Microsoft Dynamics Marketing. More information: Microsoft Dynamics Marketing
- Qualify leads faster with Insights

Typical next steps

Create or edit an opportunity

Nurture sales from lead to order—learn about the sales process

See Also

Print leads, quotes, and other records

Insights for Microsoft Dynamics CRM - powered by InsideView

Create or edit an opportunity

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.

At this point in the sales process, you're most likely in either the **Develop** or **Propose** stage. More information: Nurture sales from lead to order

On this page:

- Create an opportunity
- Edit an opportunity
- Additional considerations
- Tips and tricks
- Typical next steps

Create an opportunity

If you're following the sales process from start to finish, you qualify a lead to turn it into an opportunity. More information: Nurture sales from lead to order

If you want to create an opportunity without first creating a lead, do the following:

1. Go to **Sales** > **Opportunities**. (How do I get there?)
2. Choose **New**.
3. In the **Summary** area of the **Lead** screen, type your lead's company and contact information.
4. In the **Details** area of the **Lead** screen, type information about your lead's industry and preferred contact method.
5. Add any notes and activities (for example, phone calls or emails) related to this lead. More information: Keep track of notes, tasks, calls, or email with activities
6. To add stakeholders, in the **Stakeholders** area, choose **+**.
7. To add sales team members, in the **Sales Team** area, choose **+**.
8. To add competitors, in the **Competitors** area, choose **+**.
9. To add products, in the **Products** area, choose **+**.
10. To add a quote, in the **Quotes** area, choose **+**. More information: Create or edit a quote
11. Choose the **Save** button on the bottom right of the screen.

Edit an opportunity

1. Go to **Sales** > **Opportunities**. (How do I get there?)
2. Choose the opportunity you want to edit.
3. Add any extra details you have about your lead.
4. Choose the **Save** button on the bottom right of the screen.

Additional considerations

- A way that might help you increase your sales is to add all products that your customer might need. Your CRM system might offer product bundles or product families to make it easier for you to choose products for upsell and cross-sell.
- Be sure to add all stakeholders for your project. A stakeholder is anyone who should participate in, review, or approve your proposed solution.
- If other people in your organization are working on this sale, be sure to add them as sales team members.
- Nurture your opportunities through a CRM marketing campaign. More information: Get started with CRM marketing

Tips and tricks

Need a faster way to enter opportunities? Try one of these:

- Quick create--Enter new contacts (or other data)--fast!
- Import accounts, leads, or other data
- Qualify leads faster with Insights

Typical next steps

Create or edit a quote

Nurture sales from lead to order—learn about the sales process

See Also

Run a report

Use Bing Maps to view a location

Assign a record to a user or team

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

Print leads, quotes, and other records

Insights for Microsoft Dynamics CRM - powered by InsideView

Create or edit a quote

One way you might increase your sales is to add all products that your customer might need to your quote. Your Microsoft Dynamics CRM system might offer product bundles or product families to make it easier for you to choose products for upsell and cross-sell.

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.

On this page:

- [Create a quote from an opportunity]
- [Create a quote]
- [Edit a quote]
- [Typical next steps]

Create a quote from an opportunity

1. Go to **Sales** > **Opportunities**. (How do I get there?)
2. Choose the opportunity you want to add a quote to.
3. In the **Quotes** area of the **Opportunity** screen, choose **+**.
4. To add products from your opportunity to your quote, click **Get Products** at the top of the **Quote** screen and choose **OK**.
5. Type shipping and payment information in the **Shipping Information** area of the **Quote** screen.
6. Type the billing and shipping addresses in the **Addresses** area of the **Quote** screen.
7. Choose the **Save** button at the bottom right corner of the screen.
8. When your quote is ready to send to your customer, choose **Activate Quote** at the top of the screen.

Create a quote

1. Go to **Sales** > **Quotes**. (How do I get there?)
2. Choose **New**.
3. Add your customer's contact information.
4. To add products from your opportunity to your quote, choose **Get Products** at the top of the **Quote** screen and choose **OK**.
5. In the **Shipping Information** area, type shipping details.
6. In the **Addresses** area, type shipping and billing addresses.
7. Choose the **Save** button at the bottom right corner of the screen.
8. When your quote is ready to send to your customer, choose **Activate Quote** at the top of the screen.

Edit a quote

1. Go to **Sales** > **Quotes**. (How do I get there?)
2. Choose the quote you want to edit.
3. Add or change any details about your quote.
4. Choose the **Save** button at the bottom right corner of the screen.
5. When your quote is ready to send to your customer, choose **Activate Quote** at the top of the screen.

Typical next steps

Create or edit an order

Nurture sales from lead to order—learn about the sales process

See Also

Run a report

Assign a record to a user or team

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

Print leads, quotes, and other records

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.

One way that can help you increase your sales is to add all products that your customer might need to your order. Your CRM system might offer product bundles or product families to make it easier for you to choose products for upsell and cross-sell. If you've already prepared a quote for your customer, you can create an order from that quote.

On this page:

Create an order from a quote

Create an order

Edit an order

Typical next steps

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. Go to **Sales** > **Quotes**. (How do I get there?)
2. Select the quote you want to create an order from.
3. Click **Create Order** at the top of the **Quote** screen.
4. Add a description and indicate whether or not you want to close the opportunity in the **Create Order** window and click **OK**.
5. To add products from your opportunity to your quote, click **Get Products** at the top of the screen, select your opportunity, and click **OK**.
6. Click the **Save** button at the bottom right corner of the screen.

Create an order

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

1. Go to **Sales** > **Orders**. [(How do I get there?)]
2. Click **New**.
3. Add your customer's contact information.
4. To add products from your opportunity to your order, click **Get Products** at the top of the screen, select your opportunity, and click **OK**.

   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. In the **Shipping Information** area, type shipping details.
6. In the **Addresses** area, type shipping and billing addresses.
7. Click the **Save** button at the bottom right corner of the screen.

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.

Edit an order

1. Go to **Sales** > **Orders**. (How do I get there?)
2. Select the order you want to edit.
3. Add or change any details about your order.
4. Click the **Save** button at the bottom right corner of the screen.

Typical next steps

Create or edit an invoice

Nurture sales from lead to order—learn about the sales process

See Also

Print leads, quotes, and other records

Create or edit an invoice

When a customer places an order, 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.

On this page:

Create an invoice from an order

1. Go to **Sales** > **Orders**. (How do I get there?)
2. Choose the order you want to create an invoice from.
3. Choose **Create Invoice** at the top of the screen.
4. Review the contents of the invoice and make any additions or corrections before sending to your customer.

Create an invoice

1. Go to **Sales** > **Invoices**. (How do I get there?)
2. Choose **New**.
3. Add your customer's contact information.
4. Choose **Save** at the top left to create the invoice record.
5. To add products from your opportunity to your order, choose **Get Products** at the top of the screen, select your opportunity, and click **OK**.
6. To add information about a product on the invoice, in the **Products** area, choose the **Add a Product** button ➕, and then choose 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.

   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.
7. In the **Shipping Information** area, type shipping details.
8. In the **Addresses** area, type shipping and billing addresses.
9. Choose the **Save** button at the bottom right corner of the screen.

Note

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

Edit an invoice

1. Go to **Sales** > **Invoices**. (How do I get there?)
2. Choose the invoice you want to edit.
3. Add or change any details about your invoice.
4. Choose the **Save** button at the bottom right corner of the screen.

Typical next steps

Close an opportunity as won or lost

Nurture sales from lead to order—learn about the sales process

See Also

Print leads, quotes, and other records

Close an opportunity as won or lost

If your customer has accepted your proposal, congratulations! Whether your customer accepted or declined your proposal, however, it's now time to close that opportunity.

1. Go to **Sales** > **Opportunities**. (How do I get there?)
2. Choose the opportunity you want to edit.
3. To close your opportunity as won, choose **Close as Won** at the top of the **Opportunity** screen.

   - OR -

   To close your opportunity as lost, choose **Close as Lost** at the top of the **Opportunity** screen.

See Also

Nurture sales from lead to order

Print leads, quotes, and other records

Provide great customer service

Get started with service

Set up service terms

Set up and define rules for service

Set up and define rules for service

Work with cases

Create and manage activities

Manage queue items

Use the Unified Service Desk

Get started with service

Key steps to get started with customer service

Customer service is an important part of your organization. To help you get started, we've created an easy to read top tasks list.

Task	Description	Learn more
Find support cases that are assigned to you	See the support cases assigned to you along with other cases in the support queue.	Find what's assigned to you in a queue
Track your interaction with your customer	Use the activities area in a support case to track interaction between you and the customer.	Add a phone call, task, email, or appointment activity to a case or record
Create and manage a support case	Learn everything you need to know about working on a support case. • Create a case • Find a solution from similar cases • Edit or resolve a case • Reassign or add it	Create and manage a case Quick ref card: For customer service reps eBook: Give create customer service Video: How to create, reactivate, and reassign a case (1:47)

Task	Description	Learn more	
	back to the support queue		
Find information in knowledge base articles	Use the knowledge base to get answers to common questions, solutions to problems, and more.	Use articles in the knowledge base eBook: Use KB articles to help your customers	
Get reports on support trends	View reports to manage your work and identify trends and issues.	Case Summary Table report Neglected Cases report Top knowledge base articles report	

See Also

eBook: What's new in customer service

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 **Microsoft Dynamics CRM** > **Service** > **Service Calendar**.
2. Click **Service Activity**. This bypasses the scheduling form.
3. Select the service to test.
4. Click **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.

Important

For Microsoft Dynamics CRM Online organizations, some features like service level agreements (SLAs), entitlements, and parent and child cases are available if you've applied product updates for CRM Online Spring '14 or later, or if you've installed the CRM Online 2015 Update or later. For on-premises CRM organizations, these features are available if you've installed CRM 2013 Service Pack 1 (on-premises) or later, or if you've updated to CRM 2015 or later. Interested in getting this feature? Find your CRM administrator or support person

Case settings

Create or edit a queue

Define settings for parent and child cases

Create rules to automatically route cases

Automatically create a case from an email

Set up rules to automatically create or update records in CRM

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

Edit existing SharePoint site records

See Also

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.

For more information about customizing business processes, see eBook: Customize a business process.

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.

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 the **More Commands** ••• button, and then click **Edit Process**.

3. To add a new stage, click **+ Insert stage** under the stage where you want to add the new stage. You can add up to 30 stages, and each stage can contain up to 30 steps.
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 the up and down arrows at the bottom of the form.
5. To add a step within a stage, click **+** at the bottom of the **Step Name** column, name the step, and then move it to where you want it to appear in the list of steps using the up and down arrows at the bottom of the form. Then click the associated field in the **Value** column and select from the drop-down list.
6. Click **Save**.

See Also

Create and manage a case

Improve customer service with better automation and tracking

Improve customer satisfaction by tracking and recording 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. More information: Set up queues to manage activities and cases

Automatically create cases from email or social records

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 send a response to the customer with case details by using a default template. More information: Automatically create a case from an email

Track service levels through SLAs

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

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

Find out 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 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

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 defining clearly 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 that define the structure for individual articles, such as the question and answer sections in a 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 email.

A typical knowledge management process 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. When approved, it is available in search results, to view, or to share with colleagues and customers after about 15 to 20 minutes.

1. Go to **Service** > **Articles**. (How do I get there?)
2. To create a new article: Click **+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 you want to use to create the article, and then click **OK**.

   Note

   If you need other templates, you can ask 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 needs to approve these.
5. In the **Actions** group, click **Submit**.

Edit, reject, or approve an article

To make sure 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 **Microsoft Dynamics CRM** > **Service** > **Articles**, open the Unapproved Articles view, and then click the article. To add comments to the article, in the **Actions** group, click **Add Comments**.
- To reject an article, open the article, and in the **Actions** group, click **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 **APPROVE**.

  When you approve an article, it is automatically published and 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 you need. But if you aren't sure what text to use before you begin looking, you can also browse through articles by subject.

1. Go to **Service** > **Articles**. (How do I get there?)
2. In the **Search** box, type the keyword, and then click the Search button.
3. To filter search results, click the Search Tool button, and then select one of the following:
   - Full-Text Search. Looks at all the published articles for the specified keyword.
   - Keyword Search. Compares the keyword you specified with alternate terminology assigned to an article to find articles. For example, an article about bicycles might use keywords like "bike" or "cycle."
   - Title Search. Looks at the title of all published articles for the keyword you specified.
   - Subject Search. Looks at the subject of all published articles for the keyword 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 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 will include "running" and "runs."

See Also

eBook: Use KB articles to help your customers

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 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. Go to **Service** > **Social Profiles**. (How do I get there?)

   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 see 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 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 you want to block.
2. In the **Blocked** drop-down menu, select **Yes**.
3. Click the **Save** button.

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.

Set up service terms

Define service level agreements (SLAs)
Disable or enable Service Level Agreements (SLAs) for cases
Create an entitlement to define the support terms for a customer
Create a customer service schedule and define the work hours
Use the workplace calendar
Set up a holiday schedule
Set when your business is closed
Schedule time off
Create or edit a service
Create or edit a contract
Define support terms for customers by using contracts
Add facilities and equipment for service scheduling

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

Alternately, you can set up a default SLA for the organization.

Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

On this page:

Standard vs. enhanced SLAs: What's the difference?

Microsoft Dynamics CRM lets you create two types of SLAs: Standard and Enhanced. We recommend that you use enhanced SLAs, which have some additional capabilities that the standard SLAs don't have. With an enhanced SLA, you can:

- Pause an SLA when the case is on hold, so that the time the case is on hold isn't considered in SLA calculations.
- Add success actions to an SLA. For example, you may want to send communication internally or outside your organization when the SLA has succeeded. Success actions are initiated only when the success condition is met on time, not when it is breached.
- Track SLA statuses and times right on the case form by default. These details are tracked through the SLA KPI Instance record type.

Create a standard SLA

1. Make sure that you have the Customer Service Manager, System Administrator, or

System Customizer security role or equivalent permissions.

When you activate 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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Go to **Service Level Agreements**.
4. To create a new SLA, on the command bar, click the **New** button.

   -OR-

   To edit an SLA, in the list of records, select the SLA, and on the command bar, click **Edit**.
5. Fill in your information:
   - **Name**.
   - **Applicable From**. Select the case field that specifies the date and time from which the SLA items will be calculated. For example, if you click the **Created On** field, the calculations for service level agreements will start from the time the case is created.
   - **Business Hours**. Select a customer service schedule record that defines your support organization's business hours. This is useful in the SLA time-tracking calculations. If a business hours record (customer service schedule) isn't selected, the work hours are considered as 24 x 7.
   - **SLA Type**. Select **Standard**.
   - **Allow Pause and Resume**. Select **Do Not Allow**. Because standard SLAs do not support pausing and resuming of SLAs, you can set this field to **Allow** only when you're creating an enhanced SLA.
6. Click **Save**.

To add SLA details, in the **SLA Details** section, click the **Add** button +.

You add SLA details to define the key performance indicators (KPIs) or metrics for the service level agreement. 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 failure and warning actions that need to be taken when a service level metric isn't met for a customer case.

SLA KPIs are performance indicators that you'd like to track, for example First Response or Resolve By. SLA items refer to SLA KPIs based on specific conditions. You can add multiple SLA items and arrange them in the order that works for you. For any given KPI, only the first SLA item that matches the conditions in the **Applicable When** section is applied.

Note

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

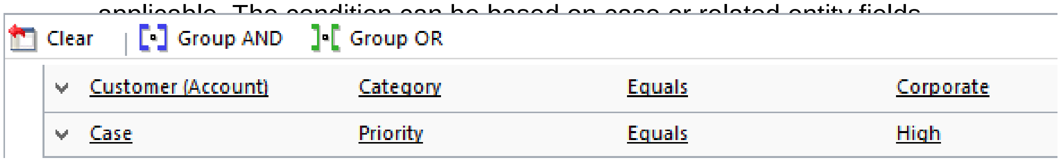
8. Fill in the information in the New SLA Item form:

   - **Name**. Type a meaningful name.
   - **Related Case Field**. Select a field of DateTime type 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, select the **First Response By** option from the drop-down box. If required, ask your system customizer to create new fields of type DateTime.

     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 will be reached for the respective SLA item. For example, select **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, assuming the business hours are 24*7.

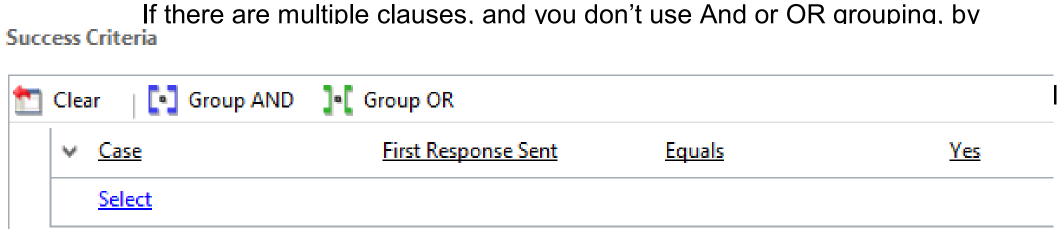
     Tip

     By default, there are four options available in the drop-down box. If you want to track other KPIs, ask your system customizer to create case fields of type date-time.
   - 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.



Note

If there are multiple clauses, and you don't use And or OR grouping, by



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Note

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

- Under **SLA Item Failure**, in the **Failure After** drop-down box, select when the SLA items will be considered as failed. For example, if you select **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 select 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 isn't 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 select **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, select 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 select **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.

9. Click **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.

Create an enhanced SLA

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

   When you activate 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. Go to **Settings** > **Service Management**. [(How do I get there?)](#)
3. Go to **Service Level Agreements**.
4. To create a new SLA, click the **New** button.

   -OR-

   To edit an SLA, in the list of records, select the SLA, and on the command bar, click **Edit**.
5. Fill in your information
   - **Name**
   - **Applicable From**. Select the case field that specifies the date and time from which the SLA items will be calculated. For example, if you select the **Created On** field, the calculations for service level agreements will start from the time the case is created.
   - **Business Hours**. Select a customer service schedule record that defines your support organization's business hours. This is useful in the SLA time-tracking calculations. If a business hours record (customer service schedule) isn't selected, the work hours are considered as 24 x 7.
   - **SLA Type**. Select **Enhanced**.
   - **Allow Pause and Resume**. Select **Allow** if you want the SLA to pause during the time the case is on hold. You can set the case statuses that will be considered "on hold" in the **Service** tab of System Settings dialog box. More information: [System Settings dialog box - Service tab](#). You can set this field to **Allow** only when you're creating an enhanced SLA.

6. Click **Save**.

To add SLA details, in the **SLA Details** section, click the **Add** button +.

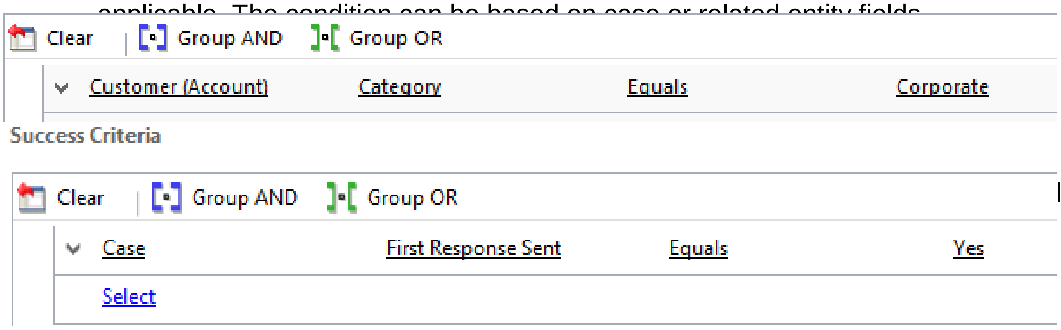
8. Fill in your information in the SLA Item form:
   - **Name**. Type a meaningful name.
   - **SLA KPI**. Select the key performance indicator the SLA item is about. For example, if you are creating a KPI for sending the first response within a specified time, select the **First Response By KPI** option from the drop-down box.

     For example, select **First Response By KPI** in the **SLA KPI** field, and set **Failure After** to 2 hours from case creation. If the case is created at 09:00, the **Failure Time** field of the SLA KPI Instance record is set to 11:00 assuming the business hours are 24*7.

     Tip

By default, there are two options available in the drop-down box. If you want to track other KPIs, for enhanced SLAs ask your system customizer to create new case fields (of type lookup) that refer to the SLA KPI Instance entity.

- 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.



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Note

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

- In the **Success Action** section, click **Add Step** and specify the actions that you want CRM to take when the success criteria is met before the violation time. For example, click **Add Step** > **Change Status**. Then, in the first drop-down box, select **Case**, and in the next drop-down box, select **Information Provided**. This option is available only if you're creating enhanced SLAs.
- Under **SLA Item Failure**, in the **Failure After** drop-down box, select when the SLA items will be considered as failed. For example, if you select **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 select 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 select **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, select 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 select **Create New Message**, and click **Set Properties**. 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.

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.

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

You can only have one default SLA at a time.

Note

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

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 - Service tab

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 been exceeded. This happens even if the failure or warning actions were already initiated before the case was updated. To avoid this, you can request that your system customizer 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.

Apply SLA on demand

With the enhancements made to SLAs, you can now apply SLAs to case records manually. It is also possible to automatically apply SLAs to cases based on your business logic (using workflows or custom plugins).

For example, if your customers are spread across geographies, you can have multiple SLAs with different business hours and holiday schedules for different geographies. You can set-up business logic to apply SLAs on case records based on the region of the customer to make sure that the SLA time calculation happens based on the correct geography.

To create workflows so SLAs are automatically applied, talk to your customer service managers, administrator, or customizer. More information: [TechNet: Workflow processes]

To apply SLAs on-demand manually, choose the SLA in the SLA field. This field is not available by default on the case form. Ask your system administrator to add the field on the case form.

Track SLA status and details

You or the CSR working on the case can see the SLA details right on the case form.

The following table explains what happens when a standard or enhanced SLA applies to a case form:

Case form with standard SLA applied	Case form with enhanced SLA applied
Only the failure time is tracked and saved on the case record. You can request the system administrator or customizer to add a timer to the case form. The timer shows the time remaining to meet the SLA or the time elapsed since the SLA failed. More information: Add a timer control to the Case form to track time against an SLA	When an enhanced SLA is applied to a case, a related SLA KPI Instance record is created for each SLA KPI that is tracked for that case. In the **Enhanced SLA Details** section of the case record, you'll see a timer and also the SLA KPI instances for the case with their statuses and failure and warning time. When a service rep puts a case on hold, the status of the SLA KPI Instance is set to Paused. You can see the time for which a case was on hold and the last time the case was put on hold. These details are not available on the case form by default, but your system customizer can add these fields on the case form for you. The on hold time is the time for which the case was set to a status that you defined as On-Hold statuses in the System settings dialog box. More information: System Settings dialog box - Service tab When the service rep resumes a case, the status of the SLA KPI Instance record is updated. The following details are updated in the record if the SLA isn't violated: • Failure time • Warning time • Total time the case is on hold If the service rep puts the case on hold after the warning time, then the warning time isn't updated when the case is resumed.

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 a case from an email

Create rules to automatically route cases

Create and manage a case

Disable or enable Service Level Agreements (SLAs) for cases

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. If you disable an SLA, you can still create or change SLA records. However, SLAs won't be applied to case records.

Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

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. Go to **Settings** > **Administration**. (How do I get there?)
3. Click **System Settings**.
4. On the **General** tab, under **Disable SLAs**, select **Yes** to disable SLAs. To enable SLAs, select **No**.
5. Click **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 create cases for them. accordingly

Note

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Choose **Entitlements**.
4. To create a new entitlement from a template, click **+ New** > **From Template**. In the **Select Template** dialog box, click the entitlement template, and click **Select**.

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

   -OR-

   To edit an entitlement, in the list of records, click the entitlement, and then on the command bar, click **Edit**.
5. Fill in your information. Use the handy tooltips as a guide.
   - **Name**. Give the entitlement a meaningful name.
   - **Primary Customer**. Choose the customer you're creating this entitlement for.

- **Start Date**. Choose the date from which the customer will be entitled for support.
- **End Date**. Choose the date after which the customer will no longer be entitled for support.
- **Restrict based on entitlement terms**. To make sure no cases are created when the entitlement term is over, click **Yes**. When you choose **Yes**, a customer service agent won't be able to create a case when **Remaining Terms** is fewer than zero OR when the term remaining for a channel is less than zero.
- **SLA**. Choose a service level agreement (SLA) record to associate the service levels or key performance indicators for the support you're 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 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 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**, 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.

6. Click **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 the 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 **+**.
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 **+**.
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, click **+ New** to create a new one.

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 **+**.
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 **+ 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 **Activate**.
2. In the **Confirm Activation** dialog box, click **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 **Deactivate**.

Set as default entitlement

If you're on Microsoft Dynamics CRM Online 2015 Update 1 or later, you can activate the entitlement and then set it as the default entitlement for a customer. The entitlement terms from the associated entitlement are automatically decremented. However, if you don't want the entitlement terms to be decremented for a case, click **Do not decrement entitlement terms** on the command bar.

1. On the command bar, click **Set As Default**.
2. In the **Confirm set default** dialog box, click **OK**.

   Now the default entitlement will automatically be applied when a case is created or when a case is updated depending on what you selected for default entitlements in the system settings area. For more information, see the "Automatically apply entitlement" section in step 4 here, System Settings dialog box - Service tab.

Associate entitlements to cases

In a case record, in the **Entitlement** field, click the **Lookup** button, 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 **Cancel**.

Renew an entitlement

To renew a canceled or expired entitlement, open the entitlement, and then on the command bar, click **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 the current date plus the number of days between the end date and 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 (SLAs).

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.

Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

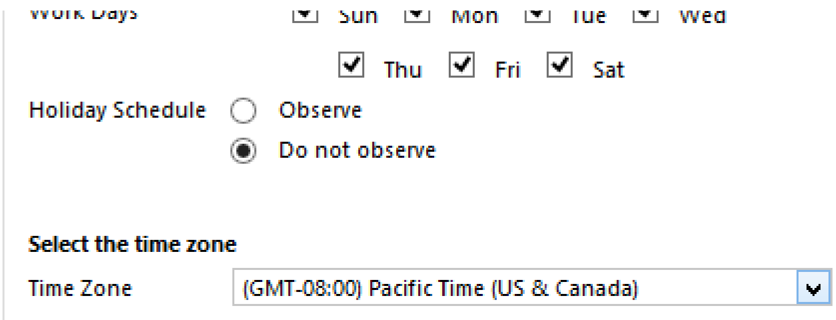
Create a customer service schedule

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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Click **Customer Service Schedule**.
4. To create a new customer service schedule, click **+ New**.



e schedule, and

x, type a
d click **Create**.
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 **Set Work Hours**.

  To set the work hours for the days, click **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]

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

Define the work hours for the schedule

In the **Set Work Hours** dialog box, complete the following fields, and then click **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 **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

Use the workplace calendar

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

1. Go to **Marketing** > **Calendar**. (How do I get there?)
2. 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.
3. To change the dates on the calendar, on the calendar control, click the arrows to see different months, or click a specific date.
4. 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 shows 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) affected 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 an 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 affected by the holiday closure.

Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: [Find your CRM administrator or support person]

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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Click **Holiday Schedule**.
4. Click **+New** and in the **Create Holiday Schedule** dialog box, enter a name and description for the holiday, and then click **Create**.
5. In the list of holidays, click the holiday you created.
6. When the holiday is open, click **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 **OK**.

The holiday is created and associated with your customer service calendar. After 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

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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Click **Business Closure**.
4. To create a new business closure, on the command bar, click **New**.

   -OR-

   To edit an existing business closure record, open it from the list.
5. 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.
6. To save this business closure, click **OK**.

See Also

Set work hours for 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. Go to **Settings** > **Business Management**. (How do I get there?)
3. Choose **Facilities/Equipment**.
4. In the list, open the resource you want to modify.
5. Under **Common**, click **Work Hours**.
6. On the **Monthly View** tab, select a date on the calendar.
7. On the Actions toolbar, click **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) for 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 don't 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.
8. Click **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 **Options**. On the **General** tab, at the bottom of the page, click the **user information** link.

See Also

Set work hours for 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.

3. Go to **Settings** > **Business Management**. (How do I get there?)
4. Click **Services**.
5. To create a new service, click **New**.

   -OR-

   To edit a service, open a service from the list.
6. 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.
7. In the **Required Resources** area, define a selection rule:

a. Choose a selection rule in the right-hand pane.

Selection rules appear in the tree beside the **Selection Rule** button.

b. Choose 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.

   Warning
   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]

8. When you're ready to save your data, click **Save**.

Activate or deactivate a service

You can make a service available on unavailable for scheduling by activating or deactivating it. To do this, in the list of service records, select a service, then click **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 for 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 with the account correctly and allotments are not recorded.

1. Go to **Service** > **Contracts**. [(How do I get there?)]

2. Click **+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 most of the fields when the fields in the **Header** section are entered; however, you can change or enter the information as needed. **Bill To Address** is required to change the status of the contract to invoiced.

5. To add activities or notes, click **Activities** or **Notes**. More information: [Add a phone call, task, email, or appointment activity to a case or record]

   Note

   - The contract becomes active when 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 **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-

   In the contract record, on the nav bar, click the arrow next to the contract name >

Contract Lines, and then click **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 **Save**.

4. To add a note, under **Notes**, click **Enter a note**, type the details, and click **Done**.

Note

You cannot delete a contract line after 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 **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 **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 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 **Hold Contract**.

- To release the contract that’s on hold, in the contract record, on the command bar, click **Release Hold**.
- To renew a canceled contract, in the contract record, on the command bar, click **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]

[eBook: What's new in customer service]

Add facilities and equipment for service scheduling

Facilities and equipment are resources you'd use to perform services for your customers. Facilities could be physical spaces like service bays or conference rooms and equipment could be tools or other assets. Add these resources to Microsoft Dynamics CRM to ensure optimal services to your customers.

Add a 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. Go to **Settings** > **Service Management**. (How do I get there?)

   -OR-

   Go to **Settings** > **Business Management**. (How do I get there?)
3. Choose **Facilities/Equipment**.
4. On the command bar, choose **New**.
5. Fill in the information as required.
   - **Name**. Enter the name of the facility or equipment you want to add for service scheduling.

Business Unit. CRM enters the business unit automatically. To choose a different business unit, choose the **Lookup** button and then select from the list.

- **Site**. Select the location where the facility or equipment is located.

  Tip
  Make sure the site and the customer are in the same location. Resources for a given service activity should also be located at the same site.
- **Primary Email**. Enter the email address of the site manager or equipment manager. If there are any updates or cancellations related to the schedule, facilities, or equipment, notifications are sent to this email address.
- **Time Zone**. Select the appropriate time zone to determine availability for the facility or equipment. By default, this is set to the time zone you've selected in the **General** tab of the **Set Personal Options** dialog box. More information: Set personal options
- **Description**. Add details about the facility or equipment, such as the numbers, size, make, or model.

6. When you're done, choose **Save** or **Save and Close**.

See Also

Basics of service and service scheduling

Set up and define rules for service

Define subjects to categorize cases, products, and articles

Microsoft Dynamics CRM includes a subject organizational structure that lets you mark and categorize service cases, knowledge base articles, products, and sales literature. By using the subject hierarchy, you can classify service cases to quickly provide service to your customer. You can also provide the appropriate sales literature. You'll also be able to better understand gaps in your sales literature, evaluate service quality by subject area, and improve reporting on the performance of your products.

Create or edit a subject

1. Go to **Settings** > **Business Management**. (How do I get there?) Click > **Subjects**. You can also get there by going to **Settings** > **Service Management** > **Subjects**.
2. To add a subject, under **Common Tasks**, click **Add a Subject**.

   -OR-

   To edit a subject, in the **Subject Tree**, select a subject, and then under **Common Tasks** click **Edit Selected Subject**.
3. In the **Subject** dialog box, enter the required information:
   - **Title**: Type a name for the subject. This is a required field.
   - **Parent Subject**: To search for and select a parent subject for the new subject, click the **Lookup** button.

     -OR-

     To make the new subject a parent subject, leave the **Parent Subject** box empty.
   - **Description**: Type a descriptive statement about the subject.
4. Click **OK**.

See Also

Create and manage a case

Get started with service management

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. Go to **Settings** > **Business Management**. [(How do I get there?)]
3. Click **Services**.
4. In the list of services, open the service to which you want to add a selection rule.
5. On the **Service** form, click **Required Resources**, and then double-click or double-tap the first selection rule in the right pane.

Selection rules appear in the tree beside the **Selection Rule** button .

6. 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.
7. Click **OK**.
8. Under **Common Tasks**, you can add resources:
   - To add individual users, facilities, equipment or teams to the selection rule, click **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 **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 **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 **Yes, save the selection as a resource group with the name**, enter a name in the box, and then click **OK**. The new resource group appears in the selection tree.
9. Click **OK**.
10. Click **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

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. Go to **Settings** > **Business Management**. (How do I get there?)
2. Click **Resource Groups**.
3. On the Actions toolbar, click **New**.
4. 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 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.
5. Click **Save**.

   After you save the record, **Resources** appears under **Common**.
6. Click **Resources**, and then on the Actions toolbar, click **Add Resources**.
7. 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."
8. Click **OK** to add the selected resources to the resource group.
9. Click **Save** or **Save and Close**.

Edit a resource group

1. Navigate to your area.

   Go to **Settings** > **Business Management**. (How do I get there?)

2. Click **Resource Groups**.
3. Open the resource group you want to change.
4. In the **Resource Groups** form, change the information.
5. Click **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 **More Actions**, and then click **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.

See Also

Get started with service

Set up and define rules for service

Use sites to manage your service locations

Create sites to define the locations where you provide service to your customers. When you're scheduling resources, you can define which resources will work on which site.

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. Go to **Settings** > **Business Management**. (How do I get there?)

3. Click **Sites**.
4. On the Actions toolbar, click **New**.
5. Fill in your information. Use the handy tooltips as a guide.
6. Click **Save**.
7. To add resources, under Common, click **Resources**, and then click **Add Resources**.
8. In the **Look Up Records** dialog box, in the **Look For** drop-down list, you can add facilities/equipment or users as resources.
9. From the list of records, double-click a resource, and click **Add**.
10. Click **Save and Close**.

See Also

Create or edit a service

Create a service activity without checking for conflicts

Find the next available time before creating a service activity

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. Go to **Settings** > **Business Management**. (How do I get there?)
3. Click **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 **OK**.
10. **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. Go to **Settings** > **Business Management**. [(How do I get there?)]
3. Click **Facilities/Equipment**.
4. In the list of records, open the record you want to set the capacity for.
5. In the user record, on the nav bar, click the **chevron** button next to the record name, and then **Work Hours**.

   -OR-

   In the Facilities/Equipment record, under **Common**, click **Work Hours**.
6. 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.
7. In the **Edit Schedule** dialog box, select one of the following and then click **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.

8. In the **Weekly Schedule** dialog box, click 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 for a resource
9. In the **Set Work Hours and Service Restrictions** dialog box, click **Show Capacity**, and then in the **Capacity** column, enter the capacity.
10. Click **OK**.
11. Click **Save & Close**.

See Also

Create or edit a selection rule

Set work hours for 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 go 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.

On this page:

- Set work hours for a facility or equipment
- Set work hours for a user

Set work hours for a facility or equipment

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. Go to **Settings** > **Business Management**. (How do I get there?)

3. Click **Facilities/Equipment**.
4. In the list, open the resource record you want modify.
5. Click **Work Hours**.
6. 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.
7. In the **Edit Schedule** dialog box, select one of the following, and then click **OK**.
   - **This date only**

     This option changes only the date selected.

     Skip to step 10.
   - **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 may affect reports regarding hours worked in the past.
8. 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.
9. Choose 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."
10. In the **Set Work Hours and Service Restrictions** dialog box, complete the following fields, and then click **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 **Add Break**, and then select the start and end time of the break.

11. To define a time when a service will not be available, on the **Service Restrictions** tab, click **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 **OK**.
12. Click **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 **OK**. Then, perform step 10 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.

Set work hours for a user

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.
2. Go to **Settings** > **Security**. (How do I get there?)
3. Click **Users**.
4. Open the user record you want to set work hours for.
5. On the top, select the arrow next to the name of the user.
6. Click **Work Hours**.
7. From the **Set up** drop-down list, choose the schedule display as required..

   Note

   Monthly schedules are the default display; you can choose weekly and daily schedules.

8. Double-click a date on the calendar that is the first day for which you want to set work hours.
9. In the **Edit Schedule** dialog box, select one of the following and then click **OK**.
   - **This date only**

     This option changes only the selected day.

     Skip to step 12.

   - **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 may affect reports regarding hours worked in the past.

10. 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. User 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 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.

11. Choose 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."

12. In the **Set Work Hours and Service Restrictions** dialog box, complete the following fields, and then click **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 **Add Break**, and then select the start and end time of the break.

13. To define a time when a service won't be available, on the **Service Restrictions** tab, click **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 **OK**.
14. To close the **Weekly Schedule** dialog box, click **Save and Close**.

See Also

Set the capacity required for a service or resource

Set when your business is closed

Add and manage users, and set security roles

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. Go to **Settings** > **Administration**. (How do I get there?)
3. Click **Users**.

   If using the CRM web application

   a. In the list, open the resource record you want to modify. The resource name appears in the nav bar. Click the arrow beside the resource name and select **Work hours**.

   If using CRM for Outlook

   a. In the list, open the resource record you want to modify.
   b. Under **Common**, click **Work Hours**.

4. 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.
5. In the **Edit Weekly Schedule** dialog box, select one of the following options, and then click **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 only changes the schedule going forward.

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

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

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

6. In the **Weekly Schedule** dialog box, click the work hours link for the schedule you want to modify.
7. In the **Work Day** dialog box, click the **Service Restrictions** tab.
8. On the Actions toolbar, click **New**.

In the **Service Restrictions** dialog box, find and select a **Service**. Click the **Lookup** button to search for a record.

10. In the **Start time** and **End time** lists, set the time when the facility or equipment is not available, and then click **OK**.
11. Click **OK**, to close the **Work Day** dialog box.
12. Click **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 for 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

In Microsoft Dynamics CRM, you can track multiple issues for a customer, or track the same issue that's affecting multiple customers, using parent and child cases.

For example, you could track a case where work needs to be done by other departments.

The primary case or issue is called the parent case. Any related cases are called a 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 about how information will be inherited.

Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

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, choose **Microsoft Dynamics CRM** > **Settings**.

b. Choose **Settings** > **Service Management**.

If using CRM for Outlook

a. In the Navigation Pane, choose **Settings** > **Business** > **Service Management**.

3. Click **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. 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. 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 **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 cases to the right people at the right time without any manual intervention. You can also use routing rules to route cases that are escalated to specific queues.

Note
This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: [Find your CRM administrator or support person]

On this page:

- [Create a routing rule set]
- [Apply a routing rule set]

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. Go to **Settings** > **Service Management**. [(How do I get there?)]

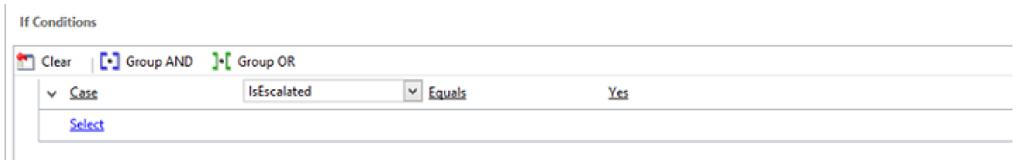
3. Click **Routing Rule Sets**.
4. To create a new routing rule set, click **New**.

   -OR-

   To edit a routing rule set that you already have, in the list of records, click the rule that's in the Draft state, and then on the command bar, click **Edit**.
5. Fill in your information. Use the handy tooltips as a guide.
6. After you enter information in all the required fields, click **Save**.
7. In the **Rule Items** section, click the **Add Rule Item** button **+** 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.
   b. Under **Rule Criteria** in the **If Conditions** section, specify the conditions for



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

Tip

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

8. Click **Save and Close**.
9. In the Routing Rule Set record, click **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.
- You can't edit an active routing rule set. Therefore, if you're importing a solution that includes an active routing rule set into an organization where the rule already exists with the same ID, the solution import will fail.

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 **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 a case from an email

Create or edit a queue

Automatically create a case from an email

Reduce the need for manually creating cases from incoming emails 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 emails to support cases.

Note

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

Create cases automatically using 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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Click **Automatic Case Creation Rules**.
4. To create a new case creation rule, click **New**.

   -OR-

   To edit an existing rule, in the list of rules, select a rule, and then on the command bar, click **Edit**.
5. 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** to indicate that cases will be created automatically from email messages.
   - **Queue**. Select the queue that the rule applies to. For example, if you want to convert email messages and then send them 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 an email to a 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

6. 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 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.

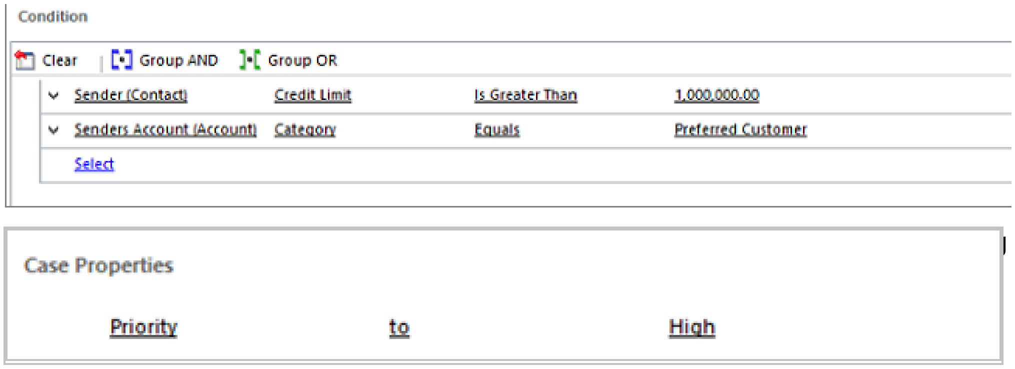
e. Under **Specify Autoresponse Settings**, select the **Send automatic email response to customer on case creation** check box if you want to automatically send email responses to the sender of the email after a case for the email is created.

   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.

7. Click **Save**.
8. 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



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 a case creation rule

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

Once the rule is active, you can't change it. To change a rule, first open the rule and on the command bar, and click **Deactivate**. You can then edit the rule.

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 **Email to Case Settings**.

See Also

Create rules to automatically route cases

Create or edit a queue

eBook: What's new in customer service

Set up rules to automatically create or update records in CRM

horizontaltabbed

Overview

Every organization has multiple applications to capture customer interactions. The ability to channel external data into Microsoft Dynamics CRM records can significantly improve the efficiency of your sales, marketing, and service teams, and increase the quality of your data. You can now direct this data from various applications and external sources into Microsoft Dynamics CRM with the help of *record creation and update rules*.

By using *record creation and update rules* in Microsoft Dynamics CRM, you can automatically create or update system or custom records from incoming CRM activities, such as emails, social activities, or custom activities, without writing any code. Not just that, you can set up the rule to convert the incoming activity into multiple CRM records. For example, you can create a case and a lead from a single social activity.

A record creation and update rule consists of rule items that define the conditions for creating or updating records, and also defines what actions or steps to take on the newly-created records. The rule also contains channel properties that are used to define conditions for rules, and also for setting properties of the record you're creating or updating.

To enable the rule to update records, you must add an **Update** step to the rule. Only the entity that you select in the **Update** step is updated based on the properties you set.

Important

This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person

On this page:

Activities and entities supported by record creation and update rules

By default, CRM supports creating records from the following activities, also called source types in the context of record creation and update rules:

- Email
- Social activity
- Task
- Phone call
- Appointment
- Service activity
- Custom activity

These activities can be converted to any default (system) entity records or custom entity records. For example, you could create a lead, opportunity (system record), or incident (custom record) from an incoming email.

Capture data from external sources

You can also capture additional valuable customer information provided by an external application in the form of JSON (a collection of name-value pairs), and use it to enhance the quality of the target records and set various conditions in the record creation and update rules.

Every default (out-of-the-box) activity or custom activity has an Additional Parameters attribute. This attribute stores the JSON payload received from an external application.

To capture this information in CRM, you can define channel properties and associate them with a particular rule or share them across multiple rules of the same source type. For example, along with a social post, you can capture important information about the post, such as sentiment value. Sentiment value is the property of social activity, so you can use this property in any other record creation and update rule of type Social Activity.

Here's the correct format in which CRM should receive the JSON payload (data received as a name-value pair in JSON format) from the external application:

{"PropertyName1":"Propertyvalue1"; "PropertyName2":"Propertyvalue2"}

Note

Any configuration done in the channel properties is only valid if those name-value pairs exist in the JSON payload. Also, you must only use parameters received from the external application in the rule item conditions and as record properties.

Activate or deactivate a rule

For any record creation and update rule to apply to a matching incoming activity, after you add the rule items, you must activate the rule.

When a record creation and update rule is activated, a corresponding workflow is created automatically. You can use channel properties to define a workflow's conditions and operators in mapping the target entity attribute values. For complex scenarios, you may configure child workflows.

More information: [TechNet: Configure workflow steps]

How do record creation and update rules work with queues?

In a record creation and update rule, when you specify a queue for a source type, any incoming activity from that source is added as a queue item for that specified queue. That is, if a rule for a particular source activity and queue combination is active, the rule processes the incoming activity on that queue to create or update records.

For an email source type, specifying a queue is mandatory. For all other source types including custom activities, it is optional.

Rules in solutions

The record creation and update rules can be packaged as a part of a CRM solution. Customizers and developers distribute solutions so organizations can use Microsoft Dynamics CRM to install and uninstall the business functionality defined by the solution.

Keep the following things in mind about using rules in solutions:

- Any rule that you created in Microsoft Dynamics CRM Online 2015 Update 1 or later can't be exported to an earlier release.
- Any rules upgraded to and edited in Microsoft Dynamics CRM Online 2015 Update 1 or later can't be exported back to an earlier release.

How to

On this page:

- Prerequisites
- Set up a rule to create and update records automatically
- Set up channel properties
- Activate a record creation and update rule
- Manage automatic record creation and update from a queue form
- Upgrade considerations

Prerequisites

- This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

  Interested in getting this feature? Find your CRM administrator or support person
- Before you can use automatic record creation rules, be sure your external application/social engagement system is already integrated with your CRM instance.

  If your CRM instance meets the prerequisites, all you need to do is set up rules in CRM that will automatically create or update a support case, lead, opportunity, appointment, task, and more from incoming activities.

Set up a rule to create and update records automatically

1. Make sure that you have the customer service, sales manager, or marketing manager 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. Go to **Settings** > **Service Management** or **Business Management**. (How do I get there?)
3. Click **Automatic Record Creation and Update Rules**.
4. To create a record creation and update rule, click **New**.

   -OR-

   To edit an existing rule, in the list of rules, open the rule you want to edit.
5. Type or modify information in the fields.

   Hover over the field labels to see what to enter.

   - **Name**. Type the name of the rule.
   - **Source Type**. From the drop-down list, select the activity that's the source of the record.

- **Queue**. Select the queue the rule applies to. Incoming activity arrives in the queue, and then the valid rule and rule item applies for creation or update of records.

  Here are a few things to consider:

  - For all activities and custom activities, except email, specifying a queue is optional. For all such activities you can have only one rule with an associated queue and one rule without an associated queue active at any given time. For example, for a Social Activity source type, you can have two active rules, one with a queue specified, and one without a queue.
  - If you selected Email as the source type for this rule, you can't activate the rule unless you select a queue.

  Note

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

6. Click **Save**.
7. Under **Channel Properties**, in the **Additional Properties** box, click a channel property group.

   Note

   When you select a property group for a record creation and update rule, you can use the channel property group's property items in the rule item conditions or while setting properties for the target record. After you activate a rule, you can't remove or change the selected property group. You can select another property group only after you remove the referenced property items of the previous property group from the rule items. When you try to select a new property group without removing the property references of the previous property group, you'll see an error.

   To learn more about creating channel property groups and adding properties to them, see the Set up channel properties section in this topic.
8. If the source type for the rule is set to Email, specify the conditions for converting the email to the target record.

Specify the following details

a. **Create records for email from unknown senders**. If you select this check box, all email messages from unknown senders (a sender whose email address isn't present in any CRM records) are converted to new records (based on the conditions you define). A contact record is also created for this unknown sender.

   Note

CRM determines what record to create based on the entity you select in the **Create Record** step under **Actions**.

If you don't select this check box, records are created only for email messages that have a CRM contact or account as the senders.

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).

b. **Create case if a valid entitlement exists for the customer**. If you select this check box, 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, CRM creates a record 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, 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. 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, CRM only associates the incoming email with the existing resolved case; a new case won't be created.

e. **Send automatic email response to customer on record creation**. Select this check box if you want to automatically send email responses to the sender of the email after a target record for the email is created.

f. **Select email template to respond to customer.** If you select the **Send automatic email response to customer on record creation** check box, select an email template (global email template or email template of any entity type). If you don't select a template, an automatic response won't be sent.

9. If the source type for the rule is set to Social Activity, specify the conditions for converting the social activity to the target record.

Specify the following details

a. **Create records for blocked social profile**. If you select this check box, CRM creates or updates a target record for the social posts (social activities) from social profiles that are blocked by you.

Note

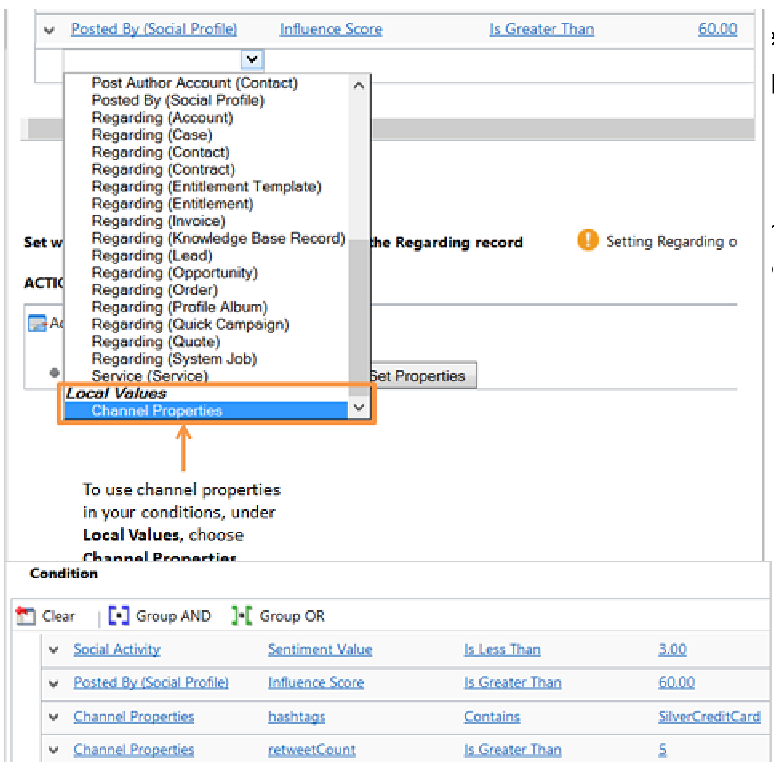
Social posts appear in CRM as social activities.

b. **Create records for direct messages only**. If you select this check box, CRM creates the target record only when the social posts are sent as direct or private messages. If you clear the check box, records are created for all social posts including public messages (timeline).

Note

CRM determines what record to create based on the entity you select in the **Create Record** step under **Actions**.

In the **Specify Record Creation and Update Details** section, click + to define the conditions for creating or updating a record and specify the properties of the record.



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activity) with a than 60, and llowing conditions:

c. Add steps to create or update records for the incoming activity that matches the conditions you defined earlier.

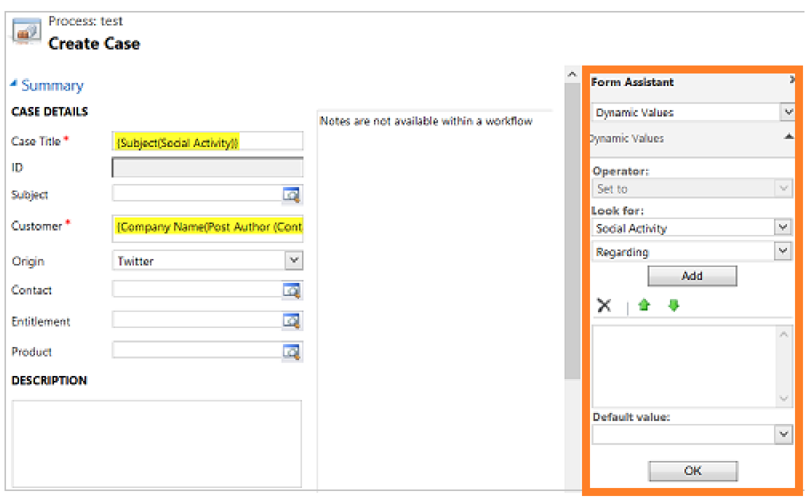
i. Under **Actions**, click **Add Step** > **Create record**.

ii. In the **Create** box, select the record type for the record you want to create from the incoming activity. For example, if you want to create a case from the social activity, select **Case**.

> **Note**
> If the incoming activity has a regarding object set, and if the regarding object entity and the entity selected in the **Create Record** step aren't the same, no workflow is applied and the actions defined in the rule are not executed.

iii. Click **Set Properties**.

The entity form is displayed. You can map the target entity fields to the social activity record data, including channel properties. Some of the mappings are available out of the box: Case title, Customer, and Origin (highlighted in yellow). The out-of-the-box mappings can be changed and new mappings can be added using the **Form Assistant** control.



The new record that is created will be automatically set as the regarding record of the incoming activity record. There is only one regarding object to the social activity, so, only one **Create** record action is possible in the **Actions** section.

iv. To add more actions, under **Specify Other Actions**, click

Add Step > <Action>. The available actions are: Create Record, Update Record, Send Email, or Start Child Workflow.

Learn more about each of these actions in TechNet: Configure workflow steps.

d. Click **Save and Close**.

Note

- Data types "Option Set" and "Two Option" are not supported in string type conditions.
- The property items for each of the supported data types need to have a default value. This requirement is important in scenarios where the configured property line items have a blank incoming web request. In such cases, the property line item will take the default value when referred to in a workflow.

11. Turn on the rule so that CRM can start creating or updating records for incoming activities based on the defined conditions. More information: Activate a record creation and update rule.

Tip

Developers can also apply rules retroactively to the incoming CRM records that might have been skipped while a rule was edited. More information: MSDN: ApplyRecordCreationAndUpdateRuleRequest Class

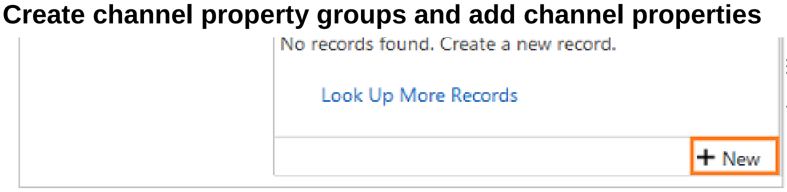
Set up channel properties

Every default or custom activity has an **Additional Parameters** attribute. This attribute stores the JSON payload received from an external application.

You can find these parameters in the **Additional Parameters** field of any incoming activity.

To capture this information in CRM and associate it with the record creation or update rule, you can define channel properties in a channel property group and associate them with a rule or share them across multiple rules. For example, along with a social post, you can capture important information about the post, such as rating or influencer score. Rating and influencer score are the properties of social channel.

Create channel property groups and add channel properties



r **Channel Properties**
tton, and then click **New**.

A channel property group form opens.

Important

A property group record contains multiple property items.

To fix this issue, first delete the properties from the conditions and steps that use the record, and then save or activate the rule.

2. Enter a meaningful name for the property group, so you can easily identify it while adding it to any record creation or update rule.
3. The **Source Type** field will be automatically set to the source type of the record creation and update rule.
4. Click **Save**.
5. In the **Channel Properties** section, click **+** to add in the group-specific channel properties.
6. In the **Channel Property** form, enter the following:
   a. **Name**. Type the property name as it appears in the activity's payload.

      Note

      The name can contain only alphanumeric and underscore characters and shouldn't be longer than 300 characters.

      To see properties received for an activity, go to **Sales** or **Service** or **Marketing** > **Activities**, and open the activity, and see the **Additional Parameters** field.

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e activity.

Important

- Create a channel property for each name from the name-value pair that you want to use in your record creation and update rule. For example, you could use **influenceScore** as a property name.
- The information in the JSON payload isn't very easy to read. To make it more readable, you can use [online JSON parser]() that will provide a better output.
- The property group doesn't support adding nested values in a JSON payload as channel properties. The following sample shows the "FollowersCount" under the user node as a nested JSON key-value pair.

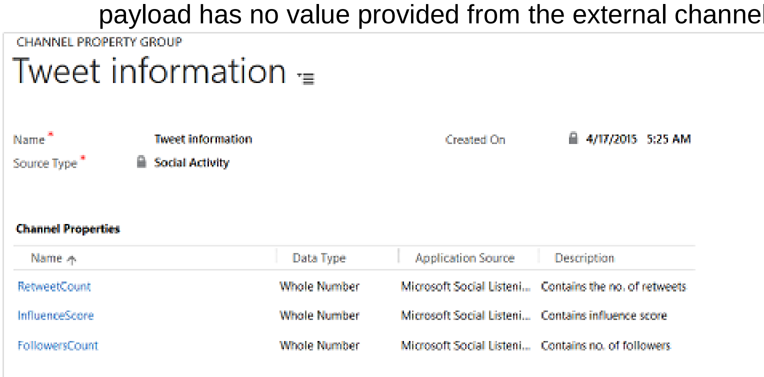
```
{
  "targetEntityName":"socialactivity",
  "socialHandle":"JuliaRice",
  "profileName":"JuliaRice",
  "profilelink":"http://twitter.com/JuliaRice",
  "community":"2",
  "fullName":"JuliaRice",
  "influencescore":"70",
  "favouritecount":"10",
  "retweetCount":187,
  "retweeted":true,
  "user":"{\"Id\":2556470443,\"FollowersCount\":22,
  \"Name\":\"JuliaRice\",\"Description\":\"\",\"Pro
```


b. **Data Type**. Select a data type for the channel property. For example, if the property is influence score, use the data type as Whole Number because its value can't be in decimals.

The selected data type will determine the relational query operators when you use the property to define conditions in the record creation and update rule items. CRM supports creating properties only of the following data types: Floating Point Number, Single Line of Text, and Whole Number.

Note

- Option Set and Two option data types are supported in conditions of type string. You'll have to type out the option set value in the conditions.
- CRM sets a default value for property items for each of the supported data types. This is for scenarios when a channel property is used in a workflow but the incoming payload has no value provided from the external channel; the workflow conditions in



fault value: String: “”, Whole

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Activate a record creation and update rule

For any record creation and update rule to apply to a matching incoming activity, after you add the rule items, you must activate the rule.

To activate a record creation and update rule

1. Go to **Settings** > **Business Management** or **Service Management**. [(How do I get there?)]()
2. Click **Automatic Record Creation and Update Rules**.
3. Open the rule you want to activate, and on the command bar, click **Activate**.

   Note

   You can have two record creation and update rules active at a time for any source type, except email—one with queue and one without a queue. You can have only one record creation and update rule active for the source type Email, and this rule should have a queue specified.

   After the rule is active, the only way to change the rule is to first deactivate it. Open the rule, and on the command bar, click **Deactivate**.

Manage automatic record creation and update from a queue form

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

More information: Create or edit a queue

Upgrade considerations

Here are a few things you should know if you're upgrading to Microsoft Dynamics CRM Online 2015 Update 1 or later from an earlier release, and have existing case creation rules for email and social activity.

Existing rules prior to upgrade	What happens to the rules after upgrade?
A rule that has rule items with conditions and properties defined	• The rule and rule items are upgraded and the properties and conditions in the existing rule items are preserved. • A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule that has a rule items with conditions , but no properties defined	• The rule and rule items are upgraded and the conditions in rule items are preserved. • A new rule item is created with blank

Existing rules prior to upgrade	What happens to the rules after upgrade?
	conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule that has a rule items with no conditions or properties defined	• The rule and rule items are upgraded. • A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule that has a rule items with properties, but no conditions defined	• The rule and rule items are upgraded and the properties in the rule items are preserved. • A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
A rule with no rule items	• The rule is upgraded. • A new rule item is created with blank conditions. A new Create Record step (with Case selected) is added with out-of-the-box property mapping. The rule items are applied in an order and the newly-created rule item is considered last in the order.
An active case creation rule for social or email source types, with a queue specified	All such rules will be upgraded in an active state.
An active case creation rule for social or email source types, without a queue specified	All such rules will be upgraded and deactivated. This is because even in Microsoft Dynamics CRM Online Spring ‘14, a case creation rule without a queue did not apply and create any record.

See Also

[Create rules to automatically route cases]

[Create or edit a queue](#)

Create or edit a queue

Make sure that activities or 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 activities and cases. You can categorize based on:

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

Create or edit a queue

1. Make sure that you have the Sales or Marketing Manager, 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. Go to **Settings** > **Service Management** or **Business Management**.
3. Choose **Queues**.
4. To create a new queue, click **New**.

   -OR-

   To edit a queue, in the list of queues, click the queue, and then on the command bar, click **Edit**.
5. Type or change information in the text boxes.

   Hovertips provide hints about what to enter.

   - In the **Summary** section, complete the required fields.
   - In the **Name** field, type the name of 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 activities in this queue.

     If you're creating a private queue, you'll need to add members to this queue manually. In the **Members** section, click the **Add** button **+** to add members to the queue. Only these members will be able to work on the items in this queue.

Note

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

- In the **Email Settings** section, in the **Convert to email activities** drop-down list, 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 the mailbox name. More information: TechNet: Create forward mailboxes or edit mailboxes
- In the **Record creation and update rules** section, add a **Record Creation and Update Rule** record. By using these rules, you can automatically create or update system or custom records from incoming CRM activities, such as emails, social activities, or custom activities. More information: Set up rules to automatically create or update records in CRM

  This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

  Interested in getting this feature? Find your CRM administrator or support person

  Important

  This is a central place to manage rules across all supported activities including out-of-the-box and custom activities associated with the queue.

  The **Record creation and update rules** section displays rules that have been created in CRM Online 2015 Update 1, using the **Email Activity Conversation Setting** or **Social Activity Conversation Setting** and that have the same queue ID as the queue.

  If you used **Email to Case** or **Social to Case** rules from earlier versions, such as CRM Online Spring '14 or CRM 2013 Service Pack 1 (on-premises), then you will be able to see your rules in this section when you upgrade to CRM Online 2015 Update 1.

  Multiple rules with the same source type and same queue can exist. Therefore, when you click **Email Activity Conversion Settings** or **Social Activity Conversion Settings**, the rule with the latest **Last Modified On** date is applied.

6. Click **Save**.

View queue items

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

Additional actions

To create records for this queue, on the command bar, click **Email Activity Conversation Settings** or **Social Activity Conversation Settings**.

More information: Set up rules to automatically create or update records in CRM or Automatically create a case from an email

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 used to store anything that needs to be completed or requires an action, for example completing a task or closing a case.

Note

For CRM Online organizations, the 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 later or have installed the CRM Online 2015 Update or later. For CRM on-premises organizations, these features are available if they have installed CRM 2013 Service Pack 1 (on-premises) or later, or have updated to CRM 2015 or later. Interested in getting this feature? More information: Find your CRM administrator or support person

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 how your business works. 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: private or public. Create private queues with limited sets 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 CSRs or users. Alternatively, 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]

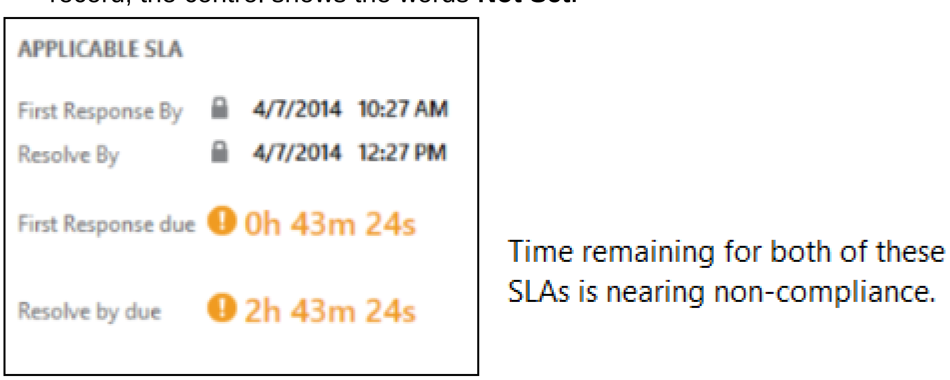
[Automatically create a case from an email]

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**.



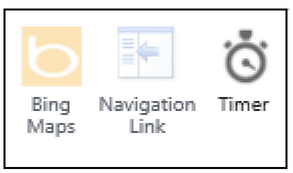
Add a timer control to the Case form

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.

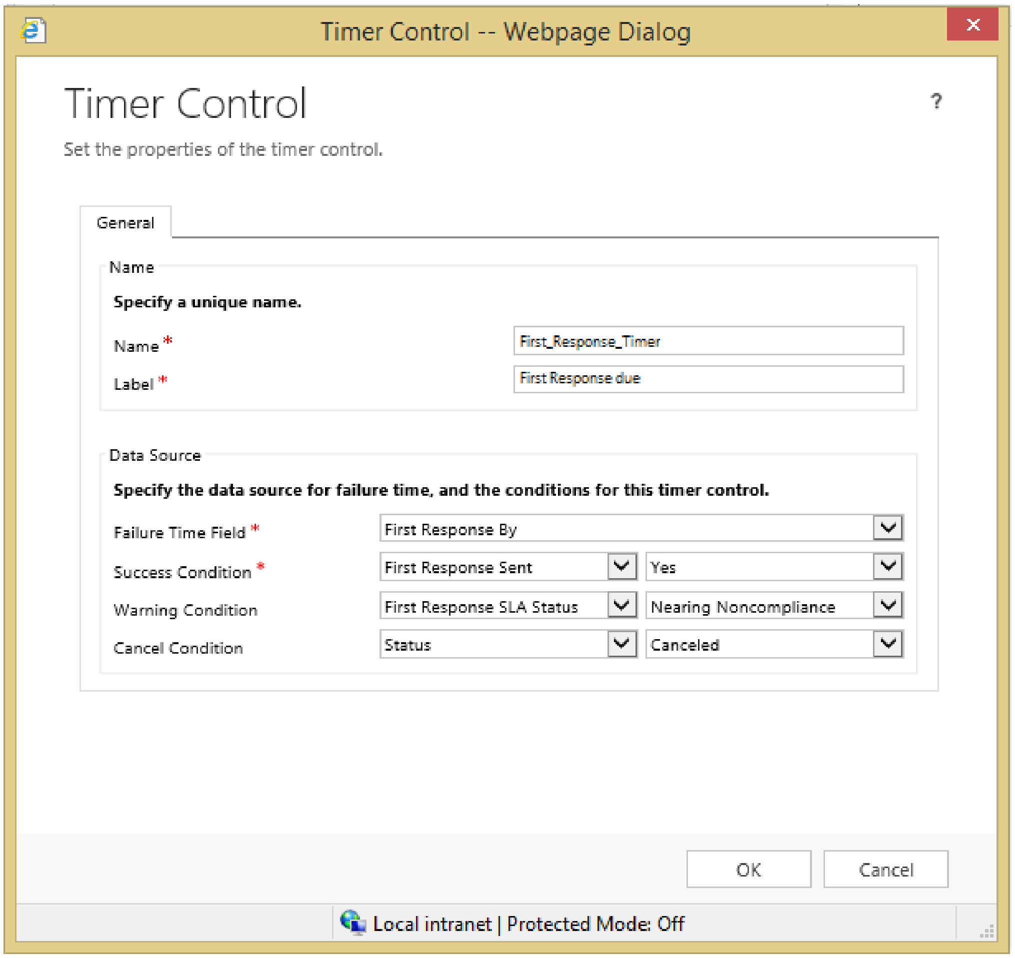
2. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. In the solution explorer, in the left nav pane, expand **Entities**, expand the **Case** entity, click **Forms**, and then open the **Case** form.
5. Click on the form where you want to place the control. You can add it anywhere except the form header or footer.
6. On the **Insert** tab, in the **Control** group, click **Timer**.



7. 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 select 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.



8. Click **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)

[TechNet: Common field properties]
[TechNet: Special field properties]

Define status reason transitions for incident (case) management

There's new capability to specify status reason transitions for the **Case** record type (entity) or custom record types.

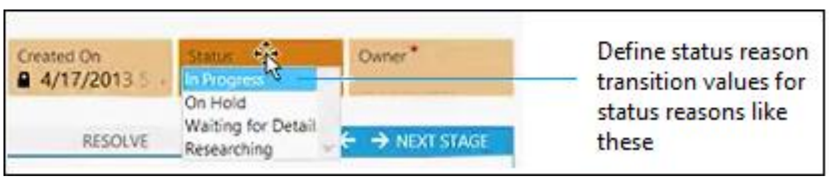
Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: [Find your CRM administrator or support person]

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].

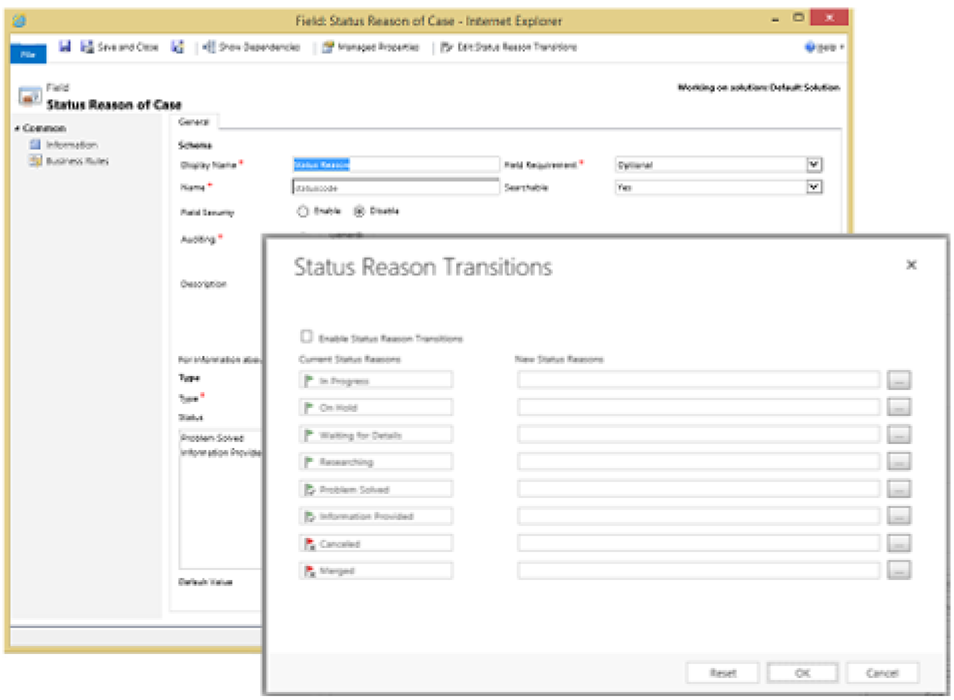
2. Go to **Settings** > **Customizations**. [(How do I get there?)]

3. Click **Customize the System**.

4. In the solution explorer, in the left navigation pane, expand **Entities**, expand the **Case** entity, and then double-click **Fields**.

5. Go to the second page of fields, and then open the **statuscode** (Status Reason of Case) field.

6. In the **Field: Status Reason** dialog box, click **Edit Status Reason Transitions** at the top of the dialog box.



In the **Status Reason Transitions** dialog box, under **New Status Reasons**, click 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 the chevron button to add to the **Selected Values** list. Click **OK** when you're done with that status reason.

Click another **Enter Value** button to modify other status reasons. When you're done, click **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.

10. 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

[TechNet: Define status reason transitions]

[Create or edit entity fields]

Work with cases

[Create and manage a case]

[Merge similar cases]

[Create and manage parent and child cases]

[Add a phone call, task, email, or appointment activity to a case or record]

[Create or edit an appointment]

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 select the right status of a case, your admin may have set things up so that you only see a limited set of statuses 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. Go to **Service** > **Cases**. [(How do I get there?)]
2. Click **New Case**.
3. Find the customer:

a. Click 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 **New** in the inline lookup results to create a new record.

4. Click the **Contact** lookup button and select an existing contact for the case or click **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 the **Find Case** lookup button and then select a case from the list of cases.
   b. If a case doesn't exist, click **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. More information: [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 the **Entitlements** lookup button and select an active entitlement.

Important
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises).
Interested in getting this feature? [Find your CRM administrator or support person.]()

Note

- If your manager has set default entitlements for a customer, a default entitlement is automatically associated with a case when:
  - A case is created
  - A case is updated and the customer, contact, or product field has changed
- When a case is created and an entitlement is applied to it (or when the case gets resolved), the entitlement terms from the associated entitlement are decremented. However, if you don't want the entitlement terms to be decremented for a case, from the command bar click **Do not decrement entitlement terms**.

9. Fill in the other details that apply to the case, and then click **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," you could look for resolved cases with the same subject to get help with your current case.

1. Go to **Service** > **Cases**. (How do I get there?)
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 **Case Relationships** to expand the menu.
4. For **Similar Cases**, click (**+**) **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 searc box, and then click 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 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 the case, and then click **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. Go to **Service** > **Cases**. (How do I get there?)
2. In the list of active cases, open the one you want to resolve.
3. On the command bar, click **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 **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. Go to **Service** > **Cases**. (How do I get there?)
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 **Save**.

Cancel a case

All case activities must to be closed before you can cancel a case.

1. Go to **Service** > **Cases**. (How do I get there?)
2. In the list of active cases, open the case that you want to cancel, and then on the command bar, click **Cancel Case**.
3. In the **Confirm Cancellation** dialog box, select the case status:
   - **Canceled**: This means the case is canceled and 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 **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. Go to **Service** > **Cases**. (How do I get there?)

2. Select the case that you want to reassign.
3. Do one of the following:

If using the web app: On the command bar, click **More Commands** and select **Assign**.

b. If using CRM for Outlook: In the **Collaborate** group, click **Assign**.

Click the **Lookup** button , and select who you want to assign the case to.

5. Click **Assign**.

Add a case to a queue

If you think another group in your team has the expertise on the subject, you can move the case to a queue so that someone else can pick it up.

1. Go to **Service** > **Cases**. [(How do I get there?)]()

2. Select the case that you want to add to a queue.
3. Do one of the following:

If using the web app: Click the **More Commands** icon , and select **Add to Queue**.

b. If using CRM for Outlook: In the **Collaborate** group, click **Add to Queue**.

Click the **Lookup** button , select the queue that you want to add the case to, and then click **Add**.

Save and route a case

When you create a new case, you can save it and route it with a single click using the **Save & Route** button.

1. Go to **Service** > **Cases**. [(How do I get there?)]()

2. Open a case record.
3. On the command bar, click **Save & Route**.
4. In the **Route Case** dialog box, click **Route**.

   The case is routed based on the active routing rule set.

   Important

   - The **Save & Route** button is available only on active cases.
   - The **Apply Routing Rule** button that was earlier available on the case form is now available in the list of records for applying the routing rule on multiple cases.

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, 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 child cases have the same parent case.

More information: Create and manage parent and child cases

Important

This feature was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

1. Go to **Service** > **Cases**. (How do I get there?)
2. In the list of active cases, select the cases you want to merge. You must select at least two active cases.
3. On the command bar, click **Merge Cases**.
4. In the **Merge Cases** dialog box, from the list of cases, select the case the other cases will

be merged into, and then click **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 was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

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. Go to **Service** > **Cases**. (How do I get there?)
2. When the case form is open, do one of the following:
   - On the command bar at the top, click **Create Child Case**.
   - Or, choose to expand **Case Relationships**, and next to **Child Case**, click **(+) Add Case record**.
3. Next, fill in the necessary case information for the child case, and then click **Save**.
4. To see the child case that was just created, from the parent case, click **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. Go to **Service** > **Cases**. (How do I get there?)
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 **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 **Set**.

From an open case, do this:

a. From the open case form, choose to expand **Case Relationships**, and next to **Child Case**, click (**+**) **Add Case record**.
b. Click 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. Go to **Service** > **Cases**. (How do I get there?)
2. Open the case that you want to link a parent case to.
3. From the case form, click 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. Go to **Service** > **Cases**. (How do I get there?)
2. In the list of active cases, open the one you want to resolve.
3. On the command bar, click **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 **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 and notes area helps you keep track of all the interactions with your customers. Record all important conversations with the customer or the communication with your team members regarding a record in Microsoft Dynamics CRM. Add a phone call, task, notes, email, or appointments right within the case, account, contact, lead, or opportunity records without navigating to a different area and opening another form.

All activities that you add from within a record appear in the **Activities** area. If the **Regarding** field of an activity is set, the activity appears in the activity wall of the regarding record. You can filter the list to show just the activities that are in progress or the ones that are overdue. Click or tap the inline **Complete** link to close the activity as **Completed**.

Add a phone call

1. Open the record you want to add the activity to.
2. If you do not see the **Add Phone Call** area open in the middle of the page, click **Activities** > **Add Phone Call**.
3. 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.
4. 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 **Look Up More Records**, and then in the **Look Up Records** dialog box, select the records.
5. 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.
6. Click **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 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

1. Open the record you want to add the activity to.
2. In the middle of the page, click **Activities** > **Add Task**.
3. Fill in your information. Use the handy tooltips as a guide.
4. The **Owner** field is set to the current user by default. If you want to reassign the task, click the lookup icon, and then select another user or team.
5. Click **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.

1. Open the record you want to add the activity to.
2. In the middle of the page, click **Activities** > **More Commands** ••• > **Email**.
3. Fill in your information. Use the handy tooltips as a guide.
4. To save the record, click **Save**.
5. To add an attachment to the email, under **Attachments**, on the right, click **+**.
6. To use a template for the email body, in the email editor, click **Insert Template**, and then select the template.
7. To attach an article to the email, in the email editor, click **Insert Article**, and then add the article.
8. Click **Save**.

Add an appointment

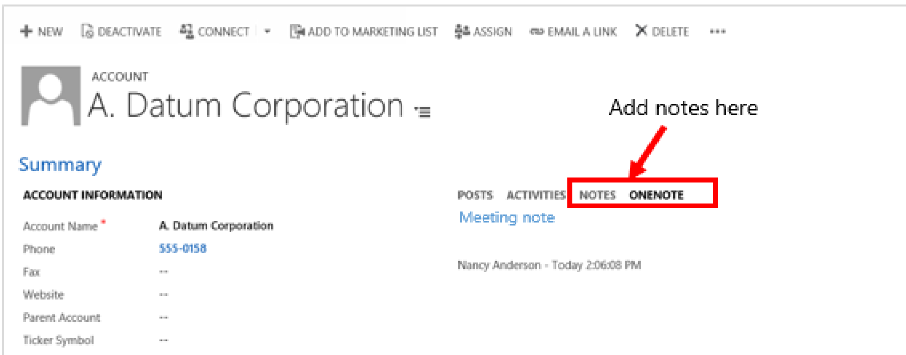
To add an appointment activity to a record, you must first save the record you are adding the activity to.

1. Open the record you want to add the activity to.
2. In the middle of the page, click **Activities** > **More Commands** ••• > **Appointment**.
3. Fill in your information. Use the handy tooltips as a guide.
4. To save the record, click **Save**.

Add notes

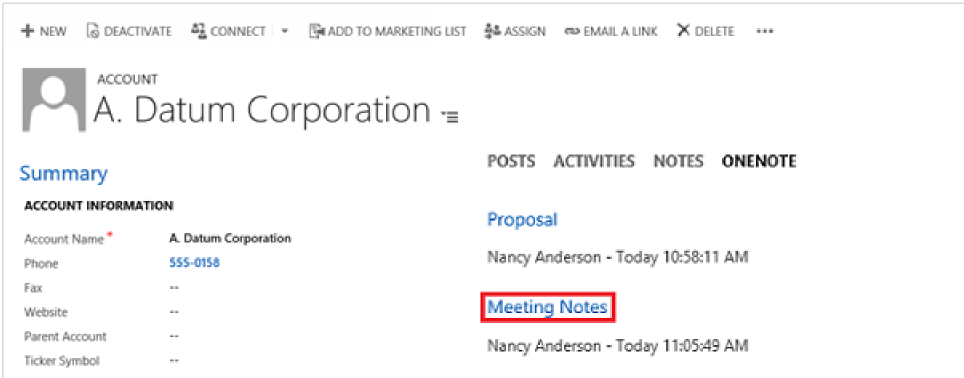
You can also easily add notes in the activities area. And if you're on the latest version of Microsoft Dynamics CRM Online, you have the benefits of using OneNote to take or review customer notes from within your CRM records. For more information on OneNote, see: Set up and use OneNote in CRM.

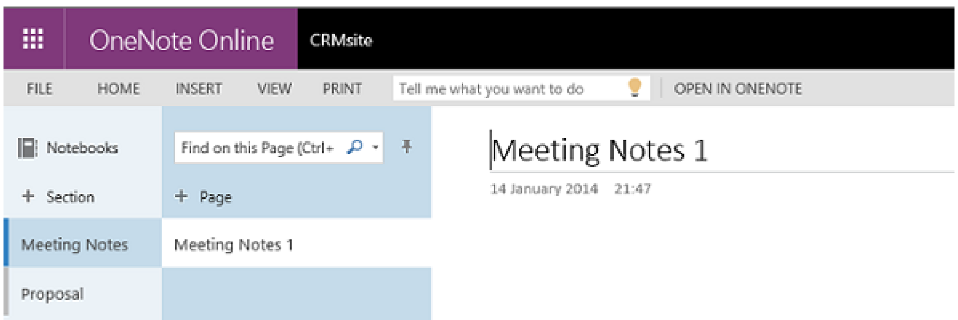
This doesn't replace the current Notes feature, but gives you another way to access notes stored in OneNote.



1. Open the record you want to add the activity to.
2. In the middle of the page, click **Notes** or **OneNote**. Then do one of the following:

- In the **Notes** area, start typing your notes.
- In the **OneNote** area, select a notebook to make entries.





Note

The notebook is stored in the associated SharePoint folder for the record. If there is more than one associated folder, the notebook is created in the first folder. For more information see, Set up and use OneNote in CRM.

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. Go to your work area.
2. Go to **Activities**. (How do I get there?)
3. On the command bar, select and add an activity. Fill in your information. Use the handy tooltips as a guide.
4. Use the **Regarding** field on the activity form to associate it with a customer or support case.

See Also

Set up and use OneNote in CRM

Create and manage a case

Create or edit an appointment

Block time to meet or talk to your customers by using appointments. 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. Do one of the following:

   To create an appointment or a recurring appointment on the Service Calendar, on the nav bar: Go to **Service** > **Service Calendar**. (How do I get there?)

   To create an appointment or recurring appointment in the Activities area, on the nav bar: Go to **Sales** > **Activities**. (How do I get there?)
2. On the command bar, click **Appointment**.
3. Type or change information in the text boxes. You can point to a field to get a tip on what data to enter.
4. If this is a recurring appointment, click **Recurrence**, and then select the time, pattern, and date range you want.
5. Click **Save**.

   If any participants have a schedule conflict, a warning appears. You can click **Ignore and Save** to save the appointment anyway.

If you want to add an attachment, make sure you save the appointment first. Then, in the **Attachments** section, click the **Add attachment record** button + (you may have to scroll to the right to see the button) and browse for the file. The attachment size limitation is the same as the email attachment size limitation, which can be changed by your system administrator. More information: System Settings dialog box - Email tab

Note
You can't insert attachments in a recurring appointment.

Important

If you plan to include appointments in solutions, we strongly recommend 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 you'll have to recreate the appointments.

If you're using CRM for Outlook

Keep the following in mind if you're using Microsoft Dynamics CRM for Outlook in addition to the web application:

- If you're using the Microsoft Dynamics CRM Online 2015 Update or later, Microsoft Dynamics CRM 2015 or later, or Microsoft Dynamics CRM 2015 for Outlook or later, you can synchronize appointment attachments between Microsoft Dynamics CRM and Dynamics CRM for Outlook if your system administrator has enabled attachment synchronization. You can insert the attachments in CRM or Dynamics CRM for Outlook.
- Appointments created in the web application and synchronized with Dynamics CRM for Outlook automatically set a 15-minute reminder and appear on the Microsoft Outlook calendar. You can change the reminder in Dynamics CRM for Outlook.
- Service calendar items aren't added to your Outlook calendar.

See Also

Navigate the service calendar

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

Track Outlook appointments in CRM for Outlook

Create and manage activities

Schedule a service activity

Navigate the service calendar

Find the next available time before creating a service activity

Create a service activity without checking for conflicts

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

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. 0.1. Go to **Service** > **Service Calendar**. (How do I get there?)

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 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 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 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

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. Go to **Service** > **Service Calendar**. (How do I get there?)
3. Click **Schedule**.
4. 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.
5. Click **Find Available Times**. The next available times are shown.
6. Under **Available Times**, select the time for which you want to schedule the service activity, and then click **Schedule**.

   The Schedule Service Activity form closes, and Microsoft Dynamics CRM fills in the information from the selected time in the Service Activity form.
7. Type or modify information in other text boxes, as required.

   Hovertips provide hints about what to enter.
8. When you're ready to save your data, click **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 **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. Go to **Service** > **Service Calendar**. (How do I get there?)
3. On the command bar, click **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 **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 **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 **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

Find what's assigned to you in a queue

Assign an activity to a user or queue

If you want 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 another user or team

1. Go to **Activities**. (How do I get there?)

   If using the CRM web application: In the list of activities, select the activity you want, and on the command bar, click **More Commands**, and then click **Assign**.

   If using CRM for Outlook: Expand **My Work**, and then click **Activities**.

   a. In the list of records, click the record you want.

   b. In the **Collaborate** group, click **Assign**.

3. In the **Assign to another user or team** field, click **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 **Lookup**, and then click **Look Up More Records**. From the **Look for** drop-down list, select **User** or **Team**. In the **Search** box, type the name, click the search button, and then click the name to select it. Click **Add**.

4. Click **Assign**.

Add to a queue

1. Go to **Activities**. (How do I get there?)

If using the CRM web application: In the list of activities, select the activity you want, and on the command bar, click **More Commands** •••, and then click **Add to Queue**.

If using CRM for Outlook:

In the list of activities, select the activity you want, and on the command bar, click **More Commands** •••, and then click **Add to Queue**.

   b. In the **Collaborate** group, click **Add to Queue**.

3. In the **Queue** field, click **Lookup**, and select the queue you want to route the activity to, and then 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 to-do lists that help you organize your work.

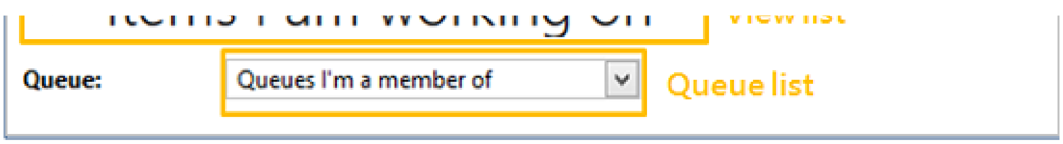
Important

For Microsoft Dynamics CRM Online organizations, some features like picking or releasing items are available if you've applied product updates for CRM Online Spring '14 or later, or if you've installed the CRM Online 2015 Update or later. For on-premises CRM organizations, these features are available if you've installed CRM 2013 Service Pack 1 (on-premises) or later, or if you've updated to CRM 2015 or later.

Interested in getting this feature? Find your CRM administrator or support person

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 **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 **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 **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 **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

a. To see only items (activities and cases) that no one else is working on, in the **View** list, click **Items available to work on**.
b. 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

a. To view only items that you're currently working on, in the **View** list, click **Items I am working on**.
b. 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

Pick an activity or case to work on

1. In the **View** list, select one of the views that show the items or cases available to work on.
2. Select the case or item that you want to work on, and on the command bar, click **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

1. In the **View** list, select one of the views that show the items or cases you're working on.
2. Select the case or item that you want to release, and on the command bar click **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 **Route**.
2. To move an activity or case to a different queue, click **Route**, and select a queue.

   Important
   If you're using CRM 2013 SP1 or CRM Online Spring '14, and you click **Look Up More Records**, you'll only see business queues, which is the default view. Business queues only include user-created queues and leave out all user and team queues. You can't set a different view as the default view. To choose a different queue, in the **Look Up Records** dialog box, in the **Look in** list, click the **All Queues** view.

   -OR-

   To assign the activity or case to another user or team to work on, click **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 **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 for CRM 2013 SP1 with product updates package

Unified Service Desk for CRM 2013 SP1 package

Set up and use Unified Service Desk for customer service

Unified Service Desk Base package

Unified Service Desk is a desktop application that helps your customer service agents provide phone, email, and chat support to your customers. Unified Service Desk provides a configurable framework to quickly build an Agent Desktop application that's integrated with Microsoft Dynamics CRM. With Unified Service Desk you can quickly make a customized Agent Desktop application by leveraging the User Interface Integration (UII) framework.

With the Unified Service Desk Base sample application package, the following components are installed:

- User Interface Integration Solution
- Unified Service Desk Solution
- Data required for Microsoft Dynamics CRM and customizations

Important

The sample applications are not supported for production use.

For more information on how to set up and administer Unified Service Desk see the, TechNet: 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 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 a 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 **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 by clicking **Search** on the toolbar.
2. In the **Search** field, enter the contact information.
3. When you find the contact information, click 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 a call script, a green check mark indicates the action has been performed.
5. Enter your case notes in the **Notes** area. To attach your notes to the case, click **Update notes** from call scripts.

Search for solutions

To help resolve the case, use the knowledge base articles or Bing search to find a solution.

1. From the **Call script** area, click the **Search for solutions** call script.
2. Then click 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 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 the **Resolve Case** call script.

See Also

[TechNet: Unified Service Desk Administration guide]

Unified Service Desk for CRM 2013 SP1 with product updates package

Unified Service Desk is a desktop application that helps your customer service agents provide phone, email, chat, and social media support to your customers. It provides a configurable framework to quickly build an agent desktop application that's integrated with Microsoft Dynamics CRM. With Unified Service Desk 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 (SP1) with product updates sample application 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

This package automatically populates 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

Important

The sample applications are not supported for production use.

For more information on how to set up and administer Unified Service Desk, see the [TechNet: Unified Service Desk Administration guide]()

Here's what you'll see when you install Unified Service Desk:

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 a different session. 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 the service agent can use when they're working on a case. 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 record notes regarding the case.
11. **KPI Control**: Shows Key Performance Indicators (KPIs) like 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 **My Work** to see all of your activities.

Create a case

1. To look up the contact information, from the toolbar, click **Search**.
2. In the **Search** field, enter the contact information.
3. When you find the contact information, click 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 a call script, a green check mark 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 **Update notes** from call scripts.

Locate a customer

When you're working on a customer session, if you want to find your customer's location, 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 customer's address in the **Search** field.

Search for solutions

To help resolve the case, you can use knowledge articles or Bing search to find a solution.

1. From the **Call script** area, click the **Search for solutions** call script.
2. Then click 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 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 the **Resolve Case** call script.

When the case is resolved, the time spent on the case gets updated in the **Actual Service Unit** field of the case form. The KPI control is also updated with the number of cases and average handling time.

See Also

TechNet: Unified Service Desk Administration guide

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 sample application package for Unified Service Desk, 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

Important

The sample applications are not supported for production use.

For more information on how to set up and administer USD, see the TechNet: 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**: 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 customer information.
9. **Call Script**: Shows call scripts 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.

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 check mark indicates 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're working on a customer session, if you want to find your customer's location, 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 opens Bing Maps and automatically populates the customer's address in the **Search** field.

Search for solutions

To help resolve a case, use the knowledge base articles or Bing search to find a solution.

1. From the **Call script** area, click or tap the **Search for solutions** call script.
2. Then click or tap one of the following:

   - **KB articles**: Use search to find articles that can help you resolve the case.
   - **Bing search**: A 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 number of cases and average handling time.

Set up and use Unified Service Desk for customer service

Give your customer service reps immediate access to business critical information so they can quickly engage with customers and address questions and issues using Unified Service Desk for Microsoft Dynamics CRM. Unified Service Desk gives you a configurable framework to quickly build applications for call centers so agents get a unified view of the customer data stored in CRM. You can aggregate customer information from different areas in CRM into one integrated desktop that provides a 360° view of customer interactions. For more information, see Overview of Unified Service Desk.

Hosted controls

Unified Service Desk Hosted Controls

Create or edit a hosted control

Toolbars

Toolbars in Unified Service Desk

Configure toolbars in your application

Action calls

Action calls

Events

Events

Entity searches

Search data using entity searches in Unified Service Desk

Window navigation rules

Use window navigation rules in Unified Service Desk

Session lines

Configure session information

Agent scripts

Guide customer interactions with agent scripts

Configure and manage agent scripts

Scriptlets

Execute scripts using scriptlets in Unified Service Desk

Forms

Create and design forms

Options

Manage Options for Unified Service Desk

User settings

Configure client caching in Unified Service Desk

Customization file

Distribute custom host controls using Customization Files

Configuration

Manage access using Unified Service Desk configuration

Audit & diagnostic settings

Configure auditing in Unified Service Desk

See Also

TechNet: What's new in Unified Service Desk

Use interactive service hub for dashboards

The new interactive experience for customer service

User's guide for the new interactive service hub

The new interactive experience for customer service

We bring to you a new intuitive and interactive experience for managing your customer service in the CRM interactive service hub. It's loaded with richer dashboards and redesigned forms that pull together key information so you can focus on what's more important and get things done faster.

Want to know more? Go through this article.

Get started

[Learn the basics]

Track your issues efficiently and act on them quickly

The redesigned forms in the interactive service hub include components that help customer service representatives quickly handle all their important stuff from a single place:

- The customer card in the forms gives a complete view of your customer's touch points
- The timeline gives a unified view of your customer's interactions across channels, and lets you act on them quickly
- The related pane lets you search and act on related records without losing context of customer data and interactions

You can manage only those record types that are enabled for use in the interactive service hub. These are the default record types: accounts, contacts, cases, activities, knowledge articles (new native CRM knowledge management), social profiles, and queue items. In addition to this, your system customizer can enable custom entities or activities for an interactive experience.

Create and manage a case with ease in the interactive service hub

Manage activities from the timeline

See and manage related records using the Related pane

Reduce call handling times with rich knowledge articles

The new knowledge management solution in CRM guides you through the process of creating rich articles in the interactive service hub, getting them reviewed, and publishing them. It also provides translation and versioning capabilities to support the knowledge lifecycle.

Knowledge management process in CRM

Create a knowledge article

Create and manage article versions

Translate a knowledge article into multiple languages

Track knowledge article views

Gain insights with dashboards

The new dashboards provide interactive chart-based visual filters, and offer users an all-in-one-place view of their workload through streams. These dashboards help CSRs effectively organize their time, focus on the issues at hand, and get more work done.

Use interactive dashboards to effectively manage your work

Monitor knowledge articles with dashboards

For admins and customizers

Create and design interactive forms

Configure interactive dashboards

User's guide for the new interactive service hub

The new interactive service hub is designed to simplify your day-to-day job, and is specifically optimized for customer service. It shows you all your vital information in one place, and lets you focus on things that require your attention.

Important

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? [Find your CRM administrator or support person.]

On this page:

- Learn the Basics
- Track your cases efficiently and act on them quickly
- Reduce call handling times with knowledge articles
- Use interactive dashboards to effectively manage service cases

Learn the Basics

The interactive service hub’s intuitive interface unifies vital information in one place, and lets you focus on things that require your attention.

In this section:

- Interactive service hub application requirements
- Access the interactive service hub
- Manage different record types
- Navigate to a record
- Switch to the record type dashboard from the list of records
- Navigate through records and pages
- See recent items
- Create new records or find existing ones
- Know your new forms

Interactive service hub application requirements

Here’s a list of operating systems and browsers that are supported by the interactive service hub:

- **Operating systems**. Windows 7, Windows 8, Windows 8.1, Windows 10
- **Browsers**. Microsoft Edge, Internet Explorer 10, Internet Explorer 11, Google Chrome, Mozilla Firefox

  Important

  Although you may be able to use Internet Explorer 8 or Internet Explorer 9, those web browsers are not recommended and are not supported with this version of the interactive service hub.

- **Screen resolution.** The interactive service hub requires at least a 1024 x 768 effective browser resolution. The effective browser resolution is determined by the screen resolution, browser zoom, and the operating system's zoom percentage. If the browser is resized to a resolution lower than the minimum supported, some content will be cropped.

Important

Here's a list of things that the interactive service hub doesn't support:

- Clients. The interactive service hub is not supported on Microsoft Dynamics CRM for Outlook, Microsoft Dynamics CRM for phones, and tablets and touch devices.
- Right-to-left (RTL) languages: Hebrew and Arabic.
- Accessibility options. The interactive service hub doesn't support third-party accessibility aids, such as screen readers, and other accessibility features such as use of a keyboard to navigate through the user interface and complete actions.

Access the interactive service hub

There are two ways for you to open the interactive service hub. You can either click **Experience it now** in the notification bar as shown here.

Or, you can directly access it by entering a URL in your browser. The URL is different depending on whether you're using CRM Online or CRM (on-premises) as follows:

- **Microsoft Dynamics CRM (on-premises)**: In your browser, type *<your CRM Server>*/*<orgname>*/engagementhub.aspx, and then press Enter. For Internet-facing deployments use https://< *hostname[:port]>/engagementhub.apsx*.

  If more than one organization is available, and you don't specify one, the default organization will be used.
- **Microsoft Dynamics CRM Online users**: Type https://<*CRM Server*>.*crm#.dynamics.com/engagementhub.aspx*, and press Enter.

Any time your administrator makes configuration changes and you reload the interactive service hub, you'll be prompted to download the metadata configuration. After you click **Download now**, it may take some time to load. If you click **Ask me later**, no changes (customization changes done in the CRM web application) will be downloaded, and you can continue to use the app without them.

To learn about the network requirements for using the Microsoft Dynamics CRM interactive service hub, see [Web application requirements for Microsoft Dynamics CRM](#).

Important

- You can't access the interactive service hub using private browsing.
- If you're using Internet Explorer, and you see a message asking for additional storage on your local computer, click **Yes**. If you click **Not for this site**, the interactive service hub application won't load.

- If the interactive service hub still fails to load, please talk to your system administrator.

Manage different record types

In the interactive service hub, you can work with record types that are enabled for the interactive experience. By default, the following record types, which you'll most commonly use to manage your customer service, are enabled:

- Accounts
- Contacts
- Cases
- Activities: Email, Task, Appointment, Phone Call, Social Activity
- Queue items
- Dashboards
- Social profiles

You can also see interactive dashboards in the interactive service hub.

Any record types that are enabled for mobile are also available for use in the interactive service hub. However, these records are read-only. For example, the entitlements are enabled for mobile, so you can see the entitlements data in the case form, but you can't create or edit an entitlement in the interactive service hub.

Note

- Your customizer can enable other custom entities and custom activities for the interactive experience.
- The navigation bar for the interactive service hub is different than the navigation bar in the CRM web application. Any changes to the representations of the other navigation bars aren't reflected in the interactive service hub. For more details, contact your customizer.
- The navigation bar in the interactive service hub doesn't support the global Search box and the Settings menu.

Navigate to a record

1. On the Main Menu, click a work area, and then click an item.

You'll see only the record types that are enabled for the interactive experience in the navigation bar of the interactive service hub.

When you click an item, you'll see the list of records. You can search for records in the list using the **Search for Records** box.

Note
The search only looks for the keywords in the primary field of the record type.

2. From the list of records, click the record you want.

Switch to the record type dashboard from the list of records

When you're in the list of records of a specific record type, use the **Switch to Dashboard** button to switch to the default dashboard for that entity.

More information: [Use interactive dashboards to effectively manage service cases]()

Navigate through records and pages

- When you're in a record, use the **Next Record** and **Previous Record** buttons to see the next or previous records in the record set. A record set is the total number of records on a single page. For example, if you have 50 total records, by default, you'll see 25 records on the first page, and 25 on the second page. When you open a record from the first page, you'll be able to move between these 25 records by using the **Next Record** and **Previous Records** buttons.

- To go the previous page in the interactive service hub, click the **Back** button before the title of the record.

Note
Your browser's **Back** button will take you to the previously visited website.

See recent items

There are two ways you can see the items you've recently worked on.

- On the Main Menu, click the down arrow next to the record type, for example, next to Cases to show the recently used records.

- On the Main Menu, click the **Recently Viewed Items** button to see recently viewed records and views.

Create new records or find existing ones

1. To create records quickly by filling in only the most basic information, on the nav bar, click the **Quick Create** button .

2. To find all of your records from multiple record types quickly, click the **Search** button . To filter results by one record type, click a record type from the filter drop-down list next to the **Search** box.

   Note
   You can only search for record types that are enabled for the interactive experience.

Know your new forms

See how the different components of the new form help you quickly handle all your important tasks and actions from a single place.

Business processes

In the interactive service hub, the case and knowledge article forms have a process bar, which is collapsed by default. When you click a process stage, it opens as a flyout showing relevant steps for that stage. A flag on a stage indicates the stage you're currently on. When you click an active stage, you can see the **Next Stage** button move to the next stage in the process.

If there is more than one process to use, you can switch between the processes by clicking **More** > **Switch Process** on the command bar, and then selecting the process you want to use.

Important
Certain fields, like **Find Case** or **Similar Cases**, aren't available on the process bar of a case form in the interactive service hub.

A tab is a group of sections on a page. Each Main form is composed of one or more tabs. By default, the **Summary** tab shows information about the customer, interactions with the customer, and other related records. You can click the different tabs to enter or see other miscellaneous details of a record.

Here's an example of how the tabs appear on the case form.

This table lists the default tabs for each record type that's enabled for the interactive experience.

Record type	Default tabs
Case	• Summary. Includes the customer card, interaction timeline, and the Related section. • Details. Tracks additional details and social response details of the case. • Case Relationships. Shows a Merged Cases and Child Cases list. You can add a new child case to the current case from the Child Cases list. It also shows a list of knowledge articles associated with the case. • SLA. Shows the related SLA KPI Instance records that are created for each SLA KPI that is tracked for the case.
Account	• Summary. Includes the customer card, interaction timeline, and the Related section. • Details. Tracks additional details like company profile, marketing details, contact preferences, and billing and shipping.
Contact	• Summary. Includes the customer card, interaction timeline, and the Related section. • Details. Tracks additional details like personal information, marketing details, contact preferences, and billing and shipping.
Activities	Activity forms don't have tabs. The form shows general information and details in different

Record type	Default tabs
	columns.
Knowledge Articles	• Content. Lets you create content for the article, and move it through to publishing. • Summary. Tracks basic settings, publishing settings, and related records. • Analytics. Shows the number of views, and a list of cases using the article.
Social Profile	Social Profile tab

See a complete view of your customer's touch points in the customer card. This card is available in the **General Information** section of the **Summary** tab.

You can add a picture to the account or contact record in the CRM web application, and it will appear on this card.

For account records, the customer card shows contact details for the primary contact. For contact records, the customer card shows details of the account the contact belongs to.

See a combined view of your customer's interactions across various channels, such as phone, email, or even social activities in the timeline. It also shows any related notes or system posts.

The timeline is available on the **Summary** tab of account, contact, and case records. For knowledge articles, the timeline appears on the **Content** tab.

Here are a few things you can do in the timeline:

- Filter the timeline for a specific activity type or find an activity by searching for a specific keyword.

  Search and filter work in combination or in isolation. For example, you can first filter the activities to just show emails, and then use the Search option to search for email messages with a specific keyword.
- Refresh the timeline so you can see the updated list of activities.
- Click the title of an activity to open the activity record.
- Take quick actions on an activity from the timeline, such as marking an activity complete, assigning it to others, adding it to a queue, converting it to a case, or deleting it. All actions that are available on a form command bar for any given record type are available here.

In the **Related** section (also called a reference panel), use the vertical tabs to see related records for the current record or search for knowledge articles. This section is enabled by default for account, contact, case, and knowledge article records. Your customizer can add this section for custom entities that are enabled for the interactive experience.

By default, the first tab in the Related section of a case record shows the recent cases and entitlements for the current case record you're working on. When you open a record from the list, it appears in a horizontal tab in the **Related** section.

Note

If you see data for any record type that isn't enabled for interactive experience, you won't be able to open or edit the record from the list. This is also the case for fields of type lookup, for example the entitlement field on the case form.

Note

For account and contact records, the **Related** section shows recent opportunities, recent cases, and active entitlements. For knowledge articles, this section shows related versions, related translations, related articles, and related products. Your system administrator or customizer can choose what related data to show in this section for each form.

The second tab in the **Related** section is the **Knowledge Articles Search** tab. This tab gives knowledge article suggestions based on the title of the record, and also lets you search for a knowledge article containing specific keywords. When you open a record from the list, it appears in a horizontal tab in the **Related** section.

For information on how to configure the interactive forms, see [TechNet: Create and design interactive forms]

Track your cases efficiently and act on them quickly

Creating and managing a case can't be any simpler. With the intuitive case form in the interactive service hub, you can do all your important tasks and actions without navigating to different parts of the application.

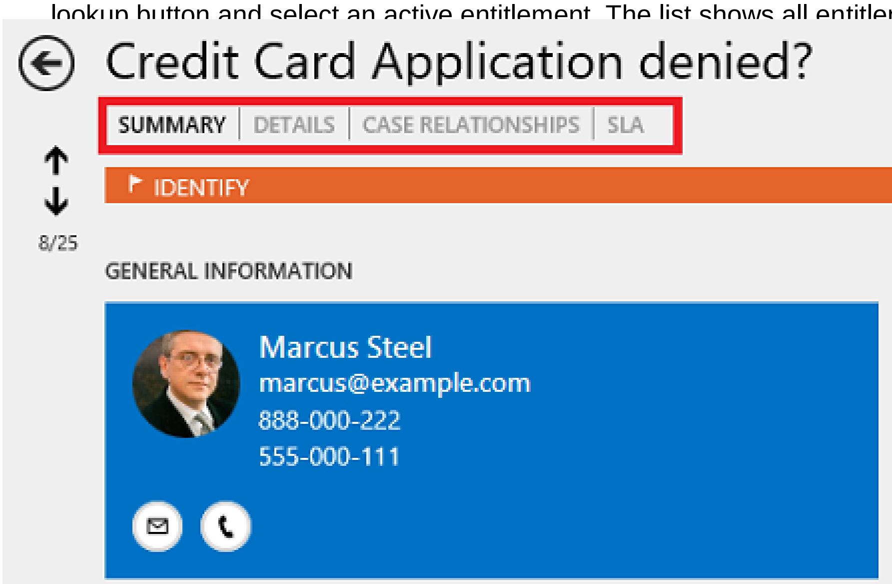
You can capture important information about customers, interactions you've had with them, and all related records of the current case in once single place.

In this section:

Create a case

1. Make sure that you have the Customer Service Manager or Customer Service Representative role, or equivalent permissions.
2. In the interactive service hub, go to **Service** > **Cases**.
3. On the command bar, click **New**.
4. In the **Case Title** field, type a subject or descriptive name to identify the case.
5. Find the customer:
   a. Click the **Identify** area of the process bar.
   b. Click the **Find 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. After you select an existing customer and save the record, the **Customer Details** section (blue tile) will show the contact details, along with recent cases and activities for the customer in the Related and Timeline section.
   c. If a customer record doesn't exist, click **New** in the inline lookup results to create a new record.
6. Click the **Find Contact** lookup button, and then select an existing contact for the case or click **New** in the inline lookup results to create a new contact record.
7. In the **Subject** field, select a subject. Associating cases with subjects helps you search for cases with similar issues and find related articles. If you don't see the subject you want in the list, ask your system administrator to add it.
8. In the **Origin** field, select the channel through which this case was initiated.
9. In the **Product** field, select the product this case is about. You can't add a product family, a draft product, or a draft product bundle.
10. To see what kind of support you should provide the customer, click the **Entitlements**

lookup button and select an active entitlement. The list shows all entitlements in CRM



default
a case is
default

he case gets
decremented.
for a case, on

ase.

- The **Details** tab tracks additional details and social response details of the case.
- The **Case Relationships** tab shows a **Merged Cases** and **Child Cases** list. You can add an existing child case to the current case from the **Child Cases** list. If you want to create a new child case for the current case, on the command bar, click **Create Child Case**. You can't merge cases in the interactive service hub.

  The **Case Relationships** tab also shows a list of knowledge articles associated with the case.
- The **SLA** tab shows the related SLA KPI instance records for each SLA KPI that's tracked for the case.

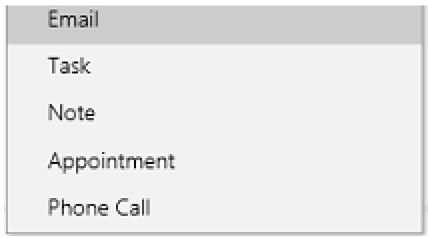
  Note
  The SLA timer for standard or enhanced SLA is not supported in the interactive service hub.

12. When you're done, click **Save**.

Manage activities from the timeline

Capture all interactions and communications you've had with your customer by adding them as activities in the Timeline section. The timeline section gives you a unified view of everything that's happening on a case, like email received, a follow-up task that you created, system posts that are automatically generated when the cases is created, or any notes you take while talking to the customer.

When you update an activity, it moves up in the Timeline because Timeline is sorted from latest to the oldest. This is the default and only order of sorting.

To	Do this	
Create a new activity	 2. Fill in your details in the activity form, and then click **Save**. **Tip** If you want to create an email activity, you can now use the new rich text editor in the interactive service hub, which has more formatting options than the one in the CRM web application. More information: [Use the rich text editor to create knowledge articles and emails]()	
Search for a specific activity	In the **Timeline** section, click the **Show Search** button . 2. In the **Search for Records** box, type the word that you want to look for in the title and content of the activities.	
Filter activities	In the **Timeline** section, click the **Show Filters** button . 2. Click Till Date to filter the activities based on date filters. The available	

	date filters are: To Date, Today, Yesterday, This Week, Last Week, This Month, Last Month, Month To Date, and Custom Time Frame. 3. Click **All Items** to filter activities based on the activity type.	
Take actions on an activity	In the **Timeline** section, click the **Quick Actions** button 2. Select the action you want to take. The list of quick actions you'll see for any activity is the same as the ones that are available for the activity at a form level (on the command bar). For example, for an email activity, you will see actions like Reply, Reply All, or Forward. Custom actions may also be available.	

See and manage related records in the Related section

The **Related** section in a case record provides you quick access to important information related to the primary case that would help you in solving the case.

See recent cases and entitlements

Click the **Recent Cases and Entitlement** tab to see:

- A list of recent cases for the customer associated with the current case.
- A list of entitlements for the customer associated with the current case.

When you click a record in the list, it opens as a horizontal tab in the **Related** section.

Search for knowledge articles

The Knowledge Base Search tab lets you search for relevant knowledge articles to resolve a case. Click the **Knowledge Base Search** tab to see search results automatically populated based on a field your administrator configured in the Knowledge Base Search control properties. For a case, this is the title of the case record.

Important

The knowledge base search in the interactive service hub shows relevant knowledge articles only when your organization is set up to use the native CRM knowledge management capability. For more information, talk to your administrator.

article to the case

- Type a different keyword to search for other knowledge articles. The following fields of a knowledge article are searched for the keywords that you type: Title, Content, Keywords, Description, and Article Public Number.
- To see knowledge articles in specific states, use the filters. You can filter search results to see all draft, published, or approved articles.
- To choose how you want to sort your search results, click **Relevance**. You can sort the knowledge articles on relevance, number of views, newest first, or oldest first.
- Click the article title to see its full content. The article opens as a horizontal tab in the **Related** section.

- To associate the knowledge article to the current case, click the **Link the KB Article** button.

  You can also dissociate the article from the case by choosing the **Unlink the knowledge article from the current record** button.
- To send an email with a link to the knowledge article on a portal, or the content of the knowledge article in an email, click the **Quick Actions** button, and then click **Email Link**. An email form opens with the link to the article populated in the email body. The fields are automatically populated based on the case and customer details. Add other information as needed, and then on the command bar, click **Send**. If your administrator hasn't selected the **Use an external portal** check box in the **Embedded Knowledge Search** setup, the content of the article is copied to the email body instead of the link.

  If the article is published, an external link is copied to the email body.

  Note
  This action is available only for Published and Expired articles.
- To copy the external URL of the article so you can share it with your customers over channels like chat or email, click the **Copy Link** button.

  Note
  This option is available only if your organization is using an external portal to publish the knowledge articles and your administrator has selected the **Use an external portal** check box in the **Embedded Knowledge Search** setup. If you use a browser other than Internet Explorer, this option isn't available.

Resolve a case

1. In the list of active cases, open the one you want to resolve.
2. On the command bar, click **Resolve case**.

   Make sure you close all the case activities. If there are open activities associated with the case, you'll see a message saying that the open activities will be canceled if you resolve this case. To continue, click **Confirm**.
3. In the **Resolve Case** dialog box, in the **Resolution Type** list, select how the case was resolved.
4. In the **Resolution** box, type a short explanation of the resolution.

   The total 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.
5. In the **Billable Time** list, enter the amount of time spent on the case to be billed to the customer.

   If this case is linked to an entitlement, the billable time will be subtracted from the allotted minutes for that entitlement.
6. Click **Resolve**.

Cancel a case

All case activities must be closed before you can cancel a case.

1. In the list of active cases, open the case you want to cancel, and then on the command bar, click **Cancel Case**.
2. In the **Confirm Cancellation** dialog box, select the case status:
   - **Canceled**: This means the case is canceled and it will no longer be assigned to you.
   - **Merged**: This means the case is merged with another case. When the case is merged, the case activities will be moved to the case it was merged with.
3. Click **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. In the list of cases, select the case that you want to reassign, and on the command bar, click **Assign**.

2. In the **Assign to Team or User** dialog box, in the **Assign To** field, select **User or Team**, and then in the **User or team** field, select who you want to assign the case to.
3. Click **Assign**.

Add a case to a queue

If you think another group in your team has expertise on the subject, you can move the case to a queue so that someone else can pick it up.

1. Go to **Service** > **Cases**. [(How do I get there?)]()

2. In the list of cases, select the case that you want to add to a queue.
3. On the command bar, click **Add to Queue**.
4. In the **Queue** field, select the queue that you want to add the case to, and then click **Add**.

Save and route a case

To save a case record and route it to a queue in a single click, use the **Save & Route** button.

1. From the list of cases, open a case record.
2. Make the changes as required, and on the command bar, click **Save & Route**.
3. In the **Route Case** dialog box, click **Route**.

   The case is routed based on the active routing rule set.

   Important
   The Save & Route button is available only on active cases.

Reduce call handling times with knowledge articles

With the new CRM knowledge management solution, you can create and manage knowledge articles that your users may be looking for. Knowledge articles can include instructions about using your products or answers to questions customers frequently have. Use the rich text editor to format your content or embed videos and images.

Important

The ability to create and format knowledge articles with the rich text editor is available only in the interactive service hub. The articles that are created in the interactive service hub will be available in the CRM web application as read-only records.

In this section:

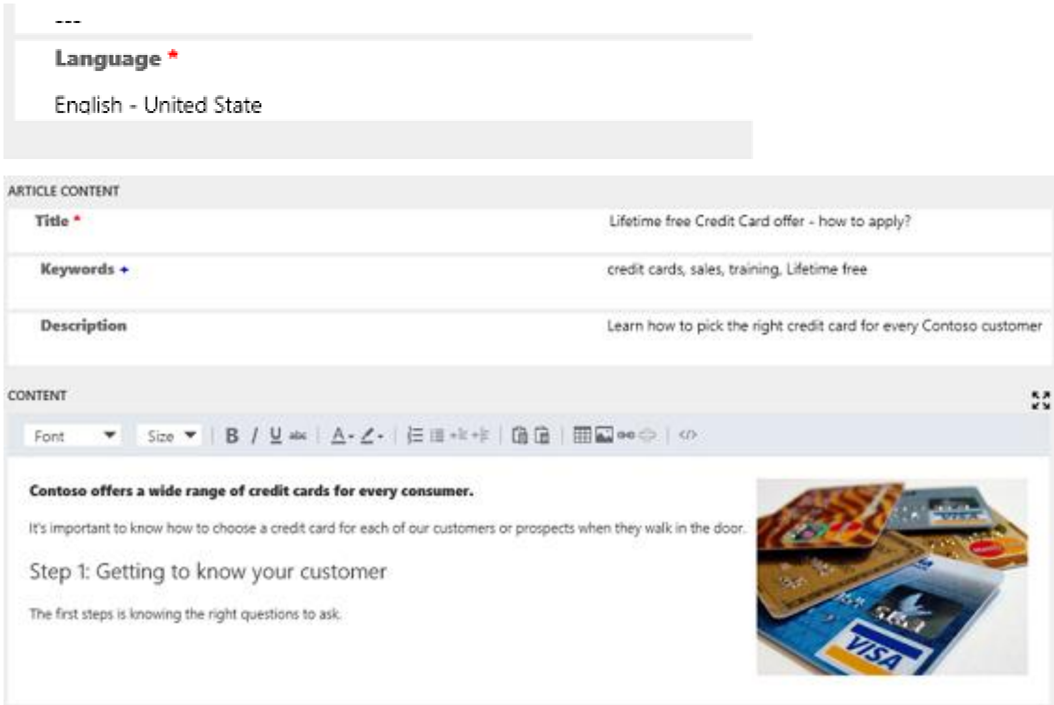
Knowledge management process

The following diagram describes the default process for creating and using knowledge articles in the interactive service hub.

Create a knowledge article

Turn your customer questions, issues, and feedback into knowledge articles, so other service reps can benefit from them. Add images and videos to your articles to explain things better and make the articles engaging.

1. Make sure that you have Create and Read permissions on the Knowledge Article entity. By default, these permissions are added to the Knowledge Manager, Customer Service Manager, or Customer Service Representative role.
2. In the interactive service hub, go to **Service** > **Knowledge Articles**.



5. In the **Content** section, add the content for your knowledge article.

   Note
   As soon as you click inside the editor space, the rich text editor command bar appears. Use the command bar options to format and style your content. More information: [Use the rich text editor to create knowledge articles and emails]

6. On the process bar, click **Author**.
7. In the **Article Subject** drop-down list, choose the subject of the article to help with article searches.
8. In the **Assign Primary Author** drop-down list, choose a person who is responsible for maintaining the article content. By default, the user who creates the article is the primary author.
9. When you're done adding the content, click **Save**.

   Posts about knowledge article-related activities will begin appearing in the **Timeline** section.

Use the rich text editor to create knowledge articles and emails

Create rich and well-formatted content for email or knowledge articles using the new rich text editor in the interactive service hub. The editor brings common word processor features like advanced styling, linking, find and replace, and insert images and tables.

You can choose a specific format or style for the content you're writing.

2 4 6 8 10 12 14 16 18 20 22 24

Command	Use
1. Formatting Styles	Apply predefined sets of formatting features to make it easier to keep the presentation of the text consistent. To make the choice easier, the style names are displayed in a style that they represent, giving you a preview of what the text will look like. **Note** This option is available in the expanded mode only.
2. Paragraph Format	Apply predefined block-level combinations of various formatting options. A paragraph format can only be applied to a block-level element, like a **paragraph** or a **div** element. **Note** This option is available in the expanded mode only.
3. Font Name	Choose a font for the selected text.
4. Font size	Choose a font size for the selected text.
5. Bold	Apply bold formatting to the selected text.
6. Italic	Apply italic formatting to the selected text.
7. Underline	Underline the selected text.
8. Strikethrough	Mark selected text for deletion.
9. Text Color	Choose a text color for the selected text.
10. Background Color	Choose a background color for the selected text.
11. Align Left	Left align the text. When you align your text left, the paragraph is aligned with the left margin and the text is ragged on the right side. **Note** This option is available in the expanded mode only.

Command	Use
12. Center	Center align the text. When you center align the text, the paragraph is aligned symmetrically along the vertical axis and the text is ragged on the both sides. **Note** This option is available in the expanded mode only.
13. Align Right	Right align the text. When you align your text right, the paragraph is aligned with the right margin and the text is ragged on the left side. **Note** This option is available in the expanded mode only.
14. Insert/Remove Numbered List	Create a numbered list.
15. Insert/Remove Bulleted List	Create a bulleted list.
16. Increase Indent	Increase the margin on the left side of text.
17. Decrease Indent	Decrease the margin on the left side of the text.
18. Paste as Plain Text	Paste the clipboard data as plain text, without the source formatting and styling.
19. Paste From Word	Paste content from Microsoft Office Word with the original content formatting. This will retain: • Spacing and line breaks • Ordered and unordered lists • Tables • Font styles and colors **Note** Images won't be copied from Word Microsoft Office Word.
20. Insert Table	Insert a table, and specify the table properties.
21. Image	Insert an image.

<table>
<tr><th>Command</th><th>Use</th></tr>
<tr><td></td><td>
1. Choose Insert Image.
2. In the Image Info tab, specify the web address of the image, and also specify properties to define how the image will appear in the email or article.
Note
If the image is located on the external server, use the full absolute path. If the image is located on a local server, you can use a relative path.
3. If you want the image to be a clickable link, in the Link tab, add a URL for the image. You can also specify if you want the targeted page to open in a new window, topmost window, same window, or parent window.
4. To configure additional image options, use the Advanced tab. This is meant for advanced users with knowledge of HTML and CSS, and lets you change the presentation of the image.
• ID. Type a unique identifier for an image element in the document (id attribute).
• Language Direction. Choose the direction of the text.
• Language Code. Type the language of the image element specified.
• Long Description URL. Type the web address of an HTML page containing a longer description of the image.
• Stylesheet Classes. Enter the class of the image element (class attribute). Note that an image element might be assigned more than one class. If this is the case, separate class names with spaces.
</td></tr>
</table>

Command	Use
	• **Advisory Title.** Enter the text of the tooltip that is shown when the mouse cursor hovers over the image. • **Style.** Enter the CSS style definitions. Note that each value must end with a semicolon and individual properties should be separated with spaces.
22. Link	Add clickable hyperlinks or email addresses to your documents. In the **Link** dialog box choose the type of link you'd like to insert. The **Link Info** tab allows you to choose the link type as well as set the link protocol and URL. The **Target** tab is only available for the URL link type. It specifies the location where the link will open after you click it.
23. Create Div Container	Create a **div** container to apply formatting to a larger document fragment that extends beyond one block. The **General** tab lets you manually add a stylesheet class that is applied to the div element. The **Advanced** tab lets you configure additional **div** element options such as assigning it an ID, a language code, a text direction, an advisory title, or CSS style properties. **Note** This option is available in the expanded mode only.
24. Source	Open the HTML source code for the content. To embed videos and IFrames, **video** and **iframe** tags can be used in HTML source code mode.

Important
You can't use client-side code (script tags or JavaScript) in articles and emails. If you want to associate CSS or JavaScript, use web resources.

Mark a knowledge article for review

To make sure the content you've created is accurate, have someone review it.

You can mark an article for review or directly assign it to a specific person or queue. When you mark an article for review, it starts appearing in the knowledge manager's dashboard. The knowledge manager can then assign the article to specific team members or a queue for review.

1. In the article you want to mark for review, in the **Status Reason** drop-down list, click **Needs Review**.
2. On the process bar, click **Author**.
3. In the **Mark for Review** field, click **Mark Complete**.
4. To assign the knowledge article to another reviewer or team, on the command bar, click **Assign** and select the user or a team.
5. To add the article to a queue so reviewers can pick it from there, on the command bar, click **More** > **Add to Queue**, and then select the queue.

Review and reject or approve a knowledge article

It's important to review articles for accuracy before they're published or made available to others.

Important
To approve a knowledge article, you must have **Approve** permissions for the knowledge article record type. This permission is added by default to the Knowledge Manager, Customer Service Manager, Customer Service Representative, or System Administrator role or equivalent permissions.

To	Do this
Pick an article assigned to you	Go to **Service** > **My Knowledge Dashboard**, and then see the **My Active Articles** stream. **-OR-** In the interactive service hub, go to **Service** > **Queue Items**, and then select the **Items available to work on** view.
To suggest review feedback	1. On the process bar, in the **Review**

To	Do this
	stage, in the **Review** field, select **Reject**. 2. In the **Timeline** section, click **+**, and then click **Note** to add details about the changes you want in the knowledge article. The article is automatically assigned to the primary author of the knowledge article.
Approve the content of the article	When you approve the content of an article, it means that the content is ready to be consumed by other customer service reps, and also ready to be published. On the process bar, in the **Review** stage, in the **Review** field, select **Approve**. The article is automatically assigned to its primary author.

Update knowledge articles to capture feedback

Make sure that your articles are up to date and accurate at all times by updating them based on feedback you receive.

1. In the interactive service hub, go to **Service** > **Knowledge Articles**.
2. Click the article you want to edit.

   If the reviewer has suggested any changes from their review, you can see them in the Timeline section.
3. Update the article based on the feedback.
4. Click **Save**.
5. To assign the article back to the reviewer for approval or publishing, on the command bar, click **Assign**, and then select a user or a team

Update published knowledge articles

When a knowledge article is in the Published state, only the users who have the Publish privilege can update it.

1. In the interactive service hub, go to **Service** > **Knowledge Articles**.
2. Click the published article you want to edit.
3. On the command bar, click **Update**.
4. Update the article based on the feedback.
5. Click **Save**.

If the article has information that complements an existing knowledge article, associate the existing article with the current knowledge article.

1. In the knowledge article, on the command bar, click **More** > **Relate Article**.
2. In the **Select Article to Associate** field, click the **Lookup** button, select an existing article, and then, click **Associate**.

   The associated article appears in the **Related Articles** list in the **Related Information** section of the **Summary** tab.

Create and manage article versions

Article versioning helps you manage updates to your knowledge articles. By creating major and minor versions of a knowledge article, you can keep your articles up to date with the latest information while keeping track of changes throughout the lifecycle of your products and services.

This capability helps you to keep accurate records of the features your organization provides and go back to previous versions if you need to.

1. In the interactive service hub, click **Services** and choose **Knowledge Articles**.
2. Open the article you want to create a new version for.
3. In the knowledge article, click **Create Major Version** or **Create Minor Version**.

   An example of a major version would be when your documentation changes to detail a new feature or functionality, while a minor version might be a change to the user interface with no change to functionality.

   The new version of your article will contain all of the same content, information, and permissions as the current version. The **Version Major** or **Version Minor** field will automatically update to reflect the new version number.

Note
You won't able to make any changes to the **Major Version Number**, **Minor Version Number**, **Language**, or **Article Public Number** fields when creating a new major or minor version of an article.

4. After you have reviewed the article, make any changes that you want to the new version. You can update the article title, content, keywords, and description to reflect any changes to your products, features, or services.

Review and publish your new version

When you are done making changes, you can push the new version of your article through your standard article workflow. When you are finished reviewing and are ready to publish, on the command bar, click **More** > **Publish**, and then choose how and when you want to publish your new version. You can publish your new version immediately, schedule it to publish at a future date, or leave it as a draft to manually publish later. More information: Schedule or publish an article

Manage article versions

Managing your article versions means publishing and archiving different versions of each article to provide the most accurate information to your customers and internal employees. Keep in mind that only one version of an article can be published at a time; it's important to keep track of the changes that are made to each version and publish them when it is appropriate.

1. In the knowledge article, click the **Summary** tab.
2. In the **Related Information** section, click the **Related Versions** button to display a list of all major and minor versions of the article.
3. In the **Related versions** list, open the version you want to delete.
4. Click the **More** button, and then click **Send to Trash**.
5. When prompted, click **OK**.

   Deleting an article version is permanent and can't be undone. You won't be able to go back to that version of the article, so make sure that you don't need any of the information. It's a good idea to create a local backup of any versions you delete.

Translate a knowledge article in multiple languages

Your knowledge content needs to reach all of your customers, no matter what market or region they are from. The knowledge management capability in CRM helps you translate your articles so that you can provide the same self-help content in multiple languages without having to manage multiple copies of the same article. By using the translation feature, you can quickly and efficiently provide 24-hour service to all of your customers.

1. Open the article you want to translate, and on the command bar, click **Translate**.
2. In the **Create new translation** dialog box, in the **Pick a language** drop-down list, choose the language you want.
3. In the **Create new version** field, choose whether to create a new major or minor version for your translation.

   You can translate articles into any language that's supported by the interactive service hub.
4. Click **Create**.
5. Enter your translated text in the appropriate fields. You can enter translated text for the following fields:
   - Title
   - Keywords
   - Article Description
   - Content
6. When you are finished reviewing and are ready to publish, click **More** > **Publish**. Choose how and when you want to publish your new version. You can publish your new version immediately, schedule it to publish at a future date, or leave it as a draft to manually publish later. More information:Schedule or publish an article

Manage article translations

After you have published a translation for an article, you can manage it and any other translations by clicking the **Summary** tab of the knowledge article.

1. In the **Related Information** section, click **Related Translations**.
2. Open the translation you want to view. Keep in mind that there may be multiple versions for each language. You can sort the translations by clicking the column headers of the **Related Translations** section.

   From here, you can:
   - Edit or update a translation
   - Create a new major or minor version of a translation
   - Delete a translation or version of a translation

Schedule or publish an article

After the content in the article is complete and reviewed, you can publish the article to the portal to make it available to your customers.

Important

If your organization is using a portal for publishing the knowledge articles, your customizer can write a plug-in that can pick the published articles and post on your portal, and also capture the article views back.

1. Make sure that you have the Publish and Update permission on the Knowledge Article record type. These permissions are added by default to the Knowledge Manager, Customer Service Manager, Customer Service Representative, or System Administrator role.
2. In the interactive service hub, go to **Service** > **Knowledge Articles**.
3. Open a knowledge article that's in the Approved state.
4. To make it easy to find knowledge articles related to specific products, associate the knowledge article with a product.

   a. On the command bar, click **More** > **Relate Product**.
   b. In the **Select Product to Associate with** field, click the **Lookup** button, elect a product this article is about, and then, click **Associate**.

      The associated article appears in the **Related Products** list in the **Related Information** section of the **Summary** tab.

5. On the process bar, click the **Publish** stage.
6. In **the Set Product Associations** field, click **Mark as Complete**.
7. If you want to schedule the article to publish on a later date, on the **Summary** tab, in the **Publish On** field, select a date and time to publish the article.
8. On the command bar, click **More** > **Publish**.

   a. In the **Publish** field, select whether you want to publish the knowledge article right away or in the future. To publish the article in the future, in the **Publishing Date Time** field, select a date and time.
   b. In the **Published Status** field, select what status the article should be in after it is published. By default, **Published** is selected.
   c. In the **Expiration Date** field, select a date and time when you want the

published article to expire. Expired articles are no longer available in searches.

d. If you've set an expiration date, in the **Expiration Status** field, select the status the knowledge article should be set to after it expires.
e. To publish all approved related translated articles with the article, in the **Publish Approved related translations with Article**, click **Yes**.
f. Click **Publish**.

Track knowledge article views

Tracking your content helps you and your authoring team assess its value to your organization and your customers. Knowing and understanding when, where, and how many times an article was viewed tells you how much your customers and team members rely on the information that it contains. This data is extremely useful when creating future content curation plans and can help you decide what content you will deliver in the future, as well as how you deliver it, where you deploy it, and what style or structure you use to write it.

To view an article's view counts and other statistics, open the article you want to track, and then click the **Analytics** tab.

- **Views** section. Shows you the total number of times that this article has been viewed. This figure represents the total views of all versions and all translations of this article combined. It also shows individual article views on specific days. You can click the column headers to sort by chronological order or by the number of views.
- **Cases** section. Shows a list of the cases that have used this article. Double-click a case to view its details.

  By reviewing cases that have used your articles, you can gain valuable insights into the questions that customers are asking, as well as what avenues they tried before asking for help. This data can help you expose your knowledge articles better and provide more useful information to your customers and team members.

Monitor knowledge articles with dashboards

Knowledge managers and authors can now monitor the status of knowledge articles using the two new default dashboards available in the interactive service hub.

Note

If these dashboards don't offer what you need, you can create new interactive dashboards. More information: [Configure interactive service hub dashboards]

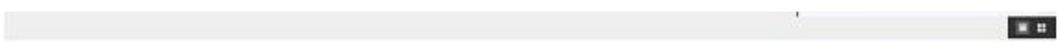
My knowledge dashboard

This dashboard is designed for authors to give them a visual snapshot of the number of knowledge articles they're working on and their status. It helps them quickly know things like article expiring in the month and articles in review.

- Streams show data from views or queues. In the knowledge dashboard, the stream shows the active articles assigned to the author.
- Charts provide a count of relevant records in the streams, such as articles by status reason, articles by owner, or articles by subject. They also act as visual filters. You can drill down in a chart to see data that interests you the most.
- Tiles give authors an aggregated view of data in the streams and help them monitor the volume of their knowledge articles.

Knowledge manager

This dashboard is designed specifically for knowledge managers. As a knowledge manager, you can quickly know the most popular articles, articles that need review, or articles that are about to expire, and take necessary actions on the articles right from here.



More information: [Use interactive dashboards to effectively manage service cases]()

Use interactive dashboards to effectively manage service cases

Microsoft Dynamics CRM interactive experience dashboards are a one-stop workplace where you review your workload and take actions. The information in the interactive dashboard is shown in real time, coming from various views and queues. The interactive dashboards with their modern and intuitive interface are optimized for the customer service experience. For example, instead of paging through the application looking for a particular case, you'll be able to open and update the case right from the dashboard. This will save you time, help to focus on tasks at hand, and get more work done. You'll need sufficient permissions to use the interactive dashboards. The permissions will be assigned to you by an administrator.

In this section:

Interactive experience dashboards overview

Interactive tiles

Visual filters (interactive charts)

Global filter

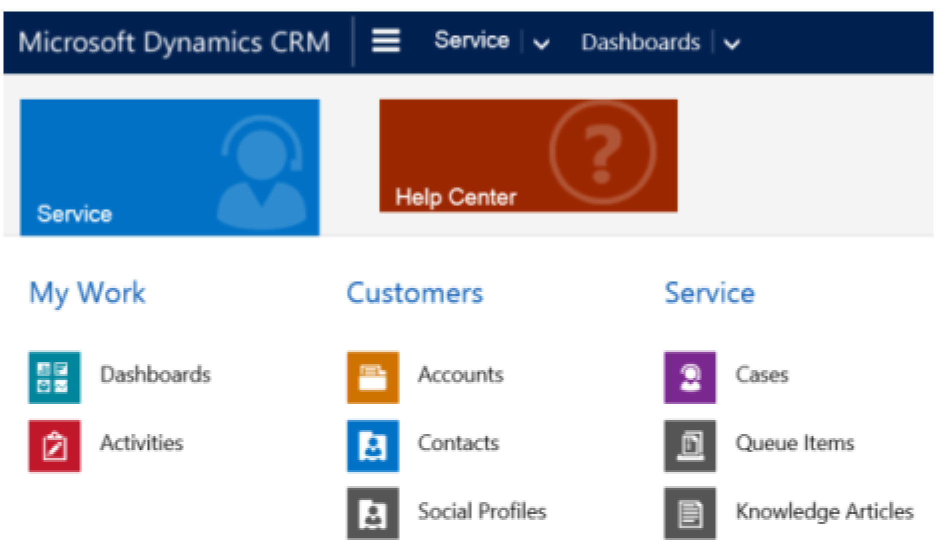
Clear the filters
Timeframe filter
Collapse or expand work item description in the stream
Show quick actions
Edit stream properties
Change the sort order in the data stream
Color-coded data in streams and charts
Information for customizers

Interactive experience dashboards overview

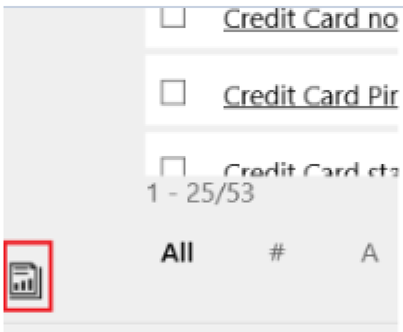
The interactive dashboards come in two flavors: multi-stream and single-stream.

When you sign in to the interactive service hub, you're looking at the Tier 1 multi-stream default dashboard. A multi-stream dashboard displays data in real time over multiple data streams. The data in a stream is based on an entity's view or a queue, such as My Activities, My Cases, or Cases in the Banking Queue. While a stream always contains information only about one entity, each stream on the dashboard may contain information about a different entity. For example, you may be tracking cases in one stream and accounts in the other stream, but, you can't track cases and accounts in the same stream. In a multi-stream dashboard all streams may be displaying data based on the same entity.

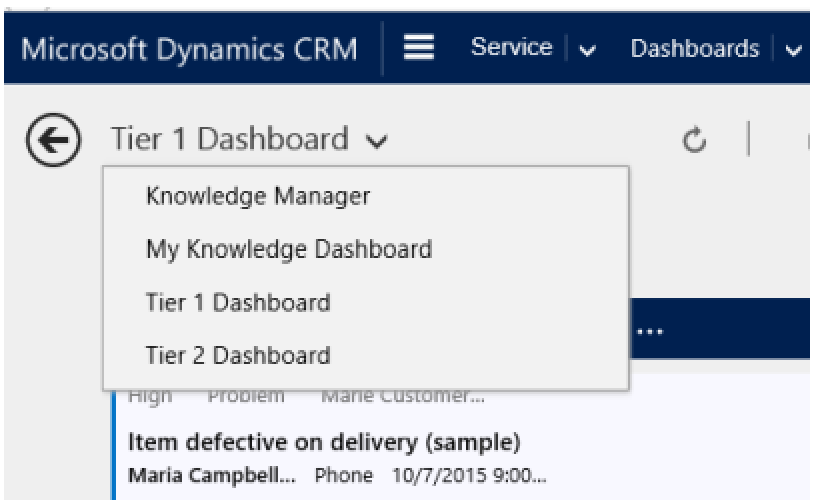
You also could be using a multi-stream entity-specific dashboard, such as the Cases dashboard. To open a dashboard like this, you'll need to navigate to **Service** and down to a specific entity, such as **Cases**, as shown here.



The default **Cases** grid is displayed. To open the **Cases** dashboard, click the square button in the bottom left corner of the page, as shown here.



Multi-stream dashboards target Tier 1 support, where customer service representatives handle many support cases at the same time. An entity-specific dashboard can be useful for Tier 1 representatives or Tier 2 customer representatives that look at fewer, but, more complex cases. In the multi-stream dashboard, you can easily switch from a standard view to the tile view. The interactive tiles show an aggregated view of the data across the queues or views. You can also click the tile to drill down to the underlying records. The interactive dashboard application opens with the Tier 1 interactive dashboard. However, you can make another selection from the available dashboards, as shown here.

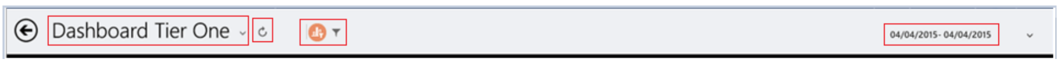


Single-stream dashboards display real-time data over one stream based on a view or queue. The tiles are positioned on the right side of the dashboards and are always shown. Single-stream dashboards are helpful to Tier 2 leads or managers, who monitor fewer, but more complex or escalated cases in a single view or queue.

Multi-stream and single-stream dashboards contain interactive charts that give you a count of relevant records, such as cases by priority or by status. These charts also act as visual filters.

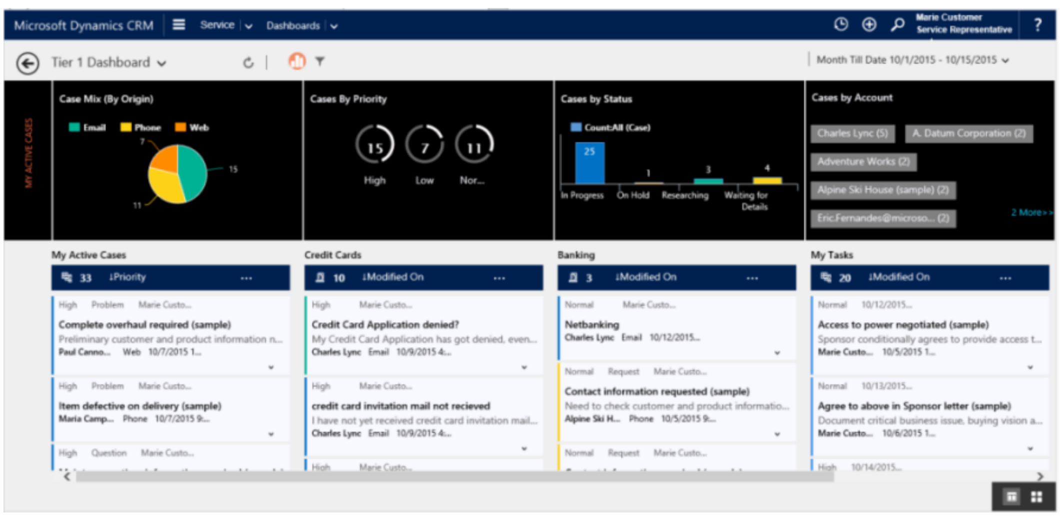
You can apply additional filtering with global filters and timeframe filters. The global filter works on streams and charts in the dashboard. You can sort the data in a stream based on different criteria, such as the priority, status, or the date when the record was created.

The illustrations here show multi-stream and single-stream dashboards with the header pane. Below the header you see visual filters and streams. In the single-stream dashboard, you also see tiles. The dashboard header shown here contains the following controls and clickable buttons, from left to right: dashboard selector, refresh, visual filter (interactive chart) button, global filter button, and timeframe filter.



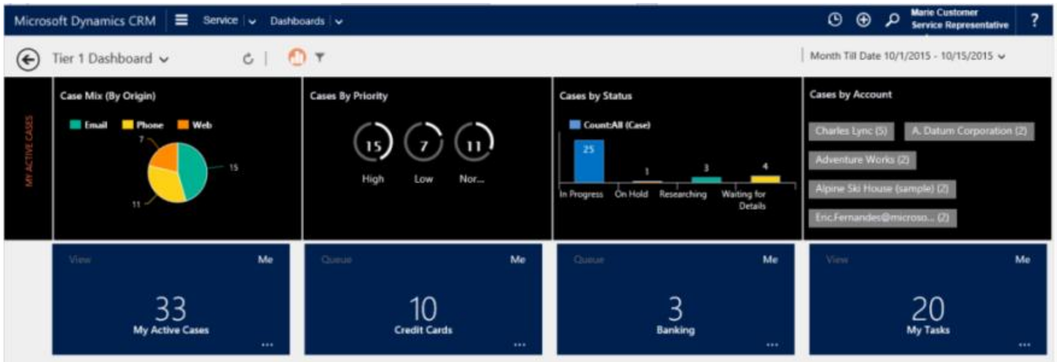
Multi-stream dashboard standard view

In the multi-stream dashboard, you see a row of visual filters (interactive charts) at the top with the data streams below.



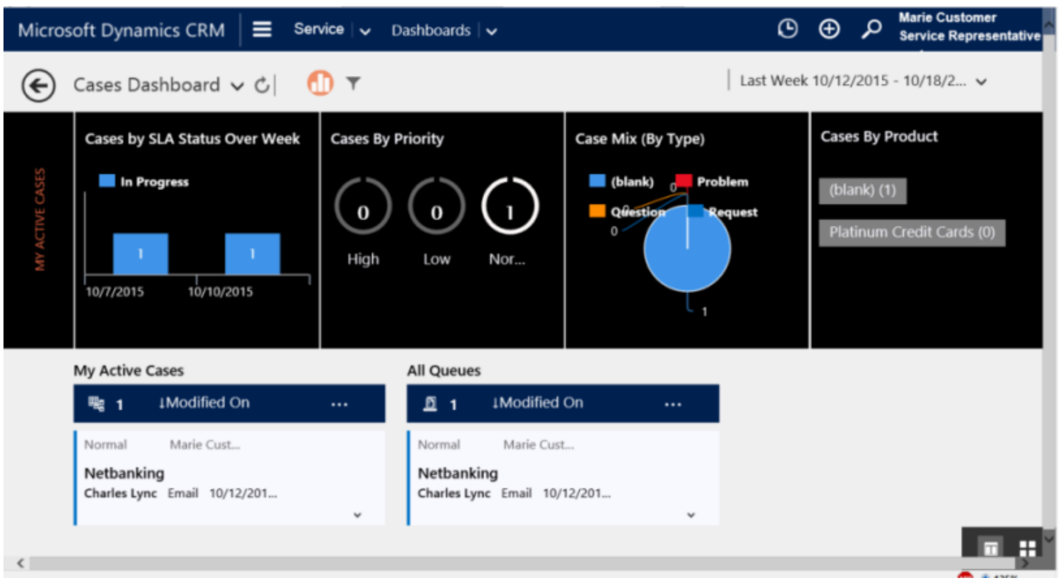
Multi-stream dashboard tile view

The same dashboard, only in the tile view.



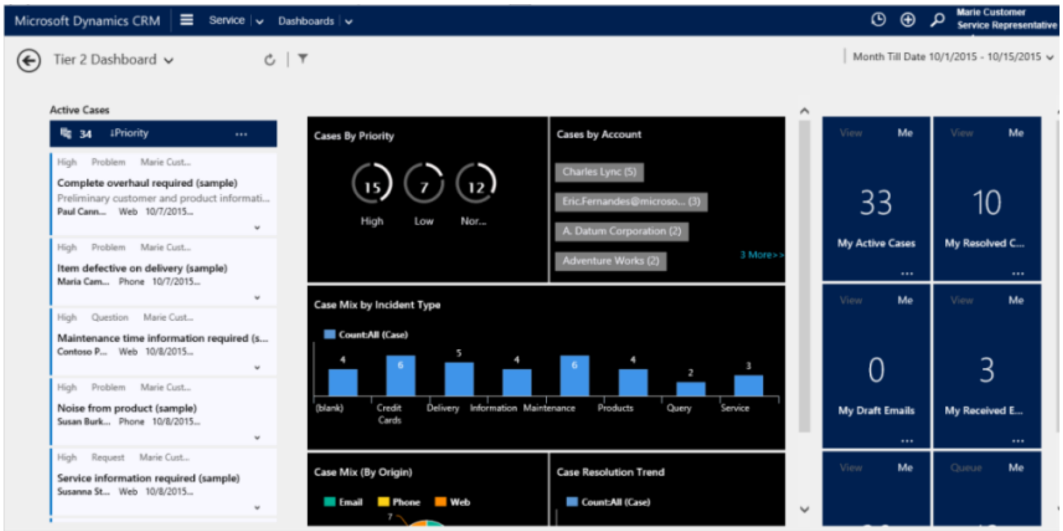
Multi-stream entity specific dashboard standard view

The following illustration shows the entity specific dashboard for the **Case** entity.



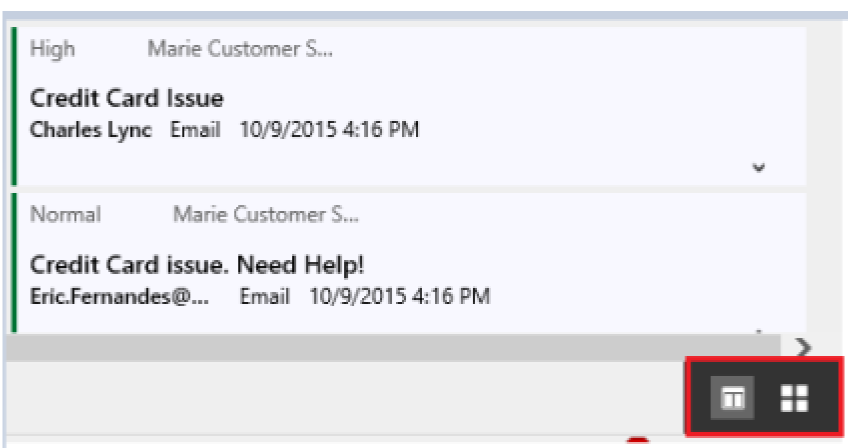
Single-stream dashboard

The single-stream dashboard contains the data stream on the left and visual filters (interactive charts) and tiles on the right.

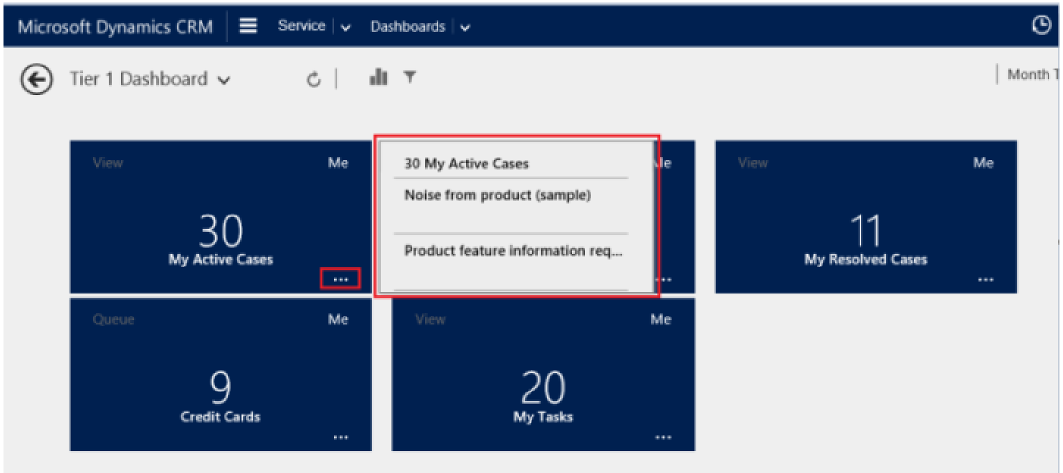


Interactive tiles

Interactive tiles provide an aggregated view of the information in the streams, across queues or views that interest you most. They help you monitor the volume of cases and quickly drill down to a particular case. In the multi-stream dashboard, you can switch from the standard view to the tile view using the switcher, a control at the bottom right corner of the dashboard, as shown here. In the single-stream dashboard, the tiles are always shown and there is no switcher on the dashboard.

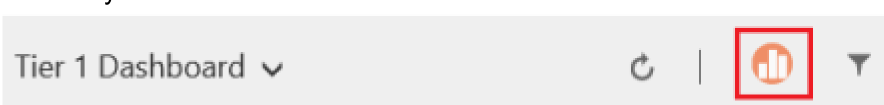


If you have five streams in the multi-stream dashboard in the standard view, after you switch to tiles, you'll see five tiles. If a view that tracks your active cases contains 30 items, the corresponding **My Active Cases** tile will display a numerical number 30 in the center of the tile. To drill down to a particular case, click the tile anywhere or **More (…)** in the right bottom corner. A flyout window will open. If there are too many cases to show, the window will have a scrollbar. You can navigate and click a particular case in the list, which will take you straight to the case form. The illustration shows the tiles and underlined cases in the list.

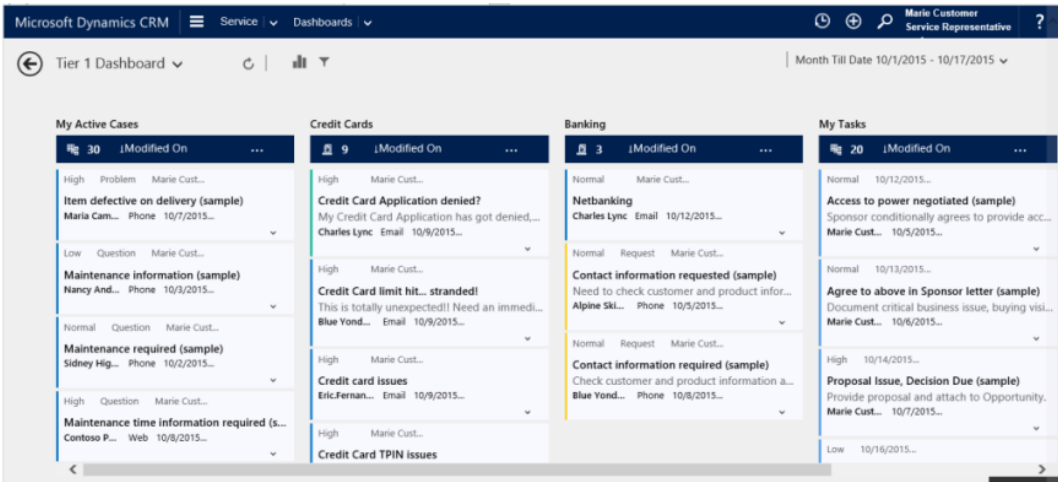


Visual filters (interactive charts)

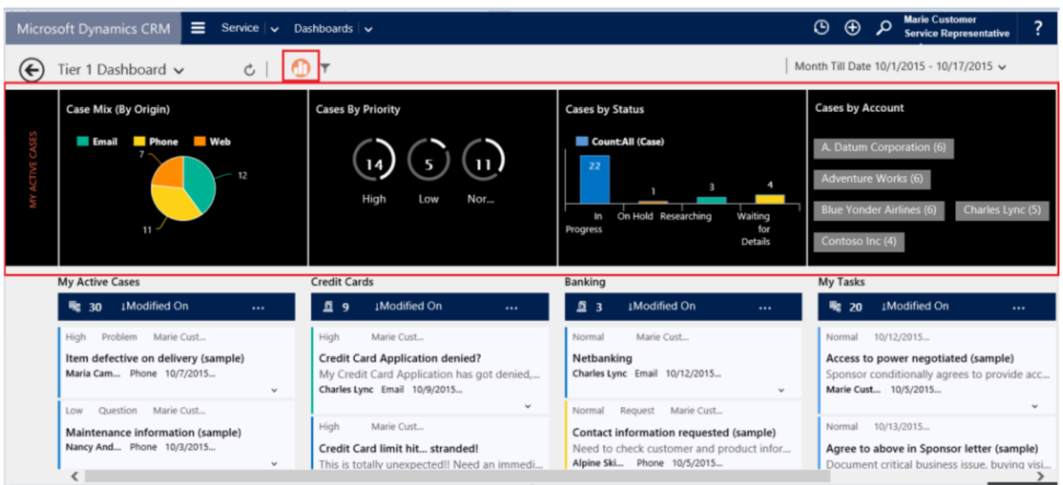
Interactive charts provide a visual snapshot of key metrics, such as cases by priority or by origin. They also act as visual filters (interactive charts) to help remove clutter from the screen and display information that interests you most. For example, if you click the High Priority circle in the "Cases by Priority" chart, the dashboard will refresh and you'll see only high priority cases in your data streams. You can find different types of charts on your dashboard, such as pie, bar, doughnut, or tag chart. Visual filters (interactive charts) and tiles help you see the changes and patterns in data, and act quickly to address the most important issues. To display the charts on the dashboard, click the visual filter (interactive chart) button in the dashboard header, as shown here. The clickable button acts as a toggle switch, to show or hide the visual filters (interactive charts) on the dashboard. On the single-stream dashboard, the visual filters (interactive charts) are always shown and can't be hidden from the view.



The following illustration shows the multi-stream dashboard without visual filters



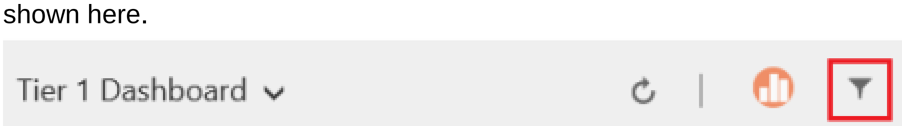
The following illustration shows the multi-stream dashboard with visual filters (interactive charts) depicting left to right: pie chart, doughnut chart, bar chart, and tag chart.



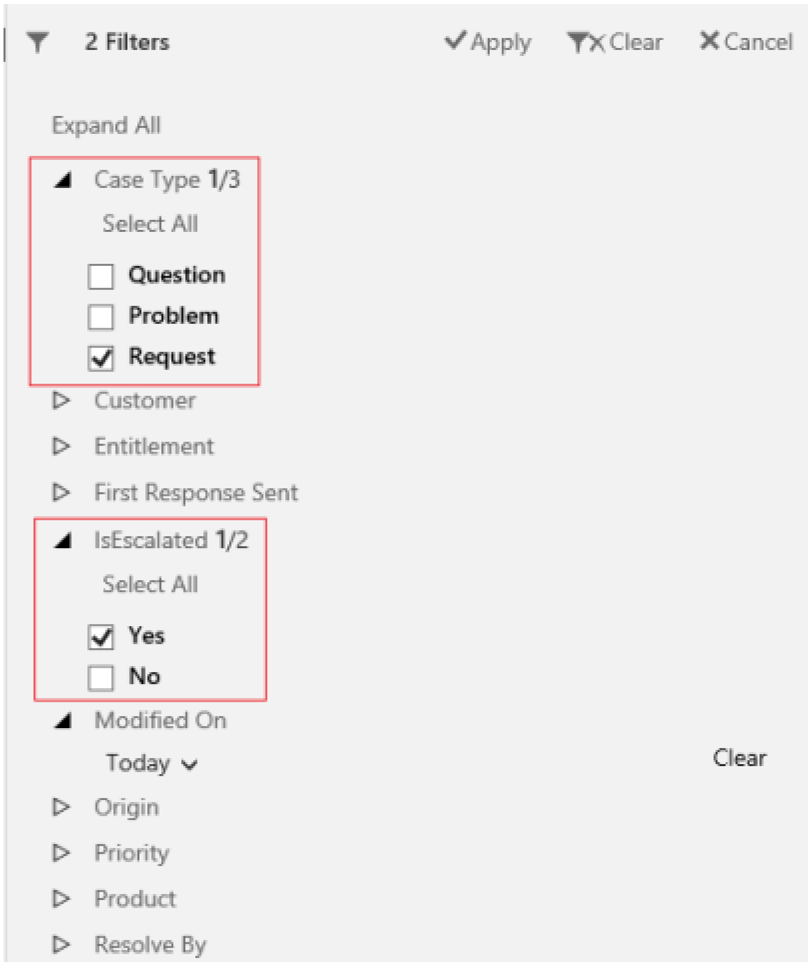
Global filter

To add granularity to filtering data, you can use the global filter. For example, you can apply the global filter to show only escalated cases and the cases that are marked as "Request."

The global filter button is shown in the dashboard header to the right of the chart button, as shown here.



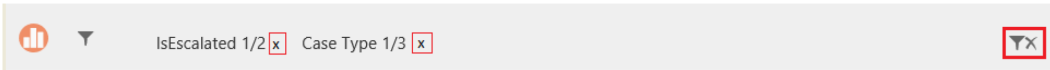
When you click the global filter button, the filter flyout window opens. The entity fields that are preconfigured by your administrator appear in alphabetical order in the flyout window. You can select multiple values in a field, as well as values from multiple fields. In our example, we checked **Yes** for the **IsEscalated** field and checked the cases of type **Request**. Click **Apply** for the action to take place.



After you apply global filters, the dashboard refreshes to show you only the escalated and requested cases in charts, streams, and tiles that are based on the filter entity (the filter entity is the entity that is used in the charts). By applying the visual filter for critical cases and the global filter for escalated cases, with just a few clicks, you went from a long list of cases to only a few cases that really matter to you.

Clear the filters

Filtering helps remove the clutter on the screen and show only the work items that you want to focus on. However, if you want to see the entire unfiltered workload, it takes only a click of the mouse to clear a particular filter or all filters at once. The applied filters are conveniently shown in the dashboard header and you can clear the filters by clicking the Clear button next to each filter or clear all filters by clicking the **Clear** button next to the global filter button as shown here.

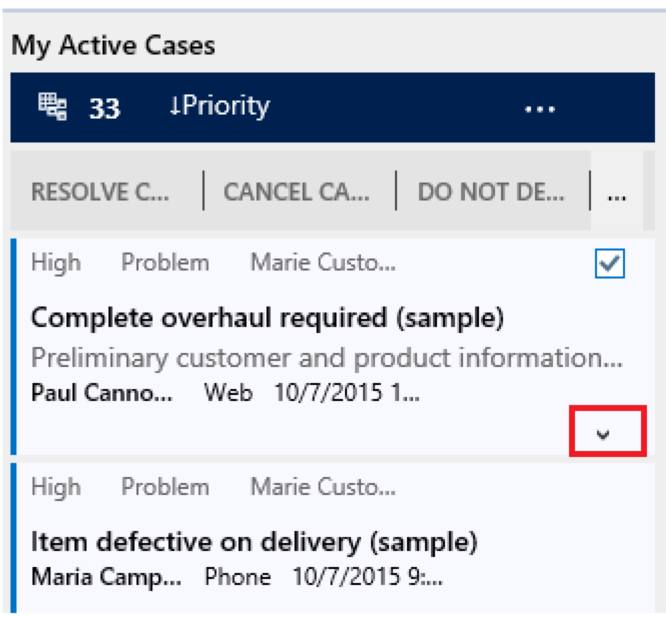


Timeframe filter

You can also apply the timeframe to display cases in a specified period of time. For example, you can choose to view data from last month, last week, a particular date, or today.

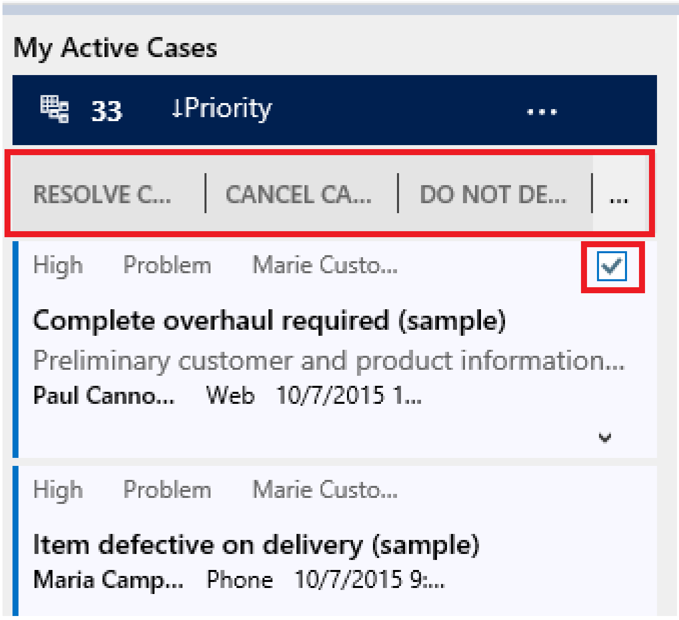
Collapse or expand work item description in the stream

To learn more about the case, you can expand the work item description area. Click the small arrow in the bottom right corner of the work item to expand or collapse the text, as shown here.

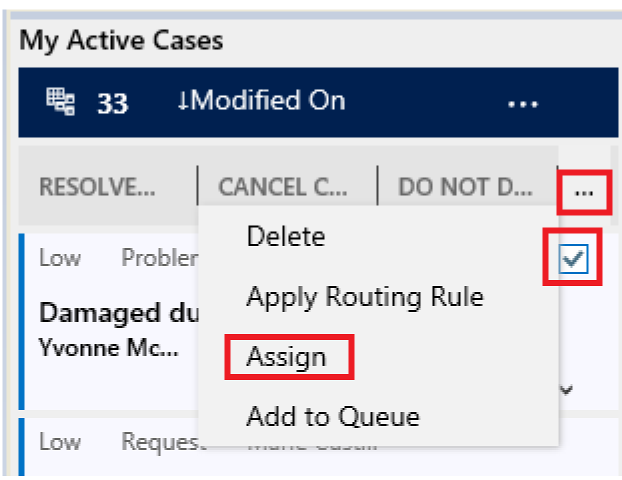


Show quick actions

You can select the check box in the top right corner of the work item to open the quick actions menu. From this menu, you can directly resolve or cancel a case, or assign the case to someone else, as shown here.

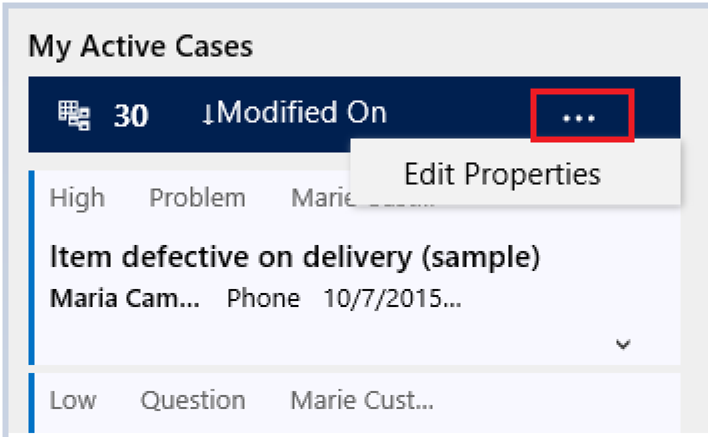


To see more menu items you can use the **More (…)** button on the quick actions menu, or toggle the check box. The illustration shows the **Assign** menu selection.

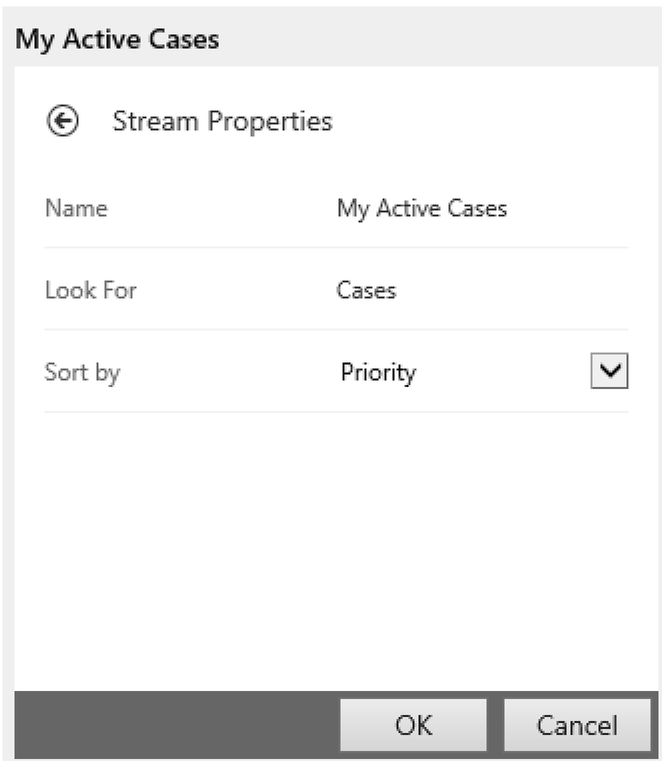


Edit stream properties

You can edit the stream properties by clicking **More (…)** in the stream header, as shown here.



For example, you can choose to sort the cases by priority, instead of the date the case was created or modified. When you click **Edit Properties**, the flyout dialog opens, in which you can make a new selection, such as sort by **Priority**, as shown here. After you change the sort criteria, the dashboard refreshes and you see the cases sorted by the priority in the stream.

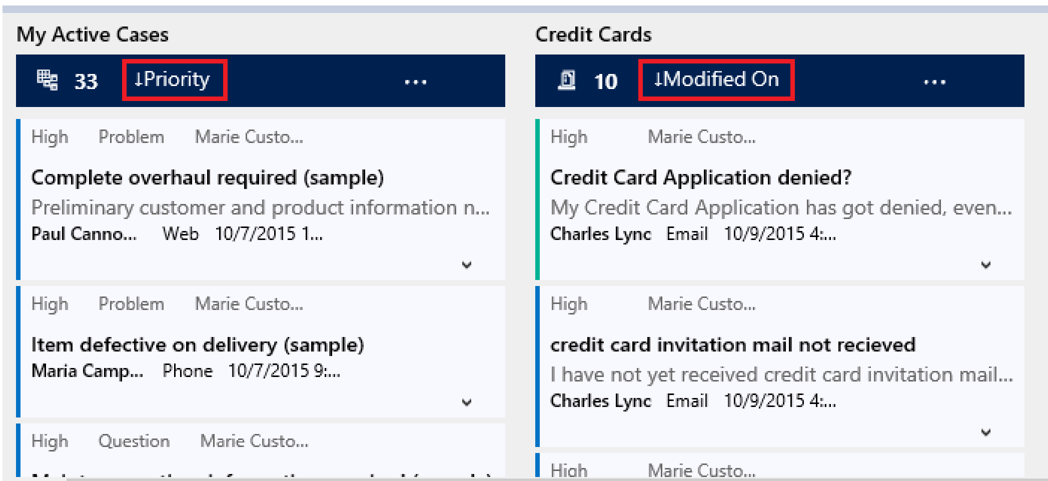


Note

By default, sorting is initially based on the **Modified On** field. If you change the default sorting from **Modified On** to something else, and the **Modified On** selection isn't in the **Sort By** list in the flyout, you won't be able to go back to sorting by that field again.

Change the sort order in the data stream

You can easily toggle the sort order in the stream by clicking the field name on which the data sorted, such as **Priority** or **Modified On**. You can sort the data to see high priority cases first, as shown here.



Color-coded data in streams and charts

The information in the charts and streams is color coded for the fields that contain a set of options. For example, a case type can be "Question," "Problem," or Request." Or, a case can be escalated ("Yes"), or not escalated ("No"). Each of these options can be assigned a specific color. For example, cases that are questions can be shown in yellow, cases that are requests in purple, and problem cases can be shown in red. In the streams, the color is shown in the thin vertical line to the left of the work item description. The doughnut charts and tag charts don't show information in color. They depict information in white, gray, and black shades. You can work with your administrator to choose the colors you like for your dashboard data.

Information for customizers

For information on how to configure the interactive dashboards, see [TechNet: Configure interactive experience dashboards]

Maximize 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

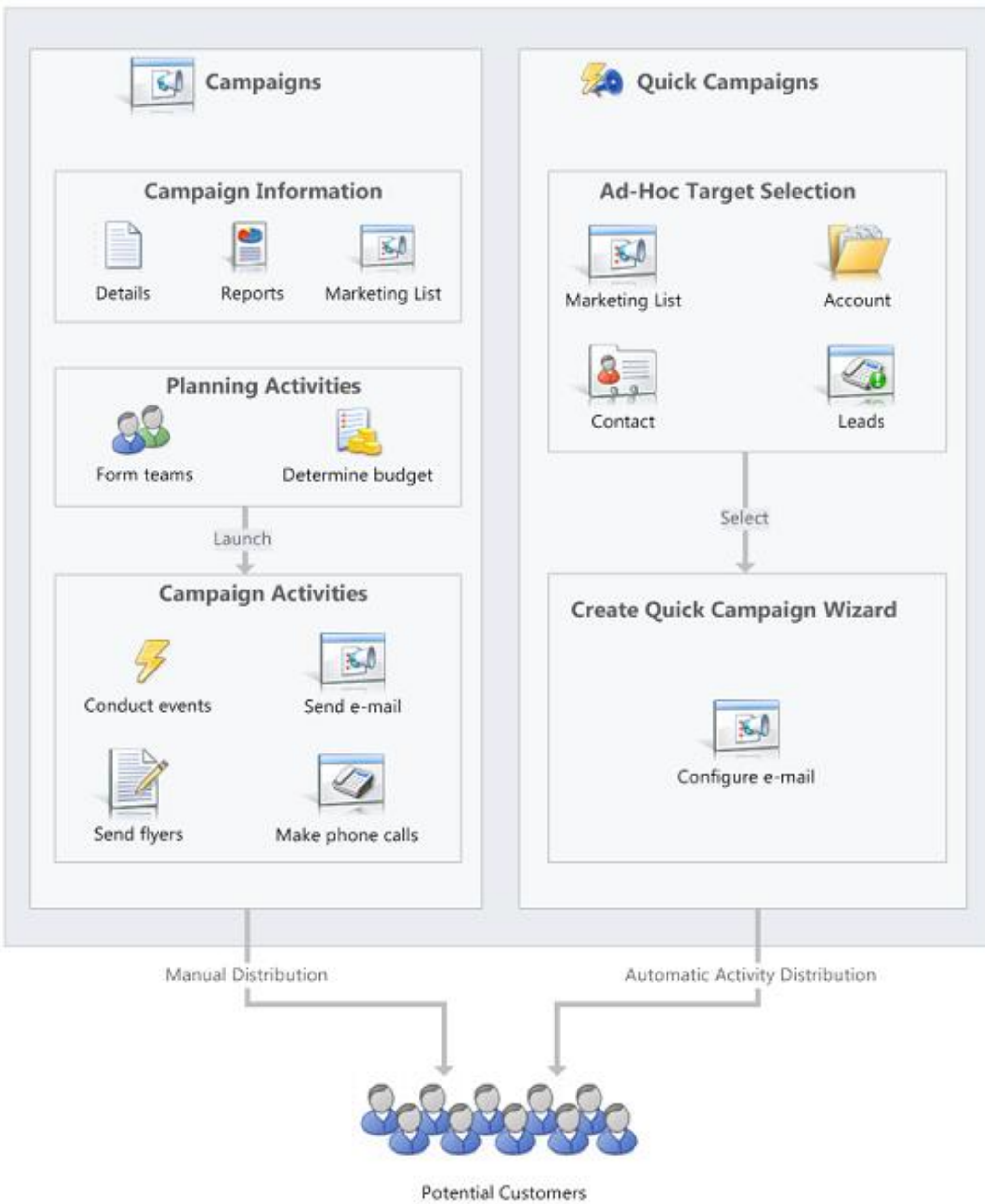
Create marketing lists

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

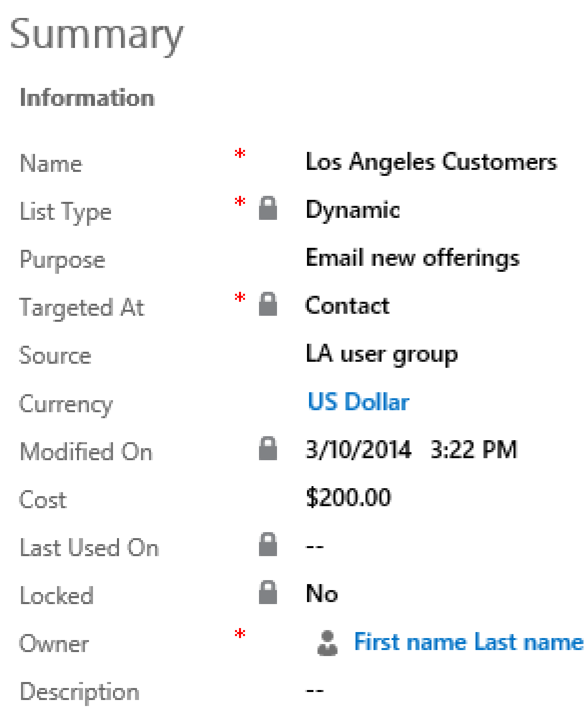
Your marketing list is the core of running a successful marketing campaign. It can include any one type of customer record, such as leads, accounts, or contacts.

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 the list, or distribute a campaign activity for a campaign associated with the list.

Create a marketing list

1. Go to **Marketing** > **Marketing Lists**. [(How do I get there?)]
2. Click **New**.
3. Add or change the information in the **Summary** area. This screenshot provides an example.



Note
To look up records in the **Owner** field, first click **Save**, or you'll lose your

changes.

4. Click **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 **Save**.

Add members to a marketing list

Add members to a static marketing list

In any marketing list record, in the **Members** area, click the **Add** ✚ button.

2. In the **Manage Members** dialog box, select one of the following options, and then click **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 **Select**, and then click **Add**.

Add using Advanced Find

a. In the **Add Members** dialog box, click **Select**, and then select 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 **Equals**, and then select a query relational operator (for example **Contains** or **Begins With**).
c. Click **Enter Text**, and then type the value that you want to locate.
d. To specify the columns to include in the search results, click **Edit Columns**, and then **Add Columns**. Then select the columns that you want to add, and click **OK**.
e. Click **Find**.
f. Select the members that you want to add, select one of the following, and then click **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 **Select**, and then select 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 **Equals**, and then select a query relational operator (for example **Contains** or **Begins With**).
c. Click **Enter Text**, and then type the value you want to locate.
d. To specify the columns to include in the search results, click **Edit Columns**, and then click **Add Columns**. Then select the columns that you want to add, and click **OK**.
e. Click **Find**.
f. Select the members that you want to remove, select one of the following, and then click **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 **Select**, and then select 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 **Equals**, and then select a query relational operator (for example **Contains** or **Begins With**).
c. Click **Enter Text**, and then type the value you want to locate.
d. To specify the columns to include in the search results, click **Edit Columns**, and then click **Add Columns**. Then select the columns that you want to add, and click **OK**.
e. Click **Find**.
f. Select the members that you want to keep, select one of the following, and then click **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 the **Add** button.

2. In the **Manage Members** dialog box, click **Select**, and then select 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 **Equals**, and then select a query relational operator.
4. Click **Enter Value**, and then type the value that you want to locate (for example, "Seattle" or "Email").

   For some values, you can click 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 **Edit Columns**, and then **Add Columns**. Select the columns that you want to add, and click **OK**.
6. Click **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 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 **+ New**.

   If you don't have any quick campaigns, the Quick Campaign Wizard will start.

Note

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The Dynamics 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 Dynamics CRM, you might be looking for a similar topic for that product. Dynamics Marketing provides a full-scale set of functionality, automation, and analytical insights for multistage and multichannel campaigns. More information: Microsoft Dynamics Marketing Help Center

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

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

1. Go to **Marketing** > **Campaigns**. (How do I get there?)
2. To create a new campaign, click **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 **Save**.
5. To add a marketing list to the campaign, in the **Marketing Lists** area, click **+**, 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.

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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

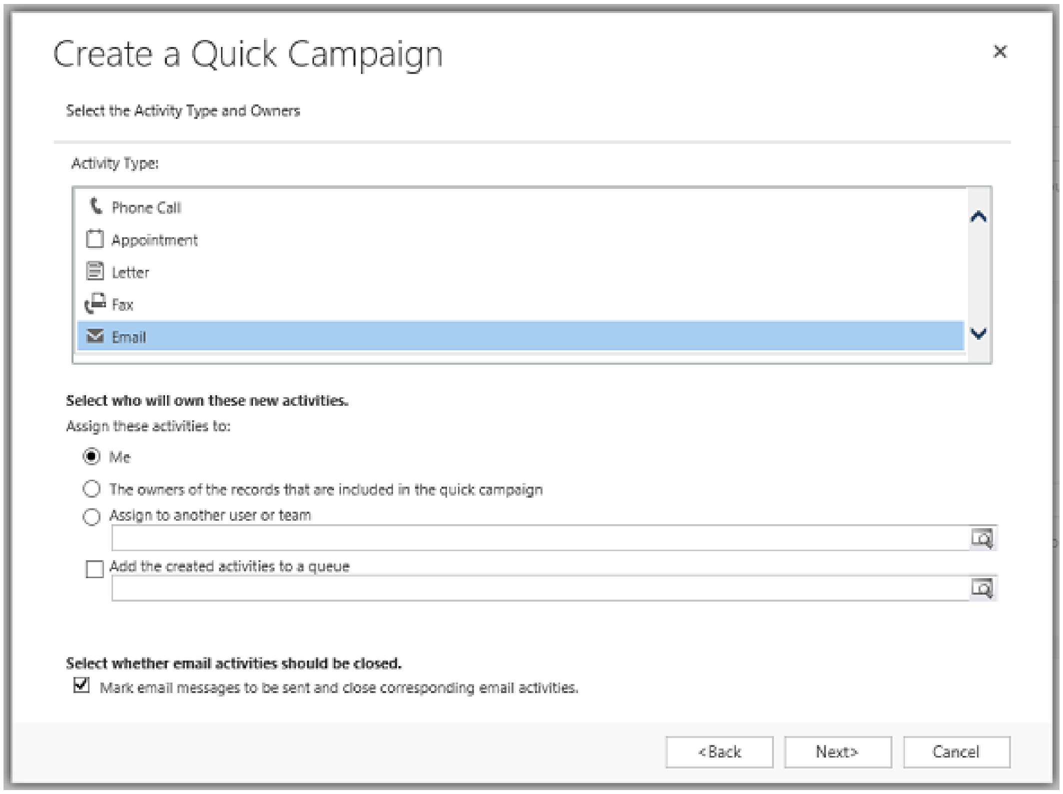
Add a marketing list, sales literature, or product to a campaign in the CRM marketing work area

Track a campaign response in the CRM marketing work area

Microsoft Dynamics Marketing Help Center

Create a quick campaign in the CRM marketing work area

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.



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. Go to **Marketing** > **Marketing Lists**. (How do I get there?)

Open a record, and then in the **Quick Campaigns** area, click the **Add** button.

3. In the Quick Campaign Wizard, read the instructions on the Welcome page, and click **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 **Next**.
7. Click **Create**.

   Note
   You can't add records to a quick campaign after you create it.

Note
This topic applies to the Marketing work area within Microsoft Dynamics CRM. The Dynamics 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 Dynamics CRM, you might be looking for a similar topic for that product. Dynamics Marketing provides a full-scale set of functionality, automation, and analytical insights for multistage and multichannel campaigns. More information: Microsoft Dynamics Marketing Help Center

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

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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 an activity to a campaign in the CRM marketing work area

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. Go to **Marketing** > **Campaigns**. (How do I get there?)

In the campaign record you want to add the planning activity to, on the nav bar, click the down arrow next to the campaign you're working on and then click **Planning Activities**.

3. To add a new activity, click **Add New Activity**, and then select the type of activity you want to create.

   -OR-

   To add an existing activity, click **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 **Save**.

Add a campaign activity to a campaign

1. Go to **Marketing** > **Campaigns**. (How do I get there?)

In the campaign record you want to add the campaign activity to, on the nav bar, click the down arrow next to the campaign you're working on and then click **Campaign Activities**.

3. Click **Add New Campaign Activity**.
4. Type in all the information you can, and then click **Save**. This creates the campaign activity so you can do more things with it, like add marketing lists.
5. To add a marketing list, click **+**. In the **Look Up Records** box, type in your search and click the **Search** button, select one or more marketing lists, and click **Add**.
6. To distribute the new campaign activity, on the command bar, click **Distribute Campaign Activity**.
7. In the activity form, type or modify information in the text boxes, and click **Distribute**.
8. Choose who will own the activities, and click **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 **Close Campaign Activity**. Set an appropriate status for the activity, and click **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.

Note
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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 in the CRM marketing work area

Add all items to your campaign that your 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. Go to **Marketing** > **Campaigns**. (How do I get there?)
2. Choose the name of the campaign that you want to add a list, product, or sales literature to. In the nav bar, click 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	Click **Target Marketing Lists**, and then click **Add Existing Marketing List**.
A product	Click **Target Products**, and then click **Add Existing Product**.
Sales literature	Click **Sales Literature**, and then click **Add Existing Sales Literature**.
A related campaign	Click **Related Campaigns**, and then click **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 the **Find** button.

5. Select the check boxes for the records that you want to add in the list of records that appears, click **Add**, and then click **OK**.
6. Click **Save** or **Save and Close**.

   Note
   To verify that the item you selected was added to the campaign, reopen the campaign. Under **Marketing**, click **Target Marketing Lists**, or under **Sales** click either **Target Products** or **Sales Literature**. The information you added appears in the list.

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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

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. Go to **Marketing** > **Campaigns**. [(How do I get there?)](#)

   Select the campaign that you want to add campaign responses to, and under **Responses**, click **Add** +.

3. Add information in the **Campaign Response** form.
4. Click **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. Go to **Settings** > **Administration**. [(How do I get there?)](#)
3. Click the **System Settings** > **Marketing** tab.
4. Set the **Create campaign responses for incoming email** option to **Yes**.

Note

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CRM, you might be looking for a similar topic for that product. Dynamics Marketing provides a full-scale set of functionality, automation, and analytical insights for multistage and multichannel campaigns. More information: Microsoft Dynamics Marketing Help Center

See Also

System Settings dialog box - Marketing tab

Get started with CRM marketing

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Create or edit a campaign template in the CRM marketing work area

Microsoft Dynamics Marketing Help Center

View and manage marketing communications with the Microsoft Dynamics Marketing Seller Portal

Stay up-to-date with communications that your Marketing department has sent to your contacts with the Seller Portal in Microsoft Dynamics Marketing. Access the Seller Portal from within Microsoft Dynamics CRM to stay well-informed about communications your customers have received from Microsoft Dynamics Marketing or to remove them from campaigns that don't apply to them.

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

This feature also requires Microsoft Dynamics Marketing 2015 Update or later.

For more information about working with the Seller Portal in Microsoft Dynamics Marketing, see Use the Seller Portal to see and manage which messages are reaching your contacts.

If you're a CRM administrator who wants to enable the Seller Portal for your users, see Dynamics Marketing for Dynamics CRM users.

View the Seller Portal for selected accounts

1. Go to **Sales** > **Accounts**. (How do I get there?)
2. Select the accounts for which you want to view marketing communications in Microsoft Dynamics Marketing.
3. Click the **More** button **…** at the top of the screen and then click **View Marketing Portal**.
4. Sign in to Microsoft Dynamics Marketing if prompted.

View the Seller Portal for selected contacts

1. Go to **Sales** > **Contacts**. (How do I get there?)
2. Select the accounts for which you want to view marketing communications in Microsoft Dynamics Marketing.
3. Click the **More** button **…** at the top of the screen and then click **View Marketing Portal**.
4. Sign in to Microsoft Dynamics Marketing if prompted.

See Also

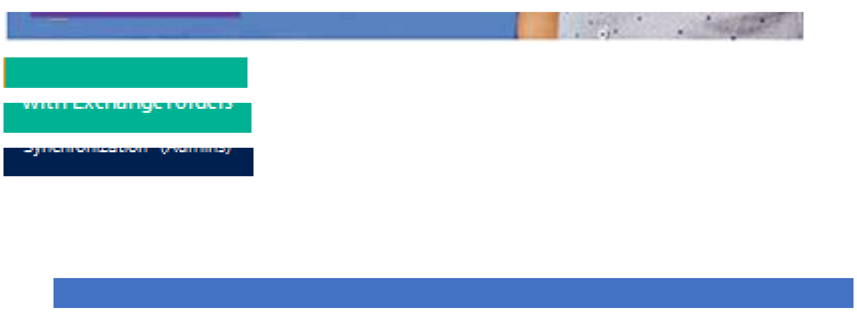
Use the Seller Portal to see and manage which messages are reaching your contacts

Use Outlook with CRM

CRM for Outlook User's Guide (full app)

CRM App for Outlook User's Guide (lightweight app)

CRM for Outlook User's Guide (full app)



Setup and configuration

Set up CRM for Outlook

Configure another organization to use with CRM for Outlook

What’s new

What's new

Get ready for the next release

Learn about the new lightweight email tracking app (CRM App for Outlook) in the latest Release Preview Guide

Get started

Do your CRM work in Outlook

Overview of tracking records in CRM for Outlook

Work offline with CRM for Outlook

Tracking records

Overview of tracking records in CRM for Outlook

Track Outlook email by moving it to a tracked Exchange folder

Track Outlook email by choosing a button in CRM for Outlook

Track Outlook contacts in CRM for Outlook

Use a wizard to add and track multiple Outlook contacts in CRM for Outlook

Track Outlook appointments in CRM for Outlook

Track Outlook tasks in CRM for Outlook

Synchronizing data

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

View the fields that are synchronized between CRM and Outlook

Choose the records to synchronize between CRM and Outlook or Exchange

Choose records to work with offline in CRM for Outlook

Synchronize records manually with CRM for Outlook

Control field synchronization between CRM and Outlook or Exchange

Synchronizing data with Outlook or Exchange FAQ

Working offline

Work offline with CRM for Outlook

Choose records to work with offline in CRM for Outlook

Example of going offline with CRM for Outlook

Setting personal options

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Set an option to automatically track incoming Outlook email in CRM for Outlook

Set address book options in CRM for Outlook

Customize your regional settings (number, currency, time, and date) in CRM for Outlook

Troubleshooting and FAQ

[Synchronizing data with Outlook or Exchange FAQ]

[Troubleshooting CRM for Outlook issues]

Get help from experts

[Search forums and communities]

[Watch videos]

[Search the Microsoft Dynamics CRM team blog]

Set up and configure

[Set up CRM for Outlook]

[Configure another organization to use with CRM for Outlook]

[Set up and configure CRM for Outlook from Office 365]

[The Outlook email address should be the same as the CRM email address]

Set up CRM for Outlook

horizontaltabbed

CRM 2016 for Outlook

If you're like many people, you use Microsoft Office Outlook as your communications, scheduling, and contact management hub for business. You can continue to use the familiar Outlook interface and integrate Microsoft Dynamics CRM at the same time by using Microsoft Dynamics CRM 2016 for Outlook. Dynamics CRM 2016 for Outlook can also provide access to CRM data while you're offline. More information: Do your CRM work in Outlook

Important

To install and use Dynamics CRM 2016 for Outlook, your organization must be running Microsoft Dynamics CRM 2016 Server.

Step 1: Review installation prerequisites

Sign in as a Local Administrator

- To install Dynamics CRM for Outlook, you must be able to sign in to your computer as a user with Local Administrator privileges.

  In smaller companies, Dynamics 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.

Review software requirements

- TechNet: Get information on software requirements

Review hardware and network requirements

- TechNet: Get information on hardware and network requirements

Install updates

- Before you install Dynamics CRM for Outlook, make sure you have all the latest Microsoft Office updates, including all security updates from Microsoft Update. Go to Microsoft Update.

Verify permissions

- To install Dynamics CRM 2016 for Outlook, you must have the appropriate security permissions. TechNet: Learn about permissions.

Step 2: Download the software

Before you or your users install Dynamics CRM 2016 for Outlook, please note the following:

- Make sure you have completed your desired CRM customizations. If your users will use Dynamics CRM 2016 for Outlook in offline mode, for best performance, enable only the minimum required record types (entities) and views for offline use. For more information, see TechNet: Customize your CRM system.
- Group Policy Folder Redirection with offline files is not supported in Dynamics CRM for Outlook. If your CRM data is stored with redirected offline files, users may be unable to use Dynamics CRM for Outlook. More information: TechNet: Using Folder Redirection
- For synchronization to work correctly, we recommend that you turn on Cached Exchange Mode in Outlook. More information: Office: Turn Cached Exchange mode on or off

Download the software

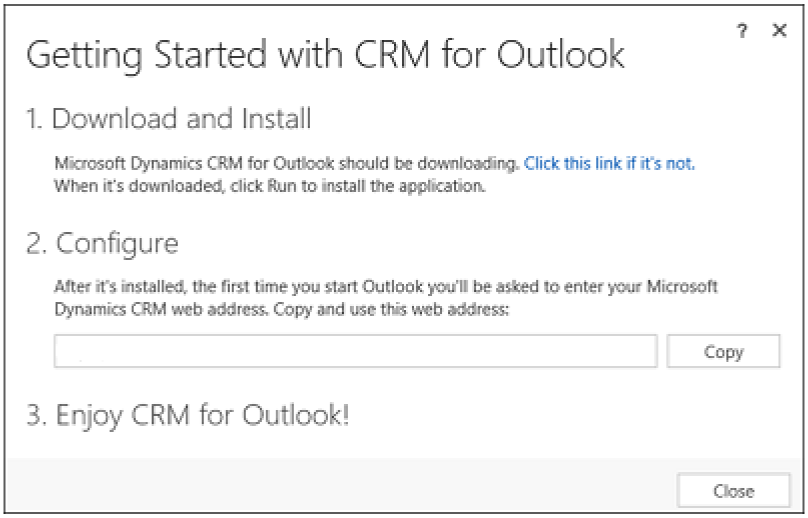
In CRM, click the **Settings** icon, and then click **Apps for Dynamics CRM**.

2. On the **Apps for Dynamics CRM** page, click **Download from Microsoft Download Center**.

   Tip
   If you prefer, you can download the software from this web page.

3. If you see one or more **Security Warning** dialog boxes, click **Run** in each.

   The software will start downloading and you'll see the following dialog box:

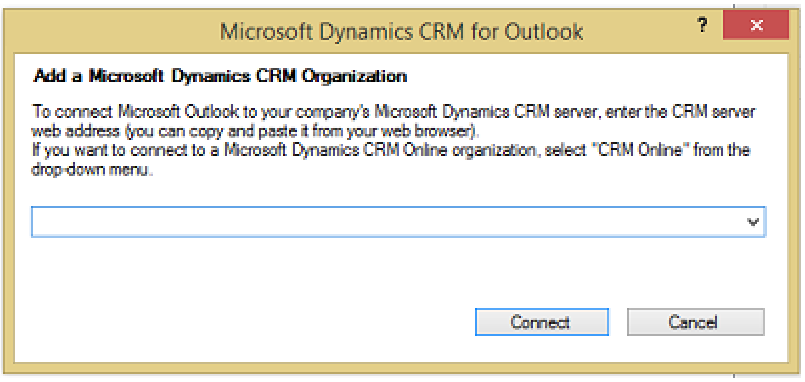


4. In the **Getting Started with CRM for Outlook** dialog box, under **2. Configure**, click **Copy** to copy your organization's URL to your computer's Clipboard. You'll paste this URL in the following **Configure** step.
5. Click **Run**, when prompted, to download the software.
6. In the **Browse 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).
7. On the **License Agreement** page, if you accept the license agreement, select **I accept the license agreement**, and then click **Next**.
8. Do one of the following:
   - To install Dynamics CRM for Outlook without offline capability, click **Install Now**.
   - To install Dynamics CRM for Outlook with offline capability, click **Options**, select the **Offline Capability** check box on the **Customize Installation** page, and then click **Install Now**. If you don't install offline capability during installation, you can add it later by choosing **Go Offline** in Dynamics CRM for Outlook.

     Important
     If you aren't able to install offline capability, check to make sure you don't have any pending Windows updates. Learn more about Windows updates
9. When prompted, restart Outlook.

Step 3: Configure CRM for Outlook

After restarting Outlook, you'll see the following dialog box:



1. Press **Ctrl+V** to paste the URL you copied in the preceding **Download the software** step, and then click **Connect**. You can also enter a Server URL or a Discovery URL.
2. If you're prompted for a password, enter the password.

   Tip
   If you want to add another organization, you can run the Configuration Wizard again after you have successfully configured the first organization. To run the Configuration Wizard, in the Windows 8 Start screen, search for **Configuration Wizard** and run it. In earlier versions of Windows, click **Start > All Programs > Microsoft Dynamics CRM**, and then click **Configuration Wizard**.

CRM 2015 for Outlook

If you're like many people, you use Microsoft Office Outlook as your communications, scheduling, and contact management hub for business. You can continue to use the familiar Outlook interface and integrate Microsoft Dynamics CRM at the same time by using Microsoft Dynamics CRM 2015 for Outlook. Dynamics CRM 2015 for Outlook can also provide access to CRM data while you're offline. More information: Do your CRM work in Outlook

Watch a video on setup, configuration, and upgrading (5:19)

Important

- To install and use Dynamics CRM 2015 for Outlook, your organization must be running Microsoft Dynamics CRM Server 2015.
- Microsoft Dynamics CRM 2013 for Microsoft Office Outlook is not compatible with Microsoft Dynamics CRM Server 2015. At a minimum, you must update CRM 2013 for Outlook to UR1 to use it with Microsoft Dynamics CRM Server 2015. More information: TechNet: Upgrading from CRM 2013 for Outlook to CRM 2015 for Outlook

Step 1: Review installation prerequisites

Sign in as a Local Administrator

- To install Dynamics CRM for Outlook, you must be able to sign in to your computer as a user with Local Administrator privileges.

In smaller companies, Dynamics 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.

Review software requirements

- TechNet: Get information on software requirements

Review hardware and network requirements

- TechNet: Get information on hardware and network requirements

Install updates

- Before you install Dynamics CRM for Outlook, make sure you have all the latest Microsoft Office updates, including all security updates from Microsoft Update. Go to Microsoft Update.

Verify permissions

- To install Dynamics CRM 2015 for Outlook, you must have the appropriate security permissions. TechNet: Learn about permissions.

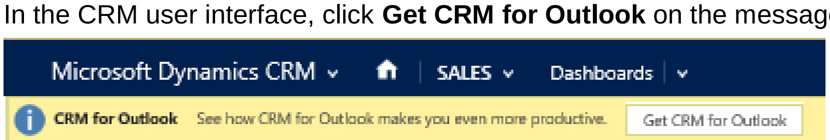
Step 2: Download the software

Before you or your users install Dynamics CRM 2015 for Outlook, please note the following:

- Make sure you have completed your desired CRM customizations. If your users will use Dynamics CRM 2015 for Outlook in offline mode, for best performance, enable only the minimum required record types (entities) and views for offline use. For more information, see TechNet: Customize your CRM system.
- Group Policy Folder Redirection with offline files is not supported in Dynamics CRM for Outlook. If your CRM data is stored with redirected offline files, users may be unable to use Dynamics CRM for Outlook. More information: TechNet: Using Folder Redirection
- For synchronization to work correctly, we recommend that you turn on Cached Exchange Mode in Outlook. More information: Office: Turn Cached Exchange mode on or off

Download the software

1. In the CRM user interface, click **Get CRM for Outlook** on the message bar.

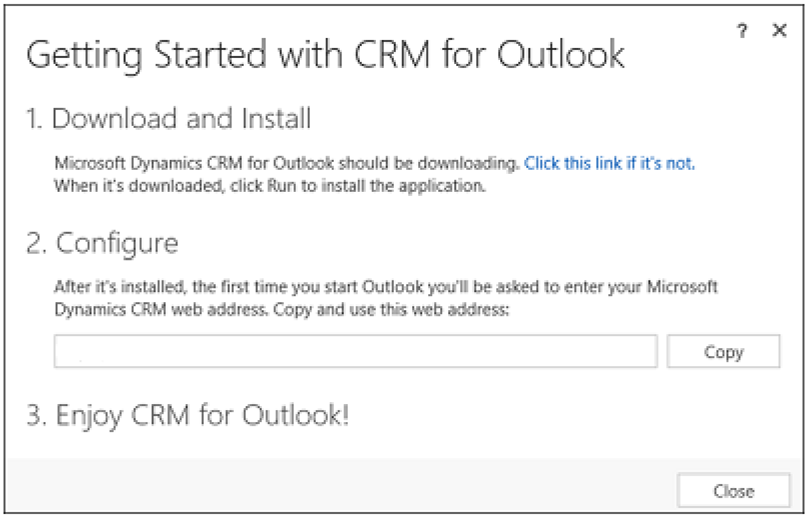


Tip

If you prefer, you can download the software from this page.

2. If you see one or more **Security Warning** dialog boxes, click **Run** in each.

   The software will start downloading and you'll see the following dialog box:

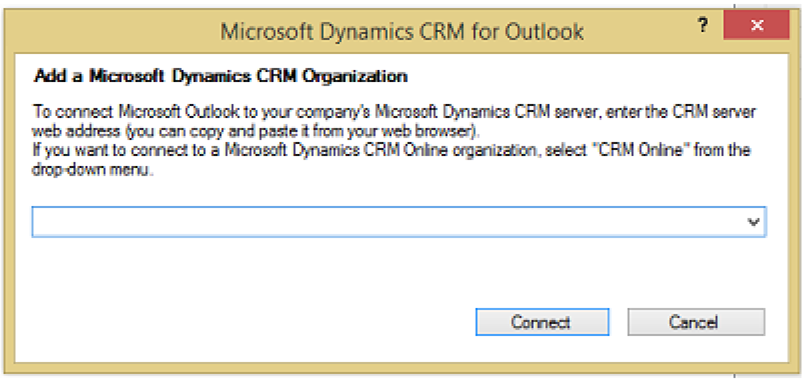
   

3. In the **Getting Started with CRM for Outlook** dialog box, under **2. Configure**, click **Copy** to copy your organization's URL to your computer's Clipboard. You'll paste this URL in the following **Configure** step.
4. Click **Run**, when prompted, to download the software.
5. In the **Browse 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).
6. On the **License Agreement** page, if you accept the license agreement, select **I accept the license agreement**, and then click **Next**.
7. Do one of the following:
   - To install Dynamics CRM for Outlook without offline capability, click **Install Now**.
   - To install Dynamics CRM for Outlook with offline capability, click **Options**, select the **Offline Capability** check box on the **Customize Installation** page, and then click **Install Now**. If you don't install offline capability during installation, you can add it later by choosing **Go Offline** in Dynamics CRM for Outlook.

     Important
     If you aren't able to install offline capability, check to make sure you don't have any pending Windows updates. Learn more about Windows updates
8. When prompted, restart Outlook.

Step 3: Configure CRM for Outlook

After restarting Outlook, you'll see the following dialog box:



1. Press **Ctrl+V** to paste the URL you copied in the preceding **Download the software** step, and then click **Connect**. You can also enter a Server URL or a Discovery URL.
2. If you're prompted for a password, enter the password.

   Tip
   If you want to add another organization, you can run the Configuration Wizard again after you have successfully configured the first organization. To run the Configuration Wizard, in the Windows 8 Start screen, search for **Configuration Wizard** and run it. In earlier versions of Windows, click **Start > All Programs > Microsoft Dynamics CRM**, and then click **Configuration Wizard**.

CRM 2013 for Outlook

If you're like many people, you use Microsoft Office Outlook as your communications, scheduling, and contact management hub for business. You can continue to use the familiar Outlook interface and integrate Microsoft Dynamics CRM at the same time by using CRM 2013 for Outlook. Dynamics CRM for Outlook can also provide access to CRM data while you're offline. More information: Do your CRM work in Outlook

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 Microsoft Dynamics CRM 2011 for Outlook client.

If you're using CRM 2013 (on-premises) or CRM Online, you can upgrade to CRM 2013 for Outlook or you can use Microsoft Dynamics CRM 2011 for Outlook if you're not ready to upgrade yet. If you use Microsoft Dynamics CRM 2011 for Outlook with CRM 2013 for Outlook or CRM Online, you can't use the Outlook client in offline mode, however. We recommend that you update to CRM 2013 for Outlook at your earliest convenience.

Step 1: Review installation prerequisites

Sign in as a Local Administrator

- To install Dynamics CRM for Outlook, you must be able to sign in to your computer as a user with Local Administrator privileges.

  In smaller companies, Dynamics 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.

Review software requirements

- TechNet: Get information on software requirements

Review hardware and network requirements

- TechNet: Get information on hardware and network requirements

Install updates

- Before you install Dynamics CRM for Outlook, make sure you have all the latest Microsoft Office updates, including all security updates from Microsoft Update. Go to Microsoft Update.

Step 2: Download the software

Before you or your users install CRM 2013 for Outlook, please note the following:

- Make sure you have completed your desired CRM customizations. If your users will use CRM 2013 for Outlook in offline mode, for best performance, enable only the minimum required record types (entities) and views for offline use. For more information, see TechNet: Customize your CRM system.
- Group Policy Folder Redirection with offline files is not supported in Dynamics CRM for Outlook. If your CRM data is stored with redirected offline files, users may be unable to use Dynamics CRM for Outlook. More information: TechNet: Using Folder Redirection
- For synchronization to work correctly, we recommend that you turn on Cached Exchange Mode in Outlook. More information: Turn Cached Exchange Mode on or off

Download the software

1. Run the Microsoft Dynamics CRM 2013 for Outlook Setup to download the software. You can start the Setup from any of the following places:
   - **From the message bar in CRM:** In the CRM user interface, click **Get CRM for Outlook** on the message bar. If you see one or more **Security Warning** dialog boxes, click **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 **Next**.
4. In the **Select the installation** page, do one of the following:
    - To install Dynamics CRM for Outlook with offline capability, click **Options**, select the **Offline Capability** check box on the **Customize Installation** page, and then click **Install Now**. If you don't install offline capability during installation, you can add it later by choosing **Go Offline** in Dynamics CRM for Outlook.

      Important
      If you aren't able to install offline capability, check to make sure you don't have any pending Windows updates. Learn more about Windows updates
    - To install Dynamics CRM for Outlook without offline capability, click **Install Now**.

      CRM installs Dynamics CRM for Outlook. You may need to restart your computer to complete the installation.
5. On the final page of the wizard, click **Close**.

Step 3: Configure CRM for Outlook

You must configure Dynamics 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 **Start > All Programs > Microsoft Dynamics CRM**, and then click **Configuration Wizard**.

1. In the Configuration Wizard, you'll see a **Server URL** drop-down list. Click 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:
        - 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**.

- 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.

1f71e2d9-5f51-46cf-aabc-f45d0f4a4a85

2. Click **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:
     - If your organization connects through Office 365, enter your Microsoft online services user name and password, and then click **OK**. This information was sent to you in email when your account was created.
     - If you're connecting with an earlier online services platform, enter your Microsoft account (formerly Windows Live ID) and password, and then click **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 **OK**. Then click **Close**.

   Tip
   If you have problems installing and configuring Dynamics CRM for Outlook, try Configuration Troubleshooting Wizard.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM for Outlook, when you go offline, a copy of the data you are working on is created and stored on your local computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and a link is maintained between the local copy and CRM Online. The next time you sign in to CRM Online, the local data will be synchronized with CRM Online.

An administrator determines whether or not an organization's users are permitted to go offline with Microsoft Dynamics CRM for Outlook by using security roles.

Users and administrators can configure which entities are downloaded via Offline Sync by using the **Sync Filters** setting in the **Options** dialog box. Alternatively, users and Administrators can configure which fields are downloaded (and uploaded) by using **Advanced Options** in the **Sync Filters** dialog box.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Do your CRM work in Outlook

TechNet: Set up CRM for Outlook

TechNet: Upgrade to Microsoft Dynamics CRM 2015 for Outlook

TechNet: Install CRM for Outlook for Microsoft Dynamics CRM 2013

TechNet: Upgrade Microsoft Dynamics CRM 2011 for Outlook to Microsoft Dynamics CRM 2013 for Outlook

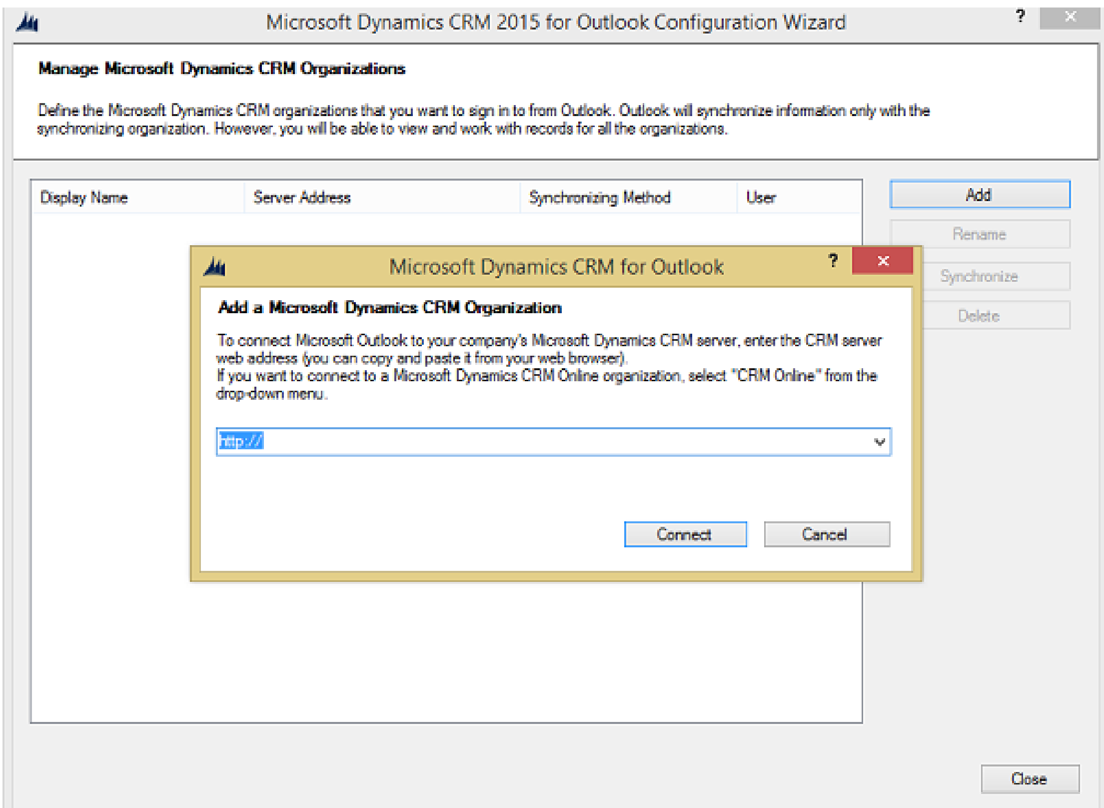
TechNet: Troubleshooting and things to know about Microsoft Dynamics CRM for Outlook

Configure another organization to use with CRM for Outlook

If you're a member of more than one Microsoft Dynamics CRM organization, and you're using Microsoft Dynamics CRM 2015 for Outlook or later, you can use this procedure to configure each organization.

1. Close Outlook.
2. Do one of the following:
    - In Windows 8 or Windows 10, choose **Start**, search for **Configuration Wizard**, and then press **Enter**.
    - In earlier versions of Windows, choose **Start**, point to **All Programs**, choose **Microsoft Dynamics CRM 2015** or **Microsoft Dynamics CRM 2016**> **Configuration Wizard**.
3. In the **Microsoft Dynamics CRM 2015 for Outlook Configuration Wizard** or **Microsoft Dynamics CRM 2016 for Outlook Configuration Wizard** dialog box, choose the **Add** button to add a new organization.

   You'll see the following (or similar) dialog box:



4. Do one of the following:
    - If you're using CRM Online, select **CRM Online** from the list.
    - If you're using CRM 2015 on-premises or later version, open a browser, log in to your CRM organization's website, copy the URL address (copy the whole address) from the address bar, and then paste it in the **Add a Microsoft Dynamics CRM Organization** dialog box.
5. Choose **Connect.**

6. If prompted, enter your credentials.
7. Repeat steps 2 through 5 for each organization you want to add.
8. If you want to change the organization that synchronizes email messages, appointments, contacts, and tasks, select the row for the organization, and then choose **Synchronize**.

   When you're prompted about whether you want to change your synchronizing or primary organization, choose **OK**.

   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 Dynamics CRM for Outlook Navigation Pane.
9. Choose **OK**.
10. In the wizard, choose **Close**.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Do your CRM work in Outlook

Set up CRM for Outlook

Synchronizing data with Outlook or Exchange FAQ

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Set up and configure CRM for Outlook from Office 365

You can use Microsoft Dynamics CRM for Outlook together with Microsoft Dynamics CRM to access CRM data while you're working within the familiar Outlook interface. Dynamics CRM for Outlook can also provide access to CRM data while you're working offline. Learn more about doing your CRM work in Outlook.

You can install Dynamics CRM for Outlook directly from the **Office 365** dialog box, but before you install the add-in, review the following installation prerequisites and configuration instructions.

Step 1: Review installation prerequisites

Logging on as a Local Administrator

- To install Dynamics CRM for Outlook, you must be able to log on to your computer as a user with Local Administrator privileges.

Software requirements

- TechNet: Get information about software requirements

Hardware and network requirements

- TechNet: Get information about hardware and network requirements

Installing updates

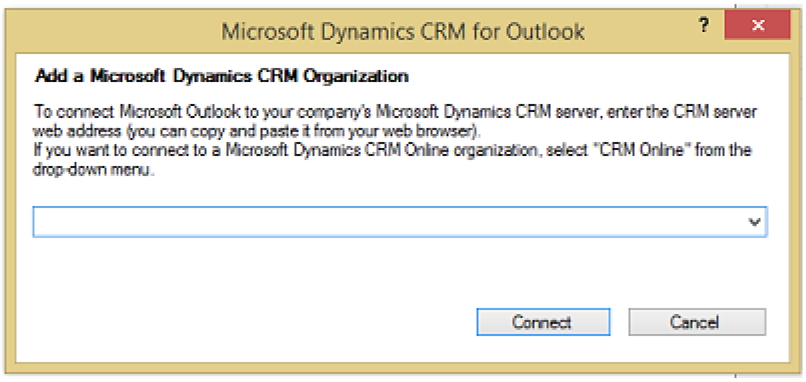
- Install all the latest Microsoft Office updates, including all security updates, from Microsoft Update. Go to Microsoft Update.
- To ensure that you stay up-to-date with future releases of Dynamics CRM for Outlook, it is highly recommended that you ensure that Windows Update is enabled on your computer. Learn how to turn on automatic updates.

Step 2: Install and configure CRM for Outlook

1. If you haven't already done so, choose **Install** in the **Office 365** dialog box to install

Dynamics CRM for Outlook.

2. When prompted, restart Outlook. This will automatically start the Configuration Wizard and you'll see the following dialog box:



Note
If the Configuration Wizard doesn't start automatically, in the Start screen, search for **Configuration Wizard** and run it.

3. In the list, select **CRM Online**, and then choose **Connect**.

Privacy notice

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

[TechNet: Software compatibility]()

[Do your CRM work in Outlook]()

The Outlook email address should be the same as the CRM email address

You're seeing the following error message:

"To track emails and perform synchronization, your Outlook email address should be the same as your email address in Microsoft Dynamics CRM."

This message is common when you have multiple Microsoft Office Outlook email addresses or have access to more than one CRM organization. For example, your company may use multiple CRM organizations for testing or upgrade purposes.

You may also see this error message if you are configuring Microsoft Dynamics CRM for Outlook, but you don't have an Outlook email address, or you haven't set the primary email address field in CRM.

To fix this, start by finding the primary Outlook email address:

Find the primary Outlook email address

1. In Outlook, choose **File**.
2. Under **Account Information**, choose **Account Settings**, and then select **Account Settings** from the list.

   In the **Account Settings** dialog box, you'll see a check mark next to the primary email address. Make a note of the exact address.

> **Important**
>
> You must use the exact email address that you see in the **Account Settings** dialog box. For example, the following email addresses are not equivalent:
>
> nanderson@contoso.com
>
> nancy.anderson@contoso.com

Then, pick **one** of the following methods.

Change the email address in CRM to match the Outlook address

Check your security role

1. Follow the steps in [View your user profile]().

2. Don’t have the correct permissions? Contact your system administrator.

3. Go to **Settings** > **Security**. (How do I get there?)
4. Choose **Users**.
5. Under **Enabled Users**, choose a user.
6. In the **Primary Email** field, enter the Outlook email address. Make sure you use the primary Outlook email address. Most people have just one Outlook email address. This should probably be a company email address and not a personal email address.
7. Save the changes.

Change the email address in Outlook to match the address in CRM

1. In Outlook, choose the **File** menu.
2. Under **Account Information**, choose **Add Account**, and then enter the account information.
3. Restart Outlook.

You’ll need to set the new email account to be the default account.

1. In Outlook, choose the **File** menu.
2. Under **Account Information**, choose **Account Settings > Account Settings…**
3. Select the new account, and then choose **Set as Default**.
4. Choose **Close**.

Get started with CRM for Outlook

Do your CRM work in Outlook

If you’re like many people, you use Microsoft Outlook as your communications, scheduling, and contact management hub for business. You can continue to use the familiar Outlook interface and integrate Microsoft Dynamics CRM at the same time by using Microsoft Dynamics CRM for Outlook, an Outlook client provided by Microsoft Dynamics CRM.

On this page:

What CRM for Outlook offers

When you use Dynamics CRM for Outlook, you can access all the CRM core functionality directly from Outlook. Dynamics CRM for Outlook also provides extra functionality that isn't available in the web client. For example, you can:

- Track Outlook email, appointments, contacts, and tasks. When you track a record in Dynamics CRM for Outlook, a copy of that record is "pushed" to CRM and the two records are synchronized. After a record is tracked, you can update it in Dynamics CRM for Outlook or in CRM. Tracking provides a great way to keep your personal information separate from your business information, because only the information you manually track is pushed to CRM. Dynamics CRM for Outlook also automatically synchronizes records you own from CRM to Dynamics CRM for Outlook. More information: Overview of tracking records in CRM for Outlook
- Apply CRM email templates, or attach sales literature and Knowledge Base articles from CRM when you are sending an Outlook email message to customers.
- Take advantage of native Outlook functionality to customize views of CRM data. For example, you can sort, filter, format, group, and categorize views the same way you manage views in Outlook, and you can open multiple views at once. You can also add conditional formatting and set follow-ups.
- Access your CRM data on the go by working in offline mode. Dynamics CRM for Outlook provides offline synchronization filters that you can modify before you go offline so you take just the data you need with you. When you're offline, changes are stored to your local drive. When you go back online, Dynamics CRM for Outlook automatically synchronizes the data again with the CRM server. More information: Work offline with CRM for Outlook
- Create Microsoft Word mail-merge documents to send form letters or form email messages to contacts, accounts, or marketing mailing lists. You can also use mail merge to create faxes and quotes. More information: Create a Microsoft Word mail-merge document with CRM for Outlook

Note

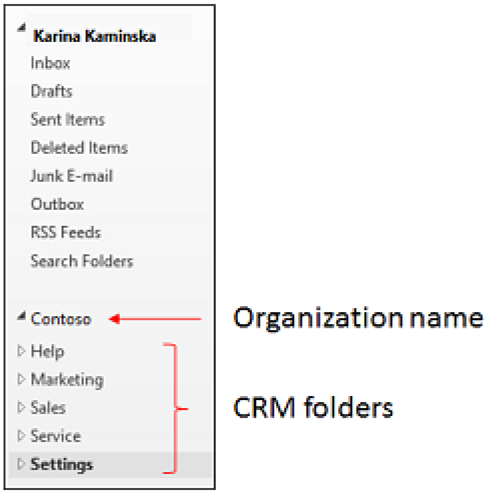
If people in your organization share the same computer by using different user accounts, each person can install and use Dynamics CRM for Outlook for their own account.

Explore CRM for Outlook

When you Install CRM for Outlook, the software adds several user interface elements to your Outlook screen.

Navigation pane

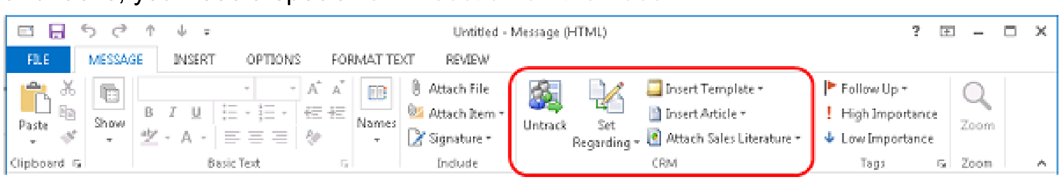
You'll see a folder for your organization in the navigation pane on the left side of the screen. Under your organization name, you'll see a list of CRM folders. Use these folders to navigate to your area and open different record types.



If you connect to more than one organization, you'll see a separate folder for each organization in the navigation pane.

Ribbon

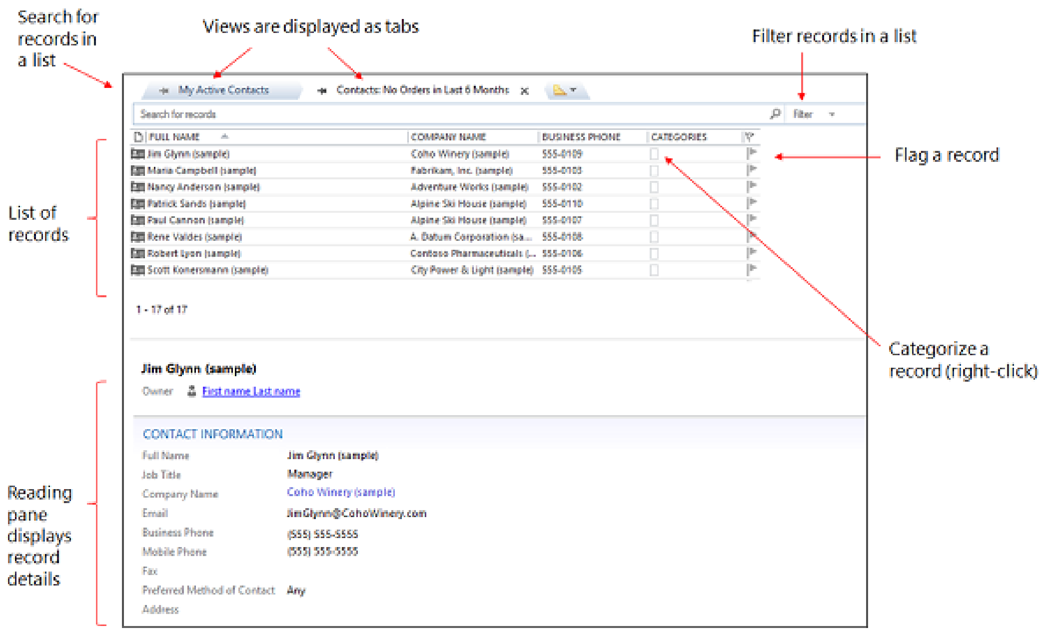
You access commands in Dynamics CRM for Outlook through the ribbon. The ribbon displays different buttons and features depending on context. For example, if you view a list of opportunities, the ribbon displays buttons that apply to opportunities. For appointments, contacts, and tasks, you'll see a special **CRM** section on the ribbon.



Lists, views, and the reading pane

When you use the navigation pane to open a folder for a type of record (Accounts, for example), you'll see a list of records. The list is determined by the view you're in and any search criteria or filter you have applied.

When you select a record in a list, the details for that record are displayed in the reading pane below the list. Data in the reading pane is read only—it's a quick way to view the contents of a record. If you want to edit the data in CRM, just double-click the record in the list.



You can change the location of the reading pane or turn it off or on. You can also customize what you see in the reading pane. More information: Customize the Reading Pane in CRM for Outlook

What Outlook features are unavailable in CRM for Outlook?

Microsoft Dynamics CRM uses standard Internet Explorer controls, so some Outlook features are unavailable in Dynamics CRM for Outlook. Use the workarounds in the following table for features that aren't available.

Feature	Workaround
Email signatures	Use a global email template or use native email signatures in Outlook.
Full-text editing features	Use standard editing controls. For example, 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.	There's no workaround for dragging and dropping records. Dragging and dropping records causes data loss.
Reminders	After synchronization with Outlook, 15-minute reminders are created for appointments and service activities created in the Microsoft

Feature	Workaround
	Dynamics CRM folders or in the web application.
Microsoft Dynamics CRM Service calendar	The CRM Service calendar isn’t available by default, but you can ask your system administrator to add it.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender’s email address, the recipient’s email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is “exported” to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization’s users are permitted to sync CRM data to Outlook by using security roles.

See Also

Overview of tracking records in CRM for Outlook

Work offline with CRM for Outlook

Create a Microsoft Word mail-merge document with CRM for Outlook

Customize the Reading Pane in CRM for Outlook

Synchronizing data with Outlook or Exchange FAQ

TechNet: CRM for Outlook compatibility

Overview of tracking records in CRM for Outlook

You can use Microsoft Dynamics CRM for Outlook to track email messages, contacts, tasks, and appointments. When you track an email message, contact, task, or appointment record, a copy of that record is saved as an activity in Microsoft Dynamics CRM and synchronized with the Outlook record. You can then view and edit that record in Dynamics CRM for Outlook or CRM. If you sync Outlook on your mobile device, you can also access these records on that device.

Tracking records in CRM for Outlook is a manual process. This gives you the ability to keep your personal Outlook records separate from your CRM records.

Tip

- If you want, you can set an option to track email automatically. More information: Set an option to automatically track incoming Outlook email in CRM for Outlook
- If your organization synchronizes records through server-side synchronization, you can track email messages through folder tracking. Folder tracking is a powerful and intuitive way to track email directly from virtually any device. More information: Track Outlook email by moving it to a tracked Exchange folder.

On this page:

Using the Track button vs. the Set Regarding button

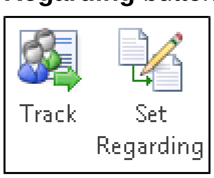
Using the tracking pane

What can you do after you track a record?

Other things to know about tracking records

Using the Track button vs. the Set Regarding button

To track a record in Dynamics CRM for Outlook, you click or tap the **Track** button or the **Set Regarding** button for the record you want to track.



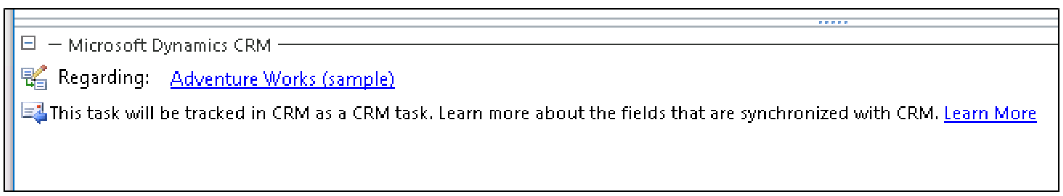
You can use either button to track a record, but it's almost always better to use the **Set Regarding** button. When you use the **Set Regarding** button, you can link an email message, appointment, or task to a specific CRM record such as an account or opportunity, or even a custom record type (entity). Some organizations also use the **Set Regarding** button to track projects.

Using the tracking pane

When a record is tracked, a Microsoft Dynamics CRM pane (also known as the “tracking pane”) appears at the bottom of the record. This pane shows:

- Whether the item is tracked
- The regarding record, if set
- The name of the parent account for contacts, if set
- Links to CRM records for email recipients. This is very useful when you want to quickly access the CRM contact record of an email recipient or see other information stored in CRM.
- Related records, along with a symbol that identifies the record type in CRM
- Whether email addresses, names, or distribution lists in an email message are CRM records

For example, the following screen shot shows the tracking pane for a tracked task linked to the Adventure Works account:



You can open the regarding record, parent record for a contact, or related records directly from the tracking pane. The tracking pane also includes an **Options** button that provides quick access to personal tracking options.

Note

If you track an email message without first expanding a distribution list, the tracking pane displays the name of the distribution list. To track the individual email addresses, expand the distribution list before you track the message.

What can you do after you track a record?

After you track a record, you can use the buttons on the Dynamics CRM for Outlook ribbon to do the following tasks.

To do this task	Choose	Applies to
Open the record directly in CRM	View in CRM	Email, appointments, contacts, and tasks
Add a connection between the record and any CRM record capable of tracking connections	Add Connection	Email, appointments, contacts, and tasks
Convert the record into a	Convert To	Email, appointments, and

CRM opportunity, lead, or case		tasks
Insert a CRM template	Insert Template	Email
Insert a CRM Knowledge base article	Insert Article	Email
Attach CRM sales literature	Attach Sales Literature	Email

Tip

If these buttons aren't available, it may be that the record marked to be tracked isn't synchronized yet. This can happen if your organization uses server-side synchronization to synchronize email, appointments, contacts, and tasks, but the synchronization hasn't happened yet. If the **View in CRM** button is enabled, the record has been synchronized. You can also use the tracking pane (as described previously) to determine whether the record has been synchronized.

Other things to know about tracking records

- **Using multiple computers.** You can use multiple computers to track items using Dynamics CRM for Outlook. For example, you might use a desktop computer and a laptop. Only one computer can be the synchronizing computer, however. Changes or updates to synchronized records will not show up in CRM if the synchronizing computer is not connected to the CRM server. More information: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange
- **Choosing data to store locally.** The CRM data stored on your local computer is determined by online synchronization filters. You can edit, deactivate, or delete these filters. More information: Choose the records to synchronize between CRM and Outlook or Exchange
- **Deleting tracked records.** When records are tracked, special rules apply when deleting records. More information: Deleting records that have been tracked with CRM for Outlook
- **Delegating access.** If you've delegated access to your Outlook account, the delegate can track items on your behalf. These items won't synchronize with CRM until you connect to the CRM server. More information: Allow someone else to manage your mail and calendar

Privacy notices

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An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Track Outlook email by moving it to a tracked Exchange folder

Track Outlook email by choosing a button in CRM for Outlook

Track Outlook appointments in CRM for Outlook

Track Outlook contacts in CRM for Outlook

Track Outlook tasks in CRM for Outlook

Deleting records that have been tracked with CRM for Outlook

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Synchronizing data with Outlook or Exchange FAQ

Customize the Reading Pane in CRM for Outlook

When you use Microsoft Dynamics CRM for 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 Dynamics CRM for Outlook Navigation Pane, click your organization.
2. Click the area that contains the records you want to work with (for example, Service), and then click the record type.

3. Click the **View** tab, and then in the **List** group, click **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 the section, and then click **Remove**.
5. To add a section, in the **Available Sections** box, click the section, and then click **Add**.
6. To change the order of the sections in the Reading Pane, in the **Displayed Sections** box, click the section, and then click the **Move Up** or **Move Down** button.
7. Click **OK**.

See Also

Do your CRM work in Outlook

Overview of tracking records in CRM for Outlook

eBook: CRM for Outlook Basics

Create a Microsoft Word mail-merge document with CRM for Outlook

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 Dynamics 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 Dynamics 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 Dynamics CRM for Outlook, open the list of records you want.

   Tip
   This list can be the results of an Create, edit, or save 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 Dynamics 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.

Privacy notices

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After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do turn off the connection, CRM for Outlook may exhibit decreased performance.

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If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Work with templates

Send bulk email to customers

Track email, appointments, contacts, and tasks

Track Outlook email by moving it to a tracked Exchange folder

Track Outlook email by choosing a button in CRM for Outlook

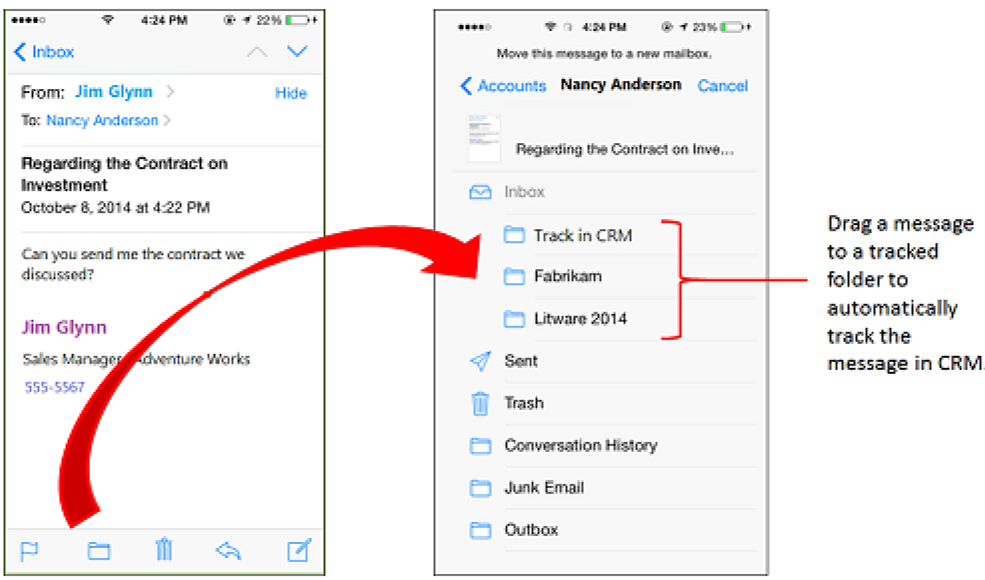
[Set an option to automatically track incoming Outlook email in CRM for Outlook]
[Track Outlook contacts in CRM for Outlook]
[Use a wizard to add and track multiple Outlook contacts in CRM for Outlook]
[Track Outlook tasks in CRM for Outlook]
[Track Outlook appointments in CRM for Outlook]
[Deleting records that have been tracked with CRM for Outlook]

Track Outlook email by moving it to a tracked Exchange folder

horizontaltabbed

How to

Track customer interactions wherever you are, and from virtually any device by using folder tracking. After you set up a tracked folder, you can drag or move email to that folder to track it automatically in Microsoft Dynamics CRM. Additionally, if you set a regarding record (such as a specific account or opportunity record) for the folder, CRM automatically links all email in that folder to that specific record. Tracked folders work in Dynamics CRM for Outlook, Exchange Online, Outlook on the web, or any other mobile app that supports Exchange.



Tip

Tracked folders work with Exchange Inbox rules. This makes it easy to automatically route email messages to a particular folder. For example, set up an Exchange rule that automatically routes email from a Contoso contact to a tracked Contoso folder, which is linked to a specific Contoso opportunity. [Tell me more about setting up rules].

On this page:

[Requirements for using tracked folders]

[Set up a tracked folder]

[Best practices for folder tracking]

[What happens when you untrack, move, delete, or rename folders, or change the regarding record?]

Requirements for using tracked folders

- This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

  Interested in getting this feature? Find your CRM administrator or support person

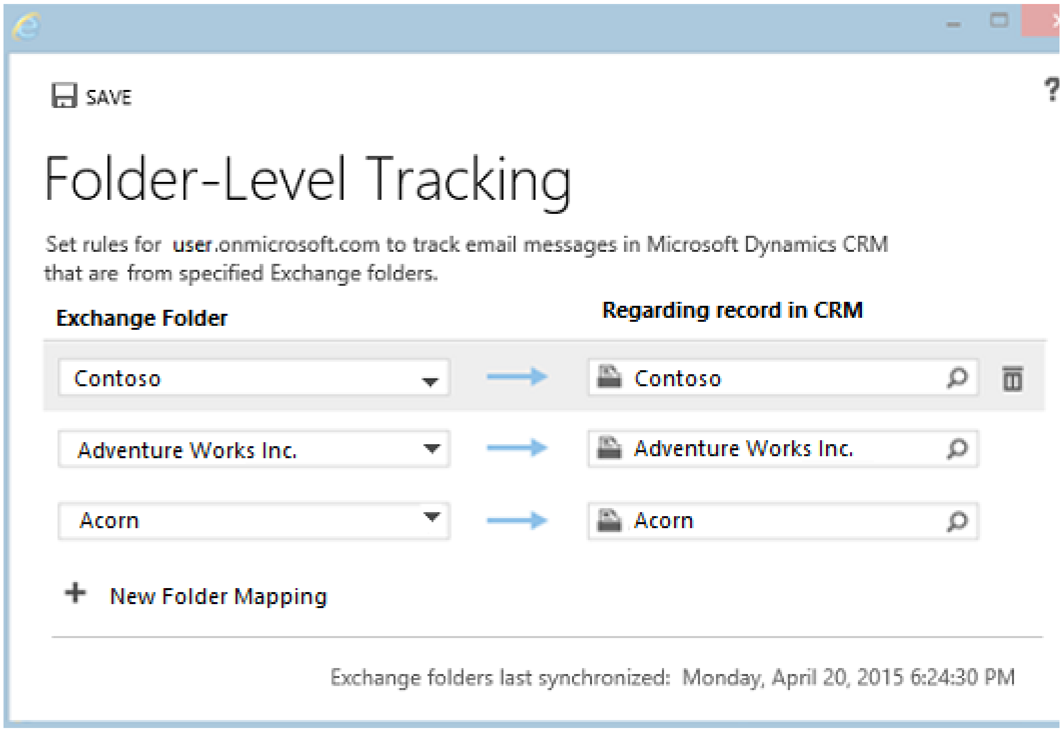
- The tracking folders feature must also be enabled by your administrator. For more information, contact your CRM administrator. For admin information on enabling tracked folders, see TechNet: Configure folder-level tracking.
- Your organization must use server-side synchronization as your email synchronization method. If you don't know which synchronization method your organization uses, contact your CRM administrator. For admin information about setting up server-side synchronization, see TechNet: Set up server-side synchronization.

Set up a tracked folder

1. Go to **Options**:

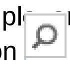
   In the web app: On the nav bar, click **Options** .

   - In Dynamics CRM for Outlook: Click **File** > **CRM** > **Options**.
2. In the **Set Personal Options** dialog box, click the **Email** tab, and then under **Select the email messages to track in Microsoft Dynamics CRM**, click **Configure Folder Tracking Rules**.
3. In the **Folder-Level Tracking** dialog box, under **Exchange Folder**, click **+ New Folder Mapping**, click the down arrow in the box that appears, and then select the folder you want to track.



Note

You can only track folders or subfolders inside your Exchange Inbox. Only the folder you select will be tracked. For example, if you select a folder that includes subfolders, the subfolders aren't tracked unless you specifically select them in this dialog box. The maximum number of folders you can track is 25.

If you want to link the folder to a specific record—for exampln account or opportunity—under **Regarding Record in CRM**, click the **Lookup** button, and then search for the record.

5. Repeat steps 3 and 4 for any additional folders you want to track and (optionally) link to regarding records.
6. When you're done adding and linking folders, click **Save**.

Best practices for folder tracking

- Make sure to take advantage of folder tracking on your mobile devices. If your device supports Exchange email, folder tracking will work automatically. You don't need to install anything. Just drag or move email to a tracked folder to automatically track that email in CRM.
- Whether you set a regarding record for a folder or not depends on how you plan to use the folder:
  - If you receive a small volume of email from many different customers, you may want to create a single folder called "Track in CRM" (or similar name) that isn't linked to a

particular record. That way, you can drag messages to that folder to track them automatically. If you later want to link an email message in that folder to a specific CRM record, open that activity record in CRM, and then fill in the Regarding field.

    - If you receive large volumes of email from a particular customer, create a folder (or use an existing folder) just for that customer and link it to a specific record. For example, create a Contoso folder and set the regarding record to a Contoso account record or opportunity record.

- You can set up multiple folders that link to the same regarding record. For example, you could link a Contoso Sales Proposal folder and a Contoso Legal Matters folder to the same Contoso account record.
- It's best not to use the same folder for different records over a period of time. For example, let's say you're tracking email communications for an opportunity with Customer 1, but you've won the opportunity, and now you don't need to track further communications with that customer. You may be tempted to simply change the regarding record for that folder to a new customer (Customer 2) you're working with. If you do that, however, all email in that folder, including the email pertaining to Customer 1, will be associated with Customer 2. So it's best in this case to create a new folder associated with Customer 2, and then set the regarding record for that new folder to Customer 2. Then you can delete the regarding record for the Customer 1 folder.
- You can include an untracked folder inside a tracked folder. For example, let's say you want to store personal email from a Contoso contact. You can create a Personal subfolder under the Contoso folder and leave it untracked.
- If you no longer need to track a folder, it's a good idea to untrack it for performance reasons. To untrack a folder, remove it from the **Folder-Level Tracking** dialog box.

What happens when you untrack, move, delete, or rename folders, or change the regarding record?

The following table shows what happens when untrack, move, or delete folders, or change the regarding record linked to a tracked folder.

Action	**Result**
Untrack a folder by deleting it from the **Folder-Level Tracking** dialog box	All email messages previously included in that folder will still be tracked, and the regarding record will still be linked to those email messages. New email messages you add to that folder won't be tracked.
Delete a folder from Outlook or Exchange	All email messages included in that folder will be deleted from Outlook or Exchange Online. Email messages already tracked through that folder will not be deleted from Microsoft Dynamics CRM, however.
Move a folder in Outlook or Exchange	The folder and all its contents will continue to be tracked. If you move a folder outside your

	Inbox, folder-level tracking rules will be disabled.
Rename a folder in Outlook or Exchange	The folder and all its contents will continue to be tracked. **Tip** When you rename folders, the software uses the Exchange folder ID for tracking purposes – it's not dependent on the actual name of the folder. This is important to know if you delete a folder, and then rename a new folder with the same name as the deleted folder. For example, let's say you delete Folder 1, create Folder 2, and then rename Folder 2 to be Folder 1. The tracking information for the original Folder 1 won't be retained in this case.
Remove the link between a tracked folder and a specific record by deleting the link in the **Folder-Level Tracking** dialog box	All messages in that folder that were previously linked will continue to be linked. New messages added to that folder won't be linked.
Move an email message in a tracked folder that's linked to a specific record to a different folder	If the new folder doesn't have a regarding record, the email message will continue to be linked to the original record. If the new folder has a regarding record, the email message will be linked to that regarding record.
Manually change the regarding record for an email message that's linked to a different regarding record through a tracked folder	The tracked folder rule takes precedence. When the folder is synchronized, the email message will be re-linked to the record specified in the folder tracking rule, even if you change the regarding record manually. To change the regarding record in this case, do one of the following: • Move the message to a tracked folder linked to the record you want. • Remove the link to the regarding record in the **Folder-Level Tracking** dialog box before you manually change the regarding record. • Move the specific email message outside the tracked folder, and then manually

	change the regarding record for that email message.
Two users move the same email message to separate folders that have different regarding records	You can only set one regarding record for an email message. In this case, the record that's processed first is linked to the regarding record.

Watch this video

Want to see folder tracking in action? This demo puts it all together for you.

<iframe width="500" height="364" src="https://www.youtube.com/embed/HiNpINvFKq8" frameborder="0" allowfullscreen></iframe>

To see video captions, click the **Closed Caption (CC)** button in the lower-right corner of the YouTube window.

Video transcript

A big part of working in Microsoft Dynamics CRM is creating and recording different types of activities that revolve around a sales or service process, such as sending emails, creating opportunities, and assigning tasks. If you want to associate an activity with a more specific record and opportunity for example, you can set the regarding record for that activity.

By using folder-level tracking, you can easily track and set the regarding record for an email by dragging or moving it into an Exchange folder.

Let's take a look at a scenario with folder-level tracking.

Nancy, a dedicated sales rep, finds and qualifies leads. Nancy has just started to work on a new opportunity called Northwind Traders. She wants to track and associate all the emails that relate to this opportunity.

First, Nancy needs to create a folder in Exchange. She already has folders for her current accounts and opportunities, so she simply creates a new folder under the Opportunities folder. Then she needs to map the Exchange folder she has just created to CRM.

Nancy clicks **Options**, and clicks the **Email** tab. She clicks **Configure** and creates a new mapping between the Exchange folder and the requested CRM record – Northwind Traders in our example. Now, whenever Nancy gets an email that relates to Northwind Traders, she can simply drag and drop the email into the folder she created.

The new email will be associated to the Northwind Traders opportunity within CRM. Also, Nancy can track emails while she's on the go by using her mobile device. She can simply move the email to the Northwind Traders folder using her native email application.

Finally, since Morgan is the main contact person in Northwind Traders, all the emails from him relate to this opportunity. Instead of manually copying the emails from Morgan, Nancy can create an Exchange rule that will automatically copy all the emails that Morgan sends to the Northwind Traders' folder.

By doing so, the emails will be automatically tracked in CRM and will be associated to the Northwind Traders opportunity.

Folder-level tracking allows you to easily track and associate emails to CRM, manually from any device, or automatically by setting Exchange rules.

See Also

Track Outlook email by choosing a button in CRM for Outlook

Overview of tracking records in CRM for Outlook

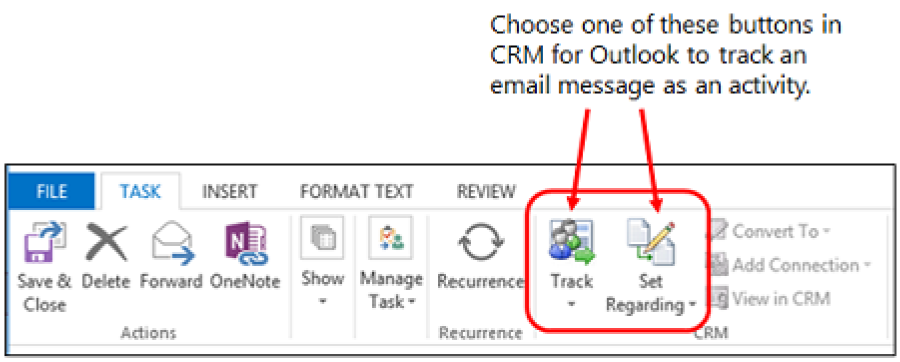
Synchronizing data with Outlook or Exchange FAQ

TechNet: Set up and manage email processing

TechNet: Configure folder-level tracking

Track Outlook email by choosing a button in CRM for Outlook

To get the most out of Microsoft Dynamics CRM, it's important to keep track of all your customer interactions, and email communications are key. Create a central repository of your Outlook email communications by "tracking" them in Microsoft Dynamics CRM for Outlook. When you track an email message in Dynamics CRM for Outlook, the email is saved as an activity record in CRM. Then you, or anyone who has access to your activity records, can view that email message along with all other customer activities in CRM, Dynamics CRM for Outlook, or on a mobile device.



Tracking email in Dynamics CRM for Outlook is a manual process. This gives you the ability to keep your personal email separate from your customer email. You can also set an option to automatically track email messages. More information: Set an option to automatically track incoming Outlook email in CRM for Outlook

Tip

If your organization synchronizes email through server-side synchronization, you can track email automatically by dragging it to a tracked folder. Folder-level tracking is a powerful and intuitive way to track email messages directly from virtually any device. More information: Track Outlook email by moving it to a tracked Exchange folder

On this page:

Requirements for tracking email messages

To track email in Dynamics CRM for Outlook, your Outlook email address must match your CRM email address. You can’t synchronize to or from multiple email addresses.

Which records are associated with the email activity?

By default, when you track an email message, Dynamics CRM for Outlook uses the CRM address book to link the message to CRM contacts on the **To**, **From**, and **Bcc** lines. You can also link the email message to a more specific record, such as a specific account, opportunity, or case. It’s usually best to link a message to a more specific record, if possible. This will make the record easier to find.

Track an email message

1. In Dynamics CRM for Outlook, select the email message you want to track.
2. Do one of the following:
   - To track the email message without linking it to a particular record in CRM, on the **Home** tab, in the **CRM** group, click **Track**.

     -Or-
   - To track the email message and link it to a particular record in CRM, on the **Home** tab, in the **CRM** group, click **Set Regarding**, click **More**, and then search for the record in the **Look Up Record** dialog box. After you find the record you want, click **Add**.

   When you click the **Track** button or the **Set Regarding** button, a Microsoft Dynamics CRM pane (also known as the “tracking pane”) appears at the bottom of the email record. This pane shows that the record is tracked and provides links to related records. If you set a “regarding” record, the tracking pane also provides a link to that record. More information: Overview of tracking records in CRM for Outlook

   You can also tell that a record is tracked by looking in the Outlook folder. You’ll see the **Tracked in CRM** symbol next to any tracked records.
3. To modify the CRM activity record (for example, to change the regarding record), open the email message in Outlook, and then, in the **CRM** group, click **View in CRM**.

What else to I need to know about tracking email records?

- **CRM address book.** The address book is installed automatically when Dynamics CRM for Outlook is installed. This makes it possible to search for a CRM contact from the **To** field of an email message or appointment when you create it. By default, Dynamics CRM for Outlook only searches for contacts you own. You can set a personal option to broaden this search. More information: Set address book options in CRM for Outlook
- **Working offline.** Email messages you track when you're offline are saved as activities when you go back online. More information: Work offline with CRM for Outlook
- **Replies to tracked messages.** You can set whether replies to tracked messages are also tracked. More information: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange
- **Editing tracked email messages.** After an email message has been sent, you can't edit it, but you can set or change a regarding record for it.
- **Attachments.** Any tracked email message can be accessed by anyone who has permission to view your activities. If the email has attachments, the attachments are included in the activity. If you don't want to make an attachment available, delete it from the email activity.

  Your administrator can block messages from being saved if they contain attachments of specific file types, such as .exe files. Any messages stored in locations other than the default Microsoft Exchange location can't be linked.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

[Track Outlook email by moving it to a tracked Exchange folder]

[Overview of tracking records in CRM for Outlook]

[Deleting records that have been tracked with CRM for Outlook]

[Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange]

[Create templates for email]

[Synchronizing data with Outlook or Exchange FAQ]

Set an option to automatically track incoming Outlook email in CRM for Outlook

When you use Microsoft Dynamics CRM for Outlook to track an email message, a copy of the email record is saved as an activity in Microsoft Dynamics CRM and synchronized with the Outlook record. More information: Overview of tracking records in CRM for Outlook

By default, tracking email is a manual process—you have to choose the **Track** button or the **Set Regarding** button for each email message you want to track. Manual tracking provides a way for you to keep your personal email separate from your customer email. As an alternative, you can set an option to track email messages automatically.

Tip

You can use Exchange folder tracking as an alternate method for tracking messages automatically. With folder tracking, you can track messages directly from virtually any device. More information: Track Outlook email by moving it to a tracked Exchange folder

Automatically track email messages

1. In Dynamics CRM for Outlook, on the **File** tab, choose **CRM**, and then choose **Options**.
2. In the **Set Personal Options** dialog box, on the **Email** tab, in the **Select how Dynamics CRM for Outlook should integrate email with Microsoft Dynamics CRM** section, select the **Check incoming email in Outlook and determine whether an email should be linked and saved as a Microsoft Dynamics CRM record** option.
3. To specify whether to track 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 (sent and received) related to CRM email messages. If you select this option, CRM will track junk mail as well as business conversations, so choose this option carefully.
- **Email messages in response to CRM email**. Only replies to or forwards of email messages that have already been tracked will be saved as email activities. This is the most common option.
- **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.

  Note

  Keep in mind that the more you use the same email address for tracking purposes, the less useful it becomes since it will be mapped to many records.

4. If you want to automatically create contract or lead records for tracked email messages, in the **Automatically create records in Microsoft Dynamics CRM** section, choose the **Create** check box, and then choose **Contacts** or **Leads** from the list. When this check box is selected, Dynamics CRM for Outlook will try to match the email address of recipients to an email address in CRM. If it can't find a matching record, it will automatically create a contact or lead record.

   Note

   Contact and lead records won't be created if you don't have the appropriate security permissions. More information: [TechNet: How security affects synchronization between CRM and Outlook]()

Note

More than one custom record type can contain the same email address. When this happens, Microsoft Dynamics CRM links the email messages **received** from this email address to the custom record type created first. For example, let's say a Patient record type created in January lists the email address someone@example.com. A Doctor record type created in February lists the same email address. Microsoft Dynamics CRM links the email messages received from someone@example.com to the Patient record type only. **Sending** an email message to someone@example.com links the email message to the Patient record type and the Doctor record type, however.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

[Track Outlook email by moving it to a tracked Exchange folder]()

[Track Outlook email by choosing a button in CRM for Outlook]()

[Overview of tracking records in CRM for Outlook]()

[Synchronizing data with Outlook or Exchange FAQ]()

Track Outlook contacts in CRM for Outlook

When you track a contact in Microsoft Dynamics CRM for Outlook, a copy of that contact record is saved in Microsoft Dynamics CRM and synchronized with the Outlook record. After your contacts are tracked, you'll be able to see any email, tasks, appointments, and account records associated with those contacts. You can access the records in Dynamics CRM for Outlook or CRM.

Tracking contacts in Dynamics CRM for Outlook is a manual process. This gives you the ability to keep your personal contacts separate from your CRM contacts. Synchronization of contacts from CRM to Dynamics CRM for Outlook is automatic, however. Any contacts that you own in CRM will automatically be available in Dynamics CRM for Outlook. If you sync Outlook on your mobile device, you can also access your CRM contact records on that device.

1. In Dynamics CRM for Outlook, choose **People** in the navigation pane, and then select up to 20 contacts.

   Tip
   If you want to select more than 20 contacts, or if you want to track all your Outlook contacts in CRM, you can use the **Add Contacts** wizard. More information: Use a wizard to add and track multiple Outlook contacts in CRM for Outlook

2. To track the contact, do one of the following:
   - To track the contact record without linking it to a parent (account) record in CRM, on the **Home** tab, in the **CRM** group, choose **Track**.

     -Or-

   - To track the contact and link it to a parent (account) record in CRM, on the **Home** tab, in the **CRM** group, choose **Set Parent**, and then search for the parent record in the **Look Up Record** dialog box. After you find the record you want, choose **Add**.

     When you choose the **Track** button or the **Set Parent** button, a Microsoft Dynamics CRM pane (also known as the "tracking pane") appears at the bottom of the contact record. This pane shows that the contact is tracked and provides links to related records. If you choose the **Set Parent** button, Dynamics CRM for Outlook also provides a link to the parent record. Tell me more about how tracking works

   In Dynamics CRM for Outlook, the **Tracked in CRM** icon is displayed next to any tracked contacts.

3. To add additional information about the contact to the Contact form in Microsoft Dynamics CRM, choose the contact, and then in the **CRM** group, choose **View in CRM**.

Notes

- To add additional information about the contact to the Contact form in Microsoft Dynamics CRM, choose the contact, and then in the **CRM** group, choose **View in CRM**.
- If the contact is linked to a parent record, you can open the parent record from the Outlook contact record in Dynamics CRM for Outlook. In the contacts list, open the record. In the **CRM** group, choose **View Parent** (or select the link in the tracking pane).
- The **Company** field for an Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information:. Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Avoiding duplicate contact records

When you track contacts, CRM checks for duplicate records. CRM also checks for duplicates when you synchronize records manually or go online if you're been working offline.

If CRM detects that a contact might be a potential duplicate, instead of saving the contact, CRM displays the **Duplicates Detected** dialog box.

Here's what you need to do if this happens:

1. In the **Potential duplicate records** list, double-click or tap the record.
2. If your new or updated record is not a duplicate, to create the new record, choose **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, choose **Cancel**.
3. If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

Important
Duplicate detection can take place only if duplicate detection is enabled and if at least one duplicate-detection rule exists for the record type.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization’s users are permitted to sync CRM data to Outlook by using security roles.

See Also

[Overview of tracking records in CRM for Outlook]

[Deleting records that have been tracked with CRM for Outlook]

[Use a wizard to add and track multiple Outlook contacts in CRM for Outlook]

[Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange]

[Synchronizing data with Outlook or Exchange FAQ]

Use a wizard to add and track multiple Outlook contacts in CRM for Outlook

You can track your Microsoft Office Outlook contacts in Microsoft Dynamics CRM for Outlook. When you track a contact, a copy of that contact’s record is saved in Dynamics CRM for Outlook and synchronized with the Outlook record. After your contacts are tracked, you’ll see any CRM email, task, or appointment activities associated with those contacts. If you sync Outlook on your mobile device, you can also access your contact records on that device.

Tracking contacts in Dynamics CRM for Outlook is a manual process. You can track up to 20 contacts at one time by choosing the **Track** button or the **Set Parent** button in Dynamics CRM for Outlook. If you want to add more than 20 contacts at one time, or if you want to add all your Outlook contacts to CRM, you can use the **Add Contacts** wizard. The wizard can also help you set a number of options. For example, you can specify if future communications with the tracked contacts should be synchronized with Dynamics CRM for Outlook.

Important

To track contacts in Dynamics CRM for Outlook, your Outlook email address must match your CRM email address. You can’t synchronize to or from multiple email addresses.

Step 1: Get ready

Before you add your Outlook contacts:

- 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. Choose **File** > **CRM** > **Import Contacts** > **Add Contacts**.
2. Choose **Next**.
3. Confirm the folder where your Outlook contacts are stored, and then choose **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. Choose 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@contoso.com, "contoso.com" is the domain. Choose 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. Choose 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, choose **Advanced**. In the **Set Account** column, choose 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 choose **OK**.

8. In the **Include Communication** column, clear the check box for any grouping for which you don't want to track email messages, appointments, or tasks in Microsoft Dynamics CRM.
9. Choose **Add Contacts**.
10. Review the Summary page and view any errors, if applicable. Then choose **Close**.

See Also

Track Outlook contacts in CRM for Outlook

Overview of tracking records in CRM for Outlook

Deleting records that have been tracked with CRM for Outlook

Synchronizing data with Outlook or Exchange FAQ

Track Outlook tasks in CRM for Outlook

When you track a task in Microsoft Dynamics CRM for Outlook, a copy of the task record is saved as an activity in Microsoft Dynamics CRM and synchronized with the Outlook record. You can then work on the task in Dynamics CRM for Outlook or CRM. If you sync Outlook on your mobile device, you can also access your task records on that device.

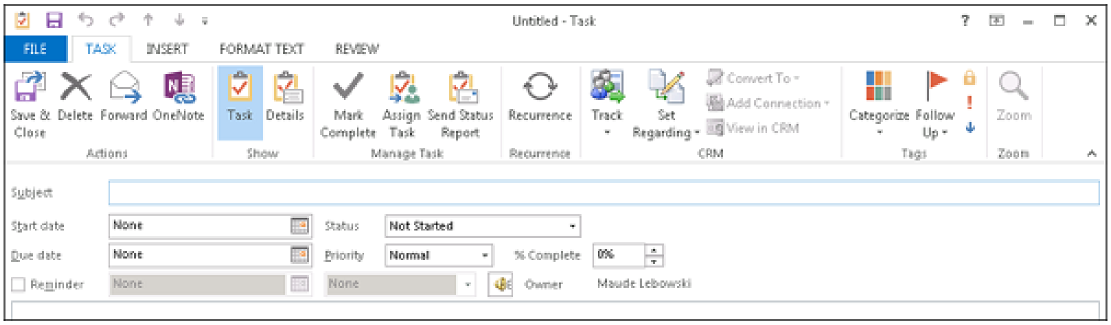
Tracking tasks in Dynamics CRM for Outlook is a manual process. This gives you the ability to keep your personal tasks separate from your CRM tasks. Synchronization of tasks from CRM to Dynamics CRM for Outlook is automatic, however. You can use Dynamics CRM for Outlook to view any task records you own that were created in CRM.

Important

To synchronize tasks between Dynamics CRM for Outlook and CRM, your Outlook email address must match your CRM email address. You can't synchronize to or from multiple email addresses.

Track a task

1. In Dynamics CRM for Outlook, create a task or open an existing task.
   - To create a task, click **Tasks** on the navigation bar, and then click **New Task**.
   - To open an existing task, click **Tasks** on the navigation bar, and then double-click the task to open it.
2. In the **Task** dialog box, if it's a new task, enter a subject in the **Subject** box. If it's an existing task, the **Subject** box will already be filled out.



3. If you haven't already done so, fill out other fields such as **Start date**, **Due date**, and **Priority**.

   Note
   When a task is created in Outlook, the system assigns the task a reminder time. Reminder information is not synchronized from Outlook to CRM. However, when a task has a **Due date** time set in CRM, it will be synchronized to reminder time in Outlook.

   If there is a **Start date** value but no **Due date** value in Outlook, the **Due date** value will automatically be set to the **Start date** value whenever you change the start date directly in Outlook. Likewise, if there is a **Start date** value but no **Due date** value in CRM, the **Due date** value will automatically be set to the **Start date** value. These changes are controlled by Outlook or CRM independently. They don't have anything to do with synchronization or synchronization direction.

4. If you want to make it a recurring task, click **Recurrence**, and then specify how often you want the task to occur.
5. To track the task, do one of the following:
   - To track the task record without linking it to a particular record in Dynamics CRM, on the **Task** tab, in the **CRM** group, click **Track**.

     Note
     To track the task record as a phone call, letter, or FAX, click the down arrow on the **Track** button, and then select the appropriate item. It will then show up as a phone call, letter, or FAX on your Activities list.

     -Or-
   - To track the task and link it to a particular CRM record (for example, a specific opportunity or case), on the **Task** tab, in the **CRM** group, click **Set Regarding**, click **More**, and then search for the record in the **Look Up Record** dialog box. After you find the record you want, click **Add**.

     When you click the **Track** button or the **Set Regarding** button, a Microsoft Dynamics CRM pane (also known as the "tracking pane") appears at the bottom of the task record. This pane shows that the record is tracked and provides links to related records. If you set a Regarding value, Dynamics CRM for Outlook also provides a link to the Regarding record. [Tell me more about how tracking works.]

6. To save the task, click the down arrow on the **Actions** button, and then click **Save & Close**.

Dynamics CRM for Outlook adds the **People** symbol to the task to show that it's tracked.

> **Note**
> If you want to stop tracking a task, open the task record, and then on the **Task** tab, in the **CRM** group, click **Untrack**. It's best to untrack items one at a time.

Assigning tasks

If you're using Microsoft Dynamics CRM 2015 for Outlook or later, you can also track assigned tasks if your administrator has enabled this capability. Learn more about enabling tracking of assigned tasks

To track a task, you must be the owner of the task. You own a task that you create until you assign it to someone else. After you assign the task, the person you assign it to owns the task. When a task is tracked, the task owner can work on the task in Dynamics CRM for Outlook or CRM. The person who assigns the task can follow the progress of the task in either tool.

When a task owner updates a task, all copies of the task are updated, including copies owned by prior owners. When a task owner completes a task, a status report is automatically sent to the person who originally assigned the task, all other prior owners, and anyone else who requests a report.

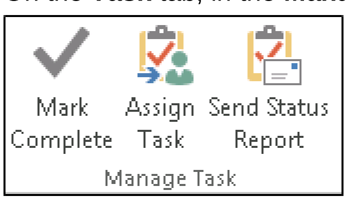
Note

The following limitations apply when tracking assigned tasks:

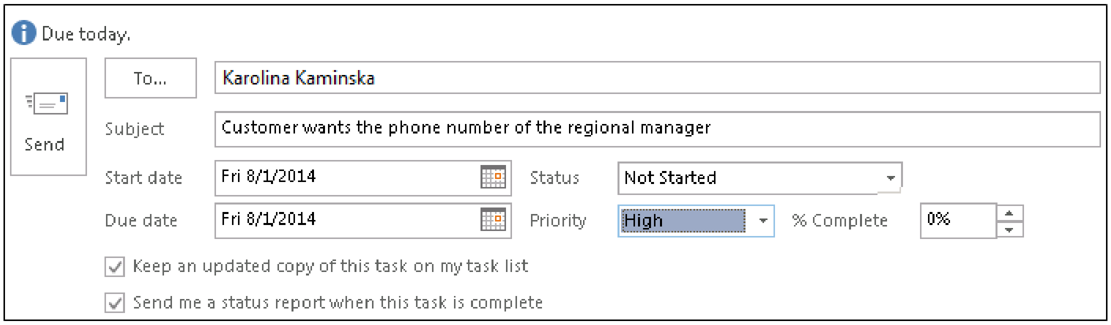
- You can't assign a task to someone in another organization.
- You can't track an assigned task if you go offline with Dynamics CRM for Outlook.
- You can't track recurring tasks.

Assign a task

1. Create a task or open an existing task as described in the previous procedure.
2. On the **Task** tab, in the **Manage Task** group, click **Assign Task**.



3. In the **Task** dialog box, in the **To** box, enter the name or email address of the person you want to assign the task to. To select from a list, click the **To** button.



Note

You can’t track tasks assigned to more than one person.

4. Select both the **Keep an updated copy of this task on my task list** check box and the **Send me a status report when this task is complete** check box.

Important

You must select both of these check boxes to track an assigned task.

5. If you want to track the task before assigning it, click the **Track** button or the **Set Regarding** button as described earlier in this topic.

Note

With assigned tasks, you must track the task record specifically as a task. You can’t track it as a phone call, letter, or FAX by selecting from the drop-down list on the **Track** button.

6. When you’re ready to assign the task, click **Send**.

When you click **Send**, ownership of the record passes to the person you’re assigning the task to. If the person you assign the task to declines the task, you’ll receive a declined task message. To reclaim ownership, open the message and click **Return to Task List**. After reclaiming ownership, you can reassign the task to someone else.

Accept, decline, or reassign a task assigned to you

1. If someone assigns a task to you in Dynamics CRM for Outlook, you have three options:
   - On the **Task** tab, in the **Respond** group, click **Accept**. If you accept the task, you become the owner of the task.
   - On the **Task** tab, in the **Respond** group, click **Decline**. If you decline the task, ownership of the task passes back to the person who assigned the task to you.
   - On the **Task** tab, in the **Manage Task** group, click **Assign Task**. If you reassign the task, ownership of the task passes to the person you assign the task to.

   Important

   Dynamics CRM for Outlook can’t track tasks that are reassigned. If a task is already tracked and you reassign the task, the task will be untracked and deleted from CRM.

You can't reassign a task by forwarding it.

2. To track a task after accepting it, click the **Track** button or the **Set Regarding** button as described earlier in this topic.

   Note
   With an assigned task, you must track the task specifically as a task. You can't track the task record as a phone call, letter, or FAX by selecting the down arrow on the **Track** button.

Send a status report about a task assignment

1. Open the task.
2. Make sure that **Status** and **% Complete** is current.
3. On the **Task** tab, in the **Manage Task** group, click **Send Status Report**.
4. In the **To** or **Cc** boxes, enter the names or email addresses of the people you want to send the status report to.
5. In the body of the message, type any information you want to include in the status report.
6. Click **Send**.

Follow the progress of tasks you assign

- To follow the progress of tasks you assign, select either or both of the following check boxes when you assign the task:

- To view tasks that you have assigned to others:
  a. Go to **Tasks**.
  b. On the **View** tab, in the **Current View** group, click **Change View**, and then click **Assigned**.
- To view the list of people who receive updated copies of an assigned task:
  a. Open the assigned task.
  b. On the **Task** tab, in the **Show** group, click **Details**, and then review the names in the **Update list** box.

See Also

[Overview of tracking records in CRM for Outlook]()

[Deleting records that have been tracked with CRM for Outlook]()

[Synchronizing data with Outlook or Exchange FAQ]()

Track Outlook appointments in CRM for Outlook

You can track an appointment in Microsoft Dynamics CRM for Outlook to save a copy of that appointment record as an activity in Microsoft Dynamics CRM. Dynamics CRM for Outlook synchronizes the CRM record with the Outlook record so you can view or edit the appointment in either tool. If you sync Outlook on your mobile device, you can also access your appointment records on that device.

Tracking appointments in Dynamics CRM for Outlook is a manual process. This gives you the ability to keep your personal appointments separate from your CRM appointments. Synchronization of appointments from CRM to Dynamics CRM for Outlook is automatic, however. You can use Dynamics CRM for Outlook to view any appointment records that you own that were created in CRM.

If you're using Microsoft Dynamics CRM 2015 for Outlook or later, you can also synchronize appointment attachments if your system administrator has enabled this capability. You can then view and update the attachments in Dynamics CRM for Outlook or CRM.

> **Important**
> To synchronize appointments between Dynamics CRM for Outlook and CRM, your Outlook email address must match your CRM email address. You can't synchronize to or from multiple email addresses.

Track an appointment

1. In Dynamics CRM for Outlook, create an appointment as you normally would in Outlook.
2. If you want to insert an attachment, click the **Insert** tab, and then select an attachment. Note that some file extensions may be blocked by your system administrator. More information: System Settings dialog box - General tab

   Dynamics CRM for Outlook doesn't support inline attachments (attachments included in the body of the message). Tell me more about inline attachments and how to convert them.

   > **Note**
   > The maximum size for an attachment is 5MB, although this can be increased to 32 MB by a system administrator.
3. To track the appointment, do one of the following:
   - To track the appointment without linking it to a particular record in CRM, on the **Appointment** tab, in the **CRM** group, click **Track.**

     -Or-
   - To track the task and link it to a particular CRM record (for example, a specific account), click **Set Regarding**, click **More**, and then search for the record in the **Look Up Record** dialog box. After you find the record you want, select **Add**.

   When you click the **Track** button or the **Set Regarding** button, you'll see a Microsoft Dynamics CRM pane (also known as the "tracking pane") at the bottom of the appointment record. This pane shows that the record is tracked and provides links to related records. If you set a Regarding value, Dynamics CRM for Outlook also provides a link to the Regarding record. Tell me more about how tracking works.

Notes

- To stop tracking an appointment, open the appointment record, and then click the **Untrack** button.
- After an appointment attachment is synchronized, if different users update the attachment in Dynamics CRM for Outlook **and** CRM, the latest update will be saved.
- After an appointment is synchronized, if you or another user changes the subject of the appointment in Dynamics CRM for Outlook or CRM, the appointment will be untracked (no longer synchronized).
- You can't synchronize attachments in recurring appointments or service appointments in Dynamics CRM for Outlook.

See Also

Overview of tracking records in CRM for Outlook

Deleting records that have been tracked with CRM for Outlook

Synchronizing data with Outlook or Exchange FAQ

Deleting records that have been tracked with CRM for Outlook

You can use Microsoft Dynamics CRM for Outlook to track email messages, contacts, tasks, and appointments. When you track an item, a copy of that record is saved as an activity in Microsoft Dynamics CRM and synchronized with the Outlook record. More information: Overview of tracking records in CRM for Outlook.

The following rules apply whether you synchronize records with Dynamics CRM for Outlook or server-side synchronization.

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, Dynamics CRM for Outlook asks whether you want to delete the email message in Microsoft Dynamics CRM.

Appointments

Deleting a tracked appointment in Outlook deletes the appointment in Microsoft Dynamics CRM. 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, Dynamics 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.

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, Dynamics 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.

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, Dynamics CRM for Outlook asks whether you want to delete the task in Microsoft Dynamics CRM.

See Also

Overview of tracking records in CRM for Outlook

Track Outlook email by choosing a button in CRM for Outlook

Track Outlook appointments in CRM for Outlook

Track Outlook contacts in CRM for Outlook

Track Outlook tasks in CRM for Outlook

Synchronize data

Synchronizing data with Outlook or Exchange FAQ

Choose the records to synchronize between CRM and Outlook or Exchange

View the fields that are synchronized between CRM and Outlook

Synchronize records manually with CRM for Outlook

[Control field synchronization between CRM and Outlook or Exchange]

[Which fields can be synchronized between CRM and Outlook?]

[How security affects synchronization between CRM and Outlook or Exchange]

[System Settings dialog box - Synchronization tab]

[Create or modify synchronization filters or view synchronizing fields]

Synchronizing data with Outlook or Exchange FAQ

What does “synchronization” mean in Microsoft Dynamics CRM or CRM for Outlook?

One of the main reasons people use Microsoft Dynamics CRM is to store customer emails so anyone with the appropriate permissions can see all relevant customer communications in one place. To store email and other messaging items (such as appointments, contacts, and tasks) in CRM, you need to synchronize your email system with CRM. More information: [TechNet: Integrate your email system with CRM]

What is CRM App for Outlook? Can I track my email through that app?

Yes. Microsoft Dynamics CRM App for Outlook is a lightweight email tracking app you can use together with Microsoft Outlook on the web, or with the Microsoft Outlook desktop application. With Dynamics CRM App for Outlook, CRM information appears inline next to a user’s Outlook email messages. For example, people can preview information about contacts and leads stored in CRM and add CRM contacts directly from an email message. They can also track incoming and outgoing email messages and (optionally) link them to new or existing CRM records. To use Dynamics CRM App for Outlook, you must synchronize email with server-side synchronization. More information: [CRM App for Outlook User's Guide (lightweight app)]

Should I synchronize records through CRM for Outlook, server-side synchronization, or the Email Router?

There are three ways to synchronize email. You can use Dynamics CRM for Outlook (also known as “Outlook sync”), server-side synchronization (also known as “Exchange sync”), or the Email Router. In most cases, server-side synchronization is the best synchronization method. Note that you must be an administrator to synchronize email with server-side synchronization or the Email Router. [TechNet: Learn more about the benefits of server-side synchronization].

Can I track records in CRM for Outlook or CRM App for Outlook if I synchronize records through server-side sync?

Yes, you can continue to use the **Track** button or the **Set Regarding** button in Dynamics CRM for Outlook to manually track records if your organization uses server-side synchronization. These buttons provide a convenient way to push records from Outlook to CRM. Note that if your organization uses server-side synchronization, records don’t get created in CRM immediately; they’re created when server-side synchronization processes synchronization for the mailbox, which can take up to 15 minutes.

You can also use Dynamics CRM App for Outlook (lightweight email tracking app) to track email if you synchronize records through server-side synchronization. More information: [CRM App for Outlook User's Guide (lightweight app)]

If I synchronize records through server-side synchronization, what filters are used to determine the records that are synchronized?

Server-side synchronization uses the same filters as Dynamics CRM for Outlook to determine the synchronized records. You can modify these filters or create new filters through Dynamics CRM for Outlook. More information: Choose the records to synchronize between CRM and Outlook or Exchange

How often are records synchronized?

Dynamics CRM for Outlook. If you synchronize records through Dynamics CRM for Outlook, records are synchronized every 15 minutes by default. You can adjust the synchronization interval through personal options. More information: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

If you need to synchronize right away, you can synchronize records manually. More information: Synchronize records manually with CRM for Outlook.

Server-side synchronization. If you synchronize records with server-side synchronization, the process is dynamic and unique for each user's mailbox. The synchronization algorithm ensures that mailboxes are synced according to dynamic parameters such as the number of email messages and the activity within the mailbox. Normally, email synchronization occurs every 5 minutes. When a mailbox has many email messages, the interval can be reduced dynamically to 2 minutes. If the mailbox is less active, the interval can be increased up to 12 minutes. Generally speaking, you can assume that a mailbox will be synced at least once every 12 minutes. Note that you can't manually synchronize records through server-side synchronization.

How do I change the synchronizing computer (client) when synchronizing with CRM for Outlook?

If you use Dynamics CRM for Outlook to synchronize records, and if you have Dynamics CRM for Outlook installed on more than one computer, you have to select one computer as the synchronizing computer for email, appointments, contacts, and tasks. To change the synchronizing computer:

1. In Dynamics CRM for Outlook, on the **File** menu, choose **CRM**, and then choose **Options**.
2. On the **Set Personal Options** page, choose the **Synchronization** tab.
3. In the **Set synchronization client** section, select **Set this computer to be the client to perform synchronization between Outlook and your primary Microsoft Dynamics CRM organization**.

Note

This option only appears when you have multiple computers connected to the same organization.

Can I view or control the fields that are synchronized between CRM and Outlook?

You can view the synchronizing fields and determine whether fields are synced one way (from Outlook to CRM), two ways (back and forth between Outlook and CRM), or not at all. More information: View the fields that are synchronized between CRM and Outlook.

If you're a system administrator, you can also control field synchronization and sync direction. More information: TechNet: Control field synchronization between CRM and Outlook or Exchange

Note

This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

Do security permissions affect synchronization?

Yes. If a system administrator has implemented security for particular fields or records, it can affect the data that's synchronized between CRM and Outlook or Exchange. More information: TechNet: How field security affects synchronization between CRM and Outlook or Exchange

Note

This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

Where can I find information on troubleshooting server-side synchronization issues?

You can find information on troubleshooting and known issues on Technet: Troubleshooting and things to know about server-side synchronization.

Privacy notice

If you use Microsoft Dynamics CRM, when you use server-side sync, CRM contacts and activities (including emails, appointments, contacts, and tasks) are synchronized to your specified email system (such as Exchange).

An administrator can configure server-side sync functionality to specify which users have the ability to send emails or appointments from CRM or synchronize activities and contacts between CRM and the user's mailbox. Both the administrator and end users can further customize filter criteria, and administrators can even define which entity fields synchronize.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

See Also

CRM for Outlook User's Guide (full app)

CRM App for Outlook User's Guide (lightweight app)

Track Outlook email by moving it to a tracked Exchange folder

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

TechNet: Integrate your email system with CRM

Choose the records to synchronize between CRM and Outlook or Exchange

Microsoft Dynamics CRM uses online synchronization filters to determine which records to synchronize between CRM and Microsoft Outlook (using Microsoft Dynamics CRM for Outlook), or Exchange (using server-side synchronization). You can modify the existing online synchronization filters or create new filters to synchronize certain types of records. You can also delete, deactivate, or activate filters. You use the same set of filters (accessed through Dynamics CRM for Outlook) whether you're synchronizing through Dynamics CRM for Outlook or server-side synchronization.

Important

The synchronization filters for appointments only apply when synchronizing through Dynamics CRM for Outlook, not server-side synchronization.

Email is not included in the synchronization filters because email is controlled by when the email is created in CRM, whether the user is on the recipient list or not. This is true for all email processing methods: Dynamics CRM for Outlook, server-side synchronization, or Email Router.

Tip

CRM also includes offline synchronization filters that you can use to choose records to work with offline in Dynamics CRM for Outlook. More information: Choose records to work with offline in CRM for Outlook

Create or modify online synchronization filters

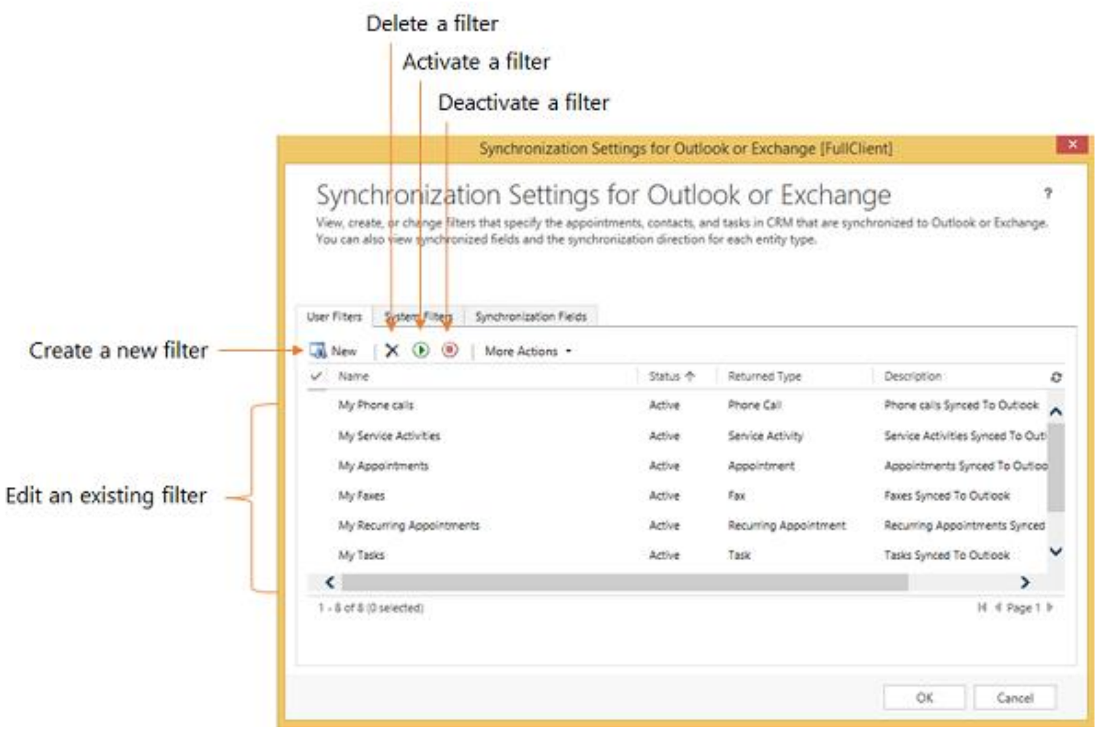
1. Go to **Options**:

In the web app: In the upper-right corner of the screen, click the **Settings** button > **Options**.

- In Dynamics CRM for Outlook: Click **File** > **CRM** > **Options**.

2. In the **Set Personal Options** dialog box, click the **Synchronize** tab.
3. Under **Synchronize Microsoft Dynamics CRM items with Outlook or Exchange**, click the **filters** link.

   CRM displays the **Synchronization Settings for Outlook or Exchange** dialog box with the **User Filters** tab selected. You can use this tab to create or edit a filter, or to delete, activate, or deactivate a filter.



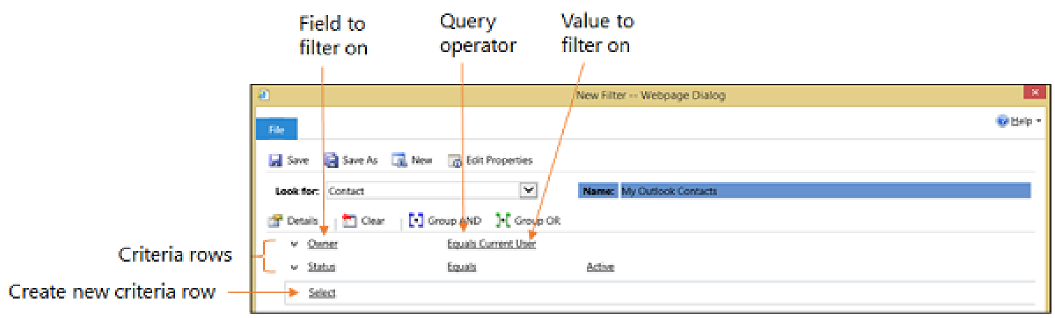
Note

If you’re a system administrator, you can create or modify organization-wide filters (system filters) through the SDK. More information: [MSDN: Tell me more about system filters]()

4. Do one of the following:
   - To open an existing filter, click the filter.
   - To create a new filter, click **New**.

Create or modify filter criteria

You use a criteria row to create or modify criteria in an offline synchronization filter. Each criteria row contains three values: the field to use in the filter (for example, **City**), an operator (for example, **Equals** or **Contains**), and the value to filter on (for example, **WA**).



Add a criteria row

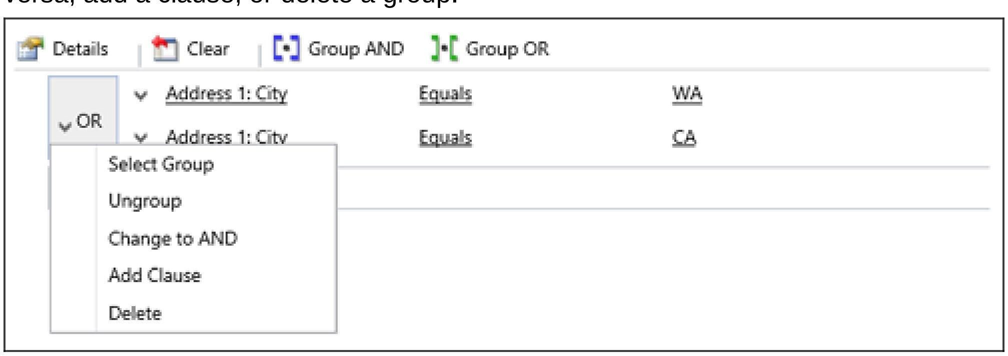
1. In the **Look for** list, select a record type.
2. Point to **Select** in the criteria grid, and then select the field to filter on from the list.
3. Select an operator from the list.
4. Enter a value to filter on.

Group rows of criteria

1. For each row you want to group, click the down arrow to the left of the field name, and then click **Select Row**.

   To remove a row from a group, click the down arrow to the left of the field name, and then click **Delete**. To clear all rows from the criteria grid, click **Clear**.
2. Click **Group AND** or **Group OR**.

After creating a group, you can click the down arrow next to the **And** or **Or** to select from different options. You can select a group, ungroup the group, change a Group AND to a Group OR or vice versa, add a clause, or delete a group.



See Also

[Choose records to work with offline in CRM for Outlook]

[Synchronizing data with Outlook or Exchange FAQ]

View the fields that are synchronized between CRM and Outlook

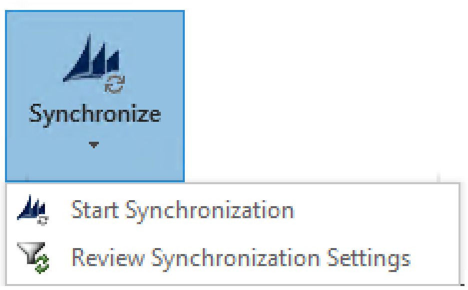
In Microsoft Dynamics CRM 2015 for Outlook or later, you can view the appointments, contacts, and tasks fields that are synchronized between Microsoft Dynamics CRM and Outlook so you can see where the data is coming from. You can also determine whether the fields:

- Are synchronized one way (from Outlook to CRM **or** from CRM to Outlook)
- Are synchronized two way (from Outlook to CRM **and** from CRM to Outlook)
- Aren't synchronized

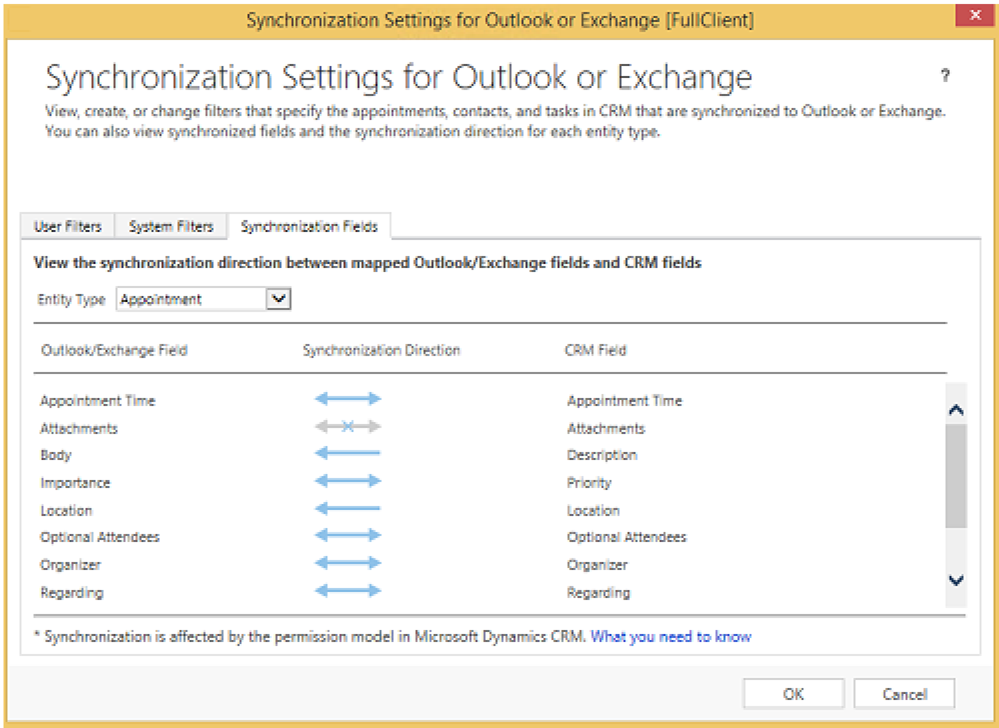
For example, if the fields are synchronized one way, from CRM to Outlook, you can update the field in Outlook and save the change, but your changes won't be synced with CRM, and will be overwritten if the same field value is changed in CRM. So if fields are synced one way, there's no need to change the value in the synchronized field.

View the synchronized fields

1. In Dynamics CRM for Outlook, click **File**, and then click **CRM**.
2. On the **Synchronize** button, click the down arrow, and then click **Review Synchronization Settings**.



3. In the **Synchronization Settings for Outlook or Exchange** dialog box, click the **Synchronization Fields** tab.



4. In the **Entity Type** list, select the record type you want to view.

   Outlook fields are displayed on the left and the corresponding CRM fields are displayed on the right. The blue arrows show the sync direction:

This indicator	Shows that the fields
→	Are synced one way from Outlook to CRM
←	Are synced one way from CRM to Outlook
↔	Are synced two way
←×→	Aren't synced

Note
Field synchronization direction can be impacted by security settings configured by your system administrator. For example, if you don't have read privileges for a field, it won't be synchronized in Outlook even if the field is configured for two-way synchronization. To determine whether you have read privileges for a field, click the **View in CRM** button to open the record in CRM. If you see the **Lock** icon, you can't access the field.

See Also

[Synchronizing data with Outlook or Exchange FAQ]

[TechNet: What fields can be synchronized between CRM and Outlook or Exchange?]

[TechNet: Control field synchronization between CRM and Outlook or Exchange (admins)]

[TechNet: How security affects synchronization between CRM and Outlook or Exchange]

Synchronize records manually with CRM for Outlook

By default, changes made in Microsoft Dynamics CRM are synchronized with Microsoft Dynamics CRM for Outlook every 15 minutes. You can set personal options in Dynamics CRM for Outlook to change how often data is synchronized, but you can’t synchronize data more frequently than every 15 minutes. If you need to synchronize right away, you can do a manual synchronization.

- In Dynamics CRM for Outlook, click **File** > **CRM** > **Synchronize** > **Start Synchronization**.

  Note
  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.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender’s email address, the recipient’s email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is “exported” to Outlook. A link is maintained between the information in

Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Choose the records to synchronize between CRM and Outlook or Exchange

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Synchronizing data with Outlook or Exchange FAQ

Control field synchronization between CRM and Outlook or Exchange

If you're a system administrator, you can control synchronization of appointments, contacts, and tasks fields between Microsoft Dynamics CRM and Outlook (using Dynamics CRM for Outlook) or Exchange (using server-side synchronization). You can:

- View and modify the fields that are synchronized between CRM and Outlook or Exchange.
- Control whether a specific pair of fields is synchronized:
  - In one direction - from Outlook or Exchange to CRM **or** from CRM to Outlook or Exchange
  - In both directions - from Outlook or Exchange to CRM **and** from CRM to Outlook or Exchange

You can also disable field synchronization between a pair of fields.

For more information about controlling field synchronization, see TechNet: Control field synchronization between CRM and Outlook or Exchange

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

See Also

View the fields that are synchronized between CRM and Outlook

TechNet: Which fields can be synchronized between CRM and Outlook?

TechNet: How field security affects synchronization between CRM and Outlook

System Settings dialog box - Synchronization tab

Synchronizing data with Outlook or Exchange FAQ

Overview of tracking records in CRM for Outlook

Which fields can be synchronized between CRM and Outlook?

Microsoft Dynamics CRM administrators can control field synchronization between Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook. For example, admins can control the synchronization direction between pairs of fields. For information about which fields can be synchronized between Microsoft Dynamics CRM and Dynamics CRM for Outlook, see TechNet: Which fields can be synchronized between CRM and CRM for Outlook.

See Also

View the fields that are synchronized between CRM and Outlook

How security affects synchronization between CRM and Outlook or Exchange

Synchronization of data between Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook or Exchange can be affected by security settings determined by your CRM administrator. For example, you may not be able to synchronize data from CRM to Dynamics CRM for Outlook for a particular field if you don't have read privileges for that field. For more information, see TechNet: How field security affects synchronization between CRM and CRM for Outlook.

See Also

Synchronizing data with Outlook or Exchange FAQ

Which fields can be synchronized between CRM and Outlook?

System Settings dialog box - Synchronization tab

Use the settings on this page to determine how data is synchronized between Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook. For example, you can control synchronization between pairs of fields or enable or disable synchronization of additional mailing addresses, assigned tasks, or appointment attachments.

Important

The **Synchronization** tab was introduced in Microsoft Dynamics CRM Online 2015 Update and Microsoft Dynamics CRM 2016 (on-premises).

Open the System Settings dialog box (if it's not 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose the **System Settings** > **Synchronization** tab.

Settings	Description
Synchronize Microsoft Dynamics CRM items with Outlook or Exchange	
Manage **system filters** for your entire organization to determine the CRM records that are synchronized to Outlook or Exchange folders.	This setting provides access to the **User Filters** tab in the **Synchronization Settings for Outlook or Exchange** dialog box. You may want to view this tab to see the default online synchronization filter settings for users in your organization. More information: Choose the records to synchronize between CRM and Outlook or Exchange
Manage the **synchronized fields** of Outlook or Exchange items including appointments, contacts, and tasks for your entire organization.	This setting provides access to the **Synchronization Fields** tab in the **Synchronization Settings for Outlook or Exchange** dialog box. Use this tab to view how appointments, contacts, and tasks fields are mapped between CRM and Outlook, and to change the synchronization direction or restrict synchronization for contacts and tasks fields. For example, if you want the contents of the contacts Notes field to be private, you can keep that field from synchronizing. More information: TechNet: Control field synchronization between CRM and Outlook or Exchange
Manage your offline filters and take your information offline in CRM for Outlook	
Manage system **offline filters** for your entire organization to determine what CRM data users can take with them when they go offline in Dynamics CRM for Outlook.	This setting provides access to the **User Filters** tab in the **Go Offline Settings** dialog box. You may want to view this tab to see the default offline synchronization filter settings for users in your organization. More information: Choose records to work with offline in CRM for Outlook
Configure general synchronization rules for your entire organization for appointments,	

Settings	Description
contacts, and tasks	
Appointments	
Synchronize appointment attachments with Outlook or Exchange	Attachments take up database space, so synchronization of appointment attachments is turned off by default. Choose the check box to turn on synchronization of attachments. **Important** Synchronization of appointment attachments is not supported for recurring appointments or service activities. More information: Track Outlook appointments in CRM for Outlook
Contacts	
Synchronize mailing address only in Outlook contact Synchronize all three addresses (Business, Home, Other) in Outlook contact	By default, just one Outlook mailing address field is synchronized between CRM and Outlook. This is sufficient for most organizations. If you want to synchronize all three Outlook mailing address fields (Business, Home, and Other fields) choose the **Synchronize all three addresses in Outlook contact** option. **Warning** Be cautious when enabling this option as it can cause data loss in some situations if you have existing data. This is due to the remapping of the attributes for existing tracked contacts. The best practice is to do in-house testing to understand how the re-mapping affects your environment and data. In most cases, you should have the full data in one side (normally in CRM) and sync to the other side (normally Outlook or Exchange).
Tasks	
Synchronize tasks that are assigned in Outlook	Outlook tasks are synchronized by default, but

Settings	Description
	synchronization of assigned tasks is turned off by default. Most companies don't require this feature because tasks would usually be assigned directly in CRM by changing ownership in CRM. You may want to enable this feature, however, if your company's business processes involve creating and sending tasks in Outlook instead of CRM. More information: Track Outlook tasks in CRM for Outlook

See Also

Choose the records to synchronize between CRM and Outlook or Exchange

Choose records to work with offline in CRM for Outlook

Track Outlook tasks in CRM for Outlook

Track Outlook appointments in CRM for Outlook

TechNet: Control field synchronization between CRM and Outlook or Exchange

TechNet: Which fields can be synchronized between CRM and Outlook?

Create or modify synchronization filters or view synchronizing fields

Looking for help on the **Synchronization Settings for Outlook or Exchange** dialog box or the **Go Offline Settings** dialog box?

- **Synchronization Settings for Outlook or Exchange dialog box.** This dialog box has three tabs:
  - **User Filters.** Use this tab to choose the records that are synchronized between CRM and Outlook or Exchange when you're online. More information: Choose the records to synchronize between CRM and Outlook or Exchange
  - **System Filters.** System administrators can programmatically modify online synchronization filters for an entire organization. More information: MSDN: Offline and Outlook filters and templates
  - **Synchronization Fields.** Use this tab to view the fields that are synchronized between CRM and Outlook, and to view the synchronization direction (one-way or two-way synchronization). More information: View the fields that are synchronized between CRM and Outlook
- **Go Offline Settings dialog box**. This dialog box has two tabs:
  - **User Filters**. Use this tab to choose the records to work with when you go offline with Dynamics CRM for Outlook. More information: Choose records to work with offline in CRM for Outlook

- **System Filters.** System administrators can programmatically modify offline synchronization filters for an entire organization. More information: MSDN: Offline and Outlook filters and templates

See Also

Choose the records to synchronize between CRM and Outlook or Exchange

Choose records to work with offline in CRM for Outlook

View the fields that are synchronized between CRM and Outlook

Work offline with CRM for Outlook

Work offline

Work offline with CRM for Outlook

Choose records to work with offline in CRM for Outlook

Example of going offline with CRM for Outlook

Work offline with CRM for Outlook

You can use Microsoft Dynamics CRM for Outlook to access your Microsoft Dynamics CRM data when you're on the go. For example, if you travel to a customer's site, you can look up your CRM contacts, review and add new notes, and more without connecting to the Internet.

When you go offline with Dynamics CRM for Outlook, the software copies a subset of CRM data to your computer's hard drive. Changes you make while you're offline are stored locally. When you connect to the server again, the changes are automatically synchronized with the CRM server.

On this page:

Before you go offline

Go offline

Go back online

What features are unavailable offline?

Other things to know about going offline

Before you go offline

Dynamics CRM for Outlook uses offline synchronization filters to determine the subset of data to copy to your local hard drive when you go offline. Before you go offline, you can modify these filters or create new filters to synchronize just the data you need. You can also delete, deactivate, or activate filters. More information: Choose records to work with offline in CRM for Outlook

Tip

The first time you go offline, it can take a significant amount of time to synchronize your local data with the CRM server if you have a lot of data. For example, in customer service situations, a parent case may have thousands of child cases. CRM isn't available when

Dynamics CRM for Outlook is synchronizing. You can shorten the time by using the offline synchronization filters to limit the amount of synchronized data.

Go offline

When you're ready to go offline, in Dynamics CRM for Outlook, choose **File** > **CRM** > **Go Offline**.

When you choose **Go Offline**, Dynamics CRM for Outlook syncs your data to your local computer using the offline sync filters. When synchronization is complete, you can disconnect your computer from the network.

Tip

You can tell if you're offline by using any of the following indicators:

- The CRM toolbar displays the **Go Online** button.
- The CRM menu displays the **Go Online** option.
- If you're using Outlook 2010 or Outlook 2013, the CRM tab displays the **Go Online** button.

Go back online

1. Make sure you're connected to your organization's network.
2. Choose **File** > **CRM** > **Go Online**.

What features are unavailable offline?

Not available offline

- Assigning records
- Posts
- 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
- Tracking assigned tasks

- Revise quote functionality
- Follow or unfollow in the activity feed
- Custom themes

Limited availability offline

- Creating or viewing reports (based on local data groups and offline data)
- Running some custom business processes (plug-ins)

Can be viewed, but can't be edited offline

- Articles
- Sales literature
- Mail-merge templates

Other things to know about going offline

- **Shared use of a computer.** Any users who log on locally to a computer that has Dynamics CRM for Outlook installed can potentially access CRM data stored in the offline database. Shared use of a computer running Dynamics CRM for Outlook is not supported.
- **How CRM handles changes from multiple users.** CRM applies additions and changes to the CRM server in the same order they're entered. If you make a change to a record while you're offline, and another user changes the same record during that time, when you go back online, your change will overwrite the changes that the other user made while you were offline.
- **Workflows.** When you work offline, CRM disables workflow notifications. If the changes you make offline are set to trigger an automated workflow process or a system job, the process is automatically triggered when you go back online.
- **Duplicate detection.** CRM disables duplicate detection when you're offline. Duplicate detection is automatically re-enabled when you go back online. You can set a personal option to determine how duplicate records are handled during synchronization. More information:**.**Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange
- **Undelivered messages.** Email messages can fail to be delivered if the mail server is down, or can be blocked if the recipient doesn't want to receive the email. If this happens, Outlook saves the email 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're working offline, email 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 email message can't be sent, Microsoft Dynamics CRM saves it as a draft activity, but it does not appear in your **Drafts** folder in Outlook.
- **Offline security permissions.** You have the same security permissions offline as when you're online.
- **Adding a related record type using the Add button (+).** If you're offline, you can't add a related record type by using the **Add** button (+). Add the related record type while you're online, and then go offline.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM for Outlook, when you go offline, a copy of the data you are working on is created and stored on your local computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and a link is maintained between the local copy and CRM Online. The next time you sign in to CRM Online, the local data will be synchronized with CRM Online.

An administrator determines whether or not an organization's users are permitted to go offline with Microsoft Dynamics CRM for Outlook by using security roles.

Users and administrators can configure which entities are downloaded via Offline Sync by using the **Sync Filters** setting in the **Options** dialog box. Alternatively, users and Administrators can configure which fields are downloaded (and uploaded) by using **Advanced Options** in the **Sync Filters** dialog box.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

[Set up CRM for Outlook]

[Choose records to work with offline in CRM for Outlook]

[Example of going offline with CRM for Outlook]

Choose records to work with offline in CRM for Outlook

Choose a subset of Microsoft Dynamics CRM data to take with you when you go offline with Microsoft Dynamics CRM for Outlook by using offline synchronization filters. By default, these filters copy the appointments, contacts, and tasks records you own to your local drive. You might want to modify the filters to take a smaller subset of data with you or to synchronize particular records. For example, you might want to synchronize all reports since reports you don't own wouldn't normally be synchronized.

You can modify the existing filters or create new filters. You can also delete, deactivate, or activate filters. You can reset the filters every time you go offline.

Tip

To synchronize data and go online and offline more quickly, you can decrease the interval for automatic synchronization. More information: Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Create or modify offline synchronization filters

1. Do one of the following:

   In the web app:

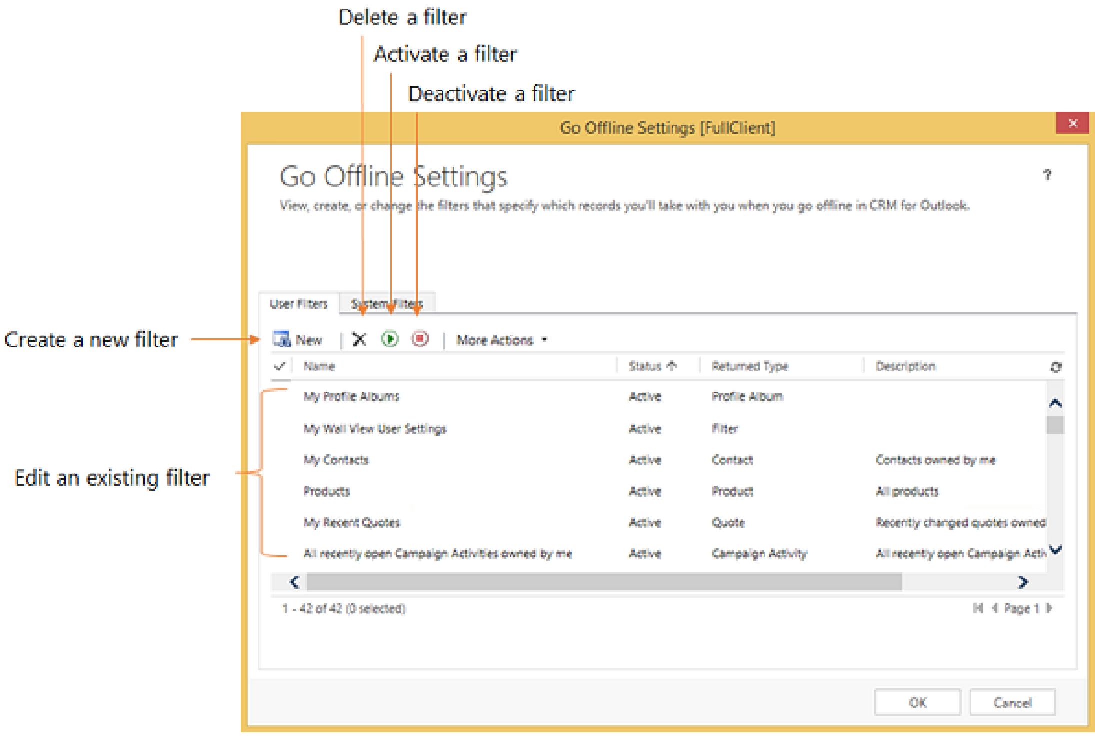
   - Choose the **Options** button in the upper-right corner of the window, and then choose **Options**.
   - In the **Set Personal Options** dialog box, choose the **Synchronize** tab.

   In CRM for Outlook:

   - On the **File** menu, choose **CRM**.
   - Choose **Options**, and then in the **Set Personal Options** dialog box, choose the **Synchronize** tab.

2. Under **Manage your offline filters and take your information offline in Dynamics CRM for Outlook**, choose the **offline filters** link.

   CRM displays the **Go Offline Settings** dialog box with the **User Filters** tab selected. You can use this tab to create or edit a filter, or to delete, activate, or deactivate a filter.



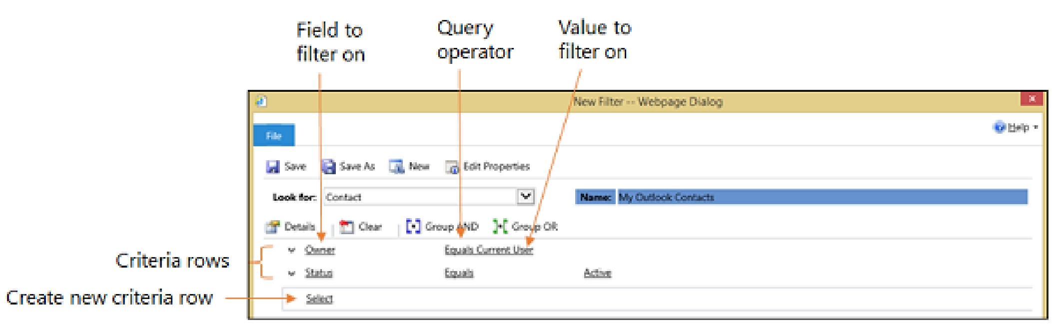
Note

If you're a system administrator, you can create or modify organization-wide filters (system filters) through the SDK. More information: [MSDN: Tell me more about system filters]

3. Do one of the following:
   - To open an existing filter, choose the filter.
   - To create a new filter, choose **New**.

Creating or modifying filter criteria

You use a criteria row to create or modify criteria in an offline synchronization filter. Each criteria row contains three values: the field to use in the filter (for example, **City**), an operator (for example, **Equals** or **Contains**), and the value to filter on (for example, **WA**).



Add a criteria row

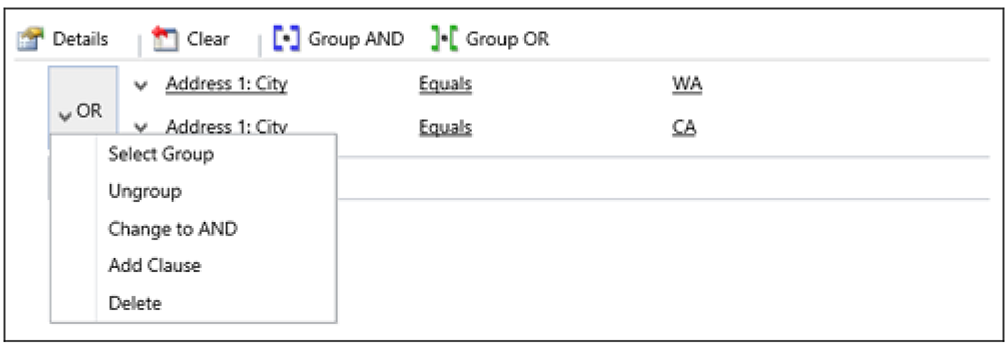
1. In the **Look for** list, select a record type.
2. Point to **Select** in the criteria grid, and then select the field to filter on from the list.
3. Select an operator from the list.
4. Enter a value to filter on.

Group rows of criteria

1. For each row you want to group, choose the **down arrow** to the left of the field name, and then choose **Select Row**.

   To remove a row from a group, choose the **down arrow** to the left of the field name, and then choose **Delete**. To clear all rows from the criteria grid, choose **Clear**.
2. Choose **Group AND** or **Group OR**.

After creating a group, you can click the down arrow next to the **And** or **Or** to select from different options. You can select a group, ungroup the group, change a Group AND to a Group OR or vice versa, add a clause, or delete a group.



See Also

[Work offline with CRM for Outlook]()

[Example of going offline with CRM for Outlook]()

[Choose the records to synchronize between CRM and Outlook or Exchange]()

[Synchronizing data with Outlook or Exchange FAQ]()

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 Dynamics 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** menu, click or tap **CRM** > **Go Offline** > **Manage 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

Users who log on locally to a device that has Microsoft Dynamics CRM for Outlook installed can potentially access CRM data stored locally. Shared use of a device running Dynamics 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.

Privacy notices

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After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender's email address, the recipient's email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is "exported" to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Work offline with CRM for Outlook

Choose records to work with offline in CRM for Outlook

Set options

Set address book options in CRM for Outlook

Customize your regional settings (number, currency, time, and date) in CRM for Outlook

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Set address book options in CRM for Outlook

With Microsoft Dynamics CRM for Outlook, when you compose an email message or set up a meeting, you can search for a CRM contact directly from the **To** field of the email message or appointment. By default, only the contacts that are synchronized with CRM for Outlook and other record types that you own (such as accounts and leads) appear in the address book. Use this process if you want to synchronize all CRM contacts, including contacts that you don't own or to synchronize additional record types that you don't own.

Note
The address book synchronizes with CRM automatically when you start Dynamics CRM for Outlook, and then once every 24 hours.

1. In Dynamics CRM for Outlook, choose **File**, and then choose **CRM** > **Options**.
2. In the **Set Personal Options** dialog box, choose the **Address Book** tab.

   Note
   This tab is not available in the CRM web application.
3. For **Contacts**, select one of the following:
   - **Match only against contacts synchronized to Microsoft Dynamics CRM**. This option is selected by default. Leave as is if you only want to be able to access the contacts that are synchronized through the online synchronization filters. More information: Choose the records to synchronize between CRM and Outlook or Exchange
   - **Match all contacts in Microsoft Dynamics CRM**. Select this option if you want all CRM contacts to be available in the address book.

4. For **Other record types**, select one of the following:
   - **Do not match.** Select this option if you do not want to sync other record types, such as accounts or leads.

   - **Match only the items I own.** This is the default option. Leave as is if you don’t want to sync additional record types that you don’t own.
   - **Match all items in Microsoft Dynamics CRM**. Select this option if you want to sync all record types, including record types you don’t own.

If your address book is slow or if there are record types you want to exclude from your address book, under **Change the record types being synchronized to your Address Book**, choose the **Select or change the values for this field** button ....

6. Add or remove record types, and then choose **OK**.
7. To save your changes and close the dialog box, choose **OK**.

Privacy notices

To use Microsoft Dynamics CRM for Outlook, you are required to sign in by using your credentials (an email address and password). You may choose to save this information locally so that you are not prompted for your credentials each time you open Outlook. If you do choose to save this information locally, CRM for Outlook will automatically connect to Microsoft Dynamics CRM Online every time you open Outlook.

After the first time you sign in and use CRM for Outlook, the connection between your computer and CRM Online will always be open when you have access to the Internet. You may choose to turn off the connection between your computer and CRM only by using a configuration setting, but if you do 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 Online the sender’s email address, the recipient’s email address, and the subject line of the message. This allows CRM Online to validate whether or not a particular mail should be stored by the CRM Online 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 appropriate permissions. When you untrack an item, that copy is automatically deleted from CRM Online only if you own the item.

If you use Microsoft Dynamics CRM Online, when you use the Sync to Outlook feature, the CRM data you are syncing is “exported” to Outlook. A link is maintained between the information in Outlook and the information in CRM Online to ensure that the information remains current between the two. Outlook Sync downloads only the relevant CRM record IDs to use when a user attempts to track and set regarding an Outlook item. The company data is not stored on the device.

An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Choose the records to synchronize between CRM and Outlook or Exchange

Track Outlook contacts in CRM for Outlook

Set personal options that affect tracking and synchronization between CRM and Outlook or Exchange

Synchronizing data with Outlook or Exchange FAQ

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 personal options that affect tracking and synchronization between CRM and Outlook or Exchange

You can use the **Set Personal Options** dialog box in Microsoft Dynamics CRM for Outlook or in Microsoft Dynamics CRM to set many options that affect tracking and synchronization.

To open the **Set Personal Options** dialog box:

- In Dynamics CRM for Outlook, on the **File** menu, click **CRM**, and then click **Options**.

  -Or-

- In CRM, click the **Settings** button in the upper-right corner of the screen, and then click **Options**.

The following table summarizes the tracking and synchronization options available in the **Set Personal Options** dialog box. The **Available** column indicates whether the option is available in Dynamics CRM for Outlook, CRM, or both. This column also indicates if the option is available for Outlook synchronization, server-side synchronization (also known as “Exchange synchronization”), or both. More information: Synchronizing data with Outlook or Exchange FAQ

Note
Some of the options on the **Synchronization** tab are available only if you’re using CRM 2015 or later or if you’re using CRM Online.

To	On this tab	In this section	See this option	Available
View or modify the online synchronization filters used to determine the CRM records copied to your local hard drive	Synchronization	Synchronize Microsoft Dynamics CRM items with Outlook or Exchange	View or manage the **filters** that determine the CRM records that are synchronized to your Outlook or	• From Dynamics CRM for Outlook or from CRM • For Outlook sync or server-side sync

			Exchange folders. More information: Choose the records to synchronize between CRM and Outlook or Exchange	
View or modify the offline synchronization filters used to determine the CRM records copied to your local hard drive when you go offline	Synchronization	Manage your offline filters and take your information offline in CRM for Outlook	Manage your **offline filters** to determine what CRM data you need with you when you go offline. More information: Choose records to work with offline in CRM for Outlook	• From Dynamics CRM for Outlook or from CRM • For Outlook sync or server-side sync
View the fields that are synchronized between Outlook and CRM	Synchronization		View or manage the **synchronized fields** of Outlook or Exchange items, including appointments, contacts, and tasks. More information: View the fields that are synchronized between CRM and Outlook	• From Dynamics CRM for Outlook or from CRM • For Outlook sync or server-side sync
Overwrite the	Synchronization	Update the	Update	• From Dynamics

names in the Outlook contacts Company field with the parent account from CRM contacts		company field for Outlook contacts	Company fields with parent account names	CRM for Outlook only • For Outlook sync or server-side sync
Set the synchronization client that synchronizes records between Outlook and Dynamics CRM	Synchronization	Set synchronization client	Set this computer to be the client to perform synchronization between Outlook and your primary Microsoft Dynamics CRM organization	• From Dynamics CRM for Outlook only • For Outlook sync only. **Note** This option only appears when you have multiple Outlook clients that are connected to the same organization.
Set the synchronization interval for synchronizing CRM items	Synchronization	Schedule automatic synchronization with Outlook	Synchronize the CRM items in my Outlook folders every	• From Dynamics CRM for Outlook only • For Outlook sync only
Enable CRM to send email using Dynamics CRM for Outlook	Email	Select how Microsoft Dynamics CRM for Outlook should integrate email with Microsoft Dynamics CRM	Allow Microsoft Dynamics CRM to send email using Microsoft Dynamics CRM for Outlook	From Dynamics CRM for Outlook only
Track incoming email automatically	Email	Select how Microsoft Dynamics CRM for Outlook	Check incoming email in Outlook and determine	From Dynamics CRM for Outlook only

		should integrate email with Microsoft Dynamics CRM	whether an email should be linked and saved as a Microsoft Dynamics CRM record. More information: Set an option to automatically track incoming Outlook email in CRM for Outlook	
Track incoming email automatically	Email	Select the email messages to track in Microsoft Dynamics CRM	Track More information: Set an option to automatically track incoming Outlook email in CRM for Outlook	From Dynamics CRM for Outlook or from CRM
Track incoming email automatically	Email	Select the email messages to track in Microsoft Dynamics CRM	Configure Folder Tracking Rules More information: Track Outlook email by moving it to a tracked Exchange folder	• From Dynamics CRM for Outlook or from CRM • For server-side sync only
Automatically create contact or lead records if the sender of the email message or	Email	Automatically create records in Microsoft Dynamics CRM	Create More information: Set an option to automatically track incoming	From Dynamics CRM for Outlook or from CRM

meeting invitation doesn't already have a record in CRM			Outlook email in CRM for Outlook	
Select how email recipients are matched to Dynamics CRM records	Address Book	Select how email recipients are reconciled with Microsoft Dynamics CRM records	All options More information: Set address book options in CRM for Outlook	From Dynamics CRM for Outlook only
Set the synchronization interval for updating your local data when you go offline	Local Data	Set how often to update local data	Update local data every Note: You may not be able to change the interval if your administrator has restricted changes.	From Dynamics CRM for Outlook only
Select how duplicate records should be handled when going from offline to online	Local Data	Select how duplicate records should be handled during synchronization	Enable duplicate detection during offline to online synchronization	From Dynamics CRM for Outlook only

Privacy notices

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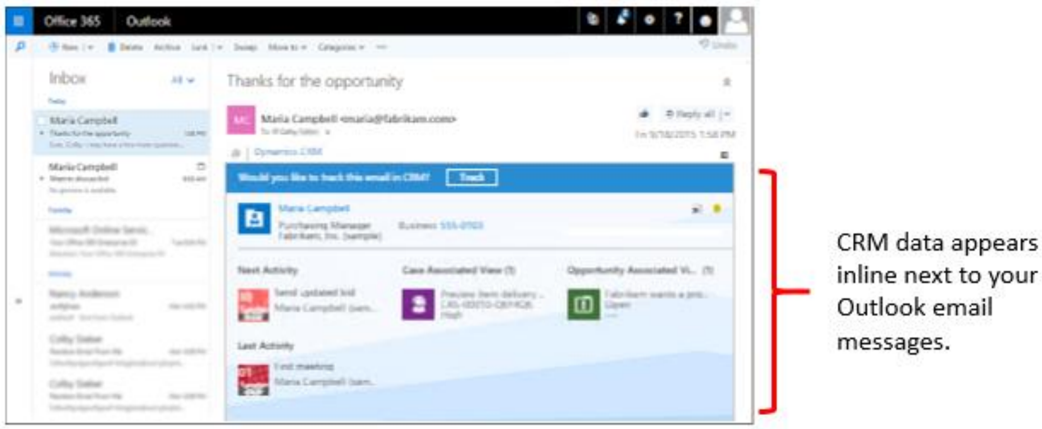
An administrator determines whether your organization's users are permitted to sync CRM data to Outlook by using security roles.

See Also

Track Outlook email by moving it to a tracked Exchange folder
Track Outlook email by choosing a button in CRM for Outlook
Synchronizing data with Outlook or Exchange FAQ
Set up email processing through server-side synchronization

CRM App for Outlook User's Guide (lightweight app)

Microsoft Dynamics CRM App for Outlook is a lightweight app that you can use to view Microsoft Dynamics CRM information and track email from within Outlook on your desktop and phone. In Dynamics CRM App for Outlook, CRM data appears right in your Outlook Inbox.



You can use Dynamics CRM App for Outlook on any of the following:

- Desktop (Outlook 2013, Outlook 2016, Outlook on the web, Microsoft Outlook for Mac)
- Tablet (Windows 8.1, Apple iPad, and Android)
- Phone (Windows Phone, Apple iPhone, and Android)

Important
Dynamics CRM App for Outlook is not the same thing as Dynamics CRM for Outlook. This topic discusses the differences between the two apps.

On this page:

What CRM App for Outlook offers

With Dynamics CRM App for Outlook, you can:

- Tap the power of CRM while working in the familiar Outlook environment.

- Track incoming or outgoing email wherever you are, as long as you have access to a browser.
- Link an incoming or outgoing email record to an existing record in CRM. For example, you might want to link an email message to a specific account or opportunity. If a record doesn't exist, you can create it right from within the app!
- Find out whether an email message is already tracked, and change the regarding record (the CRM record that the message is linked to).
- Create CRM contact or lead records for people on the **From** list that aren't already included in the CRM database. You can also create new CRM records for any entity (record type), as long as the entity has been enabled for mobile and for multi-entity search.
- Preview information about contacts and leads stored in CRM. For example, you can find a number or company name for a contact or lead, or preview the last and next activities for a contact or lead.
- Open CRM records directly to find or enter more detailed information.

How is Dynamics CRM App for Outlook different from Dynamics CRM for Outlook?

Dynamics CRM for Outlook (sometimes called the "Outlook client") is a full-featured add-in for the desktop version of Microsoft Outlook. With Dynamics CRM for Outlook, you can do all your CRM work within the familiar Outlook interface. You can even work offline. Dynamics CRM App for Outlook, on the other hand, is a lightweight app that enables you to easily track email wherever you are.

The following table contrasts Dynamics CRM App for Outlook with Dynamics CRM for Outlook:

Feature	**Dynamics CRM App for Outlook**	**Dynamics CRM for Outlook**
What you can track	Email only	Email, appointments, contacts, and tasks
Works with Outlook on the web	Yes	No
Works with Outlook for the desktop	Yes	Yes
Open and create CRM records directly	Yes	Yes
Apply custom forms and business logic	Yes	Yes
Work offline	No	Yes

Apply CRM email templates, and attach sales literature or KB articles	No	Yes
Sort, filter, format, group, and categorize lists (views)	No	Yes
Create Word mail-merge documents	No	Yes
Control field synchronization	No	Yes

For more information on Dynamics CRM for Outlook capabilities, see the CRM for Outlook User's Guide (full app)

Prerequisites for installing and using Dynamics CRM App for Outlook

Your CRM system administrator must deploy Dynamics CRM App for Outlook to your organization before you can access it. To deploy Dynamics CRM App for Outlook:

- Your organization must use CRM Online, and CRM Online 2015 Update 1 or later must be installed.
- Your organization must use Exchange Online for email processing.
- Your organization must synchronize email through server-side synchronization.
- Your organization must synchronize appointments, contacts, and tasks through server-side synchronization.
- The system administrator must set up specific security roles.
- The system administrator must add Dynamics CRM App for Outlook to your Exchange Online service.

For more information, see the following topics on TechNet:

- Add and enable CRM App for Outlook
- Set up server-side synchronization

Supported browsers for Outlook on the web

You can use Dynamics CRM App for Outlook with Outlook on the web on the following browsers:

- Internet Explorer 10, Internet Explorer 11, or Microsoft Edge
- Google Chrome version 41 or later
- Firefox version 40 or later

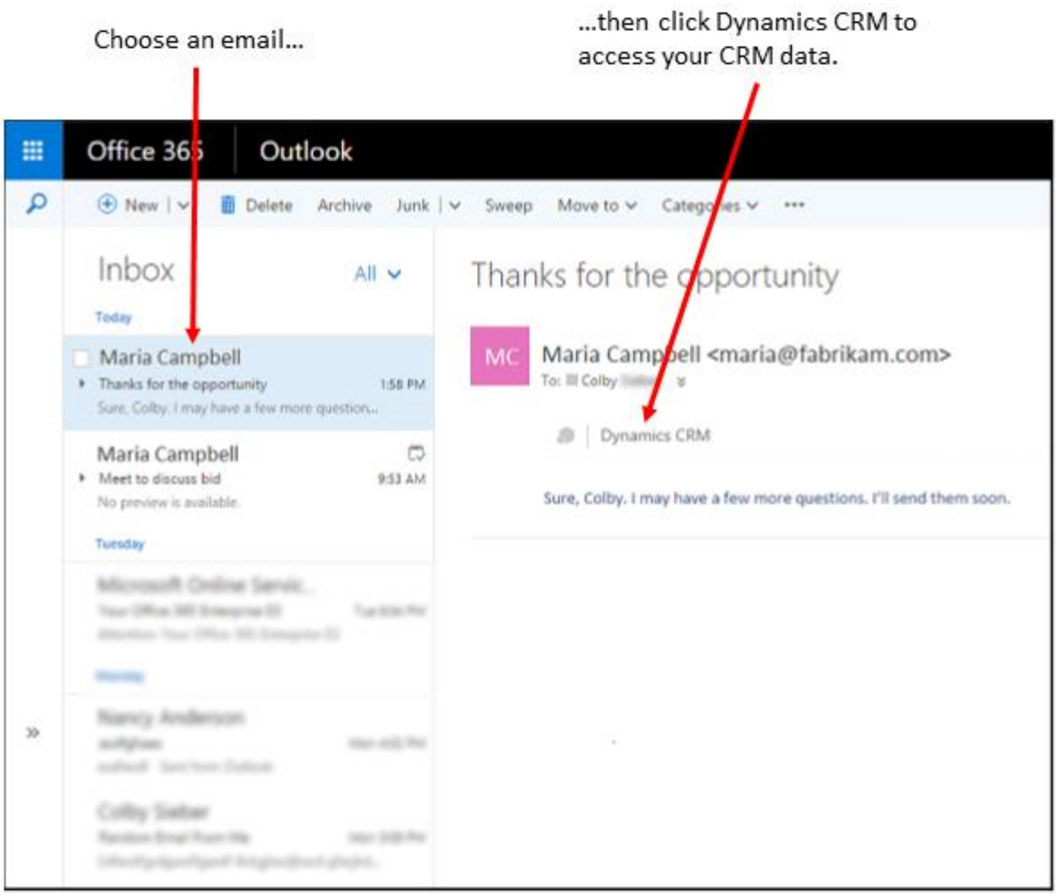
- Apple Safari version 6 or later

Supported operating systems for desktop Outlook

- You can use Dynamics CRM App for Outlook with Outlook 2013 and Outlook 2016 on Windows 7, Windows 8, Windows 8.1, or Windows 10.
- You can use Dynamics CRM App for Outlook with Outlook for Mac on Mac OS X Mavericks or Yosemite.

Accessing Dynamics CRM App for Outlook after it's been deployed

After Dynamics CRM App for Outlook has been deployed by a system administrator, the app appears as a **Dynamics CRM** tab in the Outlook reading pane. Just click the tab to access your CRM data.



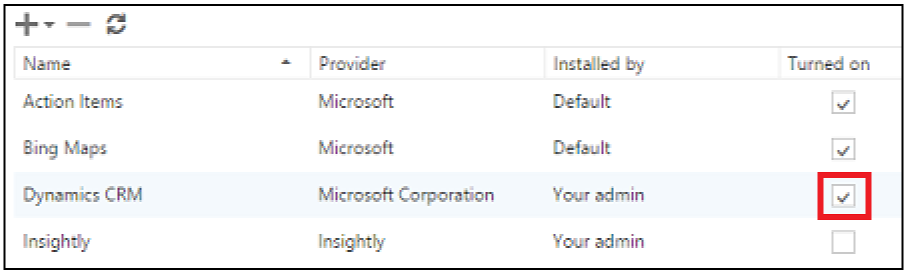
If you don't see the **Dynamics CRM** tab, you need to enable the app.

If you're using desktop Outlook:

1. Click **File > Manage Apps**.
2. Sign in, click **General > Manage add-ins**, and then select the check box for **Dynamics CRM**.

If you're using Outlook on the web:

1. Click the **Settings** menu **> Manage add-ins.**
2. Click **General > Manage add-ins** and select the check box for **Dynamics CRM**.



Name	Provider	Installed by	Turned on
Action Items	Microsoft	Default	✓
Bing Maps	Microsoft	Default	✓
Dynamics CRM	Microsoft Corporation	Your admin	✓
Insightly	Insightly	Your admin	

Install the app after it has been deployed

After the app has been deployed by your administrator, you can install it directly from Microsoft Dynamics CRM. If you're not sure whether it has already been deployed, contact your administrator.

Install the app

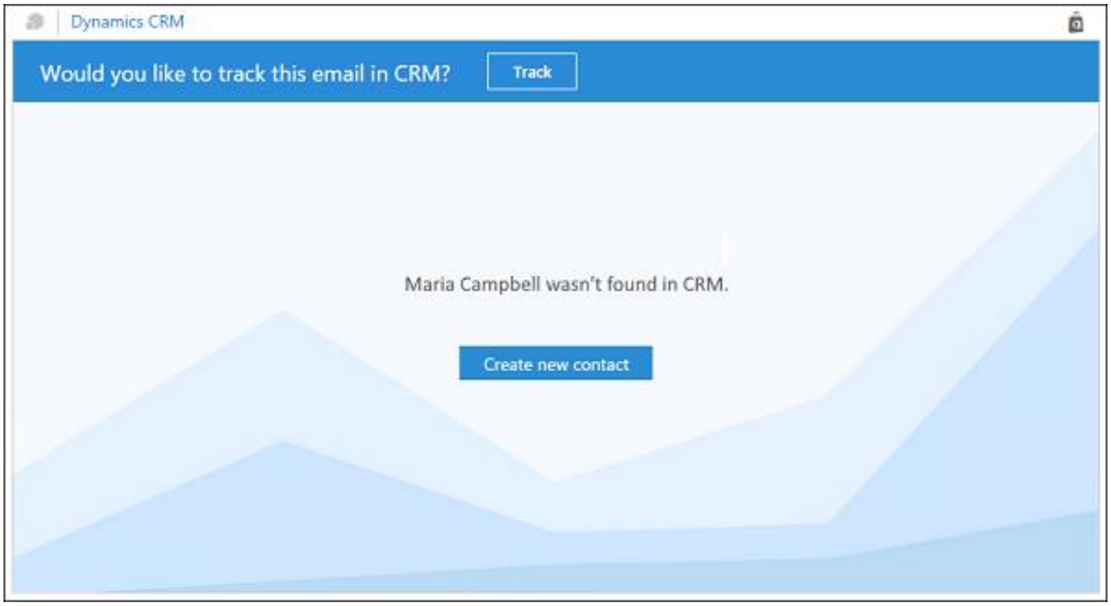
Click the **Settings** icon , and then click **Apps for Dynamics CRM**.

2. On the **Apps for Dynamics CRM** page, under **Dynamics CRM App for Outlook**, click **Add app to Outlook**.

Track an incoming email message from an unknown sender

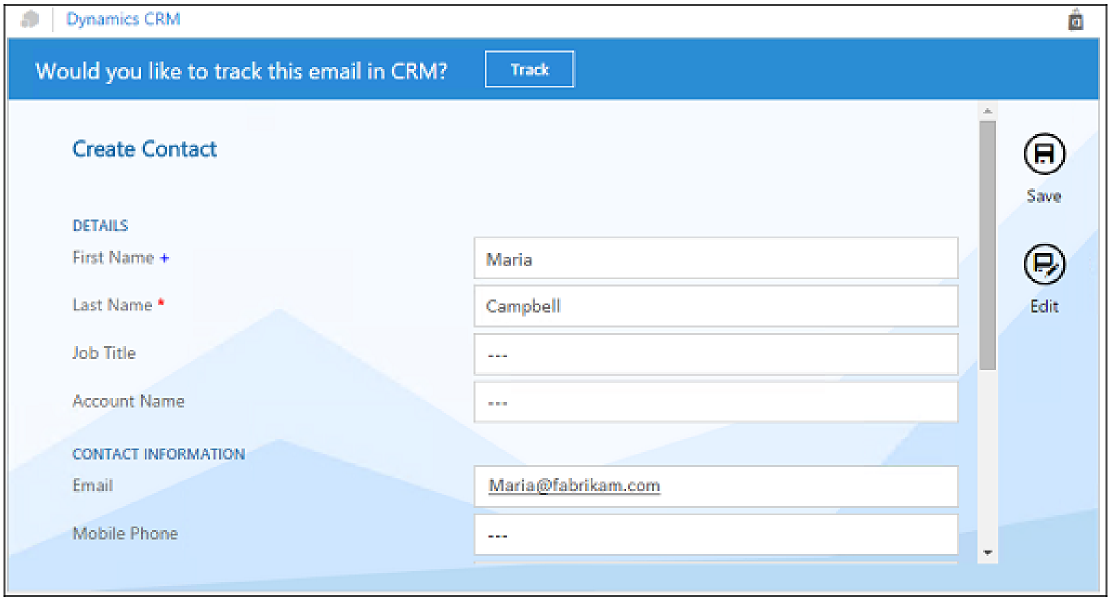
1. Select the email message in your Inbox, and then click the **Dynamics CRM** tab.

   When an email message is from an unknown sender (the sender isn't already a contact or lead in CRM), you'll see the following screen:



2. Click **Create new contact**.
3. The **First Name**, **Last Name**, and **Email** fields are already filled in for you. The **Phone Number** field will be filled in if it's available.

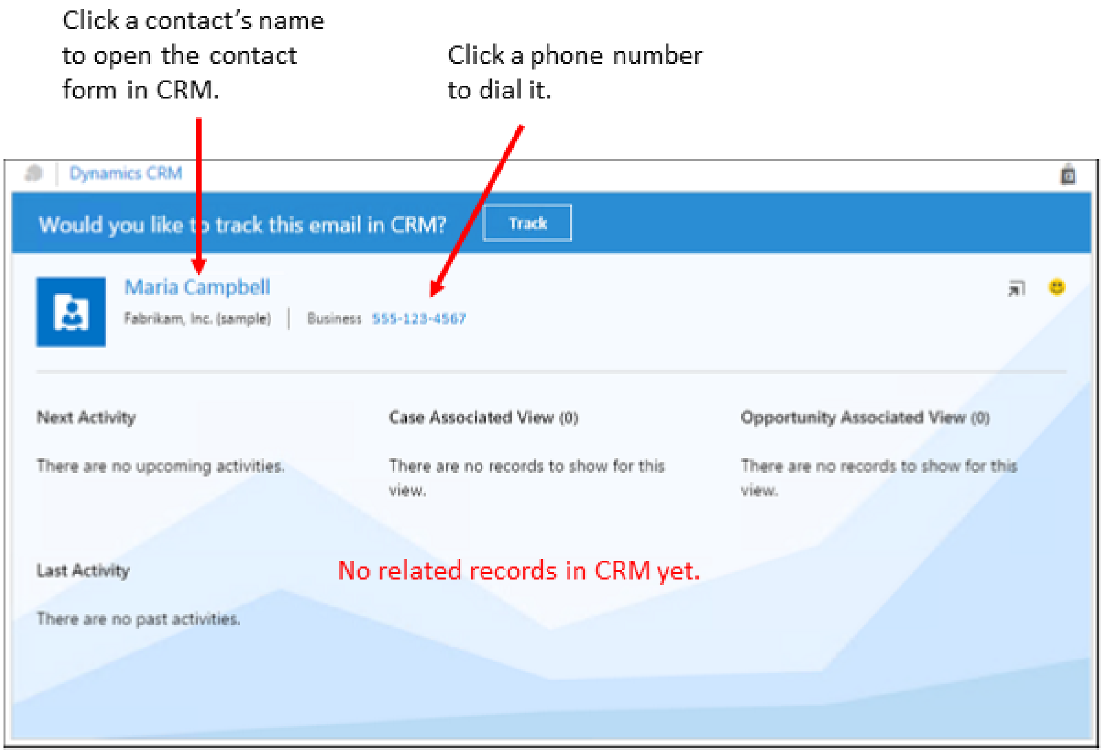
   In the **Create Contact** form, fill in other fields (as much or as little as you like), and then click **Save** when you're done entering info, or click **Edit** to open the CRM contact form to enter more details.



Note

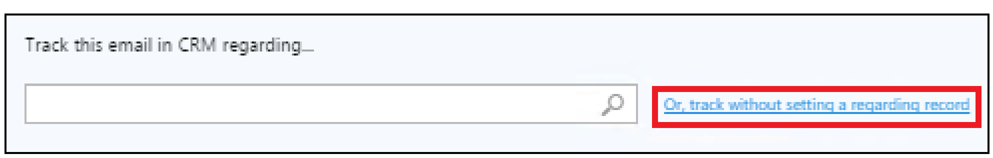
If you want to enter information for a lead instead of a contact, don’t fill in any information in the **Create Contact** form. You can track the email regarding a new lead instead. Skip to the next step to learn how.

When you click **Save** in the **Create Contact** form, the app displays contact card information, as well as empty sections for **Next Activity**, **Last Activity**, and the first two lists on the contact form. By default, these lists are **Case Associated View** and **Opportunity Associated View**. These sections are empty because the contact doesn’t have any related records in CRM yet.

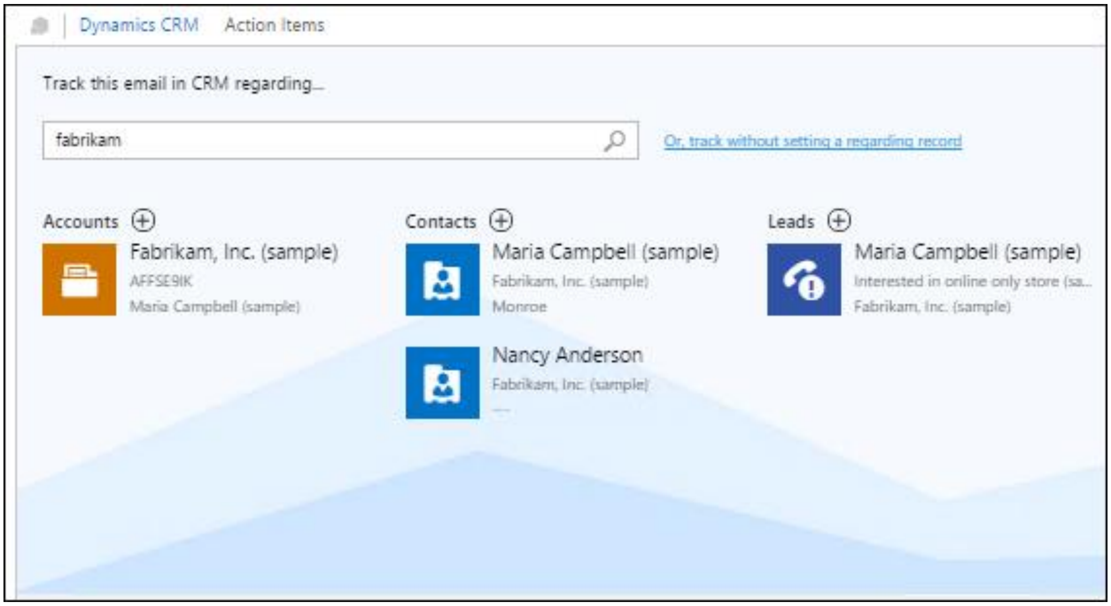


4. To track the email, click **Track**.

5. Do one of the following:
   - If you don't want to link the email message to an existing CRM record, click **Or, track without setting a regarding record**.



To link the email message to an existing record in CRM, in the search box, enter a keyword (for example, a company name), click **Lookup** , and then select one of the records in the resulting list.



When you select a record, the record appears next to **To be tracked regarding**. To open the record in CRM, click the link.

Note

When you click **Track**, syncing with CRM can take up to 15 minutes. If syncing doesn't occur after 15 minutes, ask your administrator to verify that server-side synchronization is working for sending and receiving email from CRM.

- To create a new record in CRM (for example, to create a lead record instead of a contact record) and link it to the email activity record:

i. .i. Click **New** ⊕ next to any enabled entity.

ii. In the quick create form, fill out the fields.

iii. Click **Save** to save the record if you're done adding information. To enter more detailed information, click **Save and edit in CRM**.

Note

The entities shown on the tracking page have been enabled for mobile and enabled for multi-entity search. For more information on enabling entities, see [TechNet: Entities and CRM for phones and CRM for tablets].

Preview information about a sender that's already stored in CRM as a lead or contact

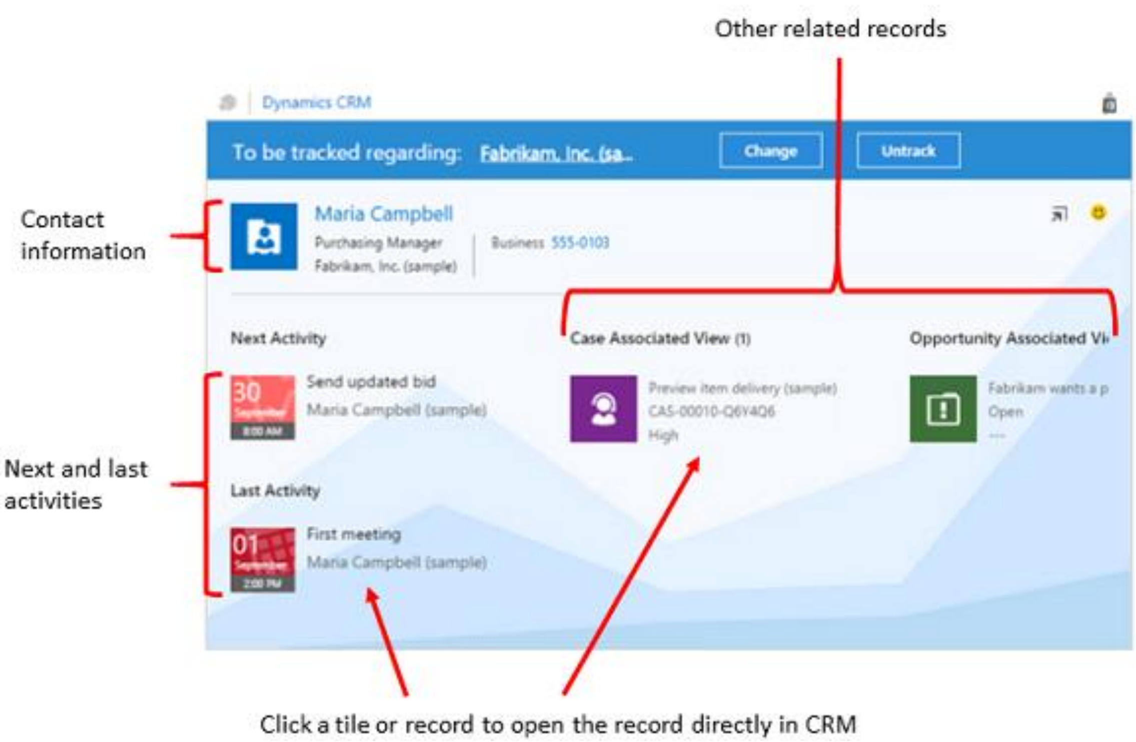
- Select the email message in your Inbox, and then click the **Dynamics CRM** tab.

  The information you'll see includes:

  - Contact information about the person (lead or contact) the email message is from
  - Next and last activities
  - Other related records, which include records from lists on the associated entity's main form

  Note

  The related records you see may vary based on whether your system has been customized. Dynamics CRM App for Outlook displays two records from each view. If you want to see all records related to a contact or lead, click the contact or lead name in the contact card.



Change the regarding record for a tracked email message

1. Open the email message, and then click the **Dynamics CRM** tab.
2. Click **Change**.

3. Do one of the following:
   - To untrack the record, click **Or track without setting a regarding record**.

To select a different CRM record, enter a keyword (for example, a company name) in the search box, click **Lookup** , and then select a record from the results list.

- To create a new record in CRM and link it to the email activity record:

Click **New** next to any enabled entity.

ii. In the quick create form, fill out the fields.

iii. Click **Save** to save the record if you're done adding information. To enter more detailed information, click **Save and edit in CRM**.

Open a CRM record from CRM App for Outlook

You can open CRM forms directly for contacts and other records. To open CRM records, click any of the following links:

- The name of the lead or contact
- The **Pop Out** button
- The name of the regarding record (once the email has been tracked)
- Any record or activity tile

See Also

[TechNet: Add and enable CRM App for Outlook]

[TechNet: Set up server-side synchronization]

[CRM for Outlook User's Guide (full app)]

Go mobile

Get started with CRM for phones and tablets

Install CRM for phones and tablets

Keep track of your contacts, leads, and activities on the go with the Microsoft Dynamics CRM for phones and Microsoft Dynamics CRM for tablets apps. You get the same intuitive experience on both your phone and tablet.

First things first: Is your mobile device supported?

If your CRM admin already told you your device can run CRM for phones or tablets, you're good to go. If you're not sure—

Check the list of supported devices on TechNet

Install the app from your device's app store

Choose the download link for your device:

Looking for a different version of the CRM for phones app?

If your organization isn't ready to use the latest CRM for phones app, you can still use the earlier version, which is now called CRM for phones express. CRM for phones express is only supported for versions of CRM earlier than Microsoft Dynamics CRM Online 2016 Update and Microsoft Dynamics CRM 2016 (on-premises).

Get CRM for phones express

Having trouble with your app?

If you're having trouble with your mobile app, it's a good idea to contact your IT department. If you want to do some troubleshooting on your own, try these resources:

- **Start up error on a tablet** If you got an error while starting CRM for tablets that looks like this: "Additional steps may be needed to configure Microsoft Dynamics CRM for this organization. Please contact your system administrator," you need to notify your CRM administrator that you received this error.

  If you're an admin trying to diagnose this error, see Troubleshoot a CRM for Windows app start-up error.
- **The app's not working well on your device** If your app isn't working well on your mobile device, be sure to check the compatibility information in TechNet: Support for CRM for phones and CRM for tablets.
- **Something else is wrong** For all other problems, see TechNet: Troubleshooting and things to know about CRM for phones and tablets.

Note

Microsoft Dynamics CRM for phones is available for Microsoft Dynamics CRM Online 2015 Update 1 and later and Microsoft Dynamics CRM 2016 on-premises or later. If your organization hasn't yet updated, you can still use the previous version of the phone app, Microsoft Dynamics CRM for phones express. More information: Get started with CRM for phones express.

User's Guide
Sign in

Privacy notice

Licensed Dynamics CRM Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using CRM for tablets, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the tablet client. Users can then access CRM Online by using CRM for tablets, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from CRM Online and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

See Also

Mobile CRM User's Guide

TechNet: Phone and tablet support

Sign in to CRM for phones and tablets

Now that you've installed your app, let's get started! First, you need to sign in. You'll need your Microsoft Dynamics CRM web address, user name, and password. If you don't have any of these, contact your CRM admin.

Find your CRM administrator or support person

1. Open your app, type in your CRM web address, and tap .

2. On the next screen, type in your user name and password, and tap **Sign in**.

A few basic navigation tips appear while your app starts up. Be sure to stay on this screen while your app starts up so any changes can download successfully to your device. If you switch to another app during this time, the processing will restart when you open this one again.

Note

Microsoft Dynamics CRM for phones is available for Microsoft Dynamics CRM Online 2015 Update 1 or later, or Microsoft Dynamics CRM 2016 on-premises or later. If your organization hasn't yet updated, you can still use the previous version of the phone app, Microsoft Dynamics CRM for phones express. More information: Get started with CRM for phones express

Install the app
Work offline

See Also

Mobile CRM User's Guide

Sign out of or reconfigure CRM for phones and tablets

If you share a tablet with another person, or if you need to sign in to a different organization or CRM server (for example, if you need to sign in to a test installation), you don't have to uninstall and reinstall the CRM for phones and tablets app. You can use either the sign out or the reconfigure options instead.

Sign out of the CRM for tablets app

If you share a tablet with another person, this is the option you should use so you can sign out and another person can sign in.

1. From your Home page, tap ... .
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

If you're an admin, tester, or trainer, this is most likely the best option for you, so you can sign into a different environment, like a CRM sandbox installation.

1. Tap ... .
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 doesn't 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.

A note about pinned tiles

If you're using a Windows 8 or Windows 8.1 phone or tablet and had pinned tiles on 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.

Work offline

Get around

See Also

Mobile CRM User's Guide

Work offline in CRM for phones and tablets

horizontaltabbed

How to

Stay productive when your phone doesn't have service, or when your tablet's not connected to the Internet. The mobile apps keep records that you've used recently, so you can still access them when you're disconnected.

You can also capture new information by creating drafts of new records like accounts, contacts, and activities. When you’re connected again, save the records that you created while you were offline.

Your offline experience might look a little different than when you’re connected, because charts and some images aren’t available offline.

Reconnect your device to CRM

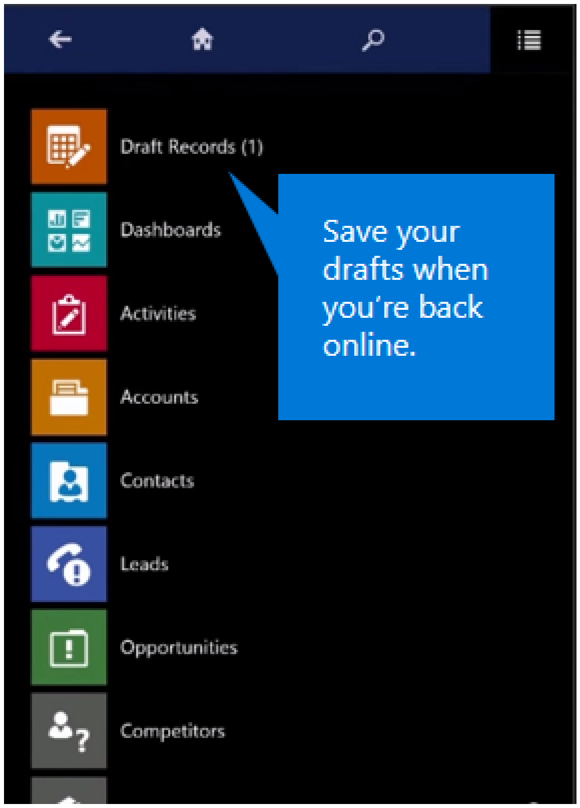
Once you have phone service or Internet again, tap the offline indicator on your device to reconnect.

You’ll need to save your drafts to make them available in the CRM system.

Save your drafts to make them available

You can view and create records as you normally would, but your records are saved as drafts. Once you’re reconnected, the app tells you that you have unsaved drafts. Be sure to review and save them as soon as you can. Any drafts you don’t save are only available to you on your mobile device.

1. From the menu, tap **Draft Records**.



2. Select each record individually, review the record and make any necessary changes, and then tap **Save**.

A few limitations for creating draft records

There are a few things you should know about working with offline drafts in the mobile apps:

- While offline, you can only create new records. To edit existing records, you need to be connected. However, you can edit records that you created while you were offline.
- While disconnected, you can only create standalone records or associate records to those that are available for offline access on your device. For example, you can create an opportunity for an account only if that account was created before you went offline, and if it's available for offline access. You can't create an opportunity for an account while offline if you also created the account while offline.
- When you're offline, you can't set the value for lookup fields. If you create a record that is associated with another record, such as adding a phone call to a contact, some lookup fields might populate automatically (in this case, the To and From fields might pre-populate). You need to fill these fields in once you re-connect while you review and save your drafts.

About cached data on your device

The records you've recently used are kept on your mobile device, and are also known as cached data. Cached data is specific to your device, so if you use both the phone and tablet apps, the cached data on each device will be different, depending on the records you've viewed on each one.

Warning

Cached data is not encrypted. You can use BitLocker to encrypt the entire hard drive on a Windows 8 or Windows 10 device.

If you're prompted to sign in while you're disconnected

If you're prompted to sign in to CRM 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 all phones and Android tablets, however, you can no longer work in offline mode and will be redirected to the **Let's get started** page until you can reconnect and sign in again.

Working offline with on-premises CRM deployments

If you're using your CRM for tablets app with Microsoft Dynamics CRM 2015 (on-premises) or later, 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 can't 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. If you're not sure whether your organization has an on-premises deployment, contact your CRM admin to find out.

Find your CRM administrator or support person

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.

Install the Windows 8 app on your tablet

Sign in

Sign out

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

Mobile CRM User's Guide

Get around in CRM for phones and tablets

horizontaltabbed

How to

When you first sign in to CRM for phones and tablets, you'll see your home page for CRM for tablets, which provides a quick overview of your CRM data, including different views and charts. Navigation is intuitive, and it's easy to view or create new records right from your Home screen or dashboard. Just swipe left and right to view more items.

Display the menu

When you want to view all of your accounts, contacts, leads, or other records, use the menu.

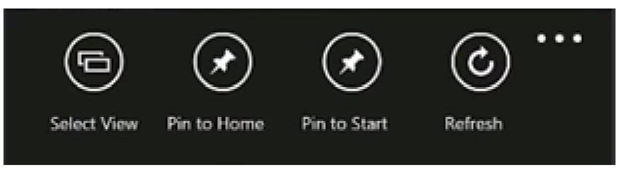
Tap the menu icon on the top of the page (on the right in the phone app, and on the left in the tablet app), and then select the type of record you want to work with.

Display the command bar

You can add a new record, change views, or do other tasks from the command bar.

Just tap on the bottom right-hand corner of the page.

You can also press and hold an item to display the command bar.



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 item (when you press and hold the item), the commands that appear are relevant to that item.

Switch to a different dashboard

If you want to use a different dashboard, it's easy to switch back and forth.

Tap **Dashboards** in the menu and then select the dashboard you want to use.

When you want to go back to your Home screen, tap **Home**.

To create new dashboards in CRM and enable them for use in CRM for phones and tablets, see Create a dashboard.

Use your browser if you need a feature not in the CRM for tablets app

The following features in the web application aren't available in CRM for phones and tablets:

- Yammer and activity feeds
- Bing Maps integration
- Parature, from Microsoft knowledge base integration

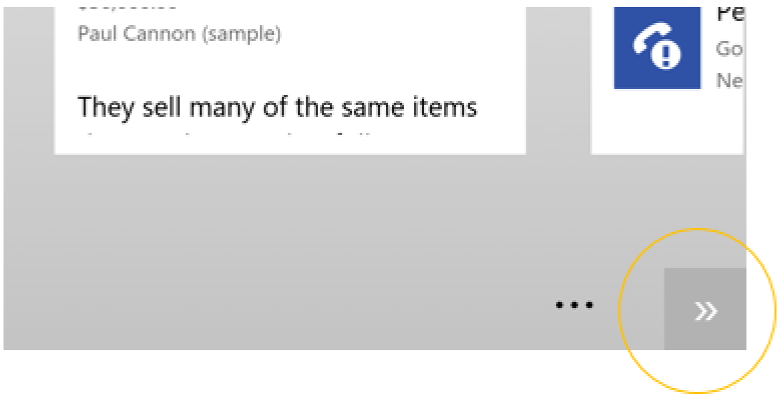
If you need to use these features or want to view a record in the web application, you can do that in your tablet's browser. (You can only do this in the tablet app.)

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 mobile app.

A note about using the mobile app on Android tablets

Navigation on Android tablets is a little different than on iPad or Windows 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.

[Sign out](#)

[Manage records](#)

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

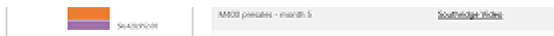
[Mobile User's Guide](#)

Track your progress with charts in CRM for phones and tablets

horizontaltabbed

How to

Your charts give you a quick view of how you're tracking to your goals. They're interactive, so you can tap an area of a chart to see the data for that area, or you can tap the area outside the chart to see the data for the entire chart. In the phone app, swipe left and right to view the chart and its associated records.



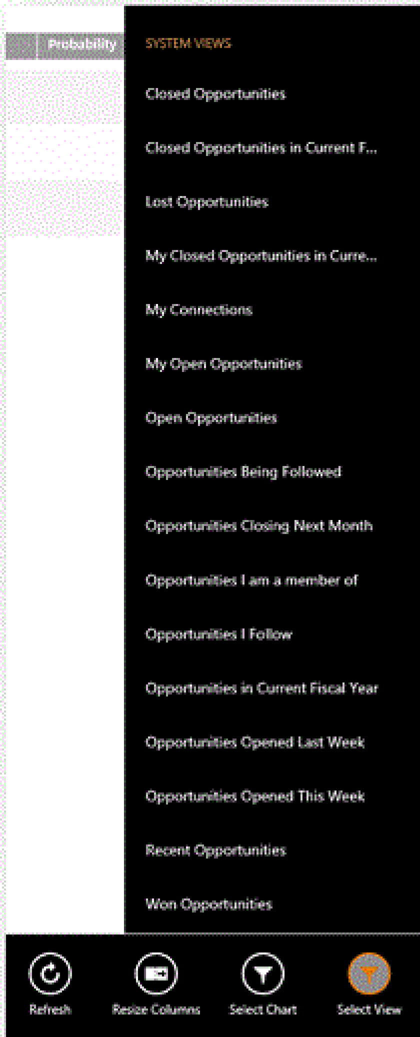
Tap any of the records to see more information.

Change the chart view

Changing the chart view shows you a different breakdown of your data, such as opportunities opened within a specific time period.

1. On the command bar, tap **Select View**.

2. Select the view you want.



Show a different chart

You can change the chart to show data for a different type of record in much the same way.

1. Tap **Select Chart** on the command bar.
2. Select the chart you want to display.

[Search](#)

[Manage activities](#)

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

[Mobile User's Guide](#)

Pin your favorites in CRM for phones and tablets

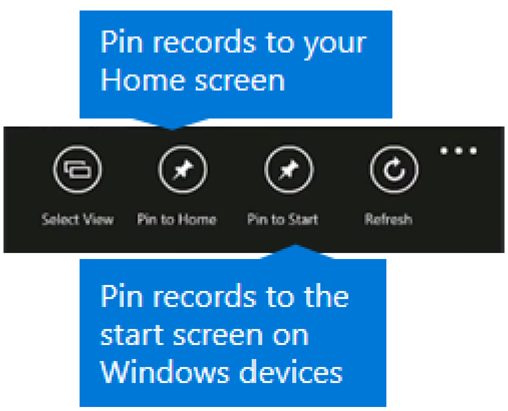
horizontaltabbed

How to

Pinned tiles provide quick access to your records, contacts, views, and dashboards. You can pin as many tiles as you want to the Pinned Tiles section of your Home screen or to the Start screen or menu of Windows 8 and Windows 10 devices.

With Microsoft Dynamics CRM 2015 or later, you can also pin dashboards to your Home screen or to the Start screen of Windows 8 and Windows 10 devices.

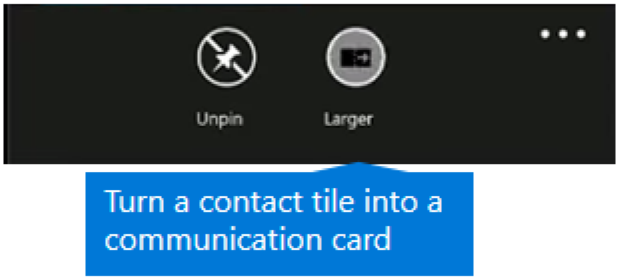
Press and hold the item you want to pin, or display the command bar while viewing a record, and then tap **Pin to Home**.



Create a communication card

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 your Home screen by expanding the pinned tile.

Press and hold a contact tile that’s pinned to the dashboard, and then tap **Larger** on the command bar.



[Sales process](#)
[Email and call](#)

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

[Mobile User’s Guide](#)

Email and call customers in CRM for phones and tablets

horizontaltabbed

How to

Call or send email to your customers easily from the mobile apps. Tap any phone number in a record to start a call, or on the communication card for a contact, tap the email button to send an email, or the phone button to start a call.

In CRM for tablets, tapping the phone button starts a Skype call. In CRM for phones, it starts a phone call.

When you’re finished with your call, the app prompts you to enter details about the call. If you’re using a Windows 8 or later tablet, you can enter details while you’re on the call, because Skype snaps to the screen next to the CRM for tablets app.

Pin your favorites
Search

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

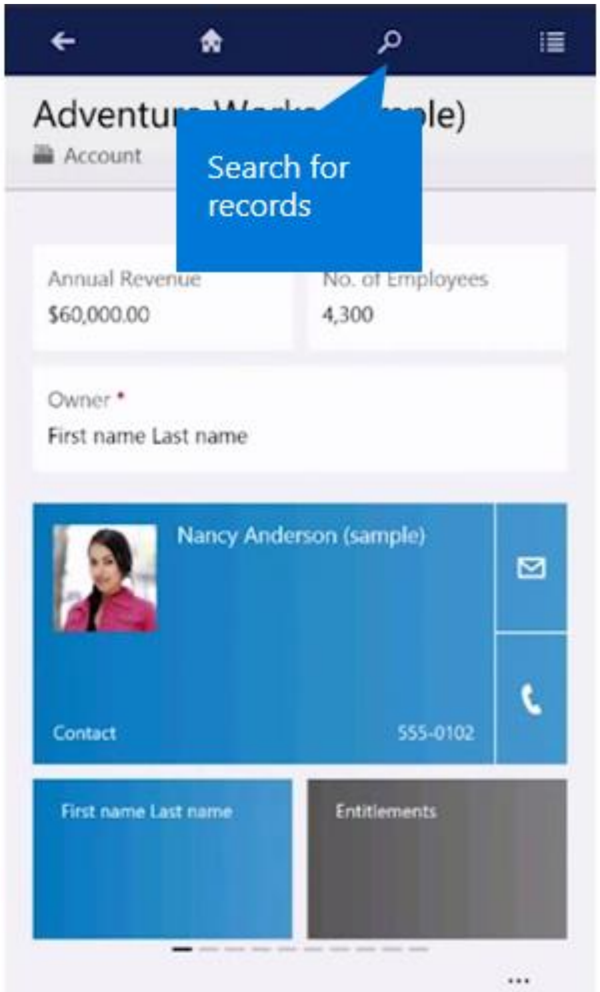
Mobile CRM User’s Guide

Search in CRM for phones and tablets

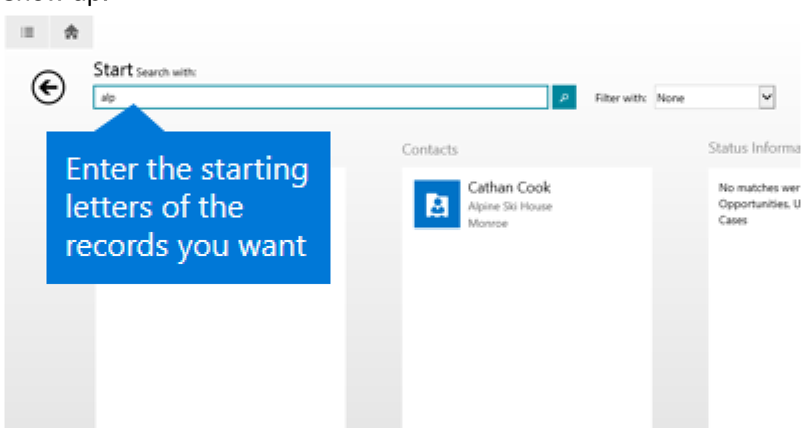
horizontaltabbed

How to

To launch a search, tap on the top of the page, type one or more letters in the search box, and tap next to the search box. The following image shows where you can find search in Microsoft Dynamics CRM for phones.



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.

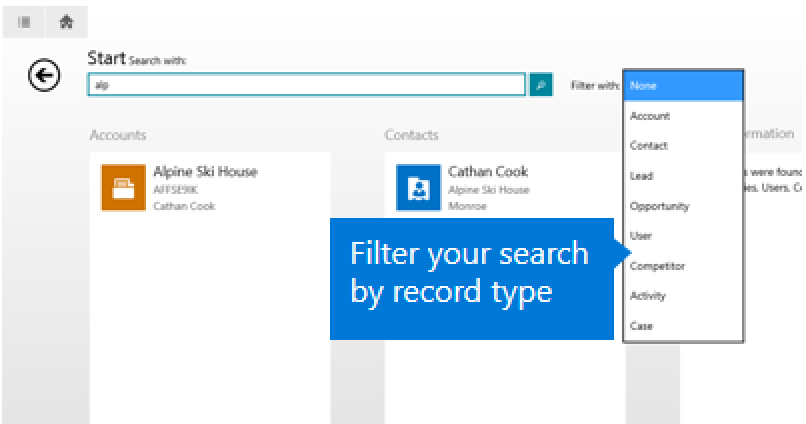


Important

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 record type, choose a record type from the **Filter with:** drop-down box.



[Email and call](#)

[Use charts](#)

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

[Mobile CRM User's Guide](#)

Manage accounts, contacts, leads, and opportunities in CRM for phones and tablets

horizontaltabbed

How to

As a sales professional, you'll be working a lot with the following types of records:

- **Accounts**   Account records contain information about the companies you do business with.

- **Contacts** Contact records contain information about the people you know and work with. Usually, multiple contacts are associated with one account. Contacts could include people responsible for making purchasing decisions, people in charge of paying invoices, support technicians, or anyone you work with at the company.
- **Leads** Leads are potential sales, and you or your company can get leads from many different sources. For example, you can generate sales leads from marketing campaigns, inquiries from your website, mailing lists, social media posts, or in person at a trade convention.
- **Opportunities** When you qualify a lead, it becomes an opportunity, or a deal that you're getting ready to close.

CRM is easy to customize to match the way your organization does business, so it's possible you might see different types of records in your CRM system.

Here are a few quick tips to view, add, or change records in CRM for phones and tablets.

Work with records on the dashboard

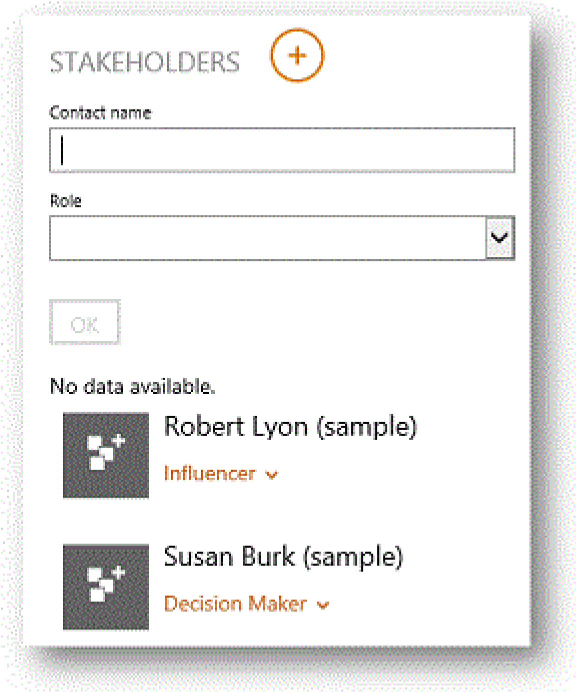
To do this:	Do this:
View all the records for a record type on the dashboard in CRM for tablets (for example, **Leads**).	Tap the header of the list. This opens your records in a grid view on your tablet.
Open the form for a record on the dashboard.	Tap the record.
Create a new record from the dashboard.	Tap the **+** 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

- In CRM for tablets, press and hold the name of the list and tap **Select View** on the command bar.
- In CRM for phones, tap **…** and tap **Select View** on the command bar.

Create or edit stakeholders or sales team members

1. In **Stakeholders** or **Sales Team** for a lead or opportunity, tap the **New Item** button **+**.
2. Enter a contact name to look up in the dropdown that appears.
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.



Resize columns

You can resize columns in a grid in the CRM for tablets app, and the app will remember your settings the next time you view that grid.

1. On the command bar, tap **Resize Columns**.
2. Drag the column handles that appear above the grid to the width you want.

Sort items

You can also sort items in a grid in the CRM for tablets app:

- To sort in ascending order by a column, tap that column's header.
- To sort in descending order, tap the column's header again.

Get around

Sales process

Export records to Excel

In Microsoft Dynamics CRM for phones and CRM for tablets, you can export records to Microsoft Excel, just like you can in the web app. From a grid view in CRM for tablets or a list of records in CRM for phones, tap **…** to open the command bar and then tap **Export to Excel**.

More information: Export data to Excel

Important
This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person.

Email a link to a page from your app

Want to share information about a client with one of your colleagues while you're out on the road? Email a link to a page. From any page in your mobile app, tap **…** to open the command bar and then tap **Email Link**.

Important
This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person.

View SharePoint and OneDrive documents in CRM for phones and tablets

If your organization has set up SharePoint integration with CRM, you can open your SharePoint documents (including OneDrive documents) from the mobile apps. Just tap the **Documents** tile to open a list of the documents associated with the record you're viewing, and then tap the document in the list to view it.

Important
This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person.

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

Mobile User's Guide

Manage activities in CRM for phones and tablets

Use activities to keep track of all your customer communications. For example, during the course of a sale, you might send emails, make phone calls, set up appointments, or assign tasks. All of these are considered activities, and the CRM for phones and tablets apps help you track them so you don't miss an important follow-up activity.

On your dashboard, **My Activities** shows your activities that are past due or due today in a darker color than those that aren't. You can do the following from your activity feed:

- To view an activity, select it from your **My Activities** feed on the dashboard.
- To add an activity, tap **+** at the top of your **My Activities** feed.
- To mark an activity complete, tap the check box next to the activity in the feed.
- To see a subset of your activities:
  - On a tablet, press and hold **My Activities** and tap **Select View** on the command bar.
  - On a phone, tap **Select View** on the command bar.

Use charts

Track customer service cases

See Also

Mobile User's Guide

Nurture leads through the sales process in CRM for phones and tablets

horizontaltabbed

How to

Move customers through the sales process, from lead to close, with the process bar in the CRM for phones and tablets apps. You complete each step in the process by entering data or marking a step complete in the process bar. When you've completed all the steps in one stage, you can move on to the next one. The process bar highlights the stage you're in so you know where you are in the process, and shows you what to do next.

For example, in the preceding illustration, you start the process with a lead. In the first stage (**Qualify**), you qualify or disqualify the lead based on criteria established by your company. If you qualify the lead, it's converted to an opportunity. The process bar then walks you through the rest of the stages: **Develop**, **Propose**, and **Close**.

The process bar helps you and everyone on your sales team follow best practices. The process bar that your company uses might have different stages than the one illustrated, to match the way you do business.

Qualify a lead

To qualify a lead and convert it to an opportunity, tap **Qualify** on the command bar.

Disqualify a lead

To disqualify and close a lead, tap **Disqualify** on the command bar and then select a reason.

Re-open a lead you thought wasn't interested

To reopen a closed lead, tap **Reopen Opportunity** on the command bar.

Manage records
Pin your favorites

Watch the video

<iframe width="500" height="364" src="https://www.youtube.com/embed/MgvdfRkVheY" frameborder="0" allowfullscreen></iframe>

See Also

Mobile User's Guide

Track customer service cases in CRM for phones and tablets

As a Customer Service Manager, use the CRM for phones and 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 mobile device.

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 mobile 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 mobile app.

Differences in the customer service area between the web app and the mobile apps

CRM for phones and tablets 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 mobile apps have a different appearance and functionality than the web app in some cases, as shown in the following table.

Web app feature	Difference in the mobile apps
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: [TechNet: Customize CRM for phones and 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 communication 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

Web app feature	**Difference in the mobile apps**
	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 don't 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.
Parature, from Microsoft knowledge base integration	Not available in the mobile apps.

Manage activities
Use Cortana voice commands

See Also

Mobile CRM User's Guide

Use Cortana voice commands in CRM for phones

You can use the following CRM voice commands with Cortana if you're using Cortana on Windows 8.1 phones or later. Cortana voice commands for CRM are only available in English at this time.

These commands work with either the CRM for phones app or the previous phone app, CRM for phones express.

To do this in CRM	**Say this**
Open an item	CRM open <item> called <item name>. *Example:* "CRM open account called Contoso." *Variation:* "CRM open account named Contoso."

To do this in CRM	Say this
Show a view	CRM show <view name>. *Example:* “CRM show my active accounts.” *Variation:* “CRM show me my active accounts.”
Search for an item	CRM find <item> called <name>. *Example:* “CRM find account called Contoso.” *Variation:* “CRM find account named Contoso.”
Create a new item	CRM create <item type> called <item name>. *Example:* “CRM create contact called Maria Campbell.” *Variation:* “CRM add new contact named Maria Campbell.”
Create a phone call activity	CRM remind me to call <call name>. *Example:* “CRM remind me to call Maria Campbell to set up appointment.”
Create an appointment	CRM schedule meeting to <subject>. *Example:* “CRM schedule meeting to discuss quote with Maria Campbell.”
Create a task	CRM remind me to <task name>. *Example:* “CRM remind me to email Maria Campbell.” *Variations:* “CRM follow up Maria Campbell.” “CRM follow up with Maria Campbell.” “CRM follow up on Contoso.”
Open task list	CRM what should I do next?

To do this in CRM	Say this
	Example: “CRM what should I do next?”

Note

The **create** commands work only with Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online 2015 Update or later. The other commands work with Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online as well as Microsoft Dynamics CRM 2015 and Microsoft Dynamics CRM Online 2015 Update or later.

For more information about using Cortana, see Meet Cortana.

Track customer service cases
Get help

Privacy notice

Cortana does not have access to the data stored in the CRM database. Cortana only captures your voice commands. When you make a voice command through Cortana, in order to both understand the request and improve Microsoft speech recognition-related products and services, Microsoft uses proprietary technologies such as, for example, acoustic and natural language processing models to record and interpret your user’s request. Voice-dictated Bing search queries are treated like other text-based search requests and may be used to improve Bing search results; however, the CRM-voice-dictated commands listed here are not used to provide advertising. For more information about privacy and Cortana, see Cortana and my privacy FAQ.

If you are an administrator, you can manage enterprise access to Cortana with the PolicyManager configuration service provider through a separate device management service. The policy for this is set at the phone level and can’t be set just for the CRM for phones app. For more information, see the MSDN topic PolicyManager configuration service provider.

See Also

Mobile User’s Guide

Meet Cortana

Get help for CRM for phones and tablets

Get help while using the app

If you ever need to get help while you're in the mobile app, just tap **Help** on the command bar.

Get deployment and troubleshooting help

If you're an admin looking for resources to help you set up or troubleshoot CRM for phones and tablets, try these resources:

TechNet: Set up CRM for phones and tablets

TechNet: Set up CRM for phones express

TechNet: Create and edit mobile forms

TechNet: Troubleshoot problems with CRM for tablets

TechNet: Troubleshoot problems with CRM for phones express

Troubleshoot a CRM for Windows app start-up error

Use Cortana voice commands

See Also

Mobile CRM User's Guide

Admin and troubleshooting for CRM for phones and tablets

Customize CRM for phones and tablets

Use InTune management with the CRM mobile apps

Secure your mobile data with Microsoft Dynamics CRM for Good

iFrame and web resource support in CRM for tablets

Troubleshoot a CRM for Windows app start-up error

Troubleshoot error code 800c0019 on Windows Phones

Customize CRM for phones and tablets

With Microsoft Dynamics CRM, you can design once and deploy everywhere. You customize the interface for the mobile apps while you're in the web app. Changes you make to dashboards or forms in the web app can also appear in the mobile apps.

To see how you can customize the home page, forms, and entities that display in the mobile apps, see TechNet: Customize CRM for phones and tablets.

Use InTune management with the CRM mobile apps

You can use Microsoft Intune to manage Microsoft Dynamics CRM for phones and CRM for tablets on Apple and Android tablets and phones. Intune provides mobile device management, mobile application management, and PC management capabilities from the cloud.

Important

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person.

For more information about using CRM for phones and CRM for tablets with Intune, see Secure and manage CRM for phones and tablets.

Note

If your device and CRM mobile app is managed by Intune, you may be prompted to sign in to Intune, enter a PIN when you start the app, both, or neither, depending on how your admins set up Intune for your organization.

More information: Microsoft Intune

See Also

Microsoft Intune

Secure your mobile data with Microsoft Dynamics CRM for Good

Microsoft Dynamics CRM for Good, integrated with Good Dynamics, protects your CRM data even if you lose or leave your mobile device somewhere. For example, if you leave your device in a taxi cab and can't get it back right away, your CRM data is protected by Good encryption. If you lose your device entirely, just notify your admin, who can remotely wipe your Microsoft Dynamics CRM for Good data from your device.

This app is intended for use only with Good Dynamics server software and services from Good Technology. If you're not using Good Dynamics, download Microsoft Dynamics CRM for phones or Microsoft Dynamics CRM for tablets instead from the Apple App store.

Download the Microsoft Dynamics CRM for Good app

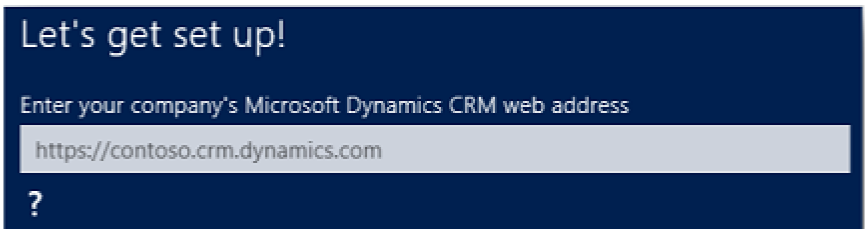
You can download the Microsoft Dynamics CRM for Good app from the Apple App store. You can also find the app on the Good Dynamics Marketplace.

Important

Microsoft Dynamics CRM for Good requires iOS 7.0 or later. To use the app on an iPad, you need Microsoft Dynamics CRM 2015 or later. To use the app on an iPhone, you need Microsoft Dynamics CRM Online 2015 Update 1 or later or Microsoft Dynamics CRM 2016.

Start and sign in to the Microsoft Dynamics CRM for Good app

1. Open the Microsoft Dynamics CRM for Good app.
2. When prompted, type in your email address and Good access key. (If you don't have a Good access key, contact your Good admin to get one.) Instead, the sign-in screen might ask for your Auth Delegate or password for other Good apps you might have installed for easy activation.
3. When prompted, select a Good security password.
4. On the **Let's get set up!** screen, enter your company's CRM web address.



5. Tap the **Arrow** button in the lower right corner to continue.
6. When prompted, type in your CRM credentials.

Now that you're signed in to the Microsoft Dynamics CRM for Good app, check out the [CRM for Phones and Tablets User's Guide] to find out all you can do.

Accessing email and other apps through Microsoft Dynamics CRM for Good

If you get an alert when you try to use email or other apps through Microsoft Dynamics CRM for Good, your admin may be controlling communication to these apps for security purposes. Contact your Good admin to find out which apps your company uses in conjunction with Microsoft Dynamics CRM for Good, along with any settings that need to be configured.

Information for admins

For a list of supported phones and tablets, see the compatibility information in TechNet: Support for CRM for phones and CRM for tablets.

For information on what your enterprise needs to do before using Microsoft Dynamics CRM for Good, see TechNet: Set up CRM for phones and CRM for tablets.

If you're having problems with the app, see TechNet: Troubleshooting and things to know about CRM for phones and tablets.

See Also

CRM for Phones and Tablets User's Guide

iFrame and web resource support in CRM for tablets

You can add iFrames and web resources in forms and dashboards in the Microsoft Dynamics CRM web app, and they will appear in CRM for tablets as well. For example, if you add a news feed to a dashboard in the web app, the news feed will also appear in the tablet app. For more information about using iFrames and web resources, see [MSDN: Create web resources and iFrame content for use with the CRM for tablets client].

Note

iFrames and web resources are supported on Apple iPad, Android, and Windows 10 tablets. Tablets running Windows 8.1 and earlier are not supported.

Important

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? [Find your CRM administrator or support person.]

Known issues

- You can't use popups for authentication or other purposes from within iFrames and web resources on CRM for tablets.
- Authentication for embedded sites isn't available.
- Errors and memory leaks in iFrames and web resources can cause CRM for tablets to stop responding, and can cause client side data loss.
- Some iFrames and web resources can adversely affect application performance.
- Microsoft Silverlight and image web resources aren't available on CRM for tablets.

See Also

[MSDN: Create web resources and iFrame content for use with the CRM for tablets client]

Troubleshoot a CRM for Windows app start-up error

Did you receive this error?

Additional steps may be needed to configure Microsoft Dynamics CRM for this organization. Please contact your system administrator.

If you're using a computer or tablet

Users:	Notify your CRM administrator that you received this error.
Admins:	To enable the Microsoft Dynamics CRM for Windows 8.1 app for on-premises CRM deployments, you need to make some configuration changes. More information: [TechNet: Set up CRM for phones and tablets]

	Important Windows Phones aren't currently supported for on-premises CRM deployments.

If you're using a Windows phone

You received this error because you're trying to connect to an on-premises deployment of CRM, which is currently not supported on Windows Phones. More information: TechNet: Support for CRM for phones and tablets

See Also

Install CRM for phones and tablets

TechNet: Support for CRM for phones and tablets

TechNet: Set up CRM for phones and tablets

Troubleshooting and things to know about CRM for phones and tablets

Troubleshoot error code 800c0019 on Windows Phones

If you get error code 800c0019 when you try to sign in to your Microsoft account while using the Microsoft Dynamics CRM for phones or CRM for phones express apps, chances are that you have the wrong date and time settings on your Windows 8 phone. This can occur after updating your Windows 8 phone, removing and replacing the battery, or after a time change.

In most cases, your phone's date and time is set automatically by your mobile operator. If it's not, you need to set it manually so you can sign in to your Microsoft account successfully. Here's how:

1. On **Start**, flick left to the **App** list and tap **Settings**.
2. Tap **Date+time**.
3. Turn off **Set automatically**.
4. Set the correct values for **Time zone**, **Date**, and **Time**.

See Also

TechNet: Troubleshooting and things to know about CRM for phones express

TechNet: Troubleshooting and things to know about CRM for phones and tablets

Get started with CRM for phones express

Microsoft Dynamics CRM for phones express is the previous version of the phone app for Microsoft Dynamics CRM. If you're looking for the most recent, full-featured version of the phone app, see the **CRM for Phones and Tablets User's Guide**.

CRM for phones express helps 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 express 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).

The following articles provide more information about how to install and use CRM for phones express:

- Install the CRM for phones express app
- Take a tour of CRM for phones express
- Use Cortana voice commands in CRM for phones
- eBook: Go mobile with CRM for phones express

See Also

TechNet: Troubleshooting and things to know about CRM for phones express

TechNet: Set up CRM for phones

TechNet: Create and edit mobile forms

Install the CRM for phones express app

While on the go, you can use Microsoft Dynamics CRM on your mobile phone with the Microsoft Dynamics CRM for phones express app.

CRM for phones express is the previous version of the phone app for Microsoft Dynamics CRM. If you're looking for the most recent, full-featured version of the phone app, see the **CRM for Phones and Tablets User's Guide**.

Before you can use the app, you need to check to make sure your CRM admin has set up CRM for phones express 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

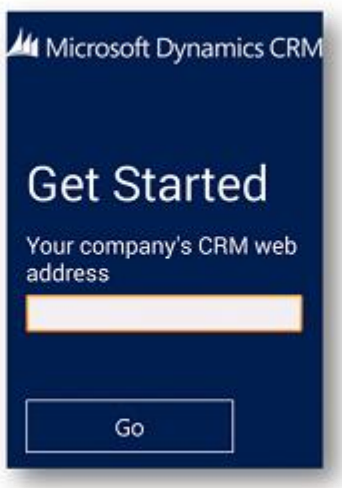
If your admins have told you to download the CRM for phones express app, choose the link in the following table for your phone. The link will take you to the app in your phone's app store.

Phone	App link
Windows Phone	Windows Store

Phone	App link
Apple iPhone	Apple App store
Android phone	Google Play

Start CRM for phones express

1. Open the CRM for phones express 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 express 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 TechNet: Mobile phone support for Microsoft Dynamics CRM.
- For specific problems and error messages, see TechNet: Troubleshooting and things to know about CRM for phones express.

Privacy notice

Licensed Dynamics CRM Online users with specific Security Roles (CEO – Business Manager, Sales Manager, Salesperson, System Administrator, System Customizer, and Vice President of Sales) are automatically authorized to access the service by using CRM for phones, as well as other clients.

An administrator has full control (at the user security role or entity level) over the ability to access and the level of authorized access associated with the phone client. Users can then access CRM Online by using CRM for phones, and Customer Data will be cached on the device running the specific client.

Based on the specific settings at the user security and entity levels, the types of Customer Data that can be exported from CRM Online and cached on an end user's device include record data, record metadata, entity data, entity metadata, and business logic.

See Also

[Get started with CRM for phones express]

[Take a tour of CRM for phones express]

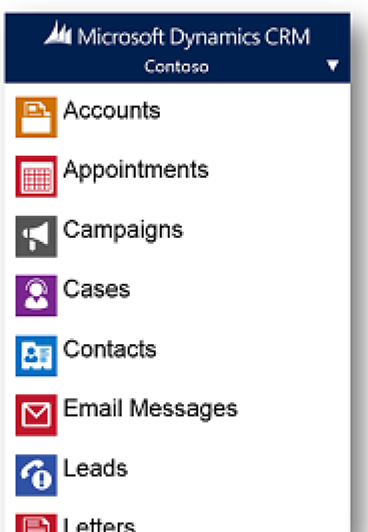
[TechNet: Troubleshooting and things to know about CRM for phones express]

[TechNet: Set up CRM for phones express]

Take a tour of CRM for phones express

If you're new to Microsoft Dynamics CRM for phones express, check out this quick tour to see how to navigate or work in the app.

When you first open CRM for phones express, 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.

Use Cortana on Windows 8 phones

You can speak your CRM for phones express commands if you're using Cortana on Windows 8.1 phones.

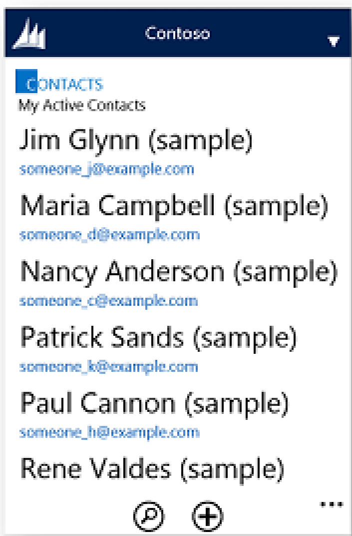
For a list of commands you can use with Cortana, see [Use Cortana voice commands in CRM for phones].

For more information about using Cortana, see [Meet Cortana].

For more information about privacy and Cortana, see [Cortana and my privacy FAQ].

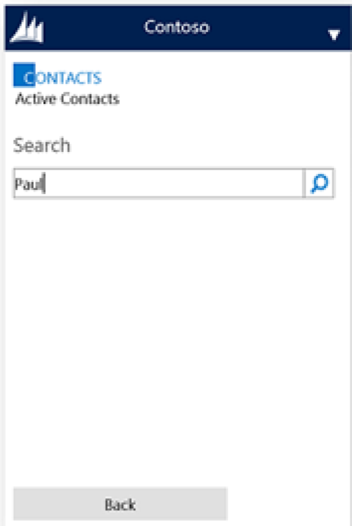
Display a list of records

- From the list of record types, tap the one you want, for example **Contacts**.

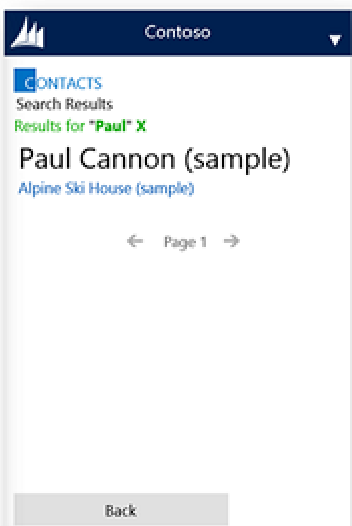


Search for records from a list

Tap the **Search** button at the bottom of the screen. Type in the text to search for.

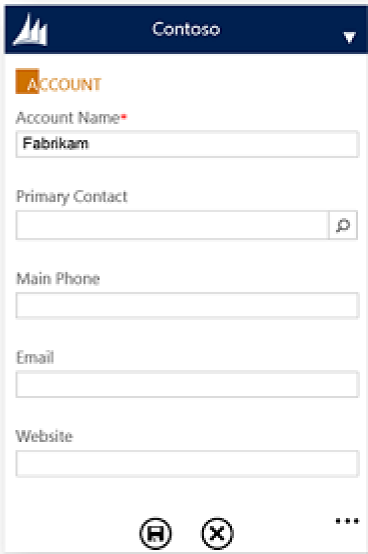


Tap the **Search** button .

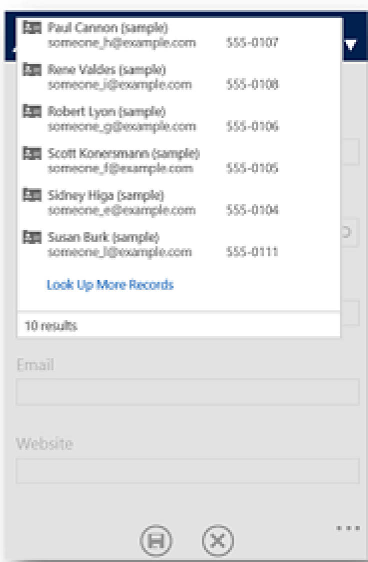


Search for records from a lookup field

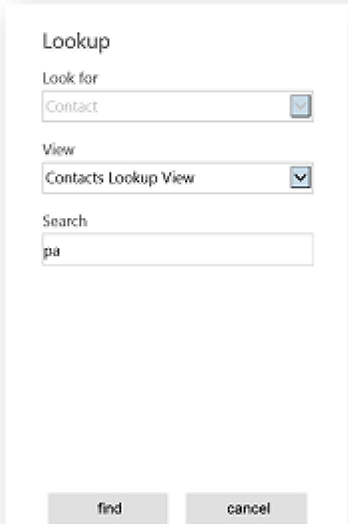
In a lookup field, tap the **Search** button .



2. Tap **Look Up More Records**.



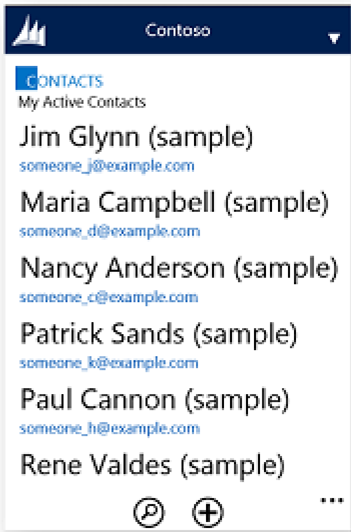
3. Enter a few characters to search and tap **Find**.



4. Select the record and tap **Done**.

Change the current view

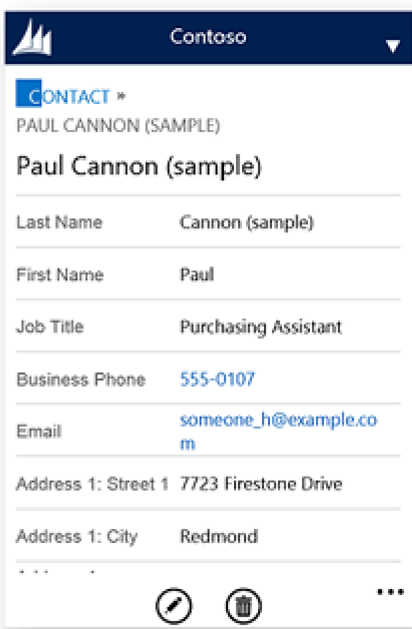
- Tap the view name and select the view you want.



Scroll down to see more records if you don't see the one you want.

Start a call or email

- Tap a phone number or email address to start a call or launch your email app.

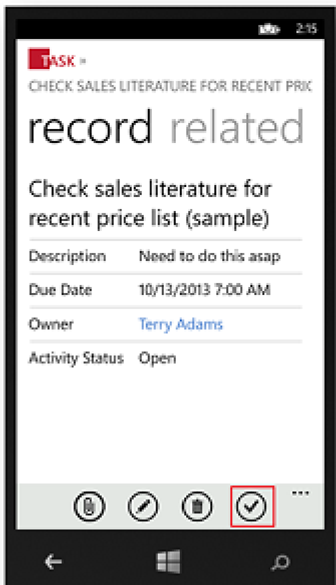


Mark activities complete

Follow the steps for the app you're using.

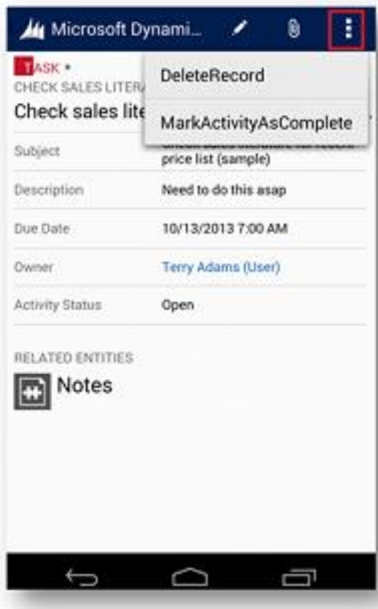
Windows Phone

- On a Windows Phone, tap the **check** button.



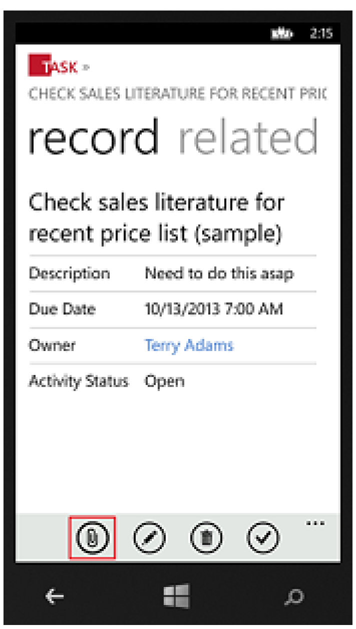
iPhone or Android phone

- 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.



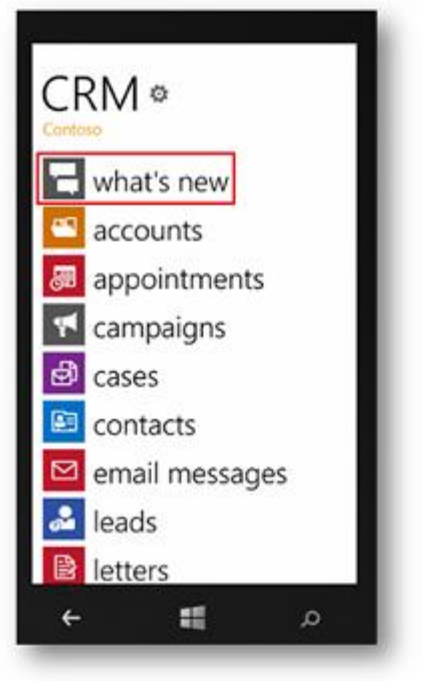
Use additional features in the Windows Phone app

The CRM for phones express 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

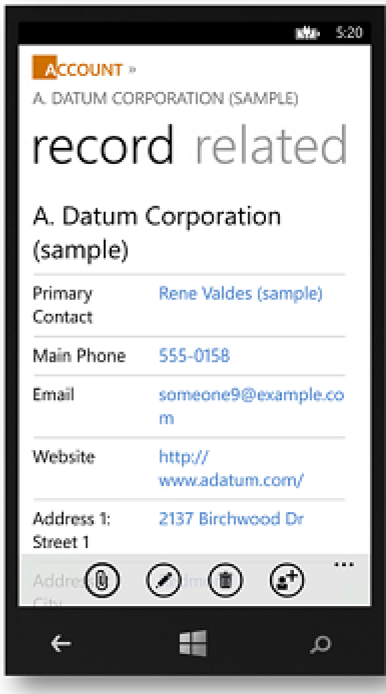
View activity feeds

- Tap **what’s new** and view the posts.



Use the record panorama

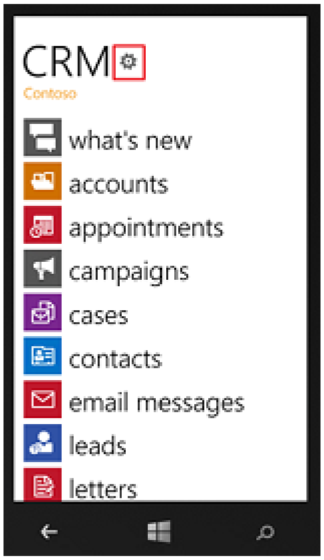
- To view additional information, swipe left and right.



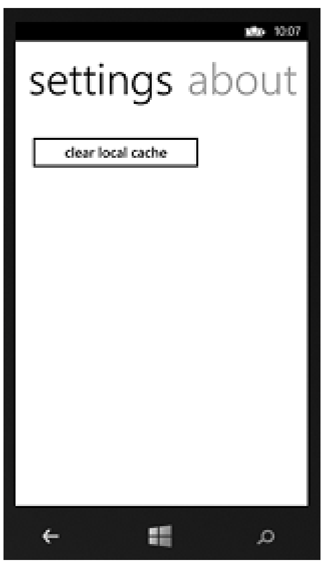
Synchronize customizations by clearing the local cache

▶

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

Cortana voice commands for Microsoft Dynamics CRM for phones

[eBook: Go mobile with CRM for phones express]

[Get started with CRM for phones express]

[Install the CRM for phones express app]

[TechNet: Troubleshooting and things to know about CRM for phones express]

[TechNet: Set up CRM for phones express]

For admins and customizers

[New releases]

[Manage your subscription]

[Add and manage users, and set up security]

[Regional and other business management settings]

[Integrate other apps with CRM]

[Create dashboards, charts, and reports]

[Manage data]

[Enable or manage auditing]

[System Settings Dialog Box Reference]

[Customize CRM]

New releases

[What's new]

[Get ready for the next release]

[After you update: next steps to success]

[Emails about update readiness for Dynamics CRM Online]

[What are Preview features and how do I enable them?]

What's new

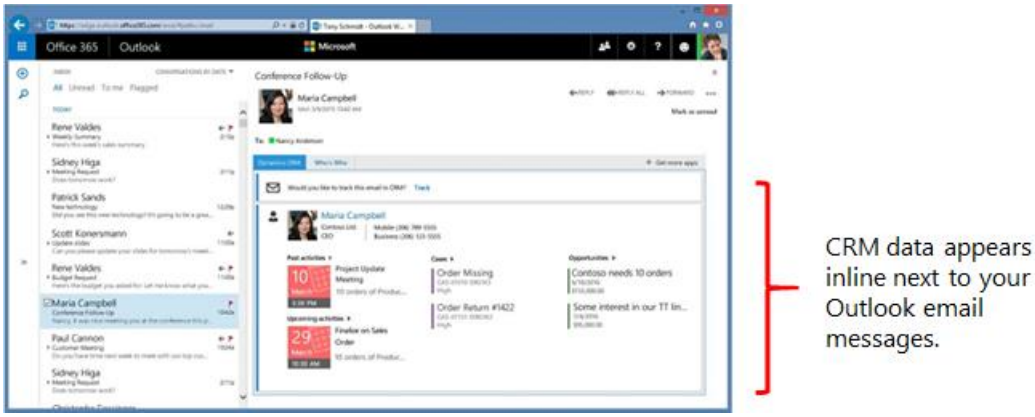
horizontaltabbed

New in 2016

We're excited to announce new features for Microsoft Dynamics CRM Online 2016 Update and Microsoft Dynamics CRM 2016 (on-premises). If you're an administrator, be sure to check out this page as well: [TechNet: What's new for administrators and customizers]

Track email from anywhere with new CRM App for Outlook

Microsoft Dynamics CRM App for Outlook is a lightweight email tracking app that surfaces contextual information from Microsoft Dynamics CRM right inside your Outlook Inbox.



You can use Dynamics CRM App for Outlook together with:

- Outlook on the web (included with Office 365) from a desktop or on your phone
- The Outlook desktop application
- Microsoft Outlook for Mac

Track incoming or outgoing email, add contacts from an email message, or even create CRM records. You can also track an email message to a new or existing CRM record.

More information: [CRM App for Outlook User's Guide (lightweight app)]

Use pre-formatted Excel templates to create Excel documents directly from CRM

If you find that you frequently create the same Microsoft Office Excel documents in CRM, you can use Excel templates to speed up document creation. For example, use a pre-formatted template to forecast sales, or to monitor sales and project cash flow (pipeline analysis). After a template is uploaded by a system administrator, it can be shared with team members.

Use Word templates to quickly create the documents your organization depends on

Standardized documents are a cornerstone for business dealings—from quotes and contracts to work orders and invoices. Now you can automatically generate standardized documents from CRM data using Microsoft Office Word templates. Use Word templates to enhance productivity, reduce human error, and ensure consistent communication across the company.

Store and manage your private documents in OneDrive for Business, directly from CRM

Now you can use the right storage option for the right situation. For example, store your private documents using the new OneDrive for Business option. For collaborative storage, use Office 365 Groups (introduced in Microsoft Dynamics CRM Online 2015 Update 1), and for documents you'll share more widely, or with the whole company, use Microsoft SharePoint.

More information: [Use OneDrive for Business to manage your private documents]

Let CRM find trending documents for you (CRM Online only)

Get content that's most relevant to what you're working on, and what's trending around you. Add Office Delve to your dashboards to automatically search through documents and find that one document that helps you close the sale.

More information: [View relevant and trending information with Office Delve]

View SharePoint documents in CRM for phones and tablets

If your organization has integrated SharePoint with CRM, you can now open your SharePoint documents from the mobile apps.

More information: [TechNet: Integrate SharePoint with CRM]

Export data to Excel from CRM for phones and tablets

You can now export data to Excel from the mobile apps. After you've exported the data you want to work with, you can open it in the Excel app on your mobile device.

Email a link to a page from CRM for phones and tablets

Want to share information about a client with one of your colleagues while you're out on the road? Email a link to a page.

Mobile apps now support Windows 10 and iOS 9

The mobile apps are now compatible with Windows 10 and iOS 9 for Apple iPhone and iPad.

New interactive service hub dashboards and forms help you prioritize workloads

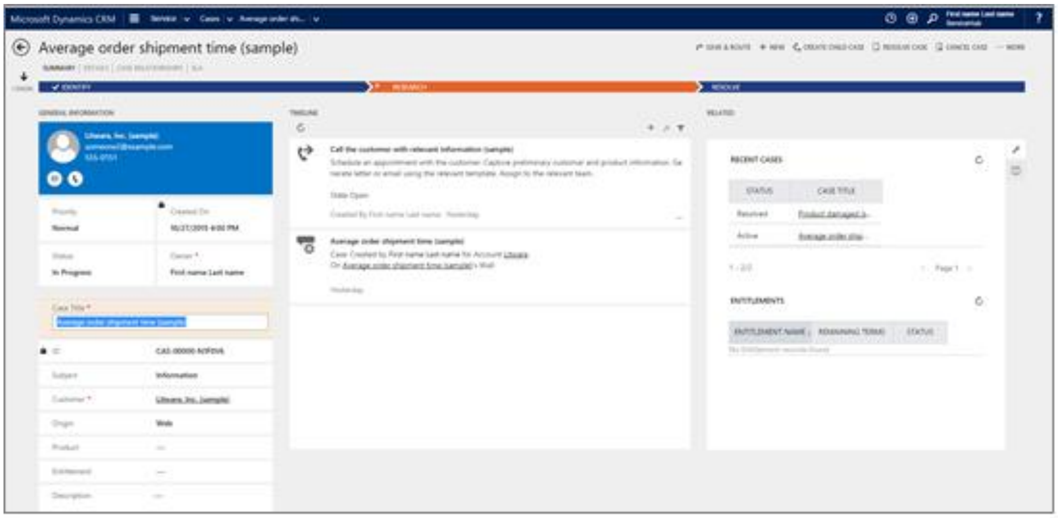
CRM 2016 includes a new interactive service hub with completely redesigned dashboards and forms that help you prioritize your workload and complete your most urgent tasks. Interactive charts provide a visual snapshot of important metrics related to work items, and also double as visual filters. You can add an additional level of filtering through global filters. You can also take action (for example, reassign a case) directly from a dashboard.

> **Important**
> This release of the interactive service hub is optimized for customer service scenarios and use cases. Because this is the first release, not all customer service scenarios are covered.

The new interactive service hub forms help you maintain context while addressing customer issues. For example, use the following sections on the **Case** form's **Summary** tab to quickly find the info you need:

- **General Information section.** Get a quick summary of the case and customer contact information, such as email address and phone number.
- **Timeline section.** See all activities related to a record and take action on an activity.
- **Related section.** Search for knowledge base (KB) records. The search pane shows suggested KB articles based on case title. You can also use this section to quickly find and open related cases. The related record opens in a new tab within this section so you don't lose the context of the case you're working on.

When you select a particular stage in the process bar, the stage opens as a popup. You can fill in details required for that stage, and then click **Next stage** to move to the next one.



If you're an administrator, you can customize the interactive service hub dashboards and forms, or create dashboards and forms. More information: [User's guide for the new interactive service hub]

Reduce case call-handling time with rich knowledge management articles

With the new interactive service hub, you can also turn customer feedback and issues into rich knowledge articles that include embedded videos, images, and more. The rich text editor offers common word-processor features like advanced styling, linking, paste from Word, find and replace, and tables.

Make sure your articles are accurate by moving them through the review and approval process, and then use versions to track changes. You can work on multiple revisions while the currently-approved content stays published. When you're ready, make the team-approved content available to all CRM users.

You can add the knowledge base search component to any entity to give salespeople, account managers, and customer service representatives access to a single source of product information, sales coaching documents, FAQs, troubleshooting steps, and solutions. When knowledge is shared with customers, it's automatically recorded so you can see top content easily.

More information: [User's guide for the new interactive service hub]

Enable service level agreements (SLAs) on demand

With new SLA enhancements, you can now apply SLAs to case records manually. You can also apply SLAs automatically to cases based on business logic by using workflows or plug-ins.

For example, if your customers are spread across geographies, you may have multiple SLAs with different business hours and holiday schedules. Set up business logic to apply SLAs on case records based on customer region to make sure the SLA time calculation happens correctly for their region.

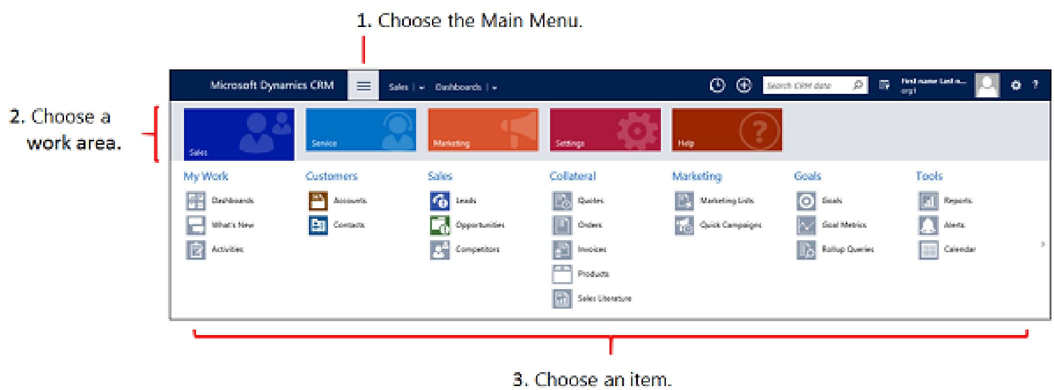
More information: [Define service level agreements (SLAs)]()

CRM Online 2015 Update 1 features now apply to CRM 2016 (on-premises)

The following CRM Online 2015 Update 1 features are now included in CRM 2016 on-premises.

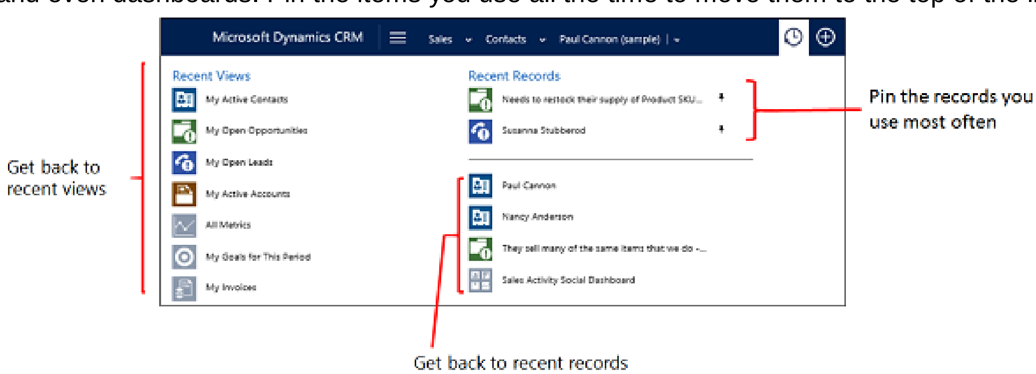
Get around and find the info you need, fast!

With the new navigation bar, it's easier and faster to find the information you need. When you click the Main Menu from the nav bar, you can get to your work areas, records, or other items with less scrolling and fewer clicks than before.

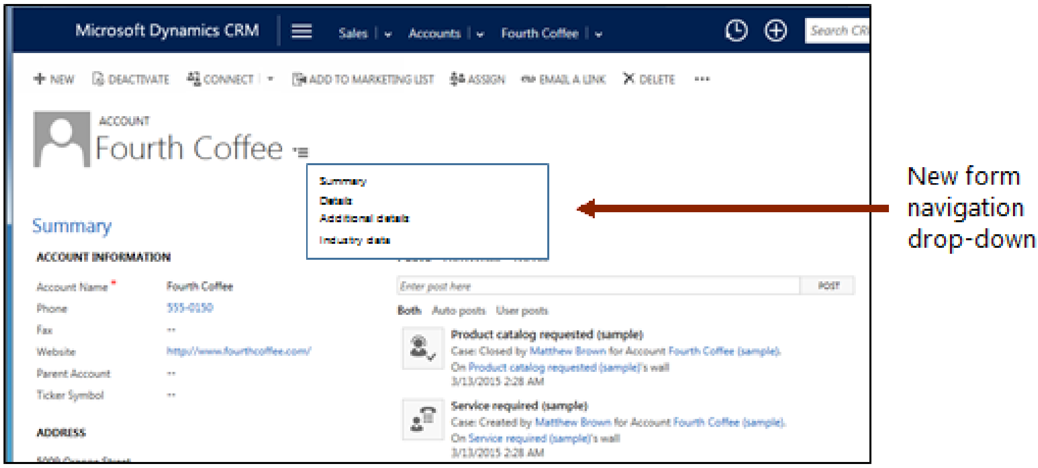


Take a short video tour (less than one minute) of the new navigation

Use the **Recently Viewed Items** button on the new nav bar to get back to your most recently viewed and pinned items. With this global tool, you can access recently viewed records, views, and even dashboards. Pin the items you use all the time to move them to the top of the list.



If you're working in a complex form with lots of fields, the new form navigation drop-down list makes it easy to get to just the data you need. Click the drop-down list next to the form title, and then select the section of the form you want to go to.



Add a logo or change the color scheme using themes

Create a uniform look and feel across all your applications with themes. For example, add a company logo or change default colors for entities or links. Preview your custom theme, and then publish it for the whole team when you're ready. No code required! You must be a CRM administrator to create a custom theme.

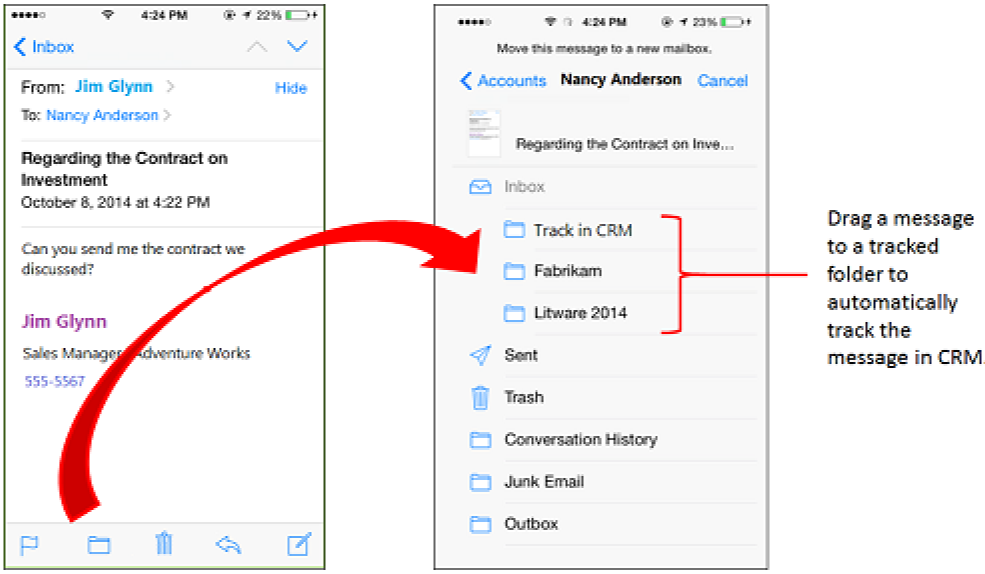
Watch a short video (2:45) about themes

More information: [TechNet: Change the color scheme or add a logo to match your organization's brand]

Track Exchange email activities automatically with folder tracking

Microsoft Dynamics CRM Online 2015 Update 1 provides a new and intuitive way to track incoming Exchange email activities. You can set up a tracking folder—use any Exchange folder in your Inbox—and then drag an incoming email message to that folder to track it. You can associate a tracked folder with a specific record, such as an account or opportunity, so when you move a message to that folder, it's automatically linked to that specific record.

Tracked folders work with Exchange Inbox rules, which makes it even easier to manage and track incoming email. For example, you could set up an Exchange Inbox rule that automatically routes email from a Contoso contact to a tracked Contoso folder, linked to a specific opportunity. Tracked folders work on any device that supports Exchange, so you can track email from virtually any device.



To use tracked folders, your organization must use server-side synchronization as your email synchronization method. Tracked folders must also be enabled by a system administrator.

Watch a short video (2:37) about folder-level tracking

More information:

- Track Outlook email by moving it to a tracked Exchange folder
- TechNet: Tell me more about server-side synchronization
- TechNet: Configure folder-level tracking

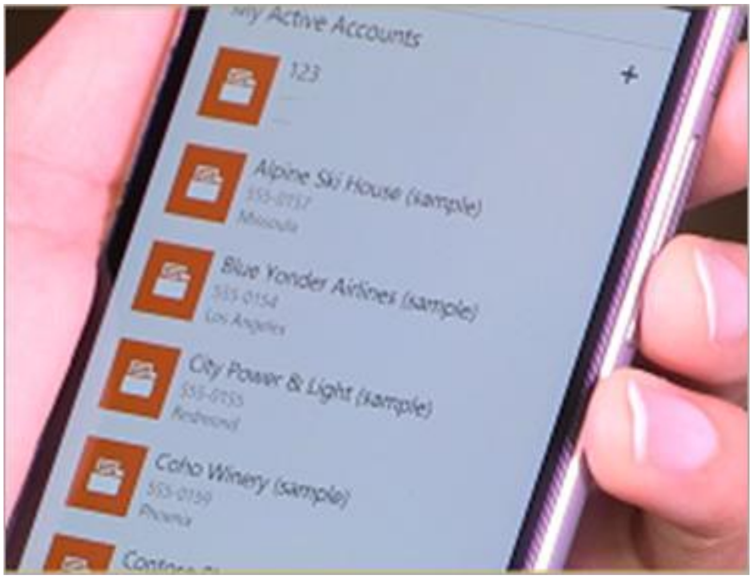
Export to Excel completely redesigned

We've redesigned exporting to Excel from the bottom up to provide for a much smoother experience. With a single click in the web client or in Dynamics CRM for Outlook, you can export your data as an Excel document, which can be opened anywhere, including the desktop version of Excel (2007 and later), Excel Online, and other Excel clients. When you export, all formatting is preserved, so you can do your calculations in Excel, and then reimport the data to CRM. You can export up to 100,000 records at a time (previous limit was 10,000).

More information: Export data to Excel

Enjoy the same great mobile experience, whether you're using a phone or tablet

The CRM for phones app now provides the same process-driven experience as CRM for tablets. Nurture your leads and opportunities through the sales process with the new intuitive interface. If you have a Windows Phone, use Cortana voice commands to get to your CRM data hands-free. More information:



Watch a short video (5:02) about the new CRM for phones app

The previous version of the CRM for phones app is still available in app stores, but it's now called CRM for phones - Express.

Secure your mobile data with Microsoft Dynamics CRM for Good

The Microsoft Dynamics CRM for Good app works with the Good Technology mobile security platform to protect your CRM data even if you lose or leave your tablet somewhere. For example, if you leave your tablet in a taxi cab and can’t get it back right away, your CRM data is protected by Good encryption. If you lose your tablet, your admin can remotely wipe your CRM for Good data from your tablet. More information: Secure your mobile data with Microsoft Dynamics CRM for Good

Speed up customer service with default entitlements

Customer service representatives use entitlements to verify the type of support a customer is eligible for and to provide the correct level of support. Now service managers or admins can set an entitlement as the default entitlement for a customer. When a rep creates a case, the default entitlement is automatically associated with the case, saving time for the rep.

For cases where service organizations do not want entitlement terms to be deducted (a faulty part is installed, for example), service reps can also credit back entitlement terms so the customer isn’t charged.

Define rules for creating or updating CRM records from incoming activities

In previous versions of Microsoft Dynamics CRM, Service Managers could set up rules to automatically create cases from incoming email or social channels. Now sales, marketing, and service teams can use these same rules to automatically create or update one or more records from any single incoming activity, such as an email, social, or custom activity.

More information: [Set up rules to automatically create or update records in CRM]()

CRM Online 2015 Update 1

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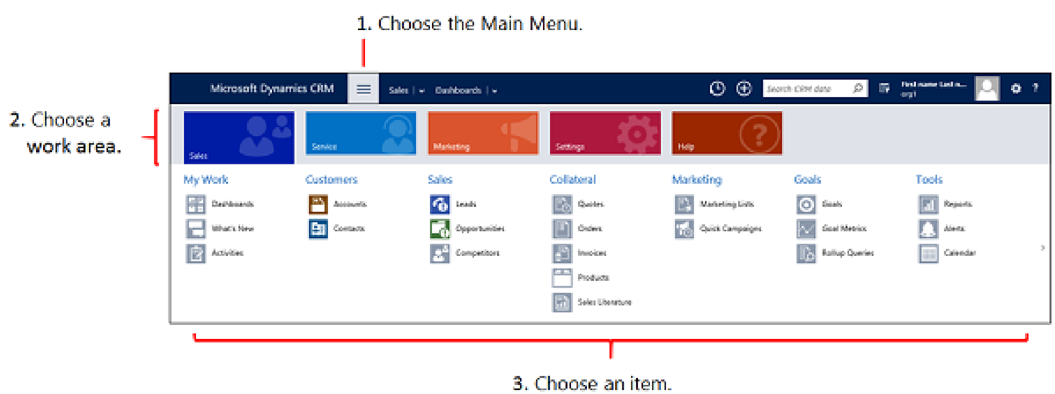

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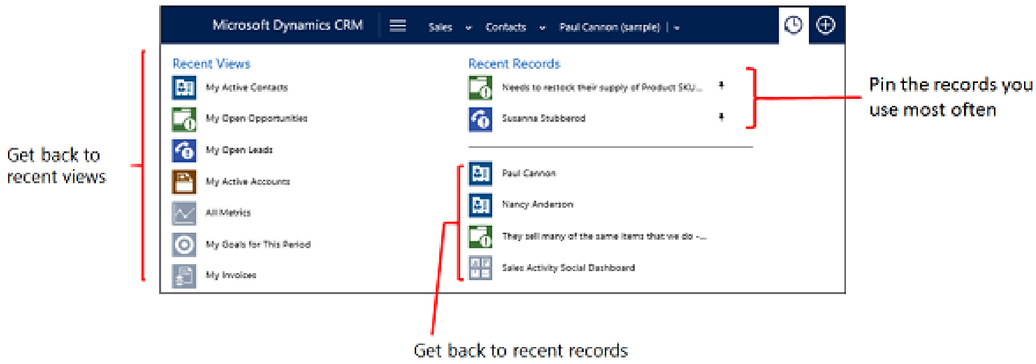

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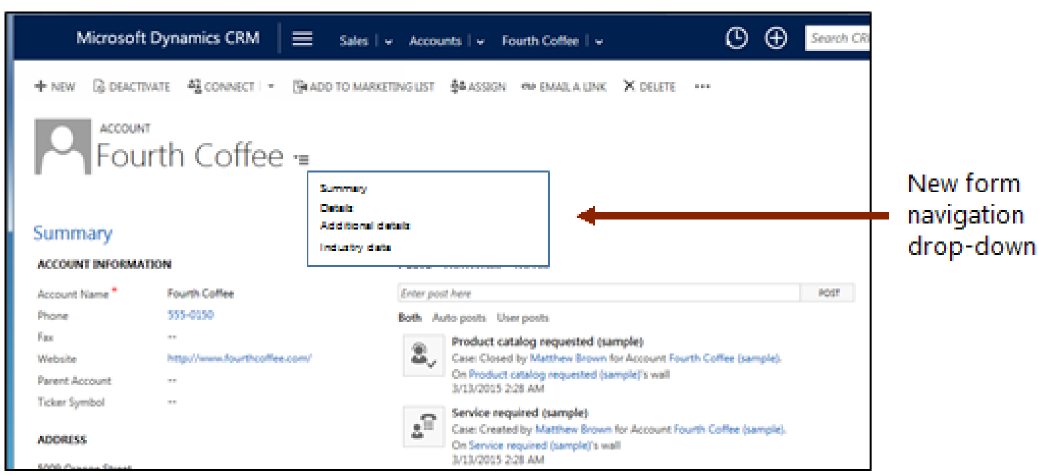

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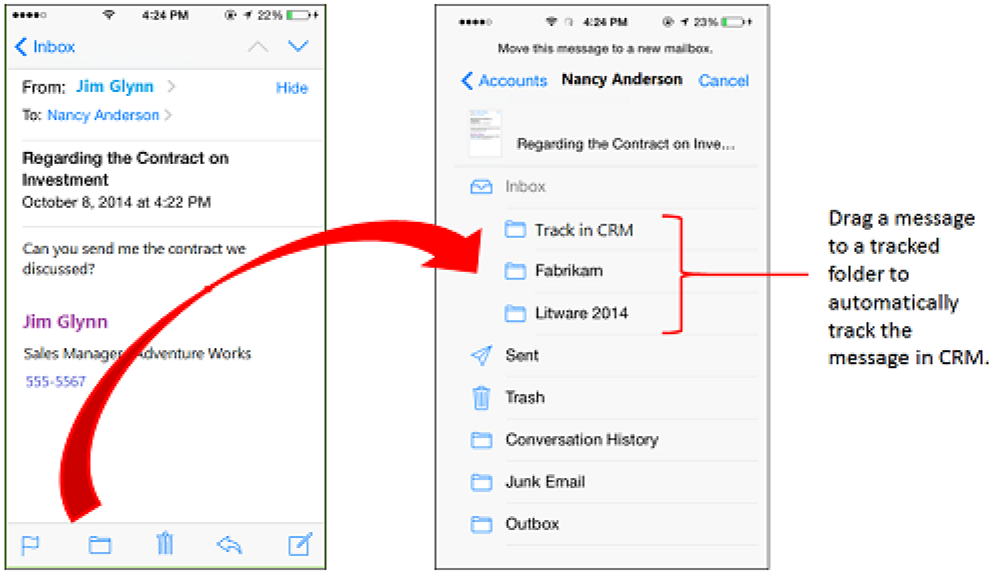

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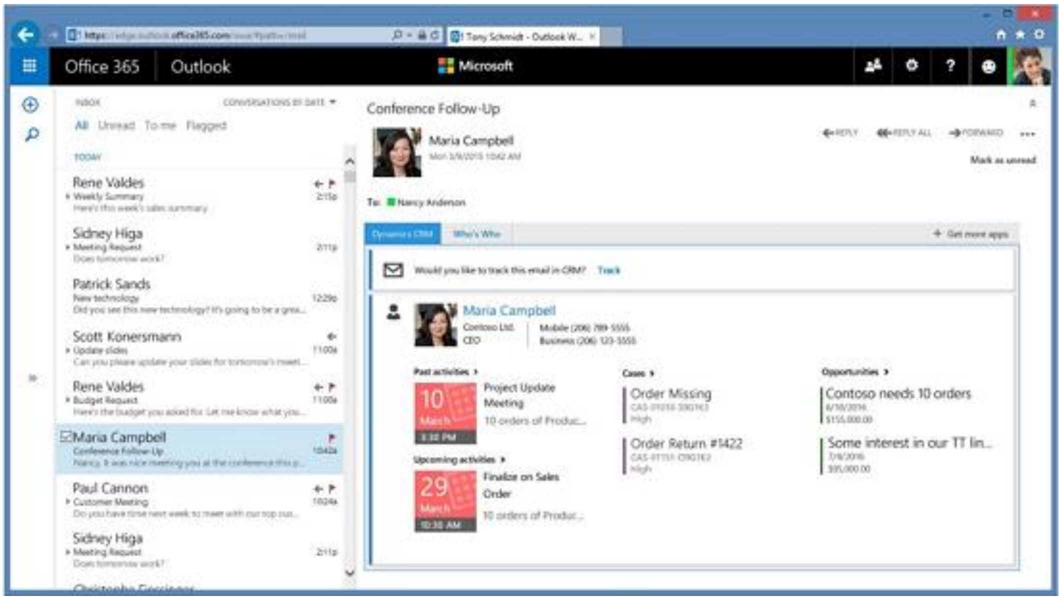
More information:

- Track Outlook email by moving it to a tracked Exchange folder
- TechNet: Tell me more about server-side synchronization
- TechNet: Configure folder-level tracking

Track incoming email wherever you are with the new CRM App for Outlook

Microsoft Dynamics CRM already includes a full-featured CRM add-in for Microsoft Office Outlook called Microsoft Dynamics CRM for Outlook. Now you have the choice of using Dynamics CRM for Outlook or the new Dynamics CRM App for Outlook Preview to track incoming email.



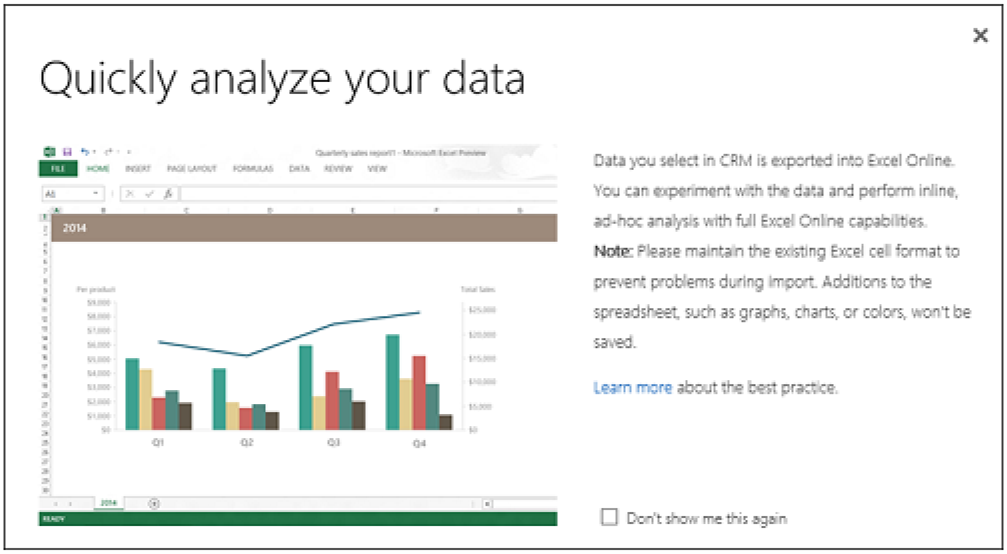
Dynamics CRM App for Outlook is a light-weight Office app that you can use together with the desktop version of Outlook on the web (included in Office 365) or Outlook 2013 to:

- Track incoming email and set a regarding record.
- Determine whether a record is already tracked and view the regarding record.
- Preview information about CRM contacts or leads.
- Create contact or lead records if the person on the **From** line isn't already included in the CRM database.
- View information about last and next activities, as well as other related records.
- Open CRM forms directly if you need more detailed information.

Dynamics CRM App for Outlook is offered as a preview feature and must be enabled by a system administrator. For more information about setting up and using Dynamics CRM App for Outlook, see the CRM App for Outlook User's Guide (lightweight app).

Do quick analysis with Excel Online, right from CRM Online

Millions of people use Microsoft Office Excel to analyze corporate data and create reports. Now you can use Microsoft Excel Online to do quick analysis, right from CRM Online. For example, if you're a sales manager, you might want to analyze the opportunities your team owns and review Key Performance Indicators (KPIs) to see how you can assist your team members. If you're a sales rep, you can open your opportunities in Excel and do what-if analysis for different incentive scenarios.



Watch a short video (2:45) about doing a “What if” analysis with Excel Online

Note

You must have an Office 365 subscription to edit Excel documents in Excel Online.

More information: [Analyze your CRM data in Excel Online]()

Export to Excel completely redesigned

We’ve redesigned exporting to Excel from the bottom up to provide for a much smoother experience. With a single click in the web client or in Dynamics CRM for Outlook, you can export your data as an Excel document, which can be opened anywhere, including the desktop version of Excel (2007 and later), Excel Online, and other Excel clients. When you export, all formatting is preserved, so you can do your calculations in Excel, and then reimport the data to CRM. You can export up to 100,000 records at a time (previous limit was 10,000).

More information: [Export data to Excel]()

New Power Query connector streamlines connections to CRM Online

With the new Power Query connector, you can connect more easily to CRM Online data from Power Query to do self-service Business Intelligence (BI). After selecting the **From Dynamics CRM Online** connector in Power Query, just supply a URL feed, and then enter your credentials.

Power Query connects and retrieves the list of tables and entities from CRM Online. You can also schedule data refreshes of your dashboard from Power BI for Office 365.

More information: 3 updates to Excel Power Query

Collaborate with team members, even if they don't have access to CRM Online

Office 365 users can use Office 365 Groups to collaborate across Office products. An Office 365 Group is a workspace that team members can use to share files, email messages, conversations, calendars, and Microsoft OneNote notes. Office 365 Groups are a great way to collaborate with team members, even if they don't have access to CRM Online. For example, create an Office 365 Group for your sales team, invite other Office 365 users to join the Group, and then share documents, email, conversations, meeting information, and OneNote notes related to specific opportunities.

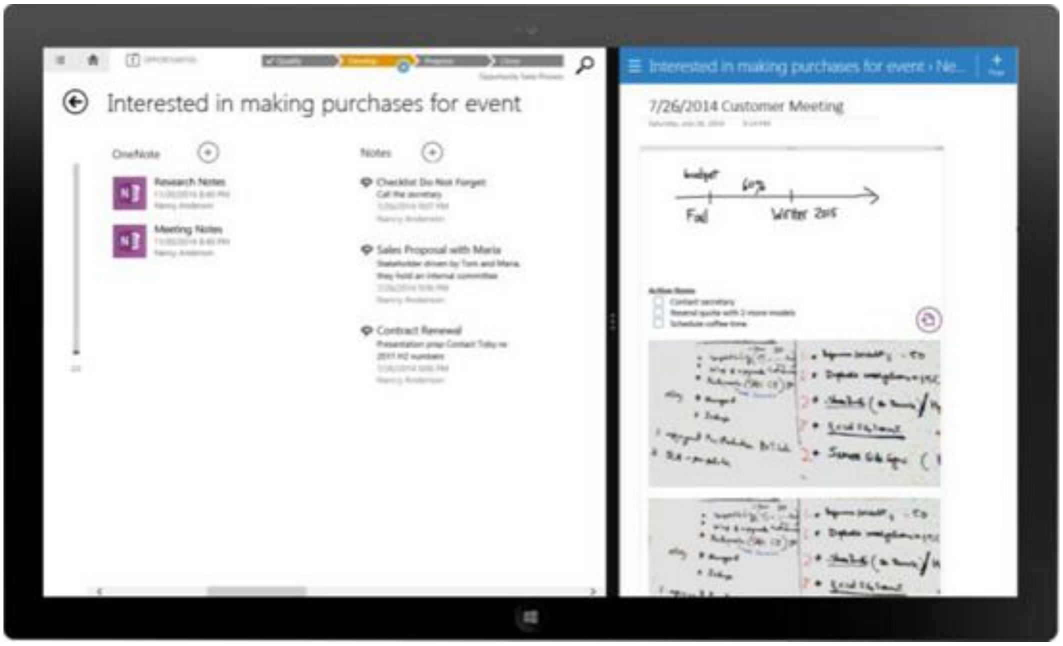
Office 365 Groups are offered as a preview feature.

More information:

- Collaborate with your colleagues using Office 365 Groups
- Tell me more about Office 365 Groups
- What are Preview features and how do I enable them?
- TechNet: Enable Office 365 Groups

Take notes in OneNote, directly from CRM Online

Take advantage of all that Microsoft OneNote has to offer, directly from CRM Online. For example, when you're on the go at a customer site, take notes on your Microsoft Surface or other mobile device while you're viewing opportunity details. Capture photos, take voice notes, do free-form drawings and more. Everything is automatically linked with the opportunity record in CRM Online.



Watch a short video (2:12) about OneNote integration in Dynamics CRM

More information: [Set up and use OneNote in CRM]

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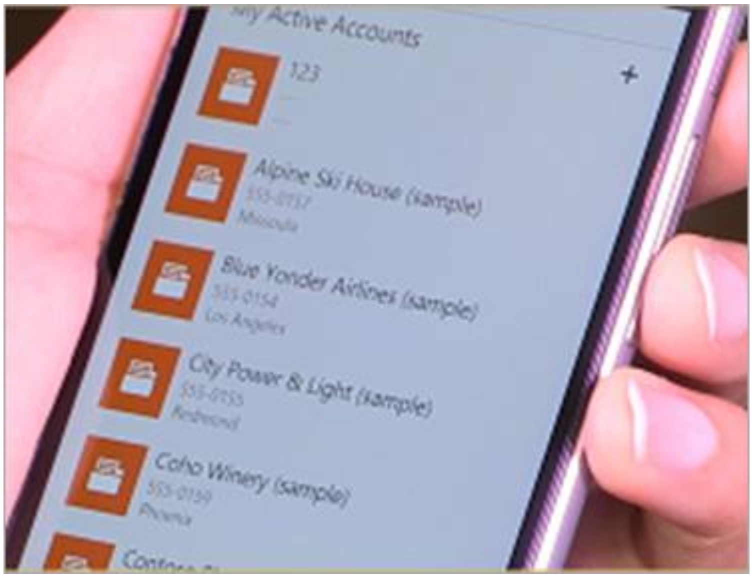

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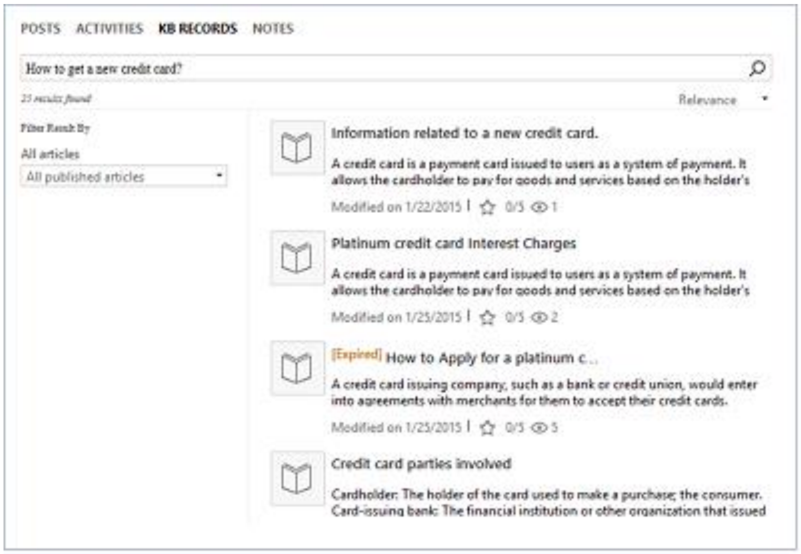
Share the knowledge (base) with Parature

We introduced Parature, from Microsoft, in the 2015 spring wave of releases. Now if you're a customer service agent, you can take advantage of rich Parature knowledge base (KB) capabilities to reduce issue handling time, directly from CRM Online. For example, while you're working on a case record, you can:

- View system-suggested KB articles
- Search for relevant KB articles
- Read the content of KB articles inline, including embedded images or videos
- Send KB article links to customers



More information: [Find knowledge articles from within a record in CRM]

Speed up customer service with default entitlements

Customer service agents use entitlements to verify the type of support a customer is eligible for and to provide the right level of support. Now service managers or admins can set an entitlement as the default entitlement for a customer. When an agent creates a case, the default entitlement is automatically associated with the case, saving time for the agent.

For cases where service organizations do not want entitlement terms to be deducted (a faulty part is installed, for example), service agents can also credit back entitlement terms so the customer isn't charged.

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More information: [Set up rules to automatically create or update records in CRM]

Forms load much faster with new form rendering engine

In Microsoft Dynamics CRM Online 2015 Update 1, you'll notice that forms are much snappier than in earlier versions. You don't have to do anything to take advantage of faster forms — they're turned on by default. If you have forms that include unsupported customizations, however, and you encounter errors as a result, you may want to temporarily turn off form enhancements while you update your scripts. More information: [System Settings dialog box - General tab]

Updates are driven by you

Microsoft Dynamics CRM Online 2015 Update 1 includes a new opt-in update model that provides flexibility for applying updates, depending on your organization's needs. For simplicity, all updates are managed through a single central portal. For more information, see [TechNet: Update policy]

Watch a short video (3:38) on customer-driven updates

Tip

If you're an administrator, be sure to check out this page as well: [TechNet: What's new for administrators and customizers]

New in 2015

Improvements to product selling features help increase sales

Improvements to the product selling experience help sales operations managers and salespeople manage and sell your company's products more effectively:

- **Sales operations managers can easily add products to the system and bundle related products together** so that salespeople can increase sales by encouraging customers to buy a group of products instead of single items. For example, you can pair a top-selling product with a less popular one, create groups of products to maximize the benefits for customers when they buy, and offer special discounts on bundled products.
- **Sales operations managers can provide tailored pricelists** based on a salesperson's territory, or on the customer segment they're assigned to.
- **Sales operations managers or customizers can localize the product catalog for different regions with localization tools.** Export and import field translations, and localize product attributes and metadata to make product details available to salespeople in their preferred language.

- **Salespeople can visualize all the products and product bundles your company sells by viewing products in hierarchical charts (similar to org charts).** When pulling together an order, you can see all the products that are available to sell, and how they're related in a visual way. When you can see all product possibilities in one view, you're less likely to miss a potential sales opportunity.

- **Salespeople can see suggestions for cross-selling and up-selling**, and get recommendations for accessories or substitutes.

Cortana support lets you speak CRM commands on Windows 8.1 phones

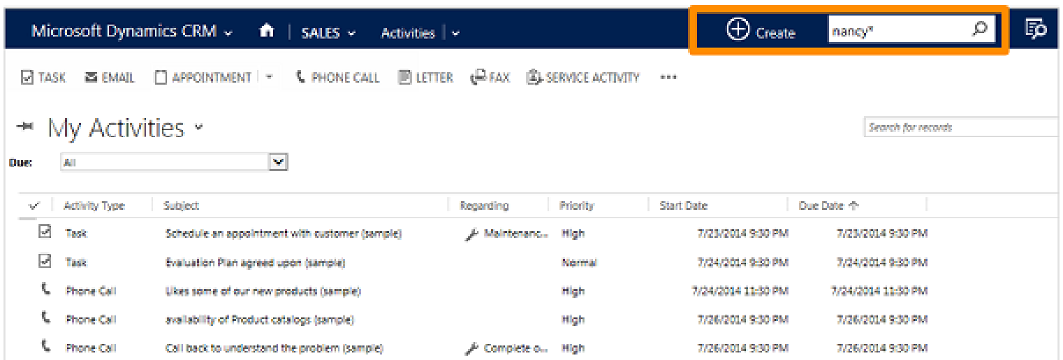
Now you can speak your commands to CRM if you are using Cortana on a Windows 8.1 phone. For a list of the CRM commands you can use with Cortana, see **Cortana voice commands for Microsoft Dynamics CRM for phones**.

Improvements to quick find make it easier to find customer records on the web app

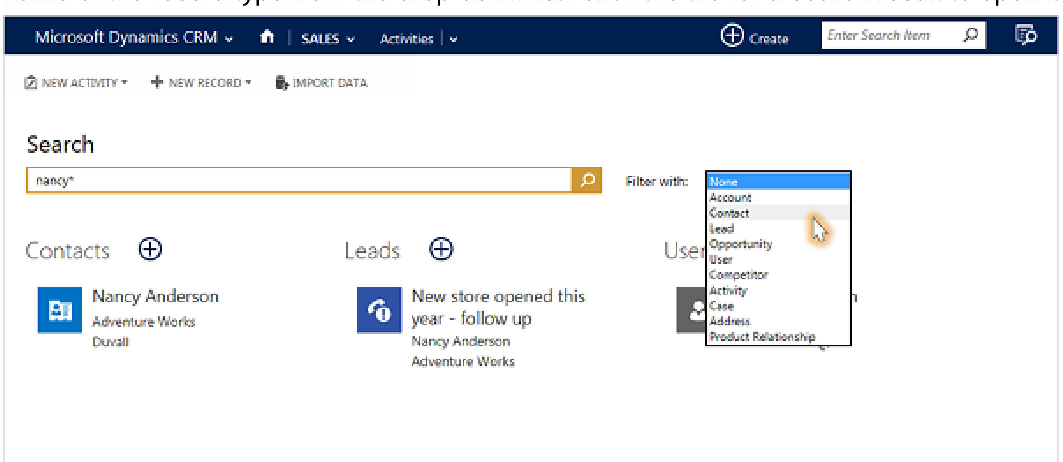
Improved search capabilities provide a quick way for users to search across multiple record types on the web app. Now, by entering keywords in the search box on the nav bar, you can quickly find and navigate to a record from anywhere in the web app.

In previous versions, quick find across multiple record types was available only on the CRM for tablets app.

The search box supports using an asterisk (*) as a wildcard character.



To only see matches for a certain type of record, on the search results page, you can select the name of the record type from the drop-down list. Click the tile for a search result to open it.



To do more sophisticated searches, click the new **Advanced Find** button, which is now on the nav bar.

Microsoft Social Engagement is now available for on-premises systems

With this release, you can access Microsoft Social Engagement from within Microsoft Dynamics CRM, whether your organization uses Microsoft Dynamics CRM Online or CRM 2015 (on-premises).

New way to view accounts, products, and users helps you see how info is related

With this release, users can see how info is related or grouped by viewing accounts, products, or users in hierarchical charts. You can click a block of info to get more details and navigate to the info you're interested in.

For example, from the hierarchical view for **accounts**, you can:

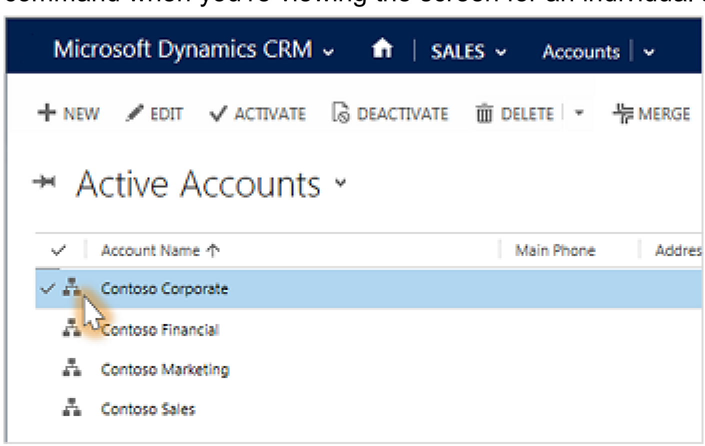
- See how an account is doing in overall revenue
- Drill into tiles for sub-accounts to see where the deals are coming from
- Find out who is working on an account and enlist help from others by sending email or sharing the account with other salespeople
- View important details about each account, such as credit limit and latest activity posts for the account

From the hierarchical view for **products**, you can see all the products available to sell, and how they're related in bundles or families. Salespeople can avoid missing a potential sale, because they can see all related products in one view.

From the hierarchical view for **users**, you can find out who another team member's boss is, or who else is on their team, without switching to another app.

Hierarchical views are also available on mobile.

- To see hierarchies that show the relationships between records, on the list of accounts, products, or users, click the **hierarchies** button. You can also click the **View Hierarchy** command when you're viewing the screen for an individual account, product, or user.



The CRM Basics guide helps users learn common tasks even if their system is customized

In friendly, bite-sized servings that are never any longer than a single page, the new CRM Basics helps new users learn how to get around the system using tiles, enter customer data, search for records, keep track of interactions with customers by adding notes and tasks, stay on top of their progress with dashboards — and more. The CRM Basics includes sections targeted at sales and service, so new users also get the run-down on the basics tailored for their role.

Because the guide covers common tasks that apply to anyone who uses Microsoft Dynamics CRM, it's relevant even if the system has been customized.

The CRM Basics is a great resource for training new users. You'll find an editable version in the **Training & Adoption Kit for Microsoft Dynamics CRM** that you can customize to create your own training materials.

You'll see the CRM Basics whenever you access help from any system that's not connected to the internet. Or, download the eBook: CRM basics for sales pros and service reps (applies to 2015).

Improvements to Quick Create let you add a contact within an opportunity

Now, when a salesperson adds a new sales opportunity to the system by using the **Create** command on the nav bar, the salesperson can also create a new contact at the same time. In previous releases, the salesperson needed to create the contact before using the Quick Create command to add an opportunity.

New Outlook Configuration Wizard makes it easy to set up and configure CRM for Outlook

With the new Outlook Configuration Wizard, which has been completely redesigned for 2015, configuring Dynamics CRM for Outlook is as easy as copy and paste. The new Configuration Wizard also makes it easy to add and manage additional CRM organizations. If you're an administrator, you'll appreciate new security features like multi-factor authentication. More information: TechNet: What's new for administrators and customizers in Microsoft Dynamics CRM 2015 and CRM Online

Synchronize more types of information between CRM and Outlook

Teams that use Dynamics CRM for Outlook as their centralized information hub can synchronize more types of information now, including:

- Additional contacts and tasks fields
- Assigned tasks
- Appointment attachments

Users can easily view the fields that are synchronized, which provides confidence about where the data comes from and how it's shared. If you're an administrator, you can configure field synchronization direction to control exactly how data is synchronized. More information: TechNet: What's new for administrators and customizers in Microsoft Dynamics CRM 2015 and CRM Online

Business processes now allow you to "branch" to different steps based on rules and conditions

Now, business processes let you take a different "branch" (and handle a customer differently), based on things like the person's budget, the type of products the person buys, when the person plans to buy your products, or other conditions. For example, let's say that in the process of qualifying a lead you learn that the person plans to buy next quarter, which means that you'll need to pull together a sales proposal and get the right approvals. The business process you're following guides you through the right steps to handle this prospect, with no guesswork.

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

Create custom Help (training) designed just for your users

If you customize Microsoft Dynamics CRM extensively, you may want to replace the default Help content with Help and training designed just for the people who use your system. You can replace Help (by redirecting to a URL) for the whole organization or just for lists and forms for specific record types (entities). The page you redirect to can be any valid URL you can paste into a browser: a page on a SharePoint site or a webpage on the Internet; even your team Wiki page, Intranet site, Word document or PDF file. For more information, see TechNet: What's new for administrators and customizers in Microsoft Dynamics CRM 2015 and CRM Online.

Earlier version?

Updating from an earlier on-premises version of Microsoft Dynamics CRM? If so, there are many more exciting new features for you to take advantage of now, including a brand new user interface.

Find out more about differences between the new tiled interface and older versions that use a ribbon: eBook: What's changed in CRM 2013?

eBook: SLAs and entitlements

Get started in CRM (2:16)

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" that remind you about 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 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 selecting a phone number to make calls via Lync or Skype. Click an email address to send an email. In addition, you can see addresses on Bing Maps. More information: Place calls with Skype or Skype for Business

  Important
  Lync has been rebranded as Skype for Business. Currently, you'll still see references to "Lync" in Microsoft Dynamics CRM, but CRM will work with Skype for Business.

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

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**

Deliver great service everywhere

The many new customer service features 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 key performance indicators (KPIs) for service level agreements (SLAs) 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 from a single location. To check out this new area: Go to **Settings** > **Service Management**. (How do I get there?)

Some new ways to manage customer service through the Service Management area include:

- 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 SLAs.
- 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 Engagement

Microsoft Social Engagement is a powerful new analytics service that enables your organization to monitor social media channels like Twitter and Facebook. Use Social Engagement 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 Engagement, 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 Engagement 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 Engagement 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 Engagement 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.

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 Microsoft 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.
- Use charts to track progress on key performance indicators.
- Use Skype to communicate with your contacts.
- Access your personalized views of lists to see the data that’s 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 templates for CRM

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: Customize 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).

Learn more about Social Insights

New Power Query connector streamlines connections to CRM Online

With the new Power Query connector, you can connect more easily to Microsoft Dynamics CRM Online data from Power Query. After selecting the **From Dynamics CRM Online connector** in Power Query, just add a URL feed, and then enter your credentials. Power Query connects and retrieves the list of tables and entitles from CRM. It's as easy as that.

Get ready for the next release

New features are continually becoming available! If you administer, configure, or install Microsoft Dynamics products and services, watch this page for information about ongoing releases — and how to prepare your organization.

horizontaltabbed

Fall 2015

The Microsoft Dynamics CRM 2016 release, and the Microsoft Dynamics Marketing 2016 Update are available now. Microsoft Social Engagement 2016 Update 1 will continue to roll out over the upcoming months.

On this page:

New features

Here are a few highlights:

Microsoft Dynamics CRM 2016

Productivity:

- Dynamics CRM App for Outlook (CRM Online only): This new lightweight email tracking app makes it easy to track incoming or outgoing email and preview relevant CRM information right in your Inbox. Add contacts or create new CRM records to track email. Dynamics CRM App for Outlook works with Microsoft Outlook on the web (included in Office 365), Outlook for the desktop, or Outlook for Mac. It also works with phones and tablets.
- Office Delve (CRM Online only): Get content that's most relevant to what you're working on and what's trending around you. Add Delve to your dashboards to automatically search through documents and find that one document that helps you close a sale.
- *Cortana integration* (CRM Online only): CRM 2016 takes Cortana integration to the next level, by embedding sales activities, accounts, and opportunities, to surface what's most relevant to salespeople at any time. This feature is coming after the CRM 2016 release.

  Note

  Cortana integration will be available as a preview feature for CRM Online 2016 Update customers. Preview features are not supported by Microsoft and will be available on an opt-in basis.

- Excel integration: View sales data in familiar Excel templates, perform what-if analysis, and upload the changes, all from CRM. Export and analyze data in Excel from your mobile device with added support for the CRM mobile apps (tablets and phones).
- OneDrive for Business: You can use the right storage option for the right situation. For example, store your private documents using the new OneDrive for Business option. For collaborative storage, use Office 365 Groups (CRM Online only), and to share documents with a larger team or the whole company, use SharePoint.

  Note

  OneDrive for Business is currently available only in SharePoint Online and will be available on-premises in SharePoint 2016.

- Document generation: Building personalized sales documents based on CRM data just got easier with document generation. With one click you can easily generate a document from CRM using predefined Word and Excel templates.

Mobility:

- Task flows *(CRM Online only):* Bring data from multiple entities together into a single user experience. For example, when you want to reach out to a contact on a deal, all relevant data is brought together in a coherent fashion so that you don't have to visit all the involved records (opportunities, contacts, and accounts).

  Note

Task flows will be available on phones and tablets as a preview feature for CRM Online 2016 Update customers. Preview features are not supported by Microsoft and will be available on an opt-in basis.

- Document management: View documents in the context of opportunities, cases, or any other entity, right in the CRM mobile apps. Seamlessly open various Office documents stored in SharePoint or OneDrive for Business from within the CRM mobile apps (tablets and phones).
- Modern mobile friendly experience: We're adding a variety of modern user interface (UI) controls, such as slider and calendar controls, for mobile apps. These new UI controls work across all mobile clients (tablets and phones) providing an engaging and immersive mobile experience.
- Preview forms: With the new mobile form previewer, see your mobile forms before deploying to CRM mobile apps (tablets and phones). Configure once and deploy everywhere.
- Mobile Management: Manage just about any device with Microsoft Intune, which provides mobile device management, mobile application management, and PC management capabilities from the cloud.
- App-to-app deep linking:Enables other mobile apps (such as email or your custom web-based app) to link and directly navigate to a record, view, or dashboard in CRM mobile apps.

Service:

- Interactive service hub: Dashboards and forms have been completely redesigned for the interactive service hub. Visual filtering and applied filtering in the new dashboards will help you prioritize your workloads and complete your most urgent tasks. The interactive service hub comes with a multi-stream dashboard for use by, for example, Tier 1 agents, and a single-stream dashboard for use by, for example, Tier 2 agents.
- Knowledge management: With the new interactive service hub, you can also turn customer feedback and issues into knowledge articles. Use the rich text editor to create and manage articles that include embedded videos and images.
- Field services: Field services allow you to more effectively manage distributed services where technicians and mobile resources are on the road delivering service and support for your customers.
- *Survey designer*: With the new Voice of the Customer survey designer you can create and send out questionnaires to collect feedback from customers about your products or services. Customers can take a survey on a phone, tablet, or computer. When a customer completes a survey, you can use rules to trigger follow-up actions that occur immediately. This feature is coming after the CRM 2016 release.

  Note

  An Azure subscription is required to host surveys.

- Unified Service Desk 2.0: Experience an improved setup that includes prerequisite installation, an updated wizard, and unattended support. We've added centralized auditing and diagnostics management. We also included the ability to distribute custom controls by using customization files. For more information, see What's new in Unified Service Desk for administrators. To learn more about how to extend and integrate Unified Service Desk 2.0, see the developer guide.

- *Service intelligence*: An interactive Power BI dashboard provides Customer Service Managers (CSMs) with an aggregate view of customer service performance. This feature is coming after the CRM 2016 release.

Platform:

- Hybrid server-side synchronization(CRM Online only): If you currently use CRM Online and Exchange Server (on-premises), and you synchronize email, appointments, contacts, and tasks with CRM, or if you synchronize email with the Email Router, you can synchronize using server-side synchronization.
- *No-code business rules*: Business analysts can now define their own business logic, which makes it less costly to define and maintain rules.
- Solution segmentation: Get tighter control over distribution of solutions and solution patches by exporting selected components instead of entire entities.
- For full details about new features for developers, check out the CRM 2016 SDK.

> **Note**
> Many CRM Online 2015 Update 1 features now apply to CRM 2016 (on-premises). For a summary of CRM Online features that now apply to CRM 2016 (on-premises), see What's new for administrators and customizers in Microsoft Dynamics CRM and CRM Online.

- Want to know more?

See what's new See what's new for administrators and customizers Download the Release Preview Guide Read the Blog post: Microsoft Dynamics CRM 2016 – Delivering the Next Generation of Intelligent Customer Engagement Check out the video demo of the new features Read about preview features and how to enable them

Dynamics Marketing

- SMS marketing: Create powerful Short Message Service (SMS) text message campaigns as well as integrate SMS marketing in your multichannel campaigns. Dynamics Marketing will support both outbound and inbound SMS marketing in select markets. Configure inbound SMS campaigns with keywords to get opt-ins, maintain a database of opt-in and opt-out preferences of your marketing contacts, send outgoing promotional text messages to opted in contacts for SMS, and track performance of your campaigns. This feature is available in the U.S., U.K., Singapore, and Canada.
- *Email marketing*: You'll see enhanced email editor features that make it easier to use for marketers including new capabilities to see the generated HTML in emails. With

improvements in the advanced editing experience, it will also be possible to use the media library directly from the HTML code. Additionally, we're making service enhancements to scale our service in the backend. This will improve our service's ability to handle high email volume, improve email deliverability, provide fault tolerance, and facilitate logging and auditing. For information about the new view-generated-code feature, see Create or view email marketing messages. For details about the code editor with the new media library feature, see Design message content using the text-based code editor

For a complete list of new features in this update, see What's new in Microsoft Dynamics Marketing.

Social Engagement

- *Social listening and social analytics*: In addition to Twitter, Facebook, blogs (such as WordPress and Tumblr), videos (such as YouTube) and news, you'll be able to add custom sources via RSS, including internal non-public sources.
- *Intelligent social*: To increase team efficiency for sales and service organizations, Social Engagement will automatically detect potential leads versus cases. This will increase sales performance through suggestions on leads coming in from social channels as well as increase team efficiency for service organizations by identifying potential cases coming in through social channels. Through adaptive sentiment, Social Engagement will learn from curations of sentiment values to create domain-specific models.
- *Group collaboration:* Define and set up groups to provide a more streamlined cross-group collaboration experience similar to Office 365.
- *Social center*: Publish tweets and Facebook posts from within a social center, including rich multimedia content. Author lookup provides additional information regarding the post author, including the number of followers and followings.
- *Sentiment and localization languages*: In addition to English, French, German, Italian, Portuguese and Spanish, Social Engagement will be adding nine additional languages: Danish, Dutch, Finnish, Greek, Norwegian, Polish, Russian, Swedish, and Turkish.

For information about the new release of Social Engagement, see What's new in Microsoft Social Engagement.

Release timing

Please visit this page periodically to get the most current information about the upcoming versions.

How to get the updates

Dynamics CRM Online

- You'll be able to schedule the specific date when your update occurs. We call this a customer-driven update since you "drive" the timing of the update to be the most suitable for your organization. For more information about our update policy and how this works for CRM Online, read TechNet: Manage Microsoft Dynamics CRM Online updates.

Dynamics CRM

- Microsoft Dynamics CRM 2016 will be delivered for both online and on-premises customers except where noted.

Dynamics Marketing

- The customer-driven update process will give admins better control over when new updates of Dynamics Marketing will be rolled out for your organization. For more information about how this works, read Manage Dynamics Marketing updates.

Social Engagement

- The listed administrator within your organization will be notified by email about the specific timing of your update to the next version. These updates will happen automatically and Microsoft will send several reminder communications, with the details, as the scheduled update approaches.

How to prepare for updates

Test the updates in a sandbox environment. We always advise that you preview and test new versions in a non-production environment before you update your live production instances. This will give you the opportunity to verify the compatibility of any customizations that you may have made, or any third-party customizations that are installed. Additionally, testing will also allow you to assess the impact of the upcoming changes on your organization and your users. If you haven't already done so, we strongly advise obtaining a non-production instance.

- Manage CRM Online sandbox instances

How to stay informed

- Keep checking this page.

  We update this page with more information for administrators and users on the specific features as the release dates approach.
- Keep others in the know.

  Add more recipients to receive communications from within the CRM Online Administration Center. For more information, read TechNet: Manage email notifications.
- Visit these resources for info about current versions:

  Microsoft Dynamics CRM Help Center

  Microsoft Dynamics Marketing Help Center

  Microsoft Social Engagement Help Center

  Microsoft Dynamics CRM eBooks and videos

Service communications

Want more information about the types of emails we send you? Check out TechNet: Policies and Communications for CRM Online Updates.

Support

Connect with Support resources or browse questions and answers in the Microsoft Dynamics CRM Forum — or you can always contact your partner.

Spring 2015

Microsoft Dynamics CRM Online 2015 Update 1, **Microsoft Dynamics Marketing 2015 Update 1 and 1.1**, **Microsoft Social Engagement 2015 Update 1and 1.1 (formerly Microsoft Social Listening)**, **and Parature, from Microsoft 15.2**.

On this page:

New features

These are just a few of the highlights:

Dynamics CRM Online

- *Improved navigation and user interface options*: Increase adoption with an improved user experience, including new UI themes and faster navigation to records.
- *Track email by folder*: Folder tracking provides a new and intuitive way to track incoming email activities on any device that supports Exchange. Now you can track your email directly from virtually any device. Watch a short video (2:37) about Exchange folder tracking.
- *Track incoming email wherever you are*: Use the new Microsoft Dynamics CRM App for Outlook to track incoming email and view CRM information about the people sending you email. You can use the new app with the desktop version of Outlook on the web (included in Office 365) or Outlook 2013. For more information, see the CRM App for Outlook User's Guide (lightweight app).

  Note
  This preview feature is available for CRM Online customers. Preview features are not supported by Microsoft and will be available on an opt-in basis.

- *Immersive Excel experience*: Now you can use Microsoft Excel Online to do quick analysis right from CRM Online. Watch a short video (2:45) about doing “What if” analysis with Excel Online.
- *Excel export completely redesigned*: With a single click, you can export to Excel anywhere, including the desktop version of Excel (2007 and later), Excel Online, and other Excel clients. For more information, see Export data to Excel.

- *New Power Query connector*: Use the new connector to easily retrieve data from CRM Online for self-service business intelligence (BI).
- *Create Office 365 Groups*: Collaborate with team members who don't have access to CRM Online with Office 365 Groups. For example, create a group for your sales team, invite other Office 365 users to join the group, and then share documents, email, OneNote notes, and more. For more information, see TechNet: Deploy Office 365 Groups.
- *Embedded OneNote*: Capture photos, take voice notes, do free-form drawings, and more. Everything is automatically linked with the record in CRM Online. Watch a short video (2:12) about OneNote integration in Dynamics CRM.
- *Social sales*: Define rules for creating or updating CRM records from incoming activities. For example, you can now generate leads or opportunities from social posts. For more information, see Set up rules to automatically create or update records in CRM.
- *Mobile sales*: With the new Microsoft Dynamics CRM for phones app, enjoy the same great mobile experience on your phone as you do on your tablet. Nurture your leads and opportunities through the sales process with the new intuitive interface. Watch a short video (5:02) about the new CRM for phones app.
- *Secure your mobile data*: Microsoft Dynamics CRM for Good, integrated with Good Dynamics, protects your CRM data even if you lose or leave your tablet somewhere. For more information, see Secure your mobile data with Microsoft Dynamics CRM for Good. Additional fees apply.
- *Integrated Parature knowledge base*: Empower agents with knowledge base integrated into daily service interactions, including the ability to both search and receive automated suggestions. For more information, see Find knowledge articles from within a record in CRM.
- *Significantly improved form performance*: A newly built form rendering engine provides fast form load while maintaining compatibility. You don't have to do anything to take advantage of faster forms — they're enabled by default. If you think you have forms that include unsupported customizations, see the How to prepare for updates section.
- Want to know more?

Read the Release Preview Guide TechNet: What's new for administrators and customizers What's New in Microsoft Dynamics CRM Get around in Microsoft Dynamics CRM, CRM for Outlook, and mobile devices Read about Preview features and how to enable them

Dynamics Marketing

Update 1:

- *Separation of service bus namespace for SDK and Connector*: You can now configure Microsoft Dynamics Marketing SDK and Microsoft Dynamics Marketing Connector for Microsoft Dynamics CRM with different service bus namespaces.
- *Microsoft-owned queues for CRM Online integration*: Microsoft Dynamics Marketing now provides managed service buses for CRM Online integration. You don't need to have a Microsoft Azure subscription and service bus namespace for CRM Online integration.
- *Double opt-in for email marketing*: Send an opt-in link to incoming contacts to verify them. Double opt-in helps you to maintain lead quality and remain compliant with regional regulations. Watch a short video (2:50) about double opt-in capabilities.
- *Duplicate detection in email messages*: Configure your instance so that email messages are delivered only once per email inbox and avoid sending multiple emails to duplicate contact records.
- *Assets & media improvements*: Tag your assets using multiple keywords and use the improved keyword based search to filter them.
- *Expanded Analytics with OData and Excel with Power BI*: Create beautiful, informative reports based on real-time data drawn directly from Dynamics Marketing. With this release, we continue to add expanded support for more OData feeds and Power BI features. In addition, Dynamics Marketing now provides an all-new collection of dashboard widgets that enable you to embed specially targeted Power BI data and graphs right on your home page, widget dock, company records, and/or campaign records. Watch a short video (3:13) about using PowerBI to connect to Microsoft Dynamics Marketing

Update 1.1:

- *Connector wizard for Microsoft Dynamics CRM (on-premises)*: The Microsoft Dynamics Marketing Connector for Microsoft Dynamics CRM now includes a connector wizard that makes it easier to install or update the connector when you use it with Microsoft Dynamics CRM (on-premises). The wizard is not necessary when you set up a connection to Microsoft Dynamics CRM Online.
- *Improved reporting during campaign automation*: The campaign automation canvas now displays the last-run and next-run times for each tile and for the campaign itself, so you can see how recently each tile ran and the next time it will run. In addition, the email tile now shows sent, opened, bounced, and blocked statistics. More information: Automate campaigns with the campaign canvas
- *Improved email delivery reporting*: In addition to the ability to view detailed delivery and performance statistics for each marketing email, the display now offers even more details about delivery, including issues related to duplicate detection, cross-campaign rules, and contact settings. In each case, you can drill down to view a list of specific affected contacts. More information: Track blocked and unsubscribed email messages

For more information about the update, see What's New in Microsoft Dynamics Marketing.

Social Engagement

Update 1:

- *User Interface*: Completely redesigned UI throughout the application for an even more intuitive and simplified user experience with visual contextual filtering capabilities.

- *Social Analytics*: Richer data with new visualizations, such as tag clouds, top hashtags, and geo-location for greater insights.
- *Social Center*: User-specific configurable and shareable streams display social posts as they come in and allow you to proactively engage with both your fans and critics from Facebook and Twitter.
- *Social Profiles*: You can now add authenticated Twitter and Facebook accounts, which allow users to interact with their audience on social posts coming from Twitter and Facebook.
- *Search Topic setup*: Setting up search topics is easier and more flexible than ever. You can define rules by the following criteria: keyword, Facebook page, and Twitter handle. The projected quota usage is displayed, as well as a preview of Twitter posts, to give you an idea of the type of results you can expect.
- *Language & Geographic Availability*: Microsoft Social Engagement is available in 110 markets and 19 languages.

Update 1.1:

- *Visualize posts in real-time with activity maps*: Create and manage activity maps to see real-time visualizations of posts with location information. Show this on a large screen and let your audience know where your topics are being discussed in the world.
- *Analyze posts with unified sentiment*: Sentiment values are no longer target specific, so you don't need to select a search topic to see sentiment values for the posts anymore. The sentiment value of a post is now determined regardless of the keywords that you chose while setting up your search topics.
- *Administer Social Engagement with a redesigned Settings area*: All pages in the Settings area now adapt to the screen size of tablets. Additionally, Solution Defaults are now called Global Settings.
- *Download data to Excel*: Widgets in the Analytics area of Social Engagement now let you export data points to a downloadable Excel file. Along with the visualized data points, additional details regarding the configuration of the data set are shared.
- *Expand the Authors widget to full view*: You can now expand the Authors widget in the Analytics area to see, and work with, up to 100 records. You can remove authors in bulk from your solution's data acquisition and add quick filters to include several authors at once.
- *Provide delegated administration privileges to Microsoft cloud service providers*: Customers can now delegate the administration of their Social Engagement solution to a cloud service provider, without adding the service provider as a licensed user.

For information about the new release of Microsoft Social Engagement, download your copy of Prepare for Microsoft Social Engagement and share it with your organization's users. You can also watch a short video (3:55) about updates to Social Engagement.

Parature

- *Unified portal*: Enterprise organizations with a single public-facing brand presence can now easily deliver online support and self-service knowledge for a variety of departments or product lines, all while using a single service desk to consistently manage the brand's customer support.

- *Enhanced knowledge search capabilities*: Advanced search capabilities in the Parature knowledge base deliver more relevant results, with added search filters to search for knowledge based on highest feedback ratings, document type, date added or updated, etc.
- *Multi-lingual service and globalization*: Enable assisted service in local languages with routing based on customer language preference and real-time chat translation. Provide translations for Knowledgebase articles and portal strings to empower customers with self-service in local languages.
- *Portal specific metrics for reports*: Create more accurate reports with metrics provided for each Portal Alias. Capture Key Point Indicators to help identify the efficacy of each Portal Alias.

For more information, download the Parature Spring '15 Release Preview Guide.

Technical Changes

From time to time, we must add and remove items from our supported configurations list to keep current with technology and allow us to provide you the best product possible. Stay tuned for important information about any changes to supported configurations.

Release Timing

The updates for Dynamics CRM Online, Dynamics Marketing, Microsoft Social Engagement, and Parature are available now. Please visit this page periodically to get the most current information about the upcoming versions.

How to get the updates

Dynamics CRM Online

- *Updates for online customers*: You'll be able to schedule the specific date when your update occurs. We call this a customer-driven update since you "drive" the timing of the update to be the most suitable for your organization. For more information about our update policy and how this works for CRM Online, read TechNet: Manage Microsoft Dynamics CRM Online updates or watch a short video about Customer Driven Updates in CRM Online 2015 Update 1.

Dynamics Marketing

- The listed administrator within your organization will be notified by email about the specific timing of your update to the next version. Microsoft will send several reminder communications as the scheduled update approaches.
- The new customer-driven update process will give admins better control over when new updates of Dynamics Marketing will be rolled out for your organization. For more information about how this works, read Manage Dynamics Marketing updates.

Social Engagement

- The listed administrator within your organization will be notified by email about the specific timing of your update to the next version. These updates will happen automatically and Microsoft will send several reminder communications, with the details, as the scheduled update approaches.

Parature

- The listed administrator within your organization will be notified by email about the specific timing of the update to the next version. Microsoft will send several reminder communications as the scheduled update approaches.

How to prepare for updates

Test the updates in a sandbox environment. We always advise that you preview and test new versions in a non-production environment before you update your live production instances. This will give you the opportunity to verify the compatibility of any customizations that you may have made, or any third-party customizations that are installed. Additionally, testing will also allow you to assess the impact of the upcoming changes on your organization and your users. If you haven't already done so, we strongly advise obtaining a non-production instance.

- Video: Learn how to get access to a testing (sandbox) environment for Dynamics CRM
- Learn how to get access to a testing (sandbox) environment for Parature, from Microsoft
  For questions, please contact Parature Support

Manage customizations for CRM. With the newly built form rendering engine, unsupported customizations will likely fail. We encourage you to test your customizations, solutions, and scripts to ensure proper functionality with the improved form engine.

More information:

- Review important details about the new form rendering engine in the Microsoft Dynamics CRM team blog.
- For JavaScript best practices, the Custom Code Validation Tool, and whether your scripts will work with all supported browsers, see MSDN: Use JavaScript with Microsoft Dynamics CRM.
- To ensure your forms customization follow the recommended practices, check out TechNet: Create and design forms.

Browser support for Parature. Parature supports all major browsers and their latest versions, including Internet Explorer, Google Chrome, and Mozilla Firefox. To make sure that you can take advantage of all the enhancements to the Service Desk and Support Portal, make sure that you update your browser to the latest version.

Pricing and licensing

- Microsoft Dynamics CRM Online solutions
- Microsoft Dynamics CRM (on-premises)
- Microsoft Dynamics Marketing
- Microsoft Social Engagement
- Parature, from Microsoft

How to stay informed

- **Keep checking this page**.
  We update this page with more information for administrators and users on the specific features as the release dates approach.
- **Keep others in the know**.
  Add more recipients to receive communications from within the CRM Online Administration Center. For more information, read TechNet: Manage email notifications.

- **Visit these resources for info about current versions**:
  Microsoft Dynamics CRM Help Center
  Microsoft Dynamics Marketing Help Center
  Microsoft Social Engagement Help Center
  Parature, from Microsoft product page
  Microsoft Dynamics CRM eBooks and videos
  Microsoft Dynamics CRM video channel
  Microsoft Dynamics CRM Readme

Service Communications

Want more information about the types of emails we send you? Check out TechNet: Policies and Communications for CRM Online Updates.

Think you missed an email about the latest update? Check out the communications we've sent for this release.

FAQ

Q: Do I need to be running a recent version of CRM Online to update to the newest version?
A: Each customer scenario is different. For detailed information about updates, please read our Update Policy.

Q: I just purchased a new organization, but it is not scheduled. How do I make that happen?
A: Don't worry if you haven't been contacted yet. Every week we schedule the new subscriptions into the update process, and notify you when your organization is scheduled.

Q: How do I determine which version of CRM I have?
A: Sign in to CRM, and in the upper right side of the screen, choose the **Settings** button.( ) > **About**.

Q: How do I know which update scenario is best for my organization?
A: Your CRM Online update process depends on what version you have and how you'd like to update. Read more about update scenarios in TechNet: Manage Microsoft Dynamics CRM Online updates.

Q: How do I see the status of my updates?
A: If you're a CRM admin, you can see the latest status of updates and incidents on the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

Support

Connect with Support Resources or browse questions/answers in the Microsoft Dynamics CRM Forum— or you can always contact your partner.

For questions about Parature, please contact Parature Support.

Fall 2014

Microsoft Dynamics CRM 2015, Microsoft Dynamics CRM Online 2015 Update, Microsoft Dynamics Marketing 2015 Update, and Parature

The 2015 releases for Microsoft Dynamics CRM, Microsoft Dynamics Marketing, and Parature have arrived! These updates add enhancements to sales, marketing, and customer service functionality, and will also add features to facilitate marketing and sales team collaboration.

On this page:

Products updated

These products were affected by the 2015 release:

- Microsoft Dynamics CRM online and on-premises versions
- Microsoft Dynamics CRM for Outlook
- Microsoft Dynamics CRM for tablets
- Microsoft Dynamics CRM for phones
- Microsoft Dynamics Marketing
- Parature

New features

These are just a few of the highlights in the 2015 release:

Microsoft Dynamics CRM Online and on-premises

- *Create product families*: Boost selling effectiveness with the ability to bundle products and recommend related products for cross-selling/up-selling opportunities.

- *Use sales hierarchies*: Manage and report on your sales data in a way that maps to your business. New hierarchical visualizations and roll-ups bring real-time territory and forecasting data to your fingertips.
- *Mobile sales improvements*: Increase field sales productivity with flexible, role tailored dashboards and analytics, personalized home pages and the ability to navigate by hierarchy. This version of the tablet app also includes improved support for disconnected scenarios.
- *Access CRM records on the go via voice commands*: Cortana is now part of Microsoft Dynamics CRM! For customers with Windows Phone 8.1, you can now use conversational voice commands to seamlessly create follow-up appointments, tasks, and phone calls; quickly find information; view your customer lists; and more. Note: This feature will be available in **English only** in markets where Cortana is available. Read about Cortana voice commands for CRM in the topic Take a tour of CRM for phones express.
- *Enhanced sales processes*: Guide sellers toward desired outcomes with enhanced branching logic within your sales processes. Increase impact via automation of business processes and enforcement of business rules across all devices.
- *Expanded case management functionality*: Enable agents to provide differentiated levels of support with flexible Service Level Agreements (SLAs). Gain insight into service effectiveness with the ability to track and analyze key metrics like SLAs and thresholds.
- *Microsoft Social Engagement availability for Microsoft Dynamics CRM Online customers*: With a minimum of 10 Professional users, you automatically have access to Social Engagement as part of your subscription at no additional charge. If you have an Enterprise subscription you also have access to Social Engagement, but with no minimum user requirement. To learn more, read Integrate Microsoft Social Engagement to Dynamics CRM.
- *Microsoft Social Engagement for on-premises CRM customers*: You can now access Social Engagement directly from within Microsoft Dynamics CRM 2015 - even as an on-premises customer - and may also be eligible for a discounted rate. Contact your Microsoft Dynamics partner for more information.
- *Improvements in Dynamics CRM for Outlook*: Set up Dynamics CRM for Outlook quickly and easily with the completely redesigned Configuration Wizard. With Microsoft Dynamics CRM 2015 for Outlook, users can sync assigned tasks and appointment attachments. Admins can control synchronization between pairs of fields, which provides confidence about where data is coming from and how it's shared. For more information, see Set up CRM for Outlook.
- *Customizable help*: Personalize the user assistance by tailoring the in-product Help content to match the specifics of your Dynamics CRM implementation. You can modify what displays under the Help question-mark icon at either an entity-specific or organization-wide level. Please read TechNet: Customize the Help experience.

For more detailed information about the 2015 release, see What's New in Microsoft Dynamics CRM.

Microsoft Dynamics Marketing

- *Sales and marketing collaboration*: Strengthen your marketing and sales synergies with the new Sales Collaboration Panel, which allows sellers to provide input into campaigns and targeting.
- *Manage multi-channel campaigns*: Streamline campaign creation and improve segmentation with graphical email editing, A/B testing, integrated offers, and approval workflows.

- *Improve B2B marketing*: Deepen your lead management capabilities with webinar integration and improved lead scoring, including the ability to introduce multiple lead scoring models.
- *Enhanced marketing resource management*: Gain unprecedented visibility into your marketing plan with the new Interactive Marketing Calendar and improve collaborative marketing with Lync click-to-call and webinars.
- *Gain social insights within Microsoft Dynamics Marketing*: Display social information collected with Microsoft Social Engagement about your brand, campaigns, and more, all within Microsoft Dynamics Marketing.
- *Additional language & geographic availability*: Microsoft Dynamics Marketing is now available in Japanese and Russian, bringing the total to 12 languages and 37 countries/regions currently supported. Find more information in the Microsoft Dynamics Marketing Translation Guide.

For more information about the update, see What's New in Microsoft Dynamics Marketing

Parature

There are many exciting new capabilities in Parature, including:

- Knowledgebase management and reporting improvements
- Comprehensive service desk configurations
- Support ticketing enhancements
- Insights into customer self-service/portal usage
- Mobile service desk enhancements
- New social channel monitoring
- Real-time chat translation
- Further integration with Microsoft Dynamics CRM
- And more

For more information, download the Parature, from Microsoft Spring '15 Release Preview Guide.

Technical changes

We want to keep you apprised of new features in the 2015 releases, but you also need to know about technical changes that could have an impact on your organization. For example, as with previous releases of Microsoft Dynamics CRM, we add and remove items from our supported configurations list to keep current with technology and allow us to provide you the best product possible.

For more information, please read:

- TechNet: What's new for administrators in Microsoft Dynamics CRM 2015 and CRM Online
- Important information about supported configurations in Microsoft Dynamics CRM
- TechNet: Manage Microsoft Dynamics CRM Online updates
- **CRM admin top links**
- Video: Upgrading from Microsoft Dynamics CRM 2013 to 2015
- TechNet: What's new in Marketing Connector for Microsoft Dynamics CRM
- Parature, from Microsoft – Latest Release Notes

Release timing

The 2015 release for Microsoft Dynamics CRM, Microsoft Dynamics Marketing, and Parature is available now. Please visit this page periodically to get the most current information about the upcoming versions.

How to get the updates

Microsoft Dynamics CRM:

- *Updates for online customers*: You'll be able to schedule the specific date when your update occurs. We call this a customer-driven update since you "drive" the timing of the update to be the most suitable for your organization. It will be necessary for the CRM administrator to formally approve the update before the update can occur. If you haven't yet updated to the Spring '14 version, features that were added then will also be enabled during this update. For more information about how this works for Microsoft Dynamics CRM, read TechNet: Manage Microsoft Dynamics CRM Online updates or watch a short video about the Update process enhancements with Microsoft Dynamics CRM Online 2015 Update (3:33).
- *Updates for on-premises customers*: Customers who are current on their Microsoft Software Assurance Plan or Business Ready Enhancement Plan will be able to get updates after the final product release. Learn more about Microsoft Dynamics Service Plans.

Microsoft Dynamics Marketing:

- The listed administrator within your organization will be notified by email about the specific timing of your update to the next version. Microsoft will send several reminder communications as the scheduled update approaches.
- Should this scheduled date not be suitable for your organization, you will have an opportunity to reschedule the date through a service request.
- Keep looking for emails with more specific instructions for updating Microsoft Dynamics Marketing.

Microsoft Social Engagement:

- The listed administrator within your organization will be notified by email about the specific timing of your update to the next version. These updates will happen automatically and Microsoft will send several reminder communications, with the details, as the scheduled update approaches.

Parature:

- The listed administrator within your organization will be notified by email about the specific timing of the update to the next version. Microsoft will send several reminder communications as the scheduled update approaches.

How to prepare for updates

Test the updates in a sandbox environment. We always advise that you preview and test new versions in a non-production environment before you update your live production instances. This will give you the opportunity to verify the compatibility of any customizations that you may have made, or any third-party customizations that are installed. Additionally, testing will also allow you to assess the impact of the upcoming changes on your organization and your users. If you haven't already done so, we strongly advise obtaining a non-production instance.

- Video: Learn how to get access to a testing (sandbox) environment for Dynamics CRM
- TechNet: Manage Microsoft Dynamics CRM Online instances

- Read TechNet: Before you upgrade: issues and considerations (applies to on-premises only)
- Learn how to get access to a testing (sandbox) environment for Parature, from Microsoft
  For questions, please contact Parature Support

Upgrading to a new version of Microsoft Dynamics Marketing. We have designed the upgrade process to be as quick, easy, and trouble-free as possible, but you should still be aware of the process and some possible issues. If you are upgrading from a previous version of Microsoft Dynamics Marketing, find out what to expect by reading Upgrading from an earlier version.

Browser support for Parature. Parature supports all major browsers and their latest versions, including Internet Explorer, Google Chrome, and Mozilla Firefox. To make sure that you can take advantage of all the enhancements to the Service Desk and Support Portal, make sure that you update your browser to the latest version.

Manage customizations for Dynamics CRM. Three deprecated form scripting methods have been removed; you'll want to make sure your code isn't using those methods before you update. There's also a tool that a developer can run before an update to identify scripts that should be evaluated. For specifics, see MSDN: Deprecated form script methods removed (part of MSDN: What's new for Developers).

Browser support for Parature. Parature supports all major browsers and their latest versions, including Internet Explorer, Google Chrome, and Mozilla Firefox. To make sure that you can take advantage of all the enhancements to the Service Desk and Support Portal, make sure that you update your browser to the latest version.

Upgrading to a new version of Microsoft Dynamics Marketing. We have designed the upgrade process to be as quick, easy, and trouble-free as possible, but you should still be aware of the process and some possible issues. If you are upgrading from a previous version of Microsoft Dynamics Marketing, find out what to expect by reading Upgrading from an earlier version.

Pricing and licensing

- Microsoft Dynamics CRM Online solutions
- Microsoft Dynamics CRM (on-premises)
- Microsoft Dynamics Marketing
- Microsoft Social Engagement
- Parature, from Microsoft

How to stay informed

- **Keep checking this page**.
  We update this page with more information for administrators and users on the specific features of the 2015 updates as the release dates approach.
- **Keep others in the know**.
  Add more recipients to receive communications from within the CRM Online Administration Center. For more information, read TechNet: Manage email notifications.

- **Visit these sites for info about current versions**:
  Microsoft Dynamics CRM Help Center
  Microsoft Dynamics Marketing Help Center
  Microsoft Social Engagement Help Center
  Parature, from Microsoft product page
  Microsoft Dynamics CRM video channel

FAQ

Q: I just purchased a new organization, but it is not scheduled. How do I make that happen?

A: Don't worry if you haven't been contacted yet. Every week we schedule the new subscriptions into the update process, and notify you when your organization is scheduled.

Q: If I have a sandbox or test organization on Microsoft Dynamics CRM Online Fall '13 and update to CRM Online 2015 Update, how do I reset it to go to Microsoft Dynamics CRM Online Fall '13 and go through the update again?

A: Starting from the Admin UI, you can (as an administrator) select prior versions for the sandbox to be reset.

Q: What happens if my update fails during the update to CRM Online 2015 Update?

A: Microsoft makes a backup prior to attempting to update your organization. In the event we are not able to update your organization, it reverts by design. No request needs to be made for this to happen.

Q: How do I determine what version of CRM I have?

A: Sign in to CRM, and in the upper right side of the screen, choose the **Settings** button ( ) > **About**.

Support

Connect with Support Resources or browse questions/answers in the Microsoft Dynamics CRM Forum—or you can always contact your partner.

For questions about Parature, please contact Parature Support.

Previous Updates

On this page

Spring 2014

Fall 2013

Spring 2014

The Spring 2014 wave of updates included a number of great new services and features.

- **Microsoft Social Engagement** to help people across your organization tap into the social conversation.

- **Microsoft Dynamics Marketing** to help marketers engage customers, build sales pipelines, and demonstrate impact.
- **Microsoft Dynamics CRM** updates to help customer service teams earn loyalty, drive resolution, and delight customers.

Great service with CRM

Get started in CRM (2:16)

What's new in this wave of releases?

Get an overview of the new features and functionality in the upcoming release

Watch this short video overview of Dynamics CRM Spring '14 (02:47)

Visit the What's New page in Microsoft Dynamics CRM Help & Training

Listen to your customers with Microsoft Social Engagement

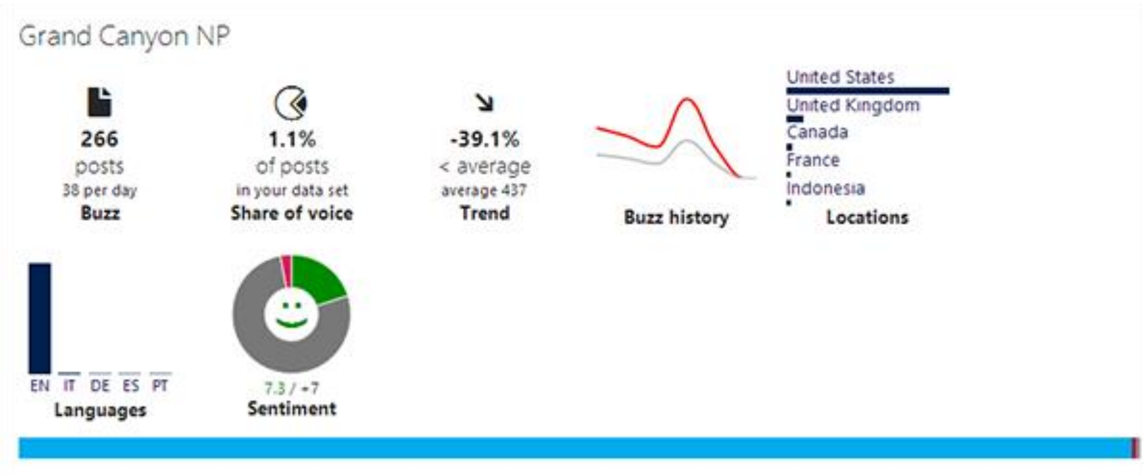
With Microsoft Social Engagement, you can scour the web to see what people are saying about your company and products. You can track sentiment across channels, identify top influencers, stay on top of the latest information and trends, get competitive insights, and more.

What is social engagement all about?

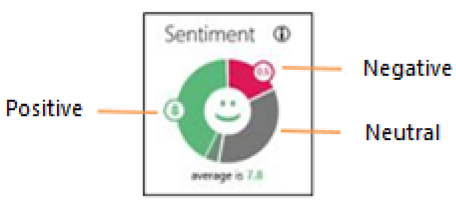
- **For sales:** Learn how social engagement can help your sales team spot new opportunities and respond to competitive threats with precision.
 eBook: "Social is for Closers"
- **For marketing:** See how marketing efforts and brand management can be enhanced dramatically through social engagement.
eBook "Your Brand Sux"
- **For customer service:** Discover how listening to your customers can lead to amazing service experiences.
eBook: "Wow Service"

What will Microsoft Social Engagement let us do?

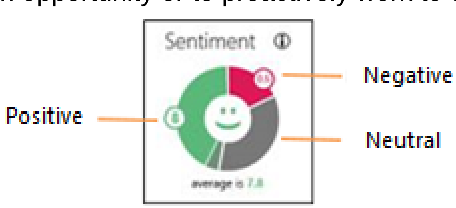
- **Analyze what people are saying.** Social Engagement helps you understand what people are saying on social media in easy-to-read charts. See how the volume posts are changing over time, and compare where the posts are coming from. You can capture posts in 19 languages on Twitter, Facebook, blogs, news, and videos.



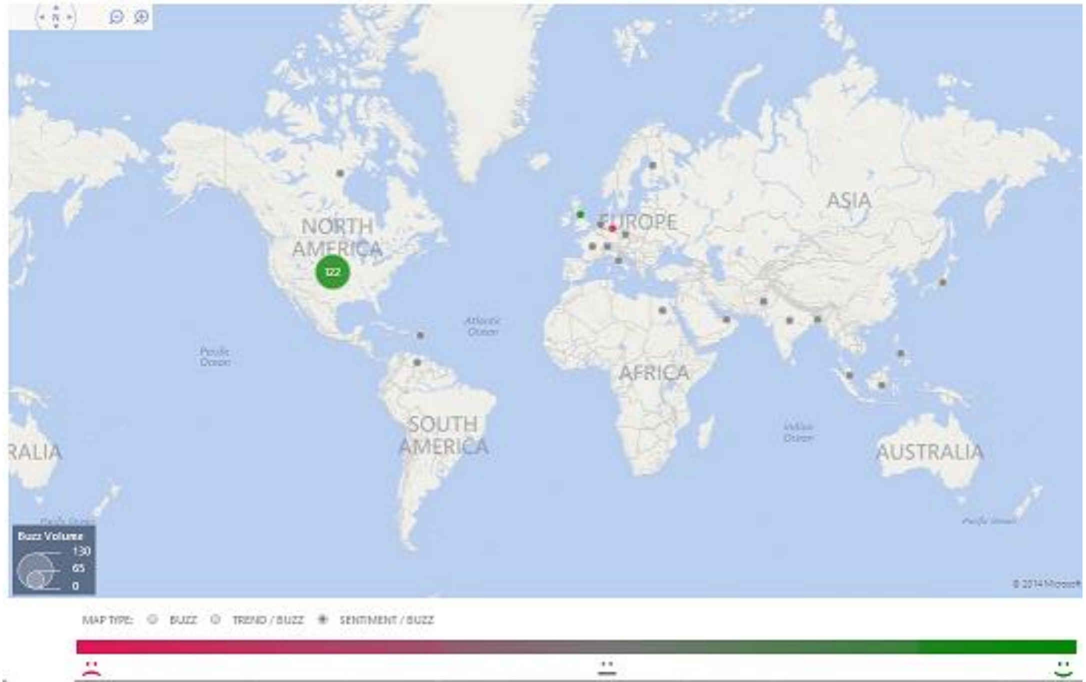
- **Get a true understanding of sentiment.** At a glance, see how people perceive your product, service, or brand natively in six languages – English, German, Spanish, French, Portuguese, and Italian.



- **Follow spikes in positive or negative sentiment.** To figure out which posts are positive, negative, or neutral, Social Engagement analyzes keywords and phrases in six native languages, which means it also picks on cultural cues. Use the information collected to seize an opportunity or to proactively work to change the social conversation in your favor.



- **Gain social insights.** See on a map where in the world social conversations are happening, and analyze by geography.



- **Track how your marketing or service campaign is doing.** After rolling out a campaign, you can measure reactions on Facebook, Twitter, blogs, news, and videos to see what's working and what isn't. Then make adjustments to your campaign accordingly.
- **Gain social insights.** Analyze social media conversations beyond your company, brand, and products; see what conversations are happening around your competitors, customers, and prospects.

Want to know more?

Watch how Microsoft Social Engagement can help you listen to the pulse of your customers [Get an overview of Microsoft Social Engagement]() [Visit the Microsoft Social Engagement Help Center]()

Start planning for Microsoft Social Engagement

- **Think about what you want to listen to.** Compile a list of keywords and phrases, as well as the Twitter accounts and Facebook pages you want to monitor.
- **Decide who your system administrators will be.** Who will be able to make changes to the searches you set up?

- **Identify business processes that can take advantage of social engagement and assign owners.** For example, if you identify that a customer requires service, who will engage that customer via social media to resolve the issue? If you incorporate social media analytics, what are your key metrics? Will they be buzz, sentiment, top influencers, or campaign impact? Start assigning owners for each of these processes.
- **Define an early warning system.** What situations do you want to be alerted about? And who should receive the email alerts? For example, if there's a spike in negative sentiment about a specific product, you can automatically notify your customer care team. What is the process once someone has been alerted?

Visit the Microsoft Social Engagement Help Center.

Geographic availability

Microsoft Social Engagement is available in 6 languages: English, French, German, Portuguese (Portugal), Spanish, and Italian. Language availability depends on the language settings chosen by your system administrator.

In addition to the 6 core languages, Microsoft Social Engagement includes features and functionality designed to listen, monitor, identify, and query publicly available social content, documents, and posts in 13 additional languages: Arabic, Chinese, Danish, Dutch, Greek, Finnish, Hebrew, Japanese, Norwegian, Polish, Russian, Swedish, and Thai. The social conversation, documents, and posts will remain in their original languages and they will not be translated by Microsoft Social Engagement. Native sentiment detection is available in English, French, German, Portuguese (Portugal), Spanish, and Italian.

Find more details in the Microsoft Social Engagement Translation Guide.

Market smarter with Microsoft Dynamics Marketing

Marketers are pressured to generate customer insights, deliver impact, and validate investments. Organizations need the ability to plan, carry out, and measure end-to-end campaigns. Our new service offering, Microsoft Dynamics Marketing, added to the marketing functionality within Microsoft Dynamics CRM, helps today's Chief Marketing Officers (CMOs) and marketing teams create and deliver amazing customer experiences.

What's coming to help marketers?

- **Additional marketing automation functionality.** On top of what is already in Microsoft Dynamics CRM, the Microsoft Dynamics Marketing service delivers insights to help marketers be smarter and to more effectively engage with their customers.
- Creating campaigns is a snap with a **new visual campaign designer**, helping CMOs reach their customers across multiple campaign channels.
- New **lead management and scoring capabilities**, **scalable email marketing capabilities** (over 10 million messages per day), and **deep marketing analytics** allow for better measurement of campaign effectiveness.

Visit the Microsoft Dynamics Marketing Help Center.

Want to know more?
Check out our eBook: Increase your impact

Want to know more?
with Microsoft Dynamics Marketing
Watch a high level overview of Microsoft Dynamics Marketing
Get an overview of Microsoft Dynamics Marketing
Visit the Microsoft Dynamics Marketing Help Center

Want to connect Microsoft Dynamics Marketing with Microsoft Dynamics CRM?

Visit the Microsoft Dynamics Marketing Setup & Administration page

Geographic availability

Microsoft Dynamics Marketing will be launched to 35 markets in 10 languages, far beyond the geographic coverage of most marketing automation solutions. It will be available later this spring.

Find more details in the Microsoft Dynamics Marketing Translation Guide

Provide amazing customer care with Microsoft Dynamics CRM

Providing responsive, relevant, and effective service improves customer loyalty. This release of Microsoft Dynamics CRM focuses many of its new features on facilitating the delivery of amazing customer service experiences. Our acquisition of Parature, a leading provider of customer service functionality, added to the new features of Microsoft Dynamics CRM, makes for an unbeatable combination!

What's coming to help customer service teams?

- A number of core enhancements to the marketing functionality within Microsoft Dynamics CRM provide you with strong enterprise-level case management capabilities including managing **Service Level Agreements** and **Entitlements**. This new functionality helps ensure that high quality and personalized service is delivered at every touch point. To learn more, visit the Service top links page.
- Deeper connections with Yammer enable agents to effectively collaborate to address important customer inquiries.
- **Enhanced Mobility**. You pick your device; we'll keep you connected with your customers. This release includes support for Windows 8.1 and Android and adds more functionality than ever before.
- A new **Unified Service Desk (USD)** within Microsoft Dynamics CRM serves as the single place where call center agents can do their work. It easily integrates with legacy and third-party systems to surface key information from these systems seamlessly. Unified Service Desk for Microsoft Dynamics CRM requires an Enterprise subscription (launching later this spring) for each subscriber using this functionality. TechNet: Read the Administration Guide for Unified Service Desk for Microsoft Dynamics CRM.
- Our recent acquisition of Parature enables customer service organizations to become a more strategic part of a business by helping add insights toward customers, creating high performance service teams, and delivering more effective customer interactions. Parature

allows you to provide a **24/7 customer support center** that is tied into your organization's website. This web-based help center gives your customers easy and convenient access to an intuitive, searchable knowledge base that delivers quick answers to their most commonly-asked service and support questions. Parature can be subscribed to as a separate service. Learn more about what Parature can do for your organization.

To learn more, visit the Microsoft Dynamics CRM Help Center

Get updated information with 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 more than 30,000 sources and millions of company and people profiles to deliver relevant, accurate company and contact information. This can help 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 (currently available in the 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.

Pricing and licensing

General Information

Some of the new functionality in these releases may require a separate license and may incur an additional subscription fee for each member of your team who uses that functionality.

Video: CRM Online License Management (04:27)

Learn more about Microsoft Dynamics CRM Online pricing and licensing options

Learn more about Microsoft Dynamics CRM on-premises licensing options

Learn more about Microsoft Dynamics CRM global pricing

Microsoft Social Engagement subscription pricing

Microsoft Dynamics CRM Online subscribers

- Microsoft Dynamics CRM Online Professional customers with a minimum of 10 users automatically have access to Social Engagement as part of their subscription at no additional charge.
- A Microsoft Dynamics CRM Online Professional subscription is $65 (USD) per user per month.
- Microsoft Dynamics CRM Online Professional customers with a minimum of 10 users automatically receive a complimentary quota of 10,000 posts per month for their organization. A "post" is any tweet, Facebook post, blog post, and so on that contains the keywords or phrases you configure the system to search for. For example, if you define a search topic to look for the keyword "Contoso", every post that contains "Contoso" counts towards that month's quota.

Learn more about purchasing Microsoft Social Engagement

Learn more about Microsoft Dynamics CRM global pricing

Microsoft Dynamics CRM 2013 on-premises customers

Microsoft Dynamics CRM Professional CAL customers with active Software Assurance can add Microsoft Social Engagement for up to 80% off the price of purchasing it by itself. Contact your partner for more details.

Learn more about purchasing Microsoft Social Engagement

Microsoft Social Engagement (standalone)

- Customers can purchase a standalone subscription to Social Engagement for US $100 per user per month.
- The organization receives an initial quota of 10,000 posts per month with this purchase.

Purchasing additional post quotas

Customers can purchase additional post quotas as shown here:

Number of posts per month	**Amount (US$)**
10,000	$100
100,000	$900 (10% discount)
1,000,000	$8,000 (20% discount)

You must purchase the full quota up front to receive the discount. For example, you won't receive a 10% discount if you purchase 10 bundles of 10,000 posts. You can't roll over posts from one month to the next.

Example: Your organization has a Microsoft Dynamics CRM Online Professional subscription for 100 users and you want to purchase an additional quota of 100,000 posts per month in addition to the complimentary bundle of 10,000 posts per month. The total price includes the Microsoft Dynamics CRM Online subscription of US $6,500 per month (100 users x $65 per user) + $900 per month for the additional quota of posts for a total of US $7,400 per month.

Adding a Microsoft Social Engagement subscription

You can add Microsoft Social Engagement subscriptions to an existing Microsoft Dynamics CRM Online Professional or Enterprise subscription via the Office 365 Administrative Portal. Microsoft Dynamics CRM Online customers with a minimum of 10 Professional users automatically have access to Social Engagement as part of their subscription at no additional charge. Customers who have purchased an Enterprise USL will have access to Microsoft Social Engagement with no minimum requirement for those Enterprise users.

If you purchased your product via the Microsoft Volume Licensing program, please contact your Microsoft partner or your reseller to add a Microsoft Social Engagement subscription.

Microsoft Dynamics Marketing subscription pricing

Microsoft Dynamics Marketing requires a separate license and may incur an additional subscription fee for each member of your team that uses this functionality.

Learn more about Microsoft Dynamics Marketing pricing and licensing options

Learn more about Microsoft Dynamics CRM global pricing

Parature subscription pricing

Features from the Parature service are available directly from Parature. Learn more about what Parature can do for your organization.

Access to product updates and new services

Updating Microsoft Dynamics CRM Online

With this update, you have the option to "opt in" and receive the new Enterprise Case Management features of Microsoft Dynamics CRM any time before the next formally-scheduled release. For more information, review the Microsoft TechNet article TechNet: Install Product Updates.

"Ask the SME" video – why, when, and how to use Sandbox instances for testing and training (3 minutes)

Important

Installing product updates is a one-way process. Once installed, the product updates can't be uninstalled.

Typically, about once a year, we release an update that requires a scheduled date to receive the update. We call this a Customer Driven Update (CDU). Microsoft Dynamics CRM Online Fall '13 fell under the CDU-type update. Microsoft Dynamics CRM Online Spring '14 does NOT require a scheduled date.

Regardless of how you receive an update – "opt in" or CDU - we always advise testing before upgrading your production instances. While we strive to minimize the impact of updates on your organization, occasionally changes that we make to Microsoft Dynamics CRM may impact custom code that you've added. We'll communicate with your CRM administrator if we believe there may be an impact. Video: Learn how to get access to a testing environment

Updating Microsoft Dynamics CRM on-premises

Updates for our on-premises customers who are current on their Microsoft Software Assurance Plan will be available via a service pack.

Learn more about Microsoft Dynamics Software Assurance plans

Before deploying to your production environment, read "Get and Install Microsoft Dynamics CRM Service Pack 1".

Adding Microsoft Social Engagement subscriptions

Microsoft Social Engagement is offered as part of Microsoft Dynamics CRM Online Professional subscriptions at no additional charge for customers with 10 seats or more. Customers who have purchased an Enterprise USL will have access to Microsoft Social Engagement with no minimum requirement for those Enterprise users. Customers with fewer than 10 seats can either increase their seat count to 10 or add Social Engagement as a standalone subscription. Both Social

Engagement and Microsoft Dynamics Marketing are offered as online services. These subscriptions can be added to an existing Microsoft Dynamics CRM Online Professional or Enterprise subscription via the Office 365 Administrative Portal.

Special pricing for a Microsoft Social Engagement subscription is available to on-premises customers who have Professional CAL Software Assurance. Please contact your partner or reseller for more information.

Adding Microsoft Dynamics Marketing subscriptions

Microsoft Dynamics Marketing is included as part of the Microsoft Dynamics CRM Online Enterprise subscription. It's also available to our Microsoft Dynamics CRM Online Professional subscribers and our on-premises customers as a standalone subscription. Both Microsoft Social Engagement and Microsoft Dynamics Marketing are offered as online services. These subscriptions can be added to an existing Microsoft Dynamics CRM Online Professional or Enterprise subscription via the Office 365 Administrative Portal.

Technical resources for developers and administrators

Microsoft Dynamics CRM

Microsoft Dynamics CRM Developer Center

Deploying and Administering Microsoft Dynamics CRM

"Ask the SME" video – why, when, and how to use Sandbox instances for testing and training (3 minutes)

Microsoft Dynamics Marketing

Microsoft Dynamics Marketing Developer Center

Microsoft Dynamics Marketing Setup and Administration

FAQ

Q: I just purchased a new organization, but it is not scheduled. How do I make that happen?

A: Don't worry if you haven't been contacted yet. Every week we schedule the new subscriptions into the update process, and notify you when your organization is scheduled.

How do I determine which version of CRM I have?

A: Don't worry if you haven't been contacted yet. Every week we schedule the new subscriptions into the update process, and notify you when your organization is scheduled.

Product availability and pricing

How will these new capabilities and services be made available to me?

- **New Enterprise Case Management customer care capabilities** (managing entitlements, service level agreements, dynamic case routing, Yammer collaboration, and so on) will be available within Microsoft Dynamics CRM for Professional and Enterprise subscriptions. Microsoft Dynamics CRM Online subscribers will be given an opportunity to "opt in" to these changes, allowing them to control the timing of the update. We will make these updates available to on-premises customers via a service pack release in the future.

- **Unified Service Desk** functionality is available in Microsoft Dynamics CRM with an Enterprise subscription (available later this spring).
- **Microsoft Social Engagement and Microsoft Dynamics Marketing** are offered as online services. These subscriptions can be added to an existing Microsoft Dynamics CRM Online Professional or Enterprise subscription via the [Office 365 Administrative Portal].
  - Special pricing for a Microsoft Social Engagement subscription is available to on-premises customers who have Professional CAL Software Assurance.
  - Microsoft Dynamics Marketing is available as a standalone subscription to on-premises customers.

Can I roll back changes after installing the service pack or updating CRM Online?

No, that is not possible. With this update, once you opt in to receive the new features in the product update, you won't be able to uninstall them. Read more in the previous section, "Access to product updates and new services."

Important

Installing product updates is a one-way process. Once installed, the product updates can't be uninstalled.

How will the new customer care capabilities within Microsoft Dynamics CRM be offered to online and on-premises customers?

The new Enterprise Case Management customer care capabilities (managing entitlements, service level agreements, dynamic case routing, Yammer collaboration, and so on) are available within Microsoft Dynamics CRM for Professional and Enterprise subscriptions. Unified Service Desk functionality is available with an Enterprise subscription.

Features from the Parature service are available directly from Parature. [Learn more about what Parature can do for your organization].

If I have Microsoft Dynamics CRM on-premises, how do I purchase Microsoft Social Engagement?

If you purchased your product via the Microsoft Volume Licensing program, please contact your Microsoft partner or your reseller to add a Microsoft Social Engagement subscription. If you acquired Microsoft Dynamics CRM via the Dynamics price list or have a Microsoft Dynamics CRM Online subscription, you can contact your partner or you can add to an existing Professional or Enterprise subscription via the [Office 365 Administrative Portal].

Microsoft Social Engagement

What kinds of things can I listen for on social media?

You can listen for product names, brand names, competitors, and campaigns.

I thought Facebook pages were private. Where does the data come from?

Facebook profiles from individual users are usually private. Social Engagement only aggregates publicly available Facebook data—private data and conversations between friends aren't included. With Social Engagement, you can select pages and get all relevant data from that page, or get data from public posts, but there is no way to sign in or otherwise access private data.

Can I respond to someone's Facebook or Twitter post?

You can respond to Twitter posts, but not Facebook posts for now. You'll be able to respond to Facebook posts in future releases.

Can I compare how many posts are on Facebook vs. Twitter?

Yes. The main dashboard shows the volume of posts by channel, sentiment, and language (English, French, German, Portuguese (Portugal), and Spanish).

How do I get the information? Does it come in a long report?

Social Engagement offers a number of easy-to-read graphs and charts so the data is easy to aggregate, understand, and share.

Can you measure whether people are saying positive, negative, or neutral things on the web?

Yes, this is called "sentiment analysis." Posts are scanned for keywords and phrases to determine a sentiment rating of positive, negative, or neutral. Social Engagement offers natural language processing for sentiment analysis so it can pick up on cultural cues that could be missed if the sentiment is translated to English first. Most other providers don't offer natural language processing - or they charge extra for this service.

What operating systems and web browsers does Microsoft Social Engagement run on?

Microsoft Social Engagement is supported on the same set of operating systems and web browsers as Microsoft Dynamics CRM Online. TechNet: Learn more about web browser support.

When will Microsoft Social Engagement be available?

Microsoft Social Engagement is available as of April 1, 2014. Microsoft Dynamics CRM Online customers with 10 or more Professional licenses were recently notified via email of their eligibility to add-on Microsoft Social Engagement for no additional charge as a part of their current subscription. The Microsoft Dynamics CRM Administrators within an organization will soon receive an additional email with information on how to add the Microsoft Social Engagement service to their Microsoft Dynamics CRM Online subscription via the Microsoft Online Portal.

If I have Microsoft Dynamics CRM on-premises, how do I purchase Microsoft Social Engagement?

If you purchased your product via the Microsoft Volume Licensing program, please contact your Microsoft partner or your reseller to add a Microsoft Social Engagement subscription. If you acquired Microsoft Dynamics CRM via the Dynamics Price list or have a Microsoft Dynamics CRM Online subscription, you can contact your partner or you can add to an existing Professional or Enterprise subscription via the Office 365 Administrative Portal.

Fall 2013

Microsoft Dynamics CRM 2013 Fall updates

- If you haven't updated to Microsoft Dynamics CRM 2013, see what you're missing! Microsoft Dynamics CRM Release Preview Guide

- Watch these videos to get an overview of the new user experience:

  Getting Started with Microsoft Dynamics CRM Online (2:16)

  Microsoft Dynamics CRM 2013 User Experience Overview (8:19)

- Watch this video to learn how to use CRM with Windows 8 tablets to help build relationships with your customers, even while you're on the go:

  Microsoft Dynamics CRM 2013 for Tablets (4:14)

- Connect your internal business processes to help turn your system into an outcome-driven tool:

  Microsoft Dynamics CRM 2013 Business Process Overview (10:35)

- Check out these short, friendly eBooks to help you get familiar with features in the new version:

  What's changed in CRM 2013?

  Introduction to business processes in CRM

- Want to try out Microsoft Dynamics CRM Online Fall '13 before you update?

  Take a test drive!

Prepare your organization for CRM 2013

Use the following sections to get everyone ready for the upcoming release of Microsoft Dynamics CRM:

CRM administrators

- Get your team ready for the new version:

  Prepare for the change

- Watch this video to see how to migrate your organization to the new on-premises version of Microsoft Dynamics CRM 2013:

  Upgrading to Microsoft Dynamics CRM 2013 from CRM 2011 (on-premises) (19:56)

- Some things to consider before and after the upgrade:

  How to prepare for the Microsoft Dynamics CRM 2013 upgrade (on-premises)

- Plan, install, configure, customize, and maintain Microsoft Dynamics CRM 2013:

  Deploying and Administering Microsoft Dynamics CRM

CRM developers

- Learn how the changes in the new version may affect your software development:

  MSDN: Changes in CRM 2013

- Download this SDK package to get documentation, tools, assemblies, and sample code for CRM 2013:

  Microsoft Dynamics CRM 2013 Software Development Kit (SDK)

Explore pricing and licensing options

Review licensing options for CRM 2013

CRM 2013 Pricing and Licensing Guide

Manage customizations

Learn how the upcoming changes to CRM may affect your custom code, and download a tool to help identify items that may need attention:

Managing your CRM custom code

Review update readiness communications

- Review past email about update readiness to ensure you have the information you need for a successful update:

  Prior communications

- Read these tips to help ensure the correct people receive email about the update:

  Routing update communications

After you update—next steps to success

Here's a roundup of top tips, tools, training materials, and ways to best understand and use new features. After you update to CRM 2013 -- next steps to success

After you update: next steps to success

Here are some useful resources to help your organization transition to the new versions of Microsoft Dynamics CRM, Microsoft Social Engagement, and Microsoft Dynamics Marketing.

Haven't updated yet? See the "Get ready for the next release" page.

Learn about the new features included in the latest release of Microsoft Dynamics CRM ─ visit the Dynamics CRM Help Center.

Learn how to make Microsoft Social Engagement help you hear what your customers are saying ─ visit the Social Engagement Help Center.

Learn how to make Microsoft Dynamics Marketing help your marketing teams create and deliver amazing customer experiences ─ visit the Dynamics Marketing Help Center.

eBook guides & minute-or-less videos

CRM video guides on YouTube

Dynamics CRM Training & Adoption kit – templates you can use to train your teams

Emails about update readiness for Dynamics CRM Online

Previously sent emails

The Microsoft Dynamics CRM Online Team sent the following emails to administrators of CRM Online organizations to help them Get Ready for the next release.

We are providing them here for your reference:

For CRM Online
CRM Online update emails - English
CRM Online update emails - Dutch
CRM Online update emails - French
CRM Online update emails - German
CRM Online update emails - Japanese
CRM Online update emails - Spanish

What are Preview features and how do I enable them?

Preview features are features that aren't complete, but are made available on a "preview" basis so customers can get early access and provide feedback. Preview features:

- Are subject to separate Supplemental Terms of Use.
- **Are not supported by Microsoft Support.**
- May have limited or restricted functionality.
- Aren't meant for production use.
- May be available only in selected geographic areas.

What preview features are included in Microsoft Dynamics CRM 2016?

The following table lists preview features included in Microsoft Dynamics CRM 2016 as well as learning resources for each feature.

Preview feature	Learning resource
Task flows in Microsoft Dynamics CRM for phones and Microsoft Dynamics CRM for tablets (CRM Online only)	Preview feature: Create a new task flow

How do I enable a preview feature?

To enable a preview feature, you must be a CRM administrator.

1. Go to **Settings** > **Administration**. (How do I get there?)
2. Choose **System Settings**, and then click the **Previews** tab.

3. Read the license terms, and if you agree, select the **I've read and agree to the license terms** check box.
4. For each preview feature you want to enable, click **Yes**.

How do I report an issue or provide other feedback?

If you'd like to provide feedback, offer suggestions, or report issues for a Preview feature, please go to Microsoft Connect. This website provides a collaboration platform for gathering actionable feedback to build and improve products and services.

See Also

Preview feature: Create a new task flow

Manage your subscription

Manage your CRM subscription

Add user licenses to your subscription

Add storage in CRM Online

Remove storage from your subscription

Add License Wizard and Add Storage Wizard errors

CRM Online maintenance and update schedules

Manage your CRM subscription

There are a number of tasks associated with managing your Microsoft Dynamics CRM Online subscription. To learn how to manage licenses, create users, assign security roles, grant user access, manage storage, and more, see TechNet: Manage your Microsoft Dynamics CRM Online subscription.

Add user licenses to your subscription

If you manage your subscription to Microsoft Dynamics CRM Online through the Microsoft Online Services environment using the Office 365 admin portal, you create a user account for every user who needs access to CRM Online. The user account registers the user with Microsoft Online Services environment. In addition to registration with the online service, the user account must be licensed in order for the user to have access to the service. For more information about user licensing and subscriptions, see TechNet: Manage subscriptions, licenses, and user accounts

Add storage in CRM Online

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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click **Resources in Use**.

   Review your storage used.

To get more storage

- Free up storage consumed by unneeded data. More information: TechNet: 10 ways to free storage space in Microsoft Dynamics CRM
- Purchase additional storage from the Office 365 Admin portal page. More information: TechNet: Manage storage for Microsoft Dynamics CRM

See Also

TechNet: Manage storage for Microsoft Dynamics CRM

TechNet: 10 ways to free storage space in Microsoft Dynamics CRM

Remove storage from your subscription

You may find that you don't need extra storage and choose to remove it from 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. More information: TechNet: Manage storage for Microsoft Dynamics CRM Online

See Also

[TechNet: Free storage space in Microsoft Dynamics CRM]

CRM Online maintenance and update schedules

horizontaltabbed

About

Microsoft regularly maintains and updates Microsoft Dynamics CRM Online to ensure security, performance, and availability, and to provide new features and functionality. From time to time, Microsoft also responds to service incidents. For each of these activities, the CRM admin for your organization receives email notifications. During a service incident, a CRM Online customer service representative may also call and follow up with an email.

If you're not sure who your CRM admin is, see Find your CRM administrator or support person.

If you want to change who receives email communications, see TechNet: Manage email notifications in Microsoft Dynamics CRM Online.

If you're a CRM admin, you can also see the latest status of updates and incidents in the Microsoft Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

To learn more about each type of maintenance and update activity, as well as the communications your organization receives, click one of the following links, or scroll down to the section:

Planned maintenance

Unplanned maintenance

Security updates

Service updates

Service incidents

Major service incidents

Planned maintenance

Planned maintenance includes updates and changes to the CRM Online service to provide increased stability, reliability, and performance. These changes can include:

- Hardware or infrastructure updates
- Integrated services, such as a new version of Office 365 or Microsoft Azure
- CRM Online service changes and software updates
- Minor service updates to CRM Online that occur about 10 times per year

How do I find out about planned maintenance?

Your organization receives a “Planned Maintenance” email five days before the planned maintenance. These emails go out to all CRM Online System Administrators in every CRM Online instance that is scheduled for the planned maintenance.

You can also see the schedule and status of planned maintenance activities on the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

Unplanned maintenance

From time to time, CRM Online inevitably encounters unplanned issues that require changes to ensure availability. Microsoft strives to provide as much notification as possible during these events. Because these events can’t be predicted, they are not considered planned maintenance.

How do I find out about unplanned maintenance?

Your organization receives an “Unplanned Maintenance” email. These emails go out to all CRM Online System Administrators in every CRM Online instance that is affected by the unplanned maintenance.

You can also see the status of current unplanned maintenance activities on the Office 365 service health page. To learn how to get to the Office 365 service health page, see View the status of your services.

Security updates

The CRM Online team regularly performs the following to ensure the security of the system:

- Scans of the service to identify possible security vulnerabilities
- Assessments of the service to ensure that key security controls are operating effectively
- Evaluations of the service to determine exposure to any vulnerabilities identified by the Microsoft Security Response Center (MSRC), which regularly monitors external vulnerability awareness sites

The CRM Online team identifies and tracks any identified issues, and takes swift action to mitigate risks when necessary.

How do I find out about security updates?

Because the CRM Online team strives to apply risk mitigations in a way that doesn’t require service downtime, CRM administrators usually don’t receive emails for security updates. If a security update does require service downtime, it is considered planned maintenance.

For more information about CRM Online security, see Microsoft Dynamics CRM Trust Center.

Service updates

CRM Online typically releases two major service updates per year. These updates provide new features and functionality to CRM Online.

Improvements in the update process put the power in your hands for scheduling your organization’s service updates. You can choose from a list of available dates. Service updates are only applied after they are approved by the CRM Online admin. This helps you to plan well in advance for your upgrade path, while using your sandbox organization to properly test and evaluate the service updates with your existing production code.

How do I find out about service updates?

The CRM Online team preschedules customers for the service update and emails CRM Online admins 90 days before the scheduled update. CRM Online admins receive additional emails at 30 days, 15 days, 7 days, day of, and post upgrade.

In the email, you have the opportunity to either approve the scheduled date or reschedule the update from a list of dates. All customers are updated during the defined service update release period, usually over a three-month window.

To find out more about rescheduling service updates, see [TechNet: Manage Microsoft Dynamics CRM Online updates]().

To find out what's new and how to prepare for the next release, check out the following resources:

- [What's new in CRM Online]()
- [Get ready for the next release]()

Also be sure to watch this video about improvements to the update process.

<iframe width="500" height="364" src="https://www.youtube.com/embed/7f3KTlFaQ64" frameborder="0" allowfullscreen></iframe>

Service incidents

A service incident occurs when your organization is inaccessible or you're unable to use the service or one of its components. Examples include:

- Getting a "page not found" or 404 error when you try to access CRM Online.
- All of your users are unable to sign in to your organization.
- Your users can sign in, but can't save their changes.
- Users can sign in, but see a blank screen.

How do I find out about service incidents?

If you open a case to report a service incident, a Microsoft customer support representative will call your CRM admin and follow up with an email when the service incident is resolved.

Major service incidents

A major service incident occurs when multiple organizations can't access the service.

How do I find out about major service incidents?

Microsoft's policy is to send email updates to the CRM admins of affected customers within 15 minutes of a major service incident, and a final email once the issue is considered resolved.

You can also see the status of major service incidents in your Office 365 service health page. To learn how to get to the Office 365 service health page, see [View the status of your services]().

In addition, five business days after the incident resolution, the CRM Online team publishes a post-incident report (PIR) to the Office 365 service health page. This report summarizes the following details about the incident:

- Description
- Root cause
- Customer impact
- Start date and time

- Resolution date and time
- Next steps

If the service incident breaches your Service Level Agreement, you can claim a billing credit according to the conditions of your Service Agreement. If you need help with this, see Billing FAQs for CRM Online.

Updates video

Schedule updates for a time that works for you. Find out how.

<iframe width="500" height="364" src="https://www.youtube.com/embed/Hnqsc8hGHz8" frameborder="0" allowfullscreen></iframe>

To see video captions, click the **Closed Caption (CC)** button in the lower right corner of the window.

See Also

CRM Online Service Blog

Service Level Agreement

Service Agreement

Add and manage users, and set up security

Security overview

Add and manage users, and set security roles

Understand security roles

Assign a security role to a user

Create or edit a business unit to control access to records

Enable or disable hierarchy security

Create a position to use in hierarchy security

Create or edit a team

Assign security roles to a form

Enable or disable security for a field

Set up security permissions for a field

Use field level security in a calculated field

Secure sensitive data by enabling encryption

View your user profile

About team templates

Security overview

The **Security** screen in the **Settings** work area gives you all your security-related admin settings in one place.

Select the links in this table to learn more about each CRM security setting.

Security setting	Related topics
Users	Add and manage users, and set security roles View your user profile
Security Roles	**Understand security roles** **Assign a security role to a user** Assign security roles to a form
Field Security Profiles	Enable or disable security for a field Set up security permissions for a field
Positions	Create a position to use in hierarchy security
Teams	Create or edit a team
Business Units	Create or edit a business unit to control access to records
Hierarchy Security	Enable or disable hierarchy security
Access Team Templates	Create a team template and add to an entity form

Add and manage users, and set security roles

How you manage users depends on which version of Microsoft Dynamics CRM you're using:

- To manage users in CRM Online using the Office 365 admin portal, see TechNet: Create users and assign Microsoft Dynamics CRM Online security roles.
- To manage users in Microsoft Dynamics CRM on-premises, see TechNet: Manage users.
- To manage work hours of users in Microsoft Dynamics CRM, see Set work hours for a resource.

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.

On this page:

Create a team

Edit a team

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. Go to **Settings > Security**.

   (In Microsoft Dynamics CRM for Outlook, go to **Settings > System > Security**.)
3. Click **Teams**.
4. On the Actions toolbar, click the **New** button, complete the required fields, and then click **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. Go to **Settings > Security**.

(In Dynamics CRM for Outlook, go to **Settings > System > Security**.)

3. Click **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 **Edit**, change the desired fields, and then click **Save**.

See Also

Create a team template and add to an entity form

About team templates

Print leads, quotes, and other records

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

TechNet: Manage teams

Create a team template and add to an entity form

Create or edit a team

Access Teams in Microsoft Dynamics CRM

Create or edit a business unit to control access to records

A business unit is a logical grouping of related business activities. Use business units together with security roles to control data access so people see just the information they need to do their jobs.

Keep the following in mind when creating business units:

- The organization (also known as the root business unit) is the top level of a Microsoft Dynamics CRM business unit hierarchy. CRM automatically creates the organization when you install or provision CRM. You can't change or delete the organization name.
- Each business unit can have just one parent business unit.
- Each business unit can have multiple child business units.
- You must assign every user to one (and only one) business unit.
- You can assign a team to just one business unit, but a team can consist of users from one or many business units. Consider using a team if you have a situation where users from different business units need to work together on a shared set of records.

On this page:

Create a new business unit

Change the settings for a business unit

Create a new business unit

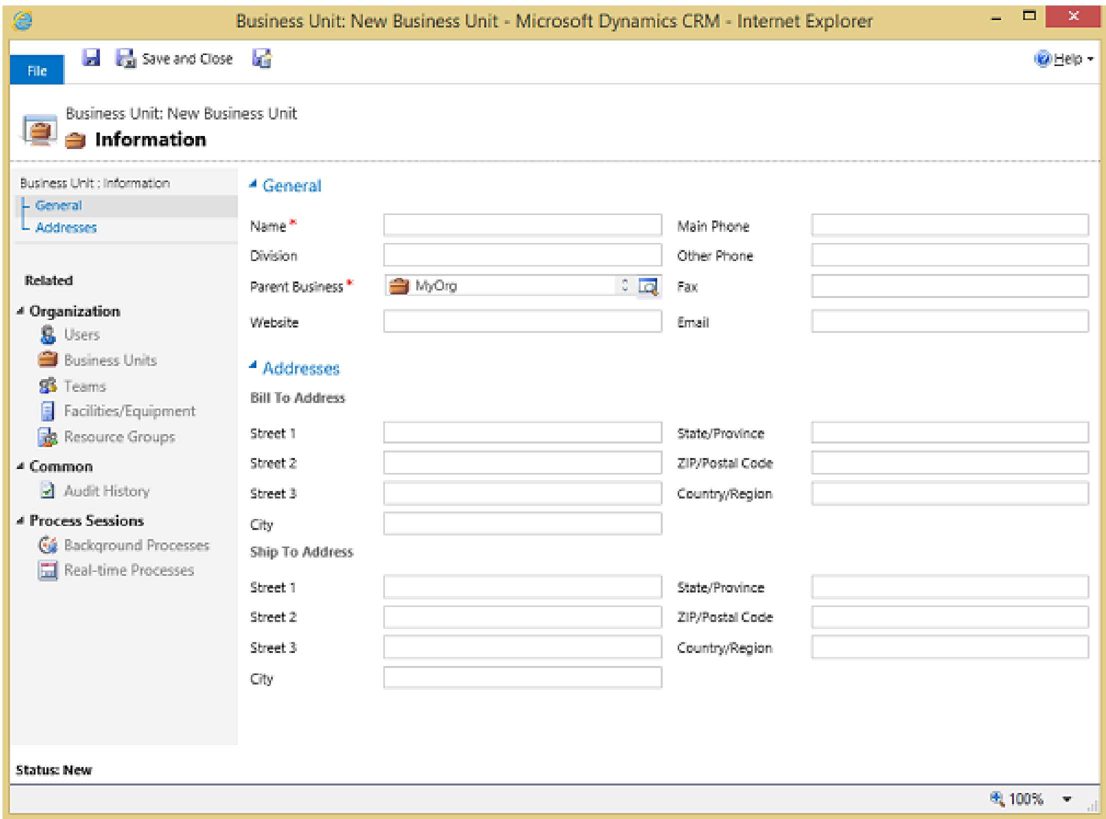
1. Make sure you have the System Administrator or System Customizer role.

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. Go to **Settings** > **Security**. (How do I get there?)
3. Choose **Business Units**.
4. On the Actions bar, choose **New**.
5. In the **Business Unit** dialog box, type a name for the new business unit. CRM automatically fills in the **Parent Business** field with the name of the root business unit.



If you want to change the parent business unit, choose the **Lookup** button , choose **Look Up More Records**, and then do one of the following:

- Select an existing business unit from the list, and then choose **Add**.
- To create a new parent business unit:

  i. Choose **New**, and then add the information for the new parent business unit in the **Business Unit** dialog box.

  ii. When you're done adding information, choose **Save and Close** in the **Business Unit** dialog box.

  iii. In the **Look Up Record** dialog box, choose **Add**.

7. In the **Business Unit** dialog box, fill in any of the other optional fields, such as the division, contact information, website, bill to address, or ship to address.
8. Choose **Save** or **Save and Close**.

Change the settings for a business unit

1. Make sure you have the System Administrator or System Customizer role.

   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. Go to **Settings** > **Security**. (How do I get there?)
3. Choose **Business Units**.
4. Choose a business unit name to open the **Business Unit** dialog box.
5. In the **Business Unit** dialog box, do one or more of the following:
   - Modify the data in one or more fields.

     Note
     You can't change the name of a business unit or delete a business unit after it has been created. You can disable a business unit or change the parent, however. When you disable a business unit, all users and teams associated with the business unit are also disabled.

   - Choose **Actions** on the Actions bar, and then select a command. For example, to change the parent business unit, choose **Actions**, and then choose **Change Parent Business**.

     Note
     When you change the parent business unit, CRM removes security roles for users and teams associated with the business unit. You must reassign them.

   - Under **Organization**, choose a record type to see a list of related records. For example, choose **Users** to view a list of users in the selected business unit or to add users to the business unit.
6. When you're done making changes, choose **Save** or **Save and Close**.

See Also

TechNet: Security concepts in Microsoft Dynamics CRM

TechNet: Manage users

TechNet: Manage teams

Enable or disable security for a field

Print leads, quotes, and other records

Enable or disable hierarchy security

Reduce the time you spend maintaining security roles for users by using hierarchy security. With hierarchy security, you can give upper-level users, such as managers or vice presidents, certain levels of access to their direct reports' records and lesser levels of access to their non-direct reports' records. Find out more about hierarchy security and how to set it up on TechNet.

TechNet: Hierarchy security

Create a position to use in hierarchy security

Reduce the complexity of managing security roles by creating a position hierarchy. Then define jobs or positions in your company and assign them to different places in your position hierarchy. Higher level positions in the hierarchy have Read, Write, Update, Append, and AppendTo access to their direct reports' records. They also have Read-only access to the records of non-direct reports in their hierarchy. Learn more about hierarchies and positions on TechNet.

TechNet: Manager hierarchy and position hierarchy security models

Assign security roles to a form

Control form and field access by assigning different security roles to different forms you create.

More information: TechNet: Security concepts 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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. Enable security roles.
   a. Under **Components**, expand **Entities**, and then expand the entity you want.
   b. Choose **Forms**. In the list, choose a form to edit it if it has a form type of Main.
   c. On the **Home** tab, in the **Form** group, choose **Enable Security Roles**.

5. 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. Choose **OK**.

6. Preview the main form.
    a. On the **Home** tab, choose **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, choose **Close**.
7. When you're ready to save your data, choose **Save and Close**.
8. Publish your customization.
    - To publish just the edited component, choose **Save** > **Publish** on the **Home** tab.
    - To publish all unpublished components at one time, choose **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.

Enable or disable security for a field

Field-level security lets you set which fields users can see or edit. For example, if want to prevent users from accidentally changing an account name, you can restrict them from editing that field. In Microsoft Dynamics CRM 2013, you could only set field-level security for custom fields, but in Microsoft Dynamics CRM 2015 or later, you can also set field-level security for default fields. More information: [TechNet: Field-level security]

To set which users and teams have read or write access to fields, see [Set up security permissions for a field].

Note

You can't change the permissions on a field that you don't have permission to access.

1. Go to **Settings** > **Customizations**. [(How do I get there?)]
2. Click **Customize the System**.
3. Under **Components**, expand **Entities**, expand the entity that has the field you want to

secure, and then click **Fields**.

4. In the list of fields, double-click the field you want to secure.
5. In the **Field** window, on the **General** tab, to the right of **Field Security**, specify whether to **Enable** or **Disable** security for the field.
6. Click **Save** or **Save and Close**.
7. When your customizations are complete, publish them:
   - To publish customizations for only the entity that you are currently editing, in the navigation pane, select the entity, and then click **Publish**.
   - To publish customizations for all unpublished entities at one time, in the navigation pane, click **Entities**, and then on the command toolbar, click **Publish All Customizations**.

See Also

TechNet: Field level security

Set up security permissions for a field

Set up security permissions for a field

You can restrict access to a field by creating a field security profile. After you create the profile, you assign users and or teams to that profile, and set up specific read, create, or write permissions for the field.

More information: TechNet: Security concepts 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. Go to **Settings** > **Security**. (How do I get there?)
3. Click **Field Security Profiles**, and then on the command bar, click **New**.
4. Enter a name and a description (optional) and click **Save**.
5. Under **Common**, click **Field Permissions**.
6. Select a field, and then click **Edit**.
7. Select the permissions that you want to assign to users or teams, and then click **OK**.
8. To add users or teams:
   a. Under **Members**, click **Teams** or **Users**.

b. On the command bar, click **Add**.

c. In the **Look Up Records** dialog box, select a team or user from the list (or search for a team or user), and then click **Select**.

d. Repeat the preceding steps to add multiple teams or users, and then click **Add**.

See Also

Enable or disable security for a field

Use field level security in a calculated field

To create a calculated field you must have the Write privilege on the **Field Security Profile** entity. If the calculated field uses secured fields in a calculation, you should consider securing the calculated field to prevent users from attempting to access data they don't have permissions for. If you create a calculated field that uses secured fields in a calculation, the calculated field editor gives you a warning and suggests that you secure the field. More information:

- TechNet: Field level security
- TechNet: Define calculated fields

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

See Also

TechNet: Field level security

TechNet: Define calculated fields

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: TechNet: Data encryption

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

TechNet: Data encryption

Regional and other business management settings

Customize regional options (admins)

Enable or disable languages

Work with fiscal year settings

Set privacy preferences for an organization

Manage transactions with multiple currencies

Set up sales territories to organize business markets by geographical area

Set up Business Management options

Change auto-numbering prefixes for contracts, cases, articles, quotes, orders, invoices, and campaigns

Customize regional options (admins)

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. Go to **Settings** > **Administration**. (How do I get there?)
3. Click **System Settings**.
4. Click the **Formats** tab.

5. From the **Current Format** list, select the language and country or region, and then click **Customize**.
6. 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 the **Number** tab to change the decimal symbol, digit grouping symbol, digit groups, and negative numbers.
   - Click the **Currency** tab to change the currency format, negative currency amounts, and number of decimal places.
   - Click the **Time** tab to change the time format, time separator, and notation for morning and afternoon.
   - Click 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 **Apply** to apply the changes and continue working in the dialog box, or click **OK** to save the changes and close the dialog box.
7. Click **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 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose **Languages**.
4. Select the languages you want to enable and clear those you want to disable.
5. Choose **Apply**.
6. When you're finished enabling and disabling languages, choose **Close**.

See Also

TechNet: Install and enable a Language Pack

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. Go to **Settings** > **Business Management**. (How do I get there?)

3. Click **Fiscal Year Settings**.
4. 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.
5. Click **OK**.

See Also

[Set up sales territories to organize business markets by geographical area]()

Set privacy preferences for an organization

Manage users' data privacy by controlling when to send error notifications, and also let users know how their privacy is protected by displaying your organization's own privacy statement instead of the one from Microsoft.

Important

This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises).

Interested in getting this feature? [Find your CRM administrator or support person]()

Set error reporting preferences for the organization

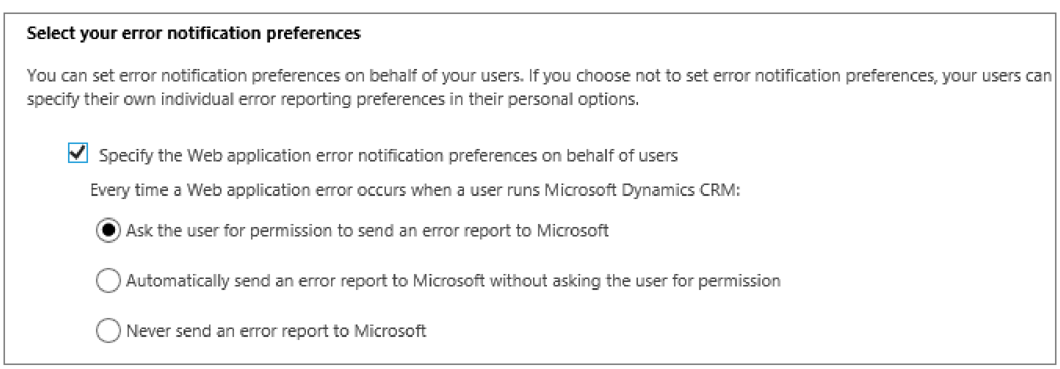
When errors occur in the product, data about the problem is sent to Microsoft. This data – an error report - allows Microsoft to track and address errors relating to Microsoft Dynamics CRM. You can help Microsoft improve products and services when you allow the system to send these error reports.

By default, individual users in Dynamics CRM have a measure of control over whether to send error reports to Microsoft. But you, as an administrator, can override their preferences and set up the error reporting preferences for the entire organization.

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.



of

When you use this setting, you can control error reporting for the entire organization by:

- Not allowing users to make changes in how error reporting occurs.
- Changing the default behavior for how error reporting happens.

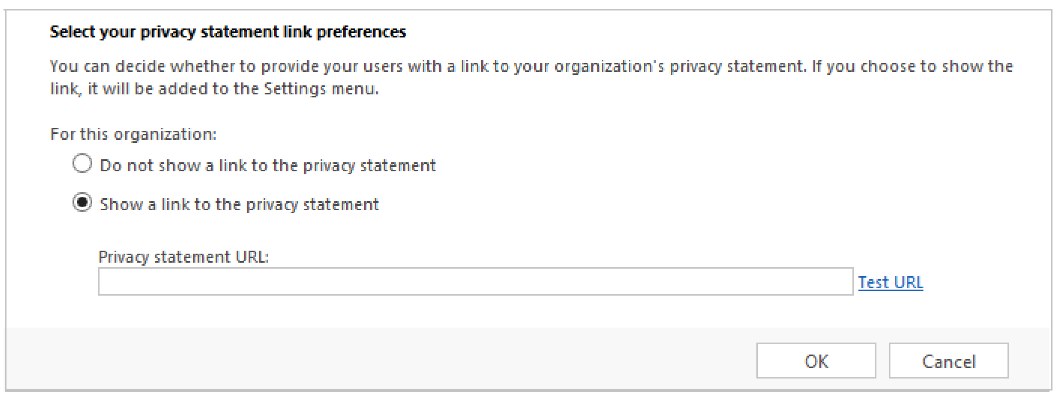
Replace the privacy statement for the organization

By default, the Microsoft privacy statement is always shown to users with an administrator role only, and not to other (business) users. As an administrator, you can add a link to specify your organization's privacy statement, which is then shown to other users in your organization.

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.



5. To make sure the link is correct, choose **Test URL**.

After you add the privacy statement URL, the link directs all Microsoft Dynamics CRM users to the specified link.

Note

Any user with the System Administrator security role will always see the Microsoft privacy statement and not the organization’s privacy statement.

See Also

Get Help from the Microsoft Dynamics CRM Community

Manage transactions with multiple currencies

Currencies determine the prices for products in the product catalog and the cost of transactions, such as sales orders. If your customers are spread across geographies, add their currencies in Microsoft Dynamics CRM to manage your transactions. Add the currencies that are most appropriate for your current and future business needs.

Add a currency

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. Go to **Settings** > **Business Management**. (How do I get there?)
3. Click **Currencies**.
4. Click **New**.
5. Fill in the information, as required.

Field	Description
Currency Type	**System** - Select this option if you want to use the currencies available in CRM. To search for a currency, click the **Lookup** button next to **Currency Code**. When you select a currency code, **Currency Name** and **Currency Symbol** are automatically added for the selected currency. • **Custom** - Select this option if you want to add a currency that's not available in CRM. In this case, you must manually enter the values for **Currency Code**, **Currency Precision**, **Currency Name**, **Currency Symbol**, and **Currency Conversion**.
Currency Code	Short form for the currency. For example,

	USD for United States Dollar.
Currency Precision	Type the number of decimals that you want to use for the currency. You can add a value between 0 and 4. **Note** If you've set a precision value in the **System Settings** dialog box, that value will appear here. More information: System Settings dialog box - General tab.
Currency Name	If you selected a currency code from the list of available currencies in CRM, the currency name for the selected code is displayed here. If you selected **Custom** as the currency type, type the name of the currency.
Currency Symbol	If you selected a currency code from the list of available currencies, the symbol for the selected currency is displayed here. If you selected **Custom** as the currency type, enter the symbol for the new currency.
Currency Conversion	Type the value of the selected currency in terms of one US dollar. This is the amount at which the selected currency converts to the base currency. **Important** Make sure you update this value as frequently as required to avoid any inaccurate calculations in your transactions.

6. When you're done, on the command bar, click **Save** or **Save and Close**.

Tip
To edit a currency, click the currency, and then enter or select the new values.

Delete a currency

1. Click **Settings** > **Business Management**.
2. Click **Currencies**.
3. From the list of currencies displayed, select the currency to delete.

Click **Delete**.

5. Confirm the deletion.

Important

You can't delete currencies that are in use by other records; you can only deactivate them. Deactivating currency records doesn't remove the currency information stored in existing records, such as opportunities or orders. However, you won't be able to select the deactivated currency for new transactions.

See Also

System Settings dialog box - General tab

Set personal options

Set up sales territories to organize business markets by geographical area

Improve sales potential and revenues by creating territories for customer and market segments in Microsoft Dynamics CRM. Then assign appropriate sales people to handle the sales and revenue opportunities for those territories.

Sales territories improve the sales potential because the members of a territory are focused on the services or sales within that territory. You can associate the financials directly with a territory and its members, which simplify business analysis. Also, based on the sales territory type and size, you can define sales methodologies and the training required for those locations.

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. Go to **Settings** > **Business Management**. (How do I get there?)

3. Choose **Sales Territories**.
4. On the command bar, choose **New**.
5. Fill in your information.
   - **Name**. Enter the geographical name for the territory such as the name of a city, country/region, or a state.
   - **Manager**. Enter the name of the user who is the manager for this territory. This person would typically assign leads to salespeople.

     Important
     You can't allocate the same user to multiple territories. If you need to assign a user to a larger area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory.
   - **Description**. Enter any details that you'd like to include for this territory, for example, "Sales territory created for education and training."
6. When you're done, on the command bar, choose **Save** or **Save and Close**.
7. To assign members to a sales territory, open the territory, and then in the left pane, under **Common**, choose **Members**.
8. On the **Users** tab, in the **Records** group, choose **Add Members**.
9. In the **Look Up Records** dialog box, select a user, and then choose **Add**.

Tip

To make your salesperson's job easier, you can also set a default price list for a territory. More information: Create price lists and price list items to define pricing of products

See Also

Nurture sales from lead to order

Set up Business Management options

Click one of the following links for information about settings on the Business Management Options page:

Work with fiscal year settings	Create or edit a goal
Set when your business is closed	Add facilities and equipment for service scheduling
Create or edit a queue	Create or edit a resource group
Set up sales territories to organize business markets by geographical area	Create or edit a service

Use sites to manage your service locations	Define subjects to categorize cases, products, and articles
Manage transactions with multiple currencies	Create connections to view relationships between records
Set up a relationship role to define family, social, or business relationships	Set up rules to automatically create or update records in CRM

Change auto-numbering prefixes for contracts, cases, articles, quotes, orders, invoices, and campaigns

Contracts, cases, articles, quotes, orders, invoices, and marketing campaigns are automatically numbered by Microsoft Dynamics CRM. If your organization has standard numbering formats, you can change the default three-character prefixes and number format to match your organization.

1. Go to **Settings** > **Administration** > **Auto-Numbering**.
2. In the **Set Auto-Numbering** dialog box, select the record type that you want to change.
3. In the **Prefix** box, enter up to three characters, symbols, or numbers.

   Prefixes are system-wide and are used for all system-generated numbers for the selected record type. If you change the prefix for a record type, it won't change the prefix of numbers that are already assigned.

   The prefix of the tracking token for email messages is set in the System Settings area. More information: System Settings dialog box - Email tab
4. In the **Number** box, enter the starting number.

   If you haven't set a numbering format before, the **Number** box displays 1000. After you set the numbering format and save your settings, this field is set to read-only and you can't modify it. If a custom auto-numbering solution was used, you won't be able to change the number.
5. Select a suffix length.

   Articles don't have suffixes. The suffix is used for records that were created while you were offline and for which the number can't be guaranteed to be unique.
6. Click **OK** to save your settings.

See Also

[Edit a solution publisher]

Integrate other apps with CRM

[Outlook or other email]

[SharePoint document management]

[Microsoft Social Engagement (social data)]

[Parature, from Microsoft (knowledge base)]

[OneNote]

[Skype or Skype for Business]

[Set up an activity feed or Yammer]

[Enable Office Delve]

[Insights for Microsoft Dynamics CRM - powered by InsideView]

Outlook or other email

[Synchronize email using server-side sync]

Synchronize email using server-side sync

[Set up email processing through server-side synchronization]

[Troubleshooting and monitoring server-side synchronization]

[Server-side synchronization isn't working for your mailbox]

[To use folder tracking, server-side synchronization must be enabled]

Set up email processing through server-side synchronization

You can use server-side synchronization to set up email processing. Server-side synchronization connects Microsoft Dynamics CRM with one or more Exchange servers or POP3 servers for incoming email, and one or more SMTP or Exchange servers for outgoing email. With server-side synchronization, you can centrally manage mailboxes and profiles, configure email for users and queues, and track errors about email processing.

You can also use server-side synchronization to synchronize appointments, contacts, and tasks between CRM and Outlook.

To learn more about setting up server-side synchronization, see [TechNet: Set up server-side synchronization of email, appointments, contacts, and tasks].

See Also

Synchronizing data with Outlook or Exchange FAQ

Troubleshooting and monitoring server-side synchronization

If your organization uses server-side synchronization for email processing, you can use the improved Server-Side Synchronization Performance Dashboard to monitor the health of mailboxes in your organization, and quickly troubleshoot problems. More information: TechNet: Troubleshooting and monitoring server-side synchronization.

See Also

Synchronizing data with Outlook or Exchange FAQ

Server-side synchronization isn't working for your mailbox

You're trying to track email using Exchange folder tracking, but server-side synchronization isn't working for your mailbox. Folder tracking requires that your email be synchronized using server-side synchronization. Contact your CRM administrator for help. More information: Find your CRM administrator or support person

For Admins

In addition to setting up server-side synchronization, you need to make sure the synchronization method for the user's mailbox is set to **Server-Side Synchronization or Email Router** for incoming email.

More information:

- For information about Exchange folder tracking, see Track Outlook email by moving it to a tracked Exchange folder.
- For admin information about setting up server-side synchronization, see TechNet: Set up server-side synchronization.

See Also

Track Outlook email by moving it to a tracked Exchange folder

TechNet: Set up server-side synchronization

To use folder tracking, server-side synchronization must be enabled

To use Exchange folder tracking, your email must be synchronized using server-side synchronization. Contact your CRM administrator for help. More information: Find your CRM administrator or support person

For Admins

The following table shows requirements for folder tracking and where to go to find more information.

Requirement	Resource
Set up server-side synchronization for email	TechNet: Set up server-side synchronization
Set the synchronization method for the user's mailbox record for incoming email to **Server-Side Synchronization or Email Router**	TechNet: Set up server-side synchronization
Configure Exchange folder tracking	TechNet: Configure Exchange folder tracking

See Also

Track Outlook email by moving it to a tracked Exchange folder

SharePoint document management

Set up SharePoint document management

Upgrade to server-based SharePoint integration

Enable SharePoint document management for specific entities

Create or add a location for the first time

Edit existing SharePoint site records

Create or edit document location records

Set up SharePoint document management

You can store the documents related to your Microsoft Dynamics CRM records in Microsoft SharePoint folders and manage the folders and documents in Microsoft Dynamics CRM. Integrating SharePoint document management with CRM makes it easier to access and share documents associated with your CRM records.

For information about setting up SharePoint integration by using a wizard, see TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

See Also

TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

Enable SharePoint document management for specific entities

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 integration. 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. More information: TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

See Also

TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

Enable SharePoint document management for specific entities

Enable SharePoint document management for specific 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.

Tip

If you're using Microsoft Dynamics CRM Online, and you haven't set up server-based SharePoint integration, you may want to do that before enabling document management for specific entities. For more information, see TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM. Or verify 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. Go to **Settings** > **Document Management**. (How do I get there?)
3. Choose **Document Management Settings**.
4. Select the entities that you want to use to manage SharePoint documents.
5. Enter the URL of the site where the document locations and folders for storing documents will be created, and then choose **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 CRM instances. For more information on server-based integration, see TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

If you're on CRM 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.

   Note

   The list component has been deprecated as of Microsoft Dynamics CRM Online 2015 Update 1. For information on converting from the List Component, see TechNet: Switching from the list component or changing the deployment.

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.

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.

6. To have the folders created under the parent account or contact, select the **Based on entity** check box. In the list next to the check box, choose **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, which in this case it the **Opportunity** entity.

7. Choose **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

Edit existing SharePoint site records

TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

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 collection in SharePoint, and the site record has the **List component is installed** check box selected.	**Add Document Location** opens with an option to specify either an absolute URL or a relative URL.	1. In the **Name** box, verify or type the name. The document location record is created in Microsoft Dynamics CRM with this name. 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. - OR - 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. 3. Click or tap**Save**.

Scenario	What appears	Next steps
There is one site record in Microsoft Dynamics CRM but the **List component is installed** check box is not selected.	**Add Document Location** appears with only the absolute URL option.	1. In the **Name** box, verify or type a name. The document location record is created in Microsoft Dynamics CRM with this name. 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. 3. Click or tap**Save**.
There is no existing location 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.	**Create SharePoint Location** appears.	Microsoft Dynamics CRM tries 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. Click or tap**OK**.

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]

Edit existing SharePoint site records

Store documents related to your Microsoft Dynamics 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 easy to access and share documents associated with your Microsoft Dynamics CRM records.

Tip

If you're using CRM 2013 SP1 or later, you can take advantage of server-based SharePoint integration between CRM Online and SharePoint Online. Server-based SharePoint integration provides an immersive document management experience consistent with the look and feel of Microsoft Dynamics CRM.

If you're using CRM Online or Microsoft Dynamics CRM 2016, you can use server-based SharePoint integration for on-premises and hybrid SharePoint deployments. For information about setting up server-based SharePoint integration using a wizard, see TechNet: Set up SharePoint integration with Microsoft Dynamics CRM

If you have already set up SharePoint document management, and want to edit your site records, use the following procedure.

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. Go to **Settings** > **Document Management**. (How do I get there?)

3. Click **SharePoint Sites**.
4. Select the site record you want to modify, and then click **Edit**.
5. Modify any of the following settings:
   - **Name**. Add or change the name for the site..
   - **Owner**. By default, the person who created the site is listed as the owner of the site record.
   - **Description**. Add or change the description for the site. For example, specify what documents the site contains.
   - **URL Type**. Specify 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**. Select 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 use the **Absolute URL** option.

  Tip

  The List component has been deprecated in Microsoft Dynamics CRM. For information on switching from the List component to server-based integration, see [TechNet: Switching from the list component or changing the deployment]()

6. Click **Save**.
7. Click **Save and Close**.

Note

To activate or deactivate a site record, on the SharePoint Sites page, select the site record, and then in the **Records** group, click **Activate** or **Deactivate**.

See Also

[TechNet: Set up SharePoint integration with Microsoft Dynamics CRM]()

[TechNet: Switching from the list component or changing the deployment]()

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. Go to **Settings** > **Document Management**. [(How do I get there?)]()

2. Choose **SharePoint Document Locations**.
3. Choose **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. Choose 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 choose **OK**.

5. Choose **Save and Close**.

Note

To activate or deactivate a document location, on the **Document Locations** page, select the document location record, and choose **Activate** or **Deactivate**.

See Also

[Set up SharePoint document management]

[Create or add a location for the first time]

Microsoft Social Engagement (social data)

[Add Social Engagement visuals to a dashboard or account]

[Set up your own searches for Social Engagement]

[Disable or enable social data for an organization]

[Connect your organization to Microsoft Social Engagement]

Add Social Engagement visuals to a dashboard or account

Microsoft Social Engagement 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.

Microsoft Dynamics CRM Online users can add Microsoft Social Engagement charts and visuals to dashboards, or you can add them to account, contact, or competitor screens. You can also add Microsoft Social Engagement charts and visuals to other types of records.

To help you get up and running quickly with Microsoft Social Engagement, 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 Engagement for Microsoft Social Engagement to monitor on social networks.

Create a Social Engagement 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 Engagement wizard, follow the steps for your role.

   If you're creating a dashboard for yourself

   a. Go to **Sales** > **Dashboards**. (How do I get there?)

   If you're an admin creating a dashboard for your whole organization

   a. Go to **Settings** > **Customizations**. (How do I get there?)
   b. Choose **Customize the System** > **Dashboards**.

2. Choose **New**.
3. Choose the layout to use for the dashboard, and then choose **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, choose the **Social Engagement** button ( ) on the dashboard layout.

6. On the **Set up Social Insights** page, choose **Search topic**, and then choose **Next**.
7. In the **Search topics list**, select the list of terms to listen for, and then choose **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, choose **Add visual**, and then select another chart or visual from the list.

9. Choose **Finish**.
10. Choose **Save**, and then choose **Close**. If you're the CRM admin, on the command bar, choose **Publish** so that other people can use the dashboard.

Add a Social Engagement 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 Engagement charts or visuals to contacts, competitors, or other types of records.

1. Go to **Sales** > **Accounts**. [(How do I get there?)]

2. You'll see a list of accounts. You may need to scroll to see the whole list.
3. Choose the account you want.
4. To start the Social Engagement wizard, choose **Configure Social Insights**.
5. On the **Set up Social Insights** page, choose **Search topic**, and then choose **Next**.
6. In the **Search topics list**, select the list of terms to listen for, and then choose **Next**.
7. 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, choose **Add visual**, and then select another chart or visual from the list.

8. Choose **Finish**.

See Also

Get ready for the next release

Set up your own searches for Social Engagement

To help you get up and running quickly with Microsoft Social Engagement, 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 Engagement to monitor different search terms, you can use a wizard to set up your own searches.

Set up your own search on a social Engagement 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. Go to **Sales** > **Dashboards**. (How do I get there?)
2. Choose **New**.
3. Choose the layout to use for the dashboard, and then choose **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, choose the **Social Engagement** button ( ) on the dashboard.

6. On the **Set up Social Insights** page, choose **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 Engagement 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").

7. Choose **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 find the one you want.

   Tip
   To add more than one chart or visual, choose **Add visual**, and then select another chart or visual from the list.

9. Choose **Finish**.

10. Choose **Save**, and then choose **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 Engagement charts or visuals to contacts, competitors, or other types of records.

1. Go to **Sales** > **Accounts**. (How do I get there?)
2. You'll see a list of accounts. You may need to scroll to see the whole list.
3. Choose the account you want.
4. To start the wizard, choose **Configure Social Insights**.
5. On the **Set up Social Insights** page, choose **Search topic**, and then choose **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 Engagement 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").

6. Choose **Next**.
7. 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, choose **Add visual**, and then select another chart or visual from the list.
8. Choose **Finish**.

See Also

Add Social Engagement visuals to a dashboard or account

Get ready for the next release

Disable or enable social data for an organization

With Microsoft Dynamics CRM, 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. More information: TechNet: Control social data

See Also

TechNet: Control social data

Automatically create a case from an email

Connect your organization to Microsoft Social Engagement

You can monitor—right on a Microsoft Dynamics CRM screen—what people are saying on Facebook, Twitter, or blogs.

TechNet: Connect to Microsoft Social Engagement

eBook: Microsoft Social Engagement for CRM

Add Social Engagement visuals to a dashboard or account

Set up your own searches for Social Engagement

Microsoft Social Engagement Help Center

Microsoft Social Engagement Forum

Parature, from Microsoft (knowledge base)

Set up knowledge management in CRM

Add a Knowledge Base search pane to a CRM form

Find knowledge articles from within a record in CRM

Unified Service Desk – Knowledge Management package

Set up knowledge management in CRM

Make important information about your products and services available to your Microsoft Dynamics CRM users in the form of knowledge articles.

We now support a native knowledge solution in Microsoft Dynamics CRM, in addition to the knowledge base in Parature, from Microsoft. The CRM knowledge solution guides users through the process of creating rich articles and publishing them. For more information, see Reduce call handling times with rich knowledge articles in the User's guide for the new interactive service hub.

Important

For Microsoft Dynamics CRM Online organizations, the native knowledge solution feature is only available if you've installed the CRM Online 2016 Update. For on-premises CRM organizations, this feature is only available if you've updated to CRM 2016. Interested in getting this feature? Find your CRM administrator or support person.

While setting up knowledge management in CRM, you can select the types of records users can search for knowledge articles. You can also define the knowledge solution to use for your organization.

To learn more about setting up knowledge management, see TechNet: Connect Microsoft Dynamics CRM to Parature knowledge base.

See Also

Knowledgebase module in Parature, from Microsoft

TechNet: Connect Microsoft Dynamics CRM to Parature knowledge base

Add a Knowledge Base search pane to a CRM form

Make the knowledge articles (KB) available to your Microsoft Dynamics CRM users in the records they're working on. When you add the knowledge base search pane to a CRM form, users will be able to search for relevant knowledge articles from CRM, and also quickly share the right information with customers.

To learn more about adding the knowledge base search pane, and setting its properties, see TechNet: Add the Knowledge Base Search control to Microsoft Dynamics CRM forms.

See Also

What's new

TechNet: What's new for administrators and customizers in Microsoft Dynamics CRM 2015 and CRM Online

Find knowledge articles from within a record in CRM

For any customer service team, it's important to give their customers the right information at the right time. After your administrator sets up knowledge management for your organization, you can search for articles while working on a customer's case or other records in Microsoft Dynamics CRM, give customers accurate and consistent information, and also deflect frequently-asked questions. With rich knowledge at your fingertips, you're likely to spend less time finding information, potentially reducing issue handling time and increasing customer satisfaction.

Microsoft Dynamics CRM supports two knowledge management solutions:

- Native CRM knowledge management: This option is available for both CRM Online and on-premises users. For Microsoft Dynamics CRM Online organizations, the native CRM knowledge solution is only available if you've installed the CRM Online 2016 Update. For on-premises CRM organizations, this feature is only available if you've updated to CRM 2016.
- Parature knowledgebase: This option is available only for CRM Online users. This feature was introduced in CRM Online 2015 Update 1.

Interested in getting this feature? Find your CRM administrator or support person.

Depending on the knowledge solution your organization chooses, you'll see knowledge articles residing either in Microsoft Dynamics CRM or in Parature.

The search options that you get while you search for knowledge articles will differ based on the knowledge management solution your organization is using.

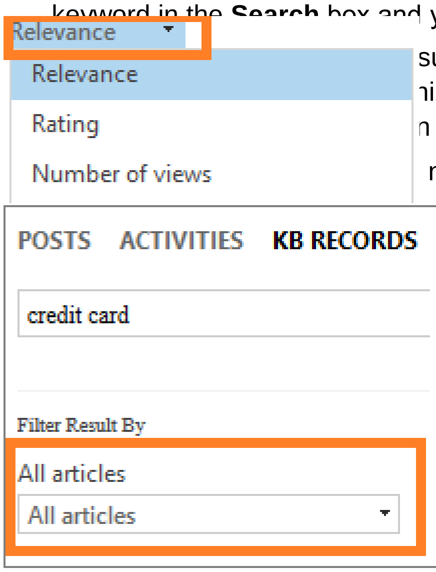
1. Go to **Service** > **Cases**. (How do I get there?)
2. Open a case record.
3. On the Activity wall, click **KB Records**.

   You'll see a list of suggested knowledge articles based on the case title. You'll also see a short blurb of the article along with its rating and number of views the article had.

   If an article is still in draft or is expired, you'll see its status before the title, so you know if you really want to share the article with the customer.

   Important

   - If your organization uses the Parature knowledgebase, the search results are filtered and shown based on the default language of your Parature department. To view or edit the default language of your Parature department, in Parature Service Desk, go to **Setup** > **Department Management** > **Department Profile**.
   - If you see a message that Knowledge Management hasn't been set up, ask your system administrator to set it up for you.
4. If you want to search the knowledge articles for a different keyword, start typing the keyword in the **Search** box and you'll start seeing matching results as you type.



sults, in the **Select how to sort results** drop-down list, ization is using the Parature knowledgebase, you can relevance, rating, number of views, or modified date.

native CRM knowledge management solution, the option not available.

Filter Result By drop-down list, select a filter.

ledgebase, you can filter the search results to show all blished articles.

   If you're using the native CRM knowledge management solution, you can filter the search results to show all draft articles, all approved articles, or all published articles.
7. To see the full content of the article, select the article name link.

   You'll be able to see the full content of the article along with images and videos, if the article has any.

8. You can take the following actions on the search results:

To associate a knowledge article with the current case, select a knowledge article, and click the **Link the KB article to the current case** button. Microsoft Dynamics CRM adds the associated knowledge article to the **Associated Knowledge Base records** section. This association helps customer service managers determine which knowledge articles were effective in resolving cases.

You can also choose to disassociate the article from the case by clicking the **Unlink the KB article from the current record** button.

To copy the external URL of the article so you can share it with your customers over channels like chat or email, click the **Copy Link** button. This option is available only if you are using Internet Explorer.

Note

If you don't see a URL when you try to paste it, it could be because the article is still in draft state or is expired.

If you're using the native CRM knowledge management solution, the Copy Link option is available only for published articles.

To associate an article with a case and share the article link with the customer through email, click the **Link the KB article to the case and email the link to the customer** button. An email form opens with the **To** field automatically filled with the customer's informaton and the link added to the email body. Fill in any additional details, and then click **Send**.

This action also associates the knowledge article with the case automatically.

If you're using the native CRM knowledge management solution, the **Email Link** option is available only for published articles.

For published articles, an external link is copied to the email body.

If you're using the native CRM knowledge management solution, and if your administrator has not selected the **Use an external portal** option when setting up knowledge management, the **Email Link** option will insert the content of the article into the email body instead of inserting the link.

If you're using the native Parature knowledgebase, and if the article is a draft, an internal Parature Service Desk link will be copied into the email. The customer may not be able to view this knowledge article.

To open the article in a new window, click the **Pop Out** button.

See Also

Create and manage a case

Unified Service Desk – Knowledge Management package

Unified Service Desk for Microsoft Dynamics CRM provides a configurable framework for quickly building applications for call centers so the customer service reps get a unified view of the customer data stored in Microsoft Dynamics CRM or any other application.

If you’re a service rep, you can use Unified Service Desk to offer your customers a reliable and consistent experience across a number of different channels including phone, email, and chat, and can also serve multiple customers simultaneously through sessions. A system administrator in your organization can integrate Unified Service Desk with many other applications that you use on a day-to-day basis so you can get your work done from your desktop without switching to different applications.

The Unified Service Desk Knowledge Management sample application package provides a configuration for integrating Microsoft Dynamics CRM with the Parature knowledge base that lets you easily search for articles from your desktop and share them with customers right away, reducing call handling times and improving customer satisfaction.

Important

The sample applications are not supported for production use.

This sample application is useful only if you have set up knowledge management for Microsoft Dynamics CRM. More information: TechNet: Connect Microsoft Dynamics CRM to Parature Knowledge Base

With the Unified Service Desk Knowledge Management package, the following components are installed:

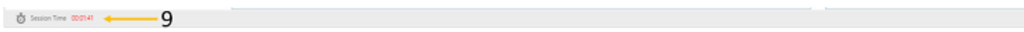
- User Interface Integration Solution
- Unified Service Desk Solution
- Data required for Microsoft Dynamics CRM and customizations
- Configurations for integrating Unified Service Desk with knowledge management

For more information on how to set up and administer Unified Service Desk, see the TechNet:Administration Guide for Unified Service Desk.

Here’s what you’ll see when you install Unified Service Desk:

1. **Dashboards**: Opens the CRM customer service dashboard.
2. **My Work**: Shows a list of all the active cases assigned to a service rep.
3. **Search**: Opens search for navigating through various entities. For this package you can search for accounts contacts, cases, activities, and queues.
4. **Session tabs**: Each tab shows a different session when you have multiple customer sessions open. The tabs make it easy for reps to work on multiple customer cases.
5. **Left pane**: When you open any session, the left pane area automatically opens and shows the call script for the session. You can open or collapse this pane.
6. **Right pane**: When you open any session, the right pane automatically opens and lets you search for knowledge base articles.
7. **Call Script**: Shows call scripts that the service rep can use when they’re working on a case. The scripts help guide the rep by giving them step-by-step instructions on how to handle the case.
8. **Notes**: Shows an area to take notes in regarding the case.

9. **Session timer**: Shows how long a service rep has been on the session.



View your cases

- From the toolbar, click **My Work** to see all of your cases.

Create a case

Look up the contact information.

1. From the toolbar, click **Search**.

   An application tab opens with a list of records.
2. In the **Search for records** box, enter the account or contact information.
3. When you find the information, click 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 open a call script, a green check mark 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 **Update notes** from call scripts.

Search for solutions

To help you resolve a case, use knowledge base articles to find a solution.

1. From the **Call script** area, click **Search for a solution**.

   The **KB Records** pane shows search results based on the title of the case. By default, the pane is configured to open in the right panel, but you can talk to your administrator to open this pane in the left or main panel.
2. To do a different search, use the **Search** box to type a keyword and search for other articles.
3. In the search results, select the article by choosing the article blurb, and do one of the following:

- To copy the URL of the article, click the **Copy Link** button. You can then paste it in the chat session with customers or in the email body.

  Note
  If you don't see a URL when you try to paste it, it could be because the article is still in the draft state or is expired.

- To send the link of the article to a customer, click the **Send Email** button.

  An email template opens with data populated in it.
- To link the article with the case, click the **Link Article** button.

Linking articles to cases helps in determining what articles were effective in resolving cases. You can also dissociate the article from the case by clicking the **Remove Link** button.

- To open the article in a new tab in the main panel and read its content, click the title of the article.

  All actions like **Copy Link** or **Send Email** are available on this new tab.

- Additionally, to open the article in a new browser window, click the **Pop Out** button. This button is available only in the main panel and is particularly useful when you're using multiple monitors. You can pop out an article and view it on a second monitor so that you can continue to use the first monitor to work on the case or take notes. While going through the article, you can click a link to go to a different page, and use the **Back** button to go back to the original article.

  Tip
  Your system administrator can also set up the Search control to search automatically based on certain criteria as soon as you open a session. To know more about this, talk to your system administrator.

Send an email

- From the list of call scripts, select the **Send email** call script, and then select a template that automatically populates the body of the email.

Update the notes

- Enter your case notes in the **Notes** area.
- From the list of call scripts, select the **Update the notes** call script. This will attach the notes you've taken during your conversation with the customer to the **Notes** tab of the case record in Microsoft Dynamics CRM.

Close the session

From the list of call scripts, select the **Close the session** call script. This will close the open session and collapse the left panel that shows the call script and right panel that lets you search KB articles.

See Also

TechNet: Administration Guide for Unified Service Desk

OneNote

Set up and use OneNote in CRM

Set up and use OneNote in CRM

Gather your thoughts, ideas, plans and research in one single place with OneNote in Microsoft Dynamics CRM.

When you turn on Microsoft OneNote integration in Microsoft Dynamics CRM Online, you have the benefits of using OneNote to take or review customer notes from within your CRM records.

You can configure OneNote in CRM Online when you're also using SharePoint Online. You must have a subscription to Office 365 to use OneNote in CRM Online.

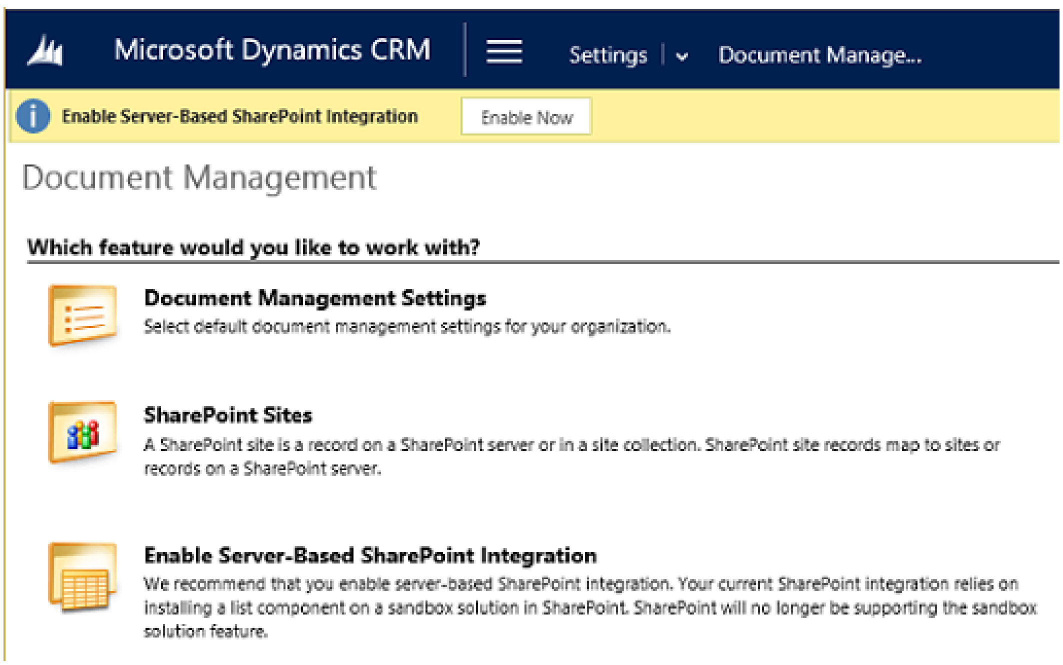
Step 1: Turn on server-based SharePoint integration

Before you can enable OneNote integration, you need to turn on server-based SharePoint integration.

Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM. Or, make sure that you have Read and Write privileges on all record types that are customizable.

Check your security role

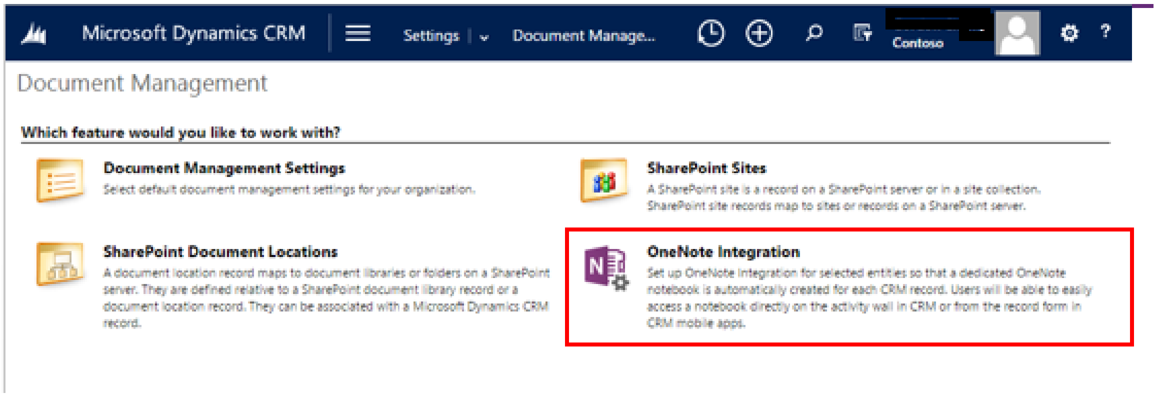
- Follow the steps in View your user profile.
- Don't have the correct permissions? Contact your system administrator.



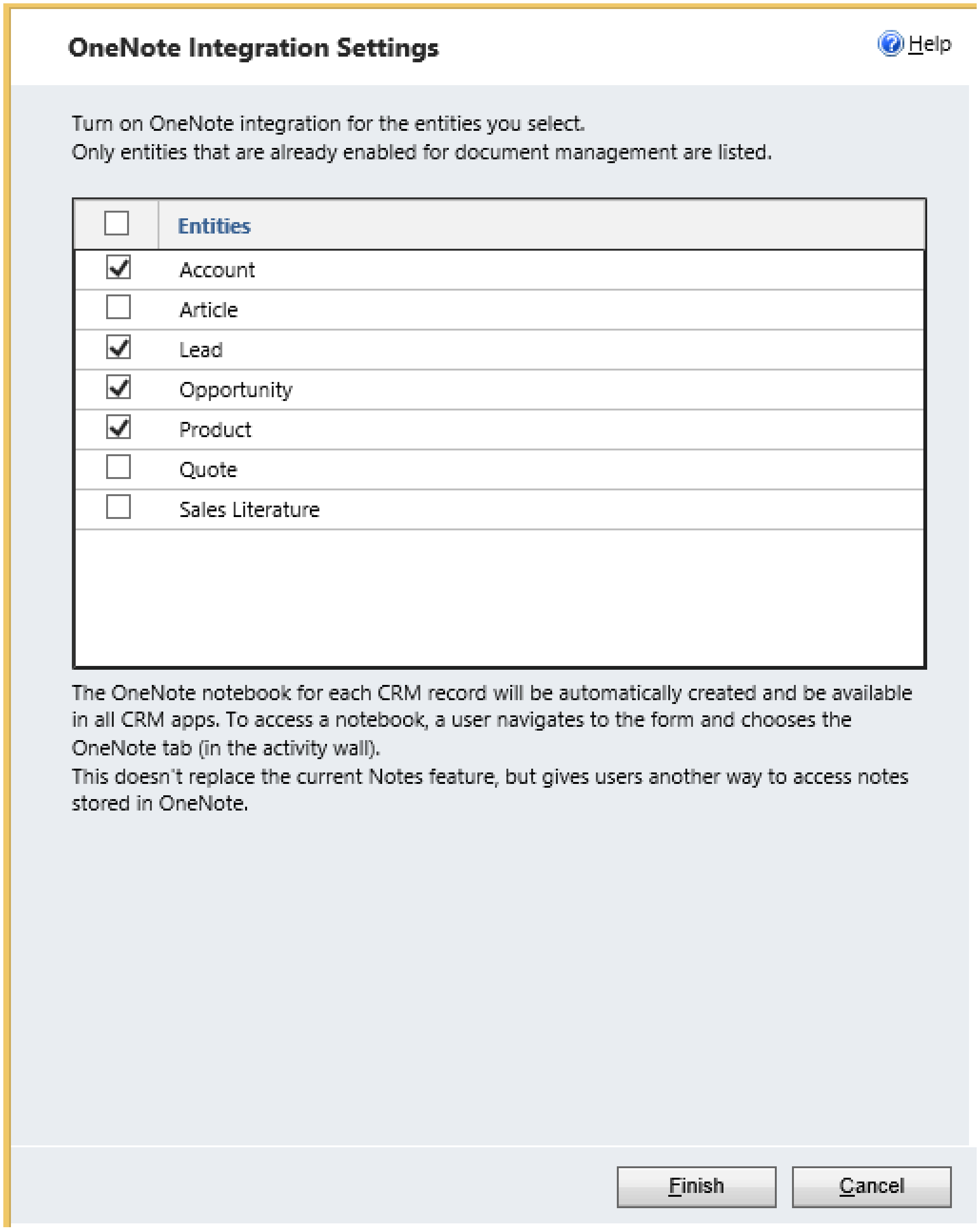
Step 2: Turn on OneNote integration

When server-based SharePoint integration is turned on, OneNote integration is listed in **Document Management**.

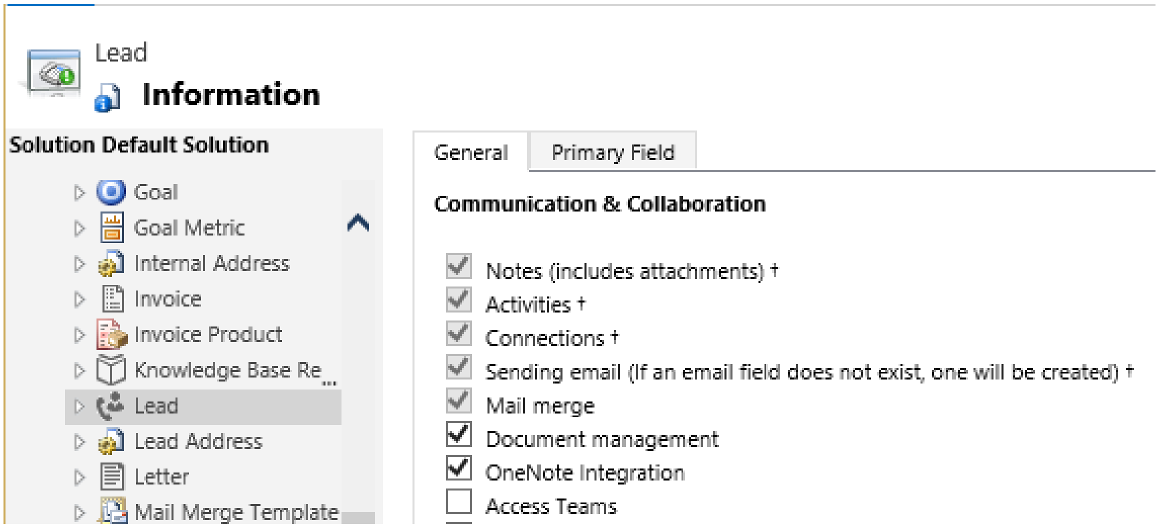
1. Go to **Settings** > **Document Management**. (How do I get there?)
2. Choose **OneNote Integration**.



3. Follow the instructions in the wizard to turn on OneNote integration for selected entities. Choose entities that need a full notebook per record. Only entities that are already enabled for document management are listed. Choose **Finish**.



4. You can also enable OneNote integration for an entity from the customization form, as long as document management has been enabled for that entity.



5. A OneNote notebook is automatically created for a record the first time you select the **OneNote** tab in the activities area in Microsoft Dynamics CRM Online. Once the dedicated OneNote notebook is created for that CRM record, you can view and navigate to that notebook from any CRM client.

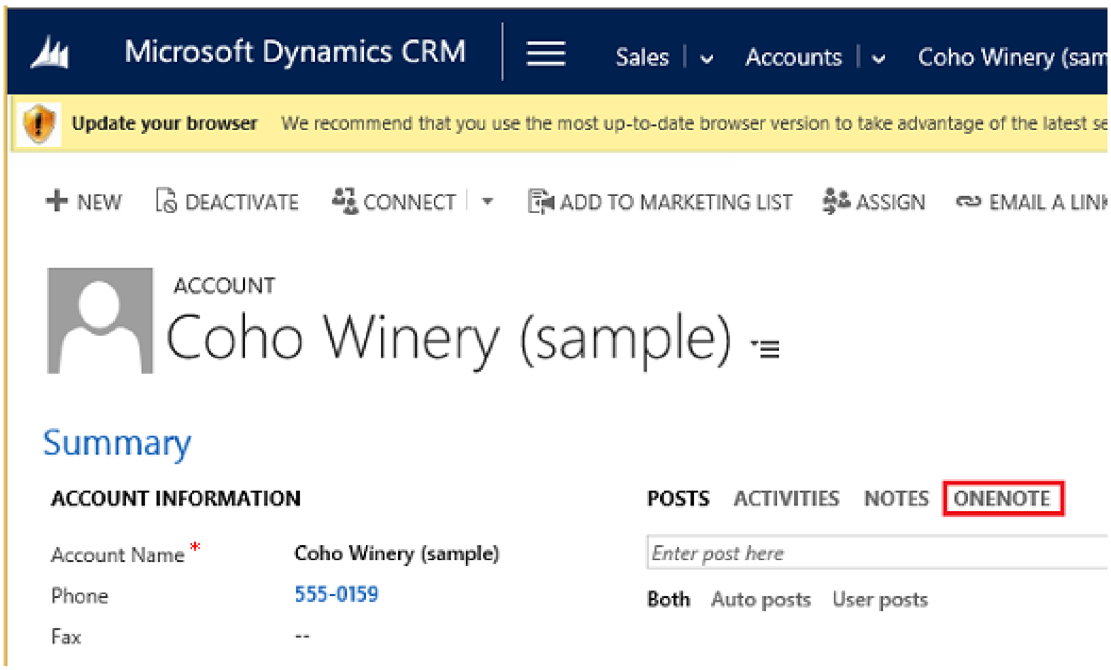
Step 3: Use OneNote in CRM Online

You can easily access a notebook directly from the activities area in CRM Online. This doesn't replace the current Notes feature, but gives you another way to access notes stored in OneNote.

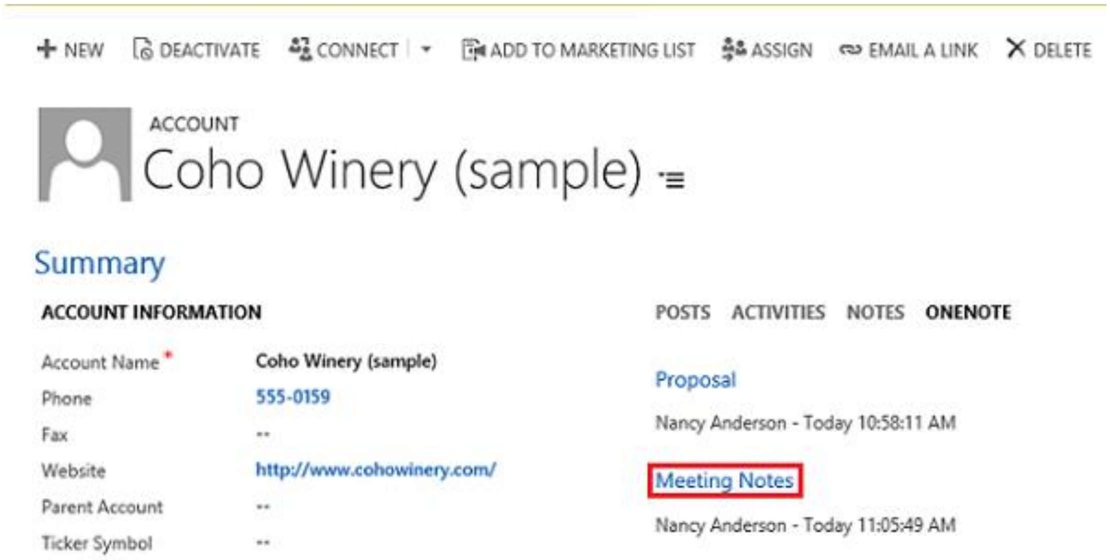
When you add a OneNote section to a notebook, it's shown individually within CRM and in order of last modified time.

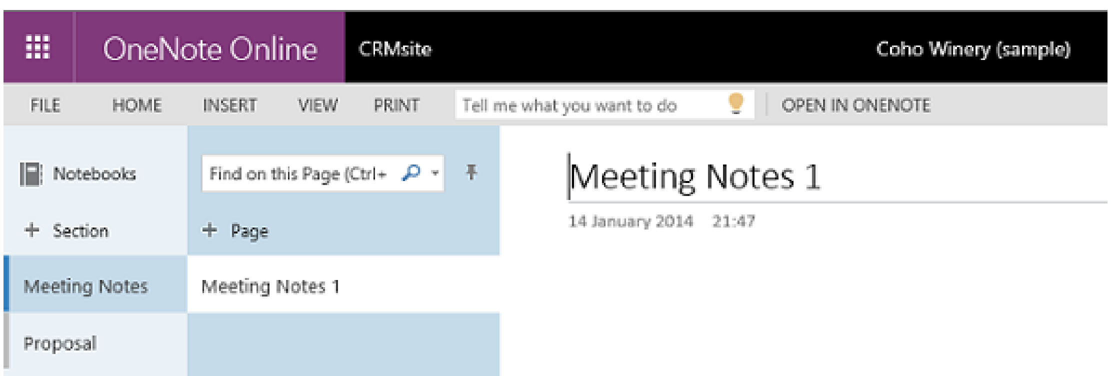
Note
If you aren't signed in to Office 365, you'll go to the Office 365 sign-in page when you select the title of the OneNote notebook. When you sign in, you'll go directly to the notebook.

1. In the activities area of a record, select **OneNote**.

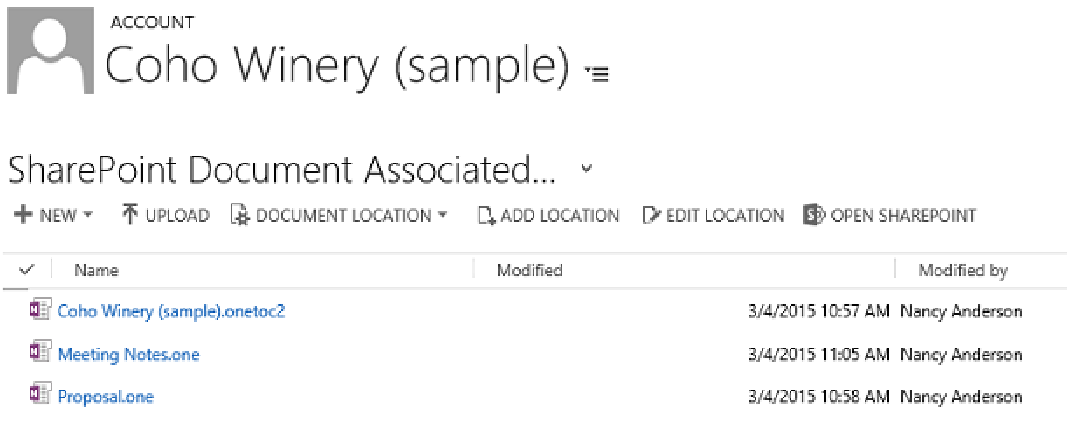


2. Select a notebook to make entries.





3. The notebook is stored in the associated SharePoint folder for the record. If there is more than one associated folder, the notebook is created in the first folder.

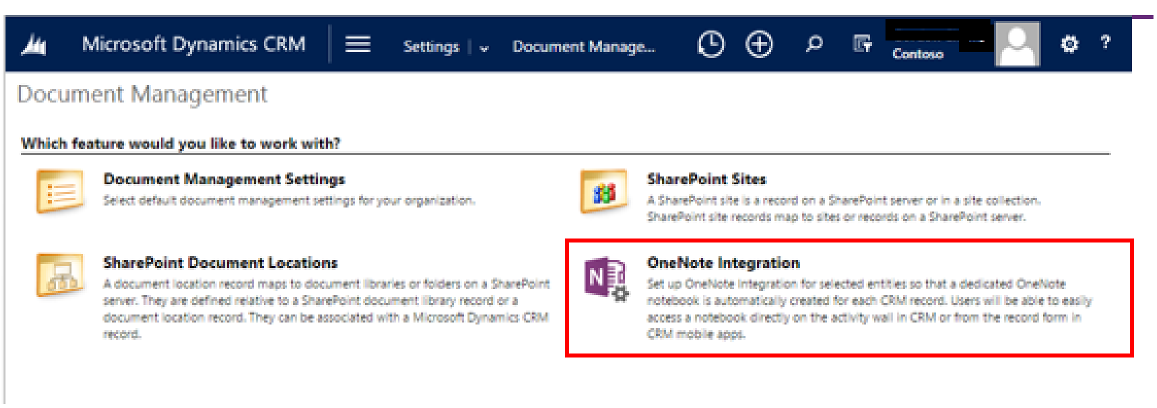


Note

- You can't edit the OneNote file from within CRM. This can be done only from the OneNote app that opens when you choose the OneNote link.
- Don't delete any OneNote. onetoc2 or .one file types in the **OneNote** section in CRM. If you do, you won't be able to access your CRM OneNote notebook.
- Sections groups that keep related sections together in OneNote aren't supported in CRM.
- You can only rename a section in the desktop version of OneNote. If you rename a section in OneNote online, you won't see the updated section name in CRM.

Optional: Turn off OneNote integration

4. 0.1. Go to **Settings** > **Document Management**. [(How do I get there?)]
2. Choose **OneNote Integration**.



3. In the **OneNote Integration Setting** dialog box, uncheck all the entities and then choose **Finish**.

See Also

OneNote in CRM FAQs

Turn on server-based SharePoint integration

Blog post: OneNote in CRM

Skype or Skype for Business

Set up Microsoft Dynamics CRM to make calls with Skype or Skype for Business

Set up Microsoft Dynamics CRM to make calls with Skype or Skype for Business

If your organization is set up to use Skype or Skype for Business (formerly Lync), you can call your contacts from within Microsoft Dynamics CRM by clicking the person's phone number. This capability is called "click to call."

Note

Lync has been rebranded as Skype for Business. Currently, you'll still see references to "Lync" in Microsoft Dynamics CRM, but CRM will work with Skype for Business.

There are a few areas where system administrators configure settings for this feature.

Users install Skype themselves. You set up Skype for Business and make it available to users.

For more information, see TechNet: Skype for Business and Skype integration with Microsoft Dynamics CRM and TechNet: Set up CRM Online to use Skype or Skype for Business

Supported versions of Skype and Skype for Business

These versions of and Skype, Lync, and Skype for Business are supported:

- Microsoft Lync 2010 or Microsoft Lync 2013
- Skype 6.0
- Skype for Business

Set whether your organization uses Skype or Skype for Business

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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click **System Settings**.
4. On the **General** tab, under **Set the telephony provider**, for **Select provider for Click to call**, select **Skype** or **Skype for Business**/**Lync**.
5. Click **OK**.

Set your organization's prefix for phone numbers

For people to place Skype or Skype for Business 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click **System Settings**.
4. 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).
5. Click **OK**.

See Also

TechNet: Skype for Business and Skype integration with Microsoft Dynamics CRM

TechNet: Set up CRM Online to use Skype or Skype for Business

Set up an activity feed or Yammer

Administer the activity feed

Connect Microsoft Dynamics CRM to Yammer

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

Connect Microsoft Dynamics CRM to Yammer

Yammer is a private social network that gives colleagues at your organization a central place to post 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, and then connect your organization to Yammer. More information: TechNet: Connect Microsoft Dynamics CRM to Yammer

Visit the Yammer website

Enable Office Delve

Office Delve in CRM is a new way to find and discover relevant and trending documents across your organization. Delve searches across your company and uses Azure Machine Learning to provide a view of the documents you're most interested in based on who created, viewed, edited, or shared the documents. Delve is a new dashboard component that can be added to any user or system dashboard so you can see trending information from within CRM.

To use Delve, your system administrator must first enable it. For more information about enabling and using Delve, see:

- TechNet: Enable Office Delve
- View relevant and trending information with Office Delve

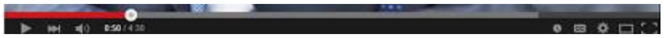
Insights for Microsoft Dynamics CRM - powered by InsideView

Boost your sales close rates with information that will help you find, understand, and engage more qualified buyers. The Insights pane lives on your Microsoft Dynamics CRM accounts, contacts, leads, and opportunities forms, where it pulls in company, contact, and social data from thousands of constantly-updated sources.

Insights helps you make quick work of prospecting, connecting, and best of all closing, because you can:

- Instantly qualify prospects with high quality company data.
- Save hours of research time with up-to-the-minute company news and social media buzz at your fingertips.
- Start a conversation with a target buyer by noting mutual acquaintances, past employers you have in common, or schools you both attended.
- Learn about your prospects and customers through 360-degree profiles and real-time updates from LinkedIn, Twitter, Blogs, and other social media.

Insights is available as a preferred provider solution that your administrator can add from the Office 365 CRM Online Administration Center. It's included at no additional charge in all Microsoft Dynamics CRM Online Professional and Enterprise paid licenses in North America. Mexico is not supported.



Get started

[CRM Insights user guide]

[Install Insights for Dynamics CRM]

For Sales reps

[Effective B2B selling with Insights]

More info

[InsideView home page]

[Insights training]

FantasySalesTeam from Microsoft

FantasySalesTeam, from Microsoft is a simple yet powerful sales gamification application that has helped hundreds of companies boost sales productivity, drive revenue, and improve Microsoft Dynamics CRM adoption through collaboration and team-based competition. FantasySalesTeam goes beyond basic gamification by providing a platform that allows anyone in an organization to “draft” a team of players, for example, a group of employees, across specific positions. Each employee on the team earns points for the metrics that their manager selects, such as making calls, finding leads, creating new opportunities, or closing deals.

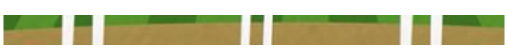
FantasySalesTeam creates a fun environment that keeps sales reps engaged, helping to increase overall CRM adoption and drive greater results.

Here’s why FantasySalesTeam works:

- Team-based competition gets reps pushing on each other and investing in the success of those around them through team-based competition.
- Measurable goals and clearly-defined metrics drive activity, performance, and behavior by setting goals and defining metrics.
- Multiple and multi-tiered awards you create keep your sales reps engaged.
- Results are highly visible through leaderboards, dashboards, TV monitors, and emails.
- The concept of “fans” gets executives, managers, marketing, operations and other non-sales employees involved.

Note

FantasySalesTeam, from Microsoft is a preferred provider solution. Ask your administrator to add it from the Office 365 admin center page.



Get started

[Case Study for FantasySalesTeam]

[Acquisition Announcement]

[Install FantasySalesTeam]

More info

[FantasySalesTeam website]

[Forum support]

FieldOne from Microsoft

FieldOne, from Microsoft empowers customers to execute their field service management strategy by enhancing the efficiency and effectiveness of valuable resources. Its set of configurable tools includes centralized scheduling and dispatching, native mobile apps, and integrated back-office functions. The FieldOne solution improves customer satisfaction rates, enhances productivity, and drives revenue.

Why FieldOne works:

- Improves customer experience by giving users quick and reliable access to customer information.
- Provides mobile field resources to enhance your total value and create new revenue opportunities.
- Facilitates more work orders and resources with fewer dispatchers while empowering users to act quickly upon changing schedules, demand changes, and emergencies.
- Increases first time fix rates and on-time delivery performance.

> **Note**
> This solution is available as a preferred provider solution that your administrator can add from the Office 365 CRM Admin Center.

Get started

[eBook: Overview of FieldOne]

[eBook: FieldOne for Mobile]

[eBook: Business Intelligence with FieldOne]

Customer Experience Story (2:38)

More info

[FieldOne Website]

[Sign-up for Training]

[Forum Support]

[Partner Portal](#)

Create dashboards, charts, and reports

Dashboards and charts [folder]

Reports

Manage data

[Manage your data (for admins)](#)

[Add or remove sample data](#)

[Set up duplicate detection rules to keep your data clean](#)

[Turn duplicate detection rules on or off for the whole organization](#)

[Run bulk system jobs to detect duplicate records](#)

[Delete bulk records](#)

[View and take action on bulk deletion jobs](#)

[Monitor and manage system jobs](#)

[Check for duplicate contacts, accounts, or leads](#)

[Perform key business calculations with rollup fields](#)

[Automate manual operations with calculated fields](#)

[Create formulas for calculated fields](#)

Manage your data (for admins)

Select the data management topic you're interested in:

[Turn duplicate detection rules on or off for the whole organization](#)

[Set up duplicate detection rules to keep your data clean](#)

[Run bulk system jobs to detect duplicate records](#)

[Delete bulk records](#)

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

[Download a template for data import](#)

[Add or remove sample data](#)

[Add ready-to-use business processes](#)

[Secure sensitive data by enabling encryption](#)

[Export customized entity and field text for translation](#)

Import translated entity and field text

Add or remove sample data

Sample data gives you something to experiment with as you learn Microsoft Dynamics CRM, and helps 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. Go to **Settings** > **Data Management**. (How do I get there?)

3. Click **Sample Data**. You'll see a message that tells you whether the sample data is currently installed.
4. Do one of the following:

   Click **Remove Sample Data**, and then click **Close**.

   -OR-

   Click **Install Sample Data**, and then click **Close**.

See Also

Create or edit a contact

Create or edit an account

Create or edit an opportunity

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. Go to **Settings** > **Data Management**. (How do I get there?)
3. Choose **Duplicate Detection Rules**.
4. To create a new duplicate detection rule, choose **New**. Type a name and description.

   –OR–

   To edit an unpublished existing duplicate detection rule, choose the duplicate detection rule.

   –OR–

   To edit a published duplicate detection rule, select the rule. On the **Actions** menu, choose **Unpublish**, and then choose the rule.
5. 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, choose the type of record that this rule applies to. For example, select **Contacts**.
      - In the **Matching Record Type** box, choose 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, choose **Select**, and then choose a field name. In the same row, in the **Matching Record Field** column, choose **Select**, and then choose a field name.

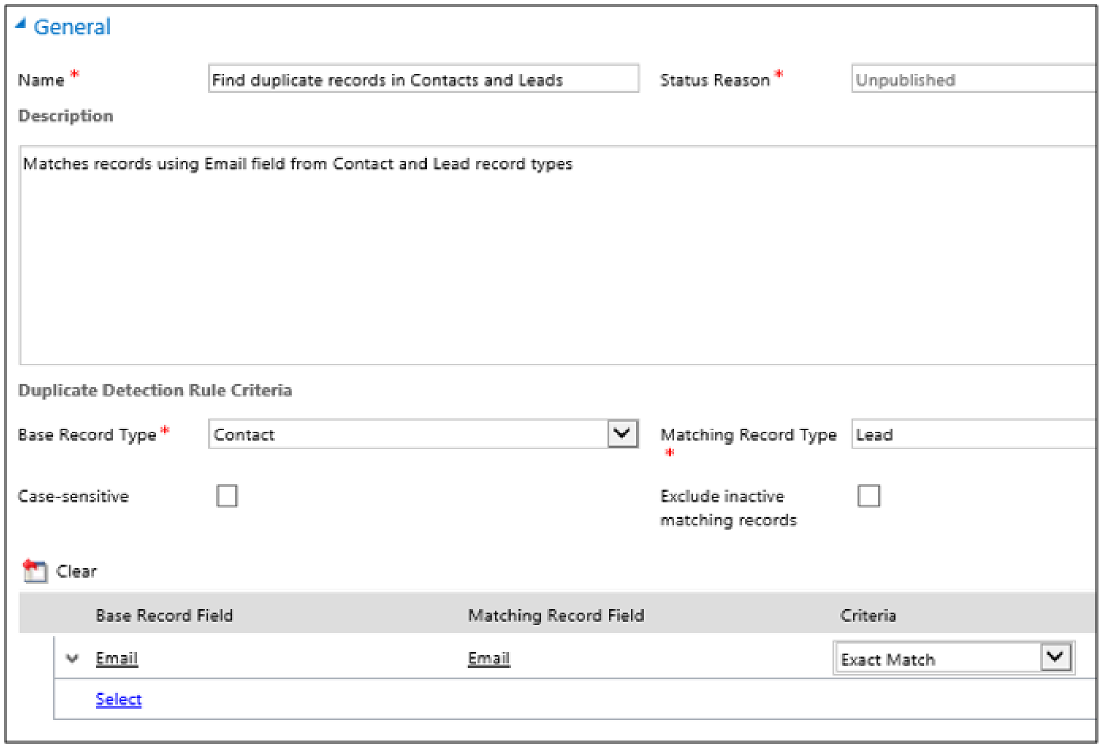
   - OR -

   If you selected the same record types for the base and matching record types, for each new criterion, in the **Field** column, choose **Select**, and then choose a field.
e. In the same row, in the **Criteria** column, choose **Select**, and then choose an operator. For example, select **Exact Match**.
f. If you specified **Same First Characters** or **Same Last Characters**, in the **No. of Characters** column, choose **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.



6. When you're finished adding criteria, choose **Save and Close**.
7. To make the new or changed duplicate detection rule usable, select the rule, and then choose **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]()

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. Go to **Settings** > **Data Management**. (How do I get there?)

3. Choose **Duplicate Detection Settings**.
4. 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.
5. 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, choose **File > CRM > Options**. Choose 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

6. Choose **OK**.

See Also

Set up duplicate detection rules to keep your data clean

Synchronizing data with Outlook or Exchange FAQ

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

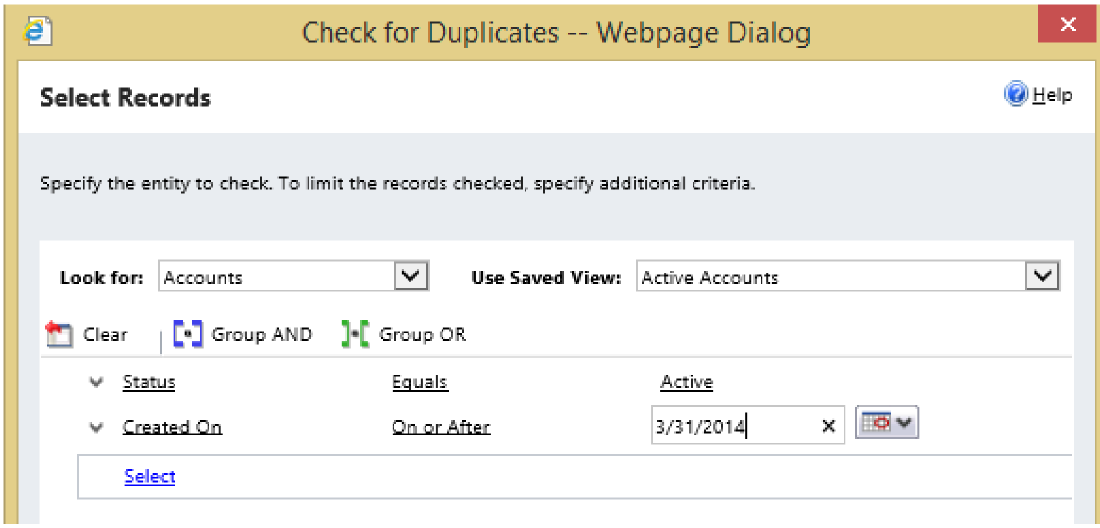
1. Go to **Settings** > **Data Management**. (How do I get there?)
2. Click **Duplicate Detection Jobs**.
3. Click **New**, or select the name of the duplicate detection job you want to run.

   You'll see the Duplicate Detection wizard, which helps you create a job to check for duplicates.
4. Click **Next**.
5. 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]

6. 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 the criteria to search on.
7. To further limit the records searched, click **Select** and then enter the criteria you want.



8. Click **Next**.
9. Accept the default name for the job, or type a different name.
10. Enter the start time for the job, and enter how often to run the job in days. (To run the job daily, type *1*.)
11. 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.
12. Click **Next**, and then click **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

TechNet: Detect duplicate data

Delete bulk records

It's a good idea to occasionally do bulk deletions to maintain data quality and manage system storage in Microsoft Dynamics CRM. For example, do bulk deletions to remove:

- Stale data
- Data that's irrelevant to the business
- Unneeded test or sample data
- Data that was incorrectly imported from other systems

For more information, see TechNet: Delete bulk records.

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. Go to **Settings** > **Data Management**. (How do I get there?)
2. Choose **Bulk Record Deletion**.
3. 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**, choose **Properties**.
Review the errors	Select the bulk-deletion job, and then under **Related**, choose **Failures**.
Pause a bulk-deletion job	a. Select the bulk-deletion job, and then on the Actions menu, choose **Pause**. b. When the confirmation message appears, choose **OK**. **Note** Bulk deletion jobs of fewer than 1,000 records cannot be paused.
Postpone a bulk-deletion job	a. Select the bulk-deletion job, and

	then on the Actions menu, choose **Postpone**. b. When the confirmation message appears, choose **OK**.
Resume a bulk-deletion job	a. Select the bulk-deletion job, and then on the Actions menu, choose **Resume**. b. When the confirmation message appears, choose **OK**.
Cancel a bulk-deletion job	a. Select the bulk-deletion job, and then on the Actions menu, choose **Cancel**. b. When the confirmation message appears, choose **OK**.
Modify recurrence of a bulk-delete job	a. Select the bulk-deletion job, and then on the Actions menu, choose **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 choose **OK**. 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.

See Also

Manage your data (for admins)

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.

Check for duplicate contacts, accounts, or leads

Microsoft Dynamics CRM includes duplicate detection rules for accounts, contacts, and leads. These rules are automatically turned on, so you don't have to do anything to set up duplicate detection for these record types.

Note

If available on your system, you may also be able to check for duplicates of other record types, in addition to contacts, accounts, and leads. Check with your system administrator. [Find your CRM administrator or support person]

See Also

Merge duplicate records for accounts, contacts, or leads

Perform key business calculations with rollup fields

"Rollup fields" show calculations based on how records are related in a hierarchy. Rollup fields can help you answer these types of questions:

- How many sub-accounts are there under one big account?

- How much annual revenue is there for all the sub-accounts under an account hierarchy?
- How many opportunities or leads is your team working for a big account, and what is the net open revenue for all the related accounts in the hierarchy?
- How much time have we spent working a big account and all its sub-accounts?

With Microsoft Dynamics CRM, you can set up rollup fields to perform calculations across related records without writing code or involving a developer.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]

For more information on rollup fields, see TechNet: Define rollup fields.

Automate manual operations with calculated fields

"Calculated fields" allow you to build formulas and set conditions that allow you to perform calculations across one or more fields. For example, you can use calculated fields to determine things like:

- Total net worth of an account by subtracting liabilities from assets
- Estimated revenue for an opportunity multiplied by the probability of closing the deal
- The quality of leads based on revenue and type of license (for example, whether a lead is hot, warm, or cold)

With Microsoft Dynamics CRM, you can set up calculations across multiple records without writing code or involving a developer.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]

For more information, see TechNet: Define calculated fields

Create formulas for calculated fields

You can use calculated fields to automate manual calculations in your business processes. For example, you can automatically apply a discount if an order is greater than $500. A calculated field can contain values resulting from simple math operations, or conditional operations (such as greater than or if-else), and many others. For information on the syntax to use with calculated fields, see TechNet: Calculated field functions syntax.

Enable or manage auditing

Audit data changes

View the audit history of individual records

[Recover database space by deleting audit logs]

[View the audit summary]

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.

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. Open a record type you want to audit (for example, open **Accounts** or **Contacts**).
3. Open a record in the list.
4. Do one of the following:

In CRM: On the nav bar, beside the record name, click the down arrow > **Audit History**.

- In CRM for Outlook: Under **Related**, click **Audit History**.

5. Use the **Filter on** drop-down box to select the field that you want to see the audit history for.
6. To open the change list for an item, double-click the item.

See Also

Audit data changes

System Settings dialog box - Auditing tab

View the audit summary

Log changes made to customer records and user access so that you can review the activities later. The auditing feature is designed to meet the auditing, compliance, security, and governance policies of many regulated enterprises.

Audit logs help administrators answer questions such as:

- Which user was accessing the system and when?
- Who updated this field value on this record and when?
- What was the previous field value before it was updated?
- What actions has this user taken recently?
- Who deleted this record?
- What locale was used to make the update?

For more information on auditing, see TechNet: Audit data and user activity

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. You can 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.

   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. Go to **Settings** > **Auditing**. (How do I get there?)

3. Choose **Audit Log Management**
4. Select the oldest audit log. Then, on the command bar, choose **Delete Logs**.
5. In the confirmation message, choose **OK**.

   Note
   You can only delete the oldest audit log in the system. To delete more than one audit log, continue to delete the oldest audit log until you have deleted enough logs.

See Also

View the audit history of individual records

System Settings Dialog Box Reference

System Settings dialog box - General tab

System Settings dialog box - Sales tab

System Settings dialog box - Marketing tab

System Settings dialog box - Service tab

System Settings dialog box - Reporting tab

System Settings dialog box - Formats tab

System Settings dialog box - Email tab

System Settings dialog box - Customization tab

System Settings dialog box - Outlook tab

System Settings dialog box - Auditing tab

System Settings dialog box - Goals tab

System Settings dialog box - Calendar tab

View system status and notifications

On/off switch for guided help

Broadcast announcements to an entire organization

System Settings dialog box - General tab

Use the settings on this page to change general system-level settings like preferences for saving, decimal and currency precision, and other default settings for Microsoft Dynamics CRM.

Open the 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click the **System Settings** > **General** tab.

Settings	**Description**
Select the default save option for forms	
Enable auto save on all forms	If Yes, which is the default, 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. More information: TechNet: Manage auto-save
Set the IM presence option	
Enable presence for the system	If Yes, which is the default, 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	Select the order in which you want customer and user names to be displayed. The default is First Name Last Name.
Set the currency precision that is used for pricing throughout the system	
Pricing Decimal Precision	Select how many decimal points to use for a currency. The default is 2.

Settings	Description
Set whether reassigned records are shared with the original owner	
Share reassigned records with original owner	Select whether a record is shared with the original owner of the record, or completely reassigned to another user. The default is No.
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	Set how to display currencies, either by a currency symbol, which is the default setting, or by currency code. For example, a currency symbol could be $, and the currency code could be USD.
Set up search	
Enable Quick Find record limits	If Yes, which is the default, if more than 10,000 records are found, a message will be displayed that suggests a more selective search.
Select entities for search	Click **Select** to choose the entities to include when users do a search in Microsoft Dynamics CRM for tablets.
Enable Bing Maps	
Show Bing Maps on forms	If Yes, which is the default, Microsoft Dynamics CRM on-premises users will need to enter a Bing Maps key. CRM Online users don't need to enter a key.
Please enter Bing Maps key	On-premises users can obtain a Bing Maps key from: Bing Maps Dev Center
Set the default country/region code	
Enable country/region code prefixing	If enabled, which is the default, CRM will prefix the country/region code to numbers that users are trying to call.
Country/Region Code Prefix	The default is+1, which is the country/region calling code for North America.

Settings	Description
Set the telephony provider	
Select provider for Click to call	Choose which provider to enable outbound calls from within CRM. This setting doesn't apply to CRM for tablets or Microsoft Dynamics CRM for phones.
Set whether users see CRM for tablets message	
Users see app download message	If Yes, which is the default, users will see a message regarding downloading the Microsoft Dynamics CRM for tablets app.
Set custom Help URL	
Use custom Help for customizable entities	If you want to replace the default Help content with custom Help designed for your users, click **Yes**. After you enable custom Help, you can enter a **Global Custom Help URL**. This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.
Global custom Help URL	To replace the default Help with a single URL for all customizable record types (entities), enter the URL here. You also have the option of entering override URLs for each record type (entity) for customizable record types. More information: TechNet: Customize the Help experience
Append parameters to URL	If you click **Yes** to append parameters to the URL, you can make your Help content more dynamic. For example, you can access parameters for User Language Code, Entity Name, Entry Point, and Form ID. More information: TechNet: Customize the Help experience
Disable Social Engagement	

Settings	Description
Prevent feature from receiving social data in CRM	Defaults to 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.
Set whether users see welcome screen	
Display welcome screen to users when they sign in	When users start CRM, they're presented with a welcome screen (navigation tour) that provides a quick overview of CRM. Click **No** to disable this tour for all users in your organization. This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.
Use legacy form rendering	
For compatibility, use the legacy form rendering engine. Note that performance may be adversely affected.	In CRM Online 2015 Update 1 and CRM 2016 on-premises, we made enhancements to Microsoft Dynamics CRM forms so that they load faster. However, if you have forms that include unsupported customizations, these enhancements can cause compatibility problems. To avoid this, you can temporarily turn the form enhancements off by choosing **Yes**. We recommend that you reset this setting to **No** after addressing scripting problems so you can take advantage of optimized forms. **Note** When a form that includes unsupported customizations is used, such as unsupported JavaScript, the form may fail to load or the user will receive an error message. • If the form just fails, set the **Use legacy form rendering** option to **Yes**. If the form loads after you select this option, you may

Settings	Description
	have unsupported customizations. • If the user receives an error, click "View the data that will be sent to Microsoft" and see the details in the <CrmScriptErrorReport> tags. More information: TechNet: What kind of customizations aren't supported?

See Also

TechNet: Manage auto-save

TechNet: Customize the Help experience

TechNet: What kind of customizations aren't supported?

System Settings dialog box - Sales tab

Use the settings on this page to configure system-level settings for the sales area of Microsoft Dynamics CRM.

Important
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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. Go to **Settings** > **Administration**. (How do I get there?)
3. Click **System Settings** and then select the **Sales** tab.
4. Fill in the information:

Settings	Description
Create products in active state	To set the products to active state by default after creation, click **Yes**. This option applies only to products that don't have a parent product family. To create products in the Draft state, click **No**.

<table>
<tr><td>Allow selection of default pricelist for opportunity via inbuilt rule</td><td>Click Yes if you want the default price list to be selected for an opportunity based on the inbuilt rule (based on the default price lists defined for territories). Otherwise, click No.</td></tr>
<tr><td>Maximum number of products in a bundle</td><td>Type the maximum number of products a bundle can have.</td></tr>
<tr><td>Use system pricing calculations</td><td>Click Yes to use the pricing calculations of Microsoft Dynamics CRM. To use custom pricing by using a plug-in, click No. When set to No, the default pricing calculations won’t be done on opportunity, quote, order and invoice records.</td></tr>
<tr><td>Discount calculation method</td><td>Select Per unit if you want the pricing engine to calculate the discount based on the prices per unit instead of a line item. By default, the calculations are done on a line item-basis. The following table shows the difference between the two calculations
<table>
<tr><th>Discount method</th><th>Product</th><th>Price per unit</th><th>Quantity</th><th>Discount</th><th>Amount</th></tr>
<tr><td>Line item</td><td>Product 1</td><td>100</td><td>11</td><td>10</td><td>(100*11)-10=1090</td></tr>
<tr><td>Per unit</td><td>Product 2</td><td>100</td><td>11</td><td>10</td><td>(100-10)*11=990</td></tr>
</table></td></tr>
<tr><td>Maximum number of properties that are allowed for a product or bundle</td><td>Type the maximum number of properties (specifications) a product or bundle can have. Product properties are added to a product family record, and all the child products and bundles under the product family inherit the properties added to the parent product family. The number specified in this setting is applied only when you publish a product or a bundle with the associated properties.</td></tr>
</table>

See Also

Set up a product catalog: Walkthrough

Create price lists and price list items to define pricing of products

Set up a discount list

Create product bundles to sell multiple items together

Use properties to describe a product

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 (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. Go to **Settings** > **Administration**. [(How do I get there?)]

3. Choose **System Settings** > **Marketing** tab.

Settings	Description
Set whether direct email through mail merge is enabled in campaigns	
Enable Direct Email via Mail Merge	Default: Yes. If Yes, users can send email as a campaign activity using the mail merge feature. **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.
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.

Settings	Description
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 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 - Service tab

Use the Service tab in System Settings to set preferences for the customer service area, such as service level agreements and entitlements in Microsoft Dynamics CRM.

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click the **System Settings** > **Service** tab.
4. Fill in the information using the following table for guidance.

Settings	Description
Disable SLAs	
Disable Service Level Agreements(SLAs) on case records	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. To disable, click **Yes**. To enable, click **No**. **Note** When SLAs are disabled, SLA records can still be created or modified. SLAs won't be applied to case records, however.
Apply SLA after manual override **Important** For Microsoft Dynamics CRM Online organizations, this feature is available only if your organization has installed Microsoft Dynamics CRM Online 2016 Update. For on-premises CRM organizations, this feature is only available if you've updated to Microsoft Dynamics CRM 2016. Interested in getting this feature? Find your CRM administrator or support person.	This setting determines if an SLA should be automatically applied on a case record when an SLA is manually selected in the SLA field of the case. The automatic SLA application can either be through the entitlement applied to the case or with the default SLA. In any case, the manual SLA takes precedence over any other way of SLA application. When set to **No**, SLAs won't be applied automatically to cases after an SLA is manually applied. **Note** When both entitlement and customer, and manual SLA are changing, the manual SLA is used regardless of this setting.
Select On Hold Case Status	Select the case statuses for which the

	SLA calculation should be paused. View (double-click) the statuses in the **Available Values** column. When a service rep sets a case to one of the On Hold status values you set here, CRM pauses the SLA calculation. When the service rep changes the status of the case back to a status other than an On Hold status, CRM updates the failure and warning time in the enhanced SLA service KPIs. It also tracks the total time for which a case record is on hold.
Automatically apply entitlement	• Select whether to automatically apply the default customer entitlement when a case is created. • Select whether to automatically apply the default customer entitlement when a case is updated and the customer, contact, or product field has changed.

See Also

Define service level agreements (SLAs)

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 (if it's not 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose **System Settings** > **Reporting** tab.

Settings	Description
Specify report categories	Default categories: • 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 (it 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose **System Settings** > **Formats** tab.

Settings	Description
Organizational Standards and Formats	
Current Format	Default: your organization's language and locale. Choose **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 (admins)

System Settings dialog box - Email tab

Use the settings on this page to set up email processing in Microsoft Dynamics CRM.

Open the 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. Go to **Settings** > **Email Configuration**. (How do I get there?)
3. Choose **Email Configuration Settings**.

Settings	Description
Configure email processing	
Process Email Using	Select whether you want to process email by using server-side synchronization or the Email Router. Server-side synchronization is the preferred synchronization method. More information: TechNet: Integrate your email system with Microsoft Dynamics CRM
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	For server-side synchronization, select the email server profile that you want to use. The email server profile holds the configuration data that enables CRM to connect to Microsoft Exchange. If you're connecting CRM Online with Exchange Online, the email server profile is automatically created for you.
Incoming Email	Select whether you want to use Dynamics CRM for Outlook, the Email Router, server-side synchronization, or a forward mailbox for processing incoming email. More information: TechNet: Create forward mailboxes or edit mailboxes
Outgoing Email	Select whether you want to use Dynamics CRM for Outlook, the Email Router, or server-side synchronization for processing outgoing email.
Appointments, Contacts, and Tasks	Select whether you want to use Dynamics CRM for Outlook or server-side synchronization to synchronize appointments, contacts, and tasks between Outlook and CRM. **Note** You can't synchronize appointments, contacts, and tasks if you're synchronizing with a POP3 email server.

Settings	Description
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 addresses have been approved by the system administrator. • Process email only for approved users • Process email only for approved queues
Configure folder-level tracking and email correlation	
Use folder-level tracking for Exchange folders (server-side synchronization must be enabled)	Users can set up Exchange tracking folders, and then move messages to those folders to track them automatically on virtually any device. More information: [Track Outlook email by moving it to a tracked Exchange folder]() Folder-level tracking provides 100% tracking accuracy. To use folder-level tracking: • You must select this check box. • Your organization must synchronize email through server-side synchronization. More information: [TechNet: Set up server-side synchronization]() This feature was introduced in CRM Online 2015 Update 1 and CRM 2016 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person]()
Use correlation to track email conversations	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 email properties for correlation and is more accurate than smart matching, but less accurate than folder-level tracking or tracking tokens. More information: [TechNet: Email message filtering and correlation]() **Note** Email correlation using email headers works best when email is processed using server-side synchronization. If you're using the Email Router to

Settings	Description
	process email, you can use tracking tokens or smart matching to correlate email activities with related records.
Use tracking tokens	Select this check box to use tracking tokens and to configure how CRM displays them in the Subject line of the email messages. Tracking tokens provide 100% tracking accuracy. If you don't want to see tokens in Subject lines, however, consider folder-level tracking, which also provides 100% tracking accuracy. You can configure prefixes and other sections of tracking tokens. Long prefixes or too many prefix changes may cause lost data in history, however. More information: TechNet: Email message filtering and correlation
Use smart matching	Select this check box to use smart matching to correlate email based on the similarity between email messages. Smart matching isn't as accurate as tracking tokens or folder-level tracking. More information: TechNet: Email message filtering and correlation
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 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 the following error message when you're reading email: "This content cannot be displayed in a frame". 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.

Settings	Description
Set file size limit for attachments	
Maximum file size (in Kilobytes)	Increase or decrease the maximum file size for attached files. The default size is 5120K. The maximum size is 32768K.
Configure alerts	Select check boxes for the type of alerts that must be sent to CRM users: • Error (default) • Warning • Information (default) **Tip** Select **Warning** if you're troubleshooting or testing or want to get more detailed messages on the alert wall.
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.

See Also

Track Outlook email by moving it to a tracked Exchange folder

Synchronizing data with Outlook or Exchange FAQ

TechNet: Set up email through server-side synchronization

TechNet: Install the Email Router for Microsoft Dynamics CRM 2016 and CRM Online

System Settings dialog box - Customization tab

Use the Customization tab in System Settings to set preferences for plug-in and workflow tracing and also the use of application mode..

Open the 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose **System Settings** and then choose the **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	Select this check box to enable application mode. When this mode is enabled, Microsoft Dynamics CRM 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. By default, application mode isn't enabled.
Plug-in and custom workflow activity tracing	
Enable logging to plug-in trace log	You can now store detailed information about an exception or trace event raised by a custom code to help developers debug plug-ins or custom workflow activity that they develop using the customization methods supported by Microsoft Dynamics CRM. • To capture trace logs only for exceptions, select **Exception**. • To capture logs for all errors and general trace events, select **All**. • To disable capturing trace logs, select **Off**. More information: MSDN: Debug a plug-in **Warning** We recommend that you don't keep this option enabled for an extended

Settings	Description
	period because it may have performance implications in your organization.

See Also

[MSDN: Debug a plug-in]

System Settings dialog box - Outlook tab

Use the settings on this page to configure how Microsoft Outlook interacts with Microsoft Dynamics CRM.

Open the System Settings dialog box (if it's not 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose **System Settings** > **Outlook** tab.

Settings	Description
Set email promotion options for Microsoft Dynamics 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.

Settings	Description
Set whether users can schedule synchronization in Microsoft Dynamics CRM for Outlook	
Users can schedule synchronization	Default: Yes. If Yes, users can set whether or not Dynamics CRM for Outlook synchronizes with Microsoft Dynamics CRM.
Minimum Time between synchronizations	Default: 15 minutes. Synchronizes Dynamics CRM for Outlook and Microsoft Dynamics CRM on the specified interval.
Set whether users can update their local data in the background in Microsoft Dynamics 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 Dynamics CRM for Outlook message	
Users see “Get Dynamics CRM for Outlook” option displayed in the message bar	Default: Yes. If Yes, the **Get CRM for Outlook** button is displayed in Microsoft Dynamics CRM.

System Settings dialog box - Auditing tab

Enable auditing to track changes to your organization’s data and maintain a log of changes.

Open the System Settings dialog box (if it's not 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Choose **System Settings** > **Auditing** tab.
4. Under **Audit Settings**, you can start auditing and specify whether or not to audit user access. You can also stop auditing if it is currently enabled.

   If you enable auditing and audit user access, CRM tracks when the user started accessing CRM and whether or not the user accessed the application by using the web application or Dynamics CRM for Outlook.
5. 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 the start of auditing for these 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

View the audit history of individual records

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 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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click the **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.

See Also

Progress Against Goals report

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. Go to **Settings** > **Administration**. (How do I get there?)

3. Go to **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

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. Go to **Settings** > **Administration**. (How do I get there?)

3. Click **System Notifications**.

On/off switch for guided help

Guided help is turned on by default, but is easy to turn off.

Turn guided help on or off for an individual user

This setting affects only the person who makes this change.

- To turn guided help off: On the nav bar, click the **Options** icon > **Opt out of guided help**.
- To turn guided help on: On the nav bar, click the **Options** icon > **Opt in for guided help**.

Turn guided help on or off for an entire organization

This setting changes access to guided help for an entire organization.

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. Go to **Settings** > **Administration**. (How do I get there?).
3. On the Administration page, click **System Settings**.
4. On the General tab, scroll down to the **Set custom Help URL** section. Next to **Enable Guided Help**, select **Yes** or **No**.

Broadcast announcements to an entire organization

Circulate information quickly to a wide set of users at one go by using **Announcements** in Microsoft Dynamics CRM. Announcements can also serve as message boards, where you can post topics of your interest that you wish to share, or get answers to.

Create an announcement

Use the **Announcements** page to create and broadcast an announcement.

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. Go to **Settings** > **System**. [(How do I get there?)]

3. Choose **Administration** > **Announcements** .
4. On the command bar, choose **New**.
5. Fill in the information, as required. Use the handy tooltips as a guide.
   - **Title** - Type a title for the announcement that clearly and unambiguously states the purpose and nature of the announcement.

   - **Body** - Type the text for the announcement that you want to broadcast.

     Tip
     You can copy and paste an announcement text from another application. However, formatting might be lost.
   - **More Information URL** - Type the address of the website that provides detailed information about the announcement. (Optional)

     Note
     A web address that does not contain "http://" is automatically expanded to a full web address. In the announcement, the web address will appear as an

active external link.

- **Expiration Date** - Type the date on which you want to stop the broadcast and the announcement should expire.

Note

You can't edit/extend this date after expiry. Microsoft Dynamics CRM deletes the announcement after the expiration date.

6. When you're done, on the command bar, choose **Save** or **Save and Close** to begin the broadcast.

Broadcast an announcement

Make the announcements available to other users in your organization by using web resources and dashboards.

Create a 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. In a text editor, type the following code, and save the file as "announcementsondashboard.htm".

```
<html>
<body>
<script
type="text/javascript">window.location.href="/home/homepage/home_news.aspx?pagemod
e=iframe";</script>
</body>
</html>
```

3. In CRM, go to **Settings** > **Customization** > **Customize the System**.
4. Under **Components**, choose **Web Resources** > **New**.
5. Type the name as "announcements" and display name as "Announcements".
6. In the **Type** drop-down list, select **Web Page (HTML)**.
7. In the **Upload File** box, choose **Browse** and select the "announcementsondashboard.htm" file that you created earlier.

8. Choose **Save**.
9. Add this new web resource to any existing or new dashboard.

   More information: eBook: Create or customize CRM system dashboards

See Also

MSDN: Understand dashboards: Dashboard components and FormXML

Customize CRM

Create or customize entities

Create or customize forms

Create or customize views

Export and import entity and field text for translation

Create business processes and other processes

Create and manage a product catalog

Work with templates

Create or edit a solution

View or download developer resources

Add or edit an image web resource

Create or customize entities

View or edit entity information

Create a new entity

Create or edit entity fields

Map entity fields

Configure date fields to store fixed dates across time zones

Create or edit N-N relationships between entities

Create or edit N-1 relationships between entities

Create or edit 1-N relationships between entities

Create connections to view relationships between records

Set up a relationship role to define family, social, or business relationships

Change custom entity icons

Enable an entity to display data as a hierarchy

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. Go to **Settings** > **Customizations**. [(How do I get there?)](#)

3. Choose **Customize the System**.
4. 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 activity entities, and add an associated view to the entity. This allows you to track activities like phone calls, emails, and tasks.
Connections	Select this to permit ad hoc 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 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: [TechNet: Set up SharePoint integration with 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 Dynamics CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for Dynamics 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**.

5. Publish your customizations:
    - To publish customizations for only the component 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

TechNet: Customize your system

TechNet: Create and edit entities

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. Click **Entities**, and then on the command bar, click **New**.
5. Specify the **Display Name** and **Plural Name** that will be used for this entity throughout Microsoft Dynamics CRM.
6. 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.

7. 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.
8. 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**.

9. 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.
10. 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: **Managing Documents Stored in SharePoint from Microsoft Dynamics CRM[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 Dynamics CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for Dynamics CRM for Outlook	Select this to let users include records for this entity with those they can work with while offline.

11. 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.

12. Click **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 **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.

13. Change the icon for the new entity. More information: [Change custom entity icons](#).

14. For any security roles that need access to the new entity, add the needed privileges.

a. Go to **Settings** > **Administration**. (How do I get there?)

b. Click **Security Roles**.

c. 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.

d. Click **Save and Close** to save the changes to the security role.

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.

15. Publish your customizations:

- To publish customizations for only the component that you're currently editing, select the entity you've been working on, and then click **Publish**.
- To publish customizations for all unpublished components at one time, click **Entities**, and then on the command bar, click **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

TechNet: Create and edit entities

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:

- Some system entities or custom entities that are included in a managed solution may not allow you to add new fields.
- Some system fields or custom fields that are included in a managed solution may not allow you to edit them.
- The default solution is a special unmanaged solution which shows you all solution components from any managed or unmanaged solutions. You can't edit ANYTHING in the context of a managed solution. But all the things you find there are in your default solution anyway, so you don't need to.

For more information, see TechNet: Create and edit fields.

Tip

Remember to add a description of the field – this provides instructions to your users on how to use the new field.

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Fields**.
   - To add a new field, on the Actions toolbar, click **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 **Edit**. You can make changes to the following fields:

     i. For **Field Requirement**, select whether it's optional, recommended, or required.
     ii. 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.
     iii. For **Field Security**, enable or disable the feature for this field. More information: Enable or disable security for a field
     iv. For **Auditing**, enable or disable the feature for this field.
6. 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. For more information, see TechNet: Types of fields.

Possible data types for a field

Data Type	Notes
Single Line of Text	The following formats are available: • **E-mail**. This opens a new e-mail message in the default e-mail software when clicked and also validates an email address. • **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 and validates (or adds) a valid protocol (HTTP, HTTPS, FTP, FTPS, OneNote, and TEL) are allowed. • **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 Microsoft Lync users to initiate a call by using the linked number. **Important** Lync has been rebranded as Skype for Business. Currently, you’ll still see references to “Lync” in Microsoft Dynamics CRM, but CRM will work with Skype for Business.
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	The following formats are available for this field: • **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	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. If the entity does not already have a field with a currency data type, two additional fields are created: • **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. More information: [TechNet: Behavior of Date and Time data type]()
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.

7. Select the **Field type**, **Format**, and **Maximum length** of the field.
8. Select the **IME mode** for this attribute.

   Note

   This specifies whether the active state of an Input Method Editor (IME) is enabled. An IME lets you enter and edit Chinese, Japanese, and Korean characters. IMEs can be in an active or inactive state. The active state accepts Chinese, Japanese, or Korean characters. The inactive state behaves like a regular keyboard and uses a limited set of characters.
9. Click **Save and Close** to close the form editor.
10. Publish your customization.
    - To publish customizations for just one entity, under **Components**, click **Entities**. Then, on the Actions toolbar, click **Publish**.
    - To publish all customizations you have made to any entities or components, on the Actions toolbar, click **Publish All Customizations** .

Note

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

See Also

TechNet: Types of fields

TechNet: Create and edit business rules

TechNet: Create and edit fields

Map entity fields

Mapping streamlines data entry when you create new records that are associated with another record. When two entities have an entity relationship, you can 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 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 were added. If they were not added in the same order, you can edit the labels for the option values on the target field so they represent a valid mapping, as long as this does not affect existing data. If you later modify either option set, you need to 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

You can automatically create mappings for the relationship *but this usually is not recommended.* This process maps any mappable fields based only on the data type and name of the field. All existing mappings are removed.

See Also

TechNet: Create and edit entity relationships

Configure date fields to store fixed dates across time zones

You can use the Behavior property of a date and time field to specify a date with a time value, a date without a time value (useful for birthdays and anniversaries, for example), or date and time values independent of the user's local time zone (useful for hotel check-ins in a different time zone, for example). For more information, see TechNet: Behavior and format of date and time fields

See Also

TechNet: Behavior and format of date and time fields

Create or edit N-N relationships between entities

Entity relationships define how records can be related to each other in a database. A **N:N (Many-to-Many)** relationship depends on a special **Relationship** entity, sometimes called an intersect entity, so that many records of one entity can be related to many records of another entity.When viewing records of either entity in a N:N relationship you can see a list of any records of the other entity that are related to it.

More information: TechNet: Create and edit N:N (Many-to-Many) relationships

See Also

Map entity fields

Create or edit N-1 relationships between entities

Entity relationships define how records can be related to each other in a database. **N:1 (Many-to-one)** relationships exist between entities and refer to each entity as either a **Primary Entity** or **Related Entity**. The related entity, sometimes called the child entity, has a lookup field that allows storing a reference to a record from the primary entity, sometimes called the parent entity. An N:1 relationship is just a 1:N relationship viewed from the related entity.

More information: Create and edit entity relationships

Create or edit 1-N relationships between entities

Entity relationships define how records can be related to each other in a database. A 1:N (One-to-Many) relationship is when one entity record for the **Primary Entity** can be associated to many other **Related Entity** records because of a lookup field on the related entity. When viewing a primary entity record you can see a list of the related entity records that are associated with it.

More information: Create and edit 1:N relationships

Create connections to view relationships between records

In Microsoft Dynamics CRM, you can create and view the relationships between records for many entities using **Connect**. Connections enable you to easily associate users, contacts, quotes, sales orders, and many other entity records with each other. When you open a record and select **Connections**, you can view all of the connections between it and other records.

When you create a connection, you assign it a role. There are many different roles you can use to identify your connections, such as Account Manager or Colleague. Connection roles define how records are related to you, to your organization, or to one another, such as manager to employee. There are three types of connection roles: business, family, and social. Your system administrator can add new connection roles.

On this page:

- Create a connection
- View connections for a record
- Deactivate or delete a connection

Create a connection

1. Open a record, and then on the command bar, click **Connect** > **To Another**.

   The record you start with is known as the source record.

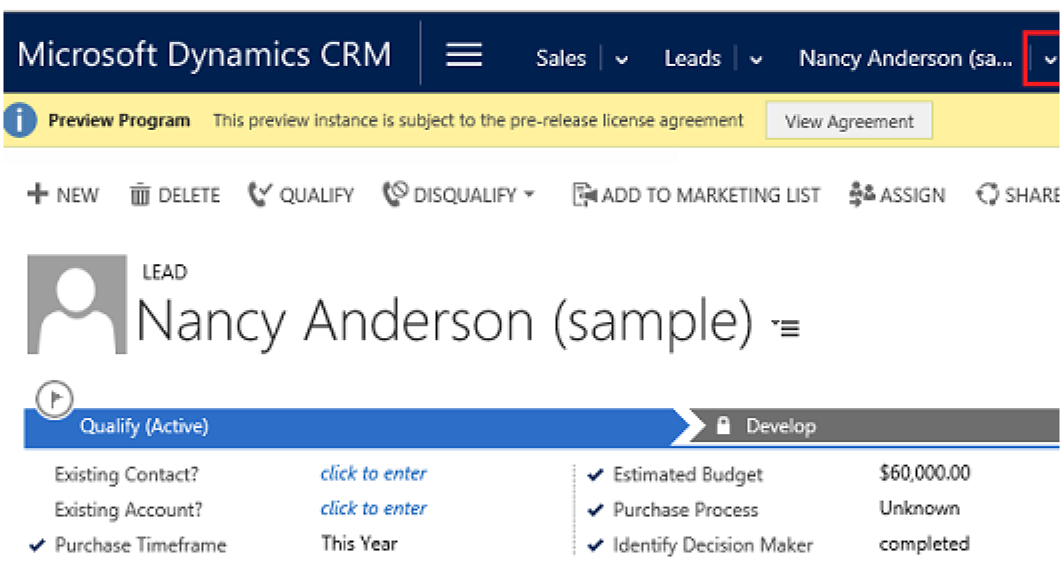
2. In the **New Connection** dialog box, enter a **Name** and **As this role** to identify the connection role for the record you want to connect to, called the target record. Optionally, enter a description.

   The role of the target record can be the same as the source record, it can be different, or you can leave the target record role blank.

3. If needed, you can select a different owner for the connection. Select **Details**, and then fill in the fields.
4. Click **Save**, **Save and Close**, or **Save & New** to save the newly created connection and open the form to create another connection.

View connections for a record

1. Open the record that you want to view connections for.
2. To view all the connections, select the related records drop-down menu next to the record name, and then click **Connections**.



Deactivate or delete a connection

If you no longer need a connection for a record, you can deactivate it or delete it to permanently remove the connection.

1. Open the record that you want to deactivate or delete the connection from.
2. Select the related records drop-down menu next to the record name, and then click **Connections**.
3. Select the connection you want to deactivate or delete, and then click **Deactivate** or **Delete**.

See Also

Set up a relationship role to define family, social, or business relationships

Set up a relationship role to define family, social, or business relationships

Identifying informal kinds of relationships between records that include family, social, or business contacts can be useful. For example, it may be helpful to know if two contacts are married, or if a contact used to work for another account. These types of relationships were known as customer relationship entities and are now called connections. To create these types of relationships, see Create connections to view relationships between records.

See Also

Create connections to view relationships between records

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 can't 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. Go to **Settings** > **Customizations**. [(How do I get there?)]
3. Click **Customize the System**.
4. Expand **Entities** if necessary, select the custom entity you want to update the icon for, and then on the command bar, click **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 the **Browse** button, select the appropriate image file, and then click **OK**.

6. On the command bar, on the **File** menu, click **Save**.
7. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, in the Navigation Pane, select the entity you have been working on, and then click **Publish**.
   - To publish customizations for all unpublished components at one time, in the Navigation Pane, click **Entities**, and then on the command bar, click **Publish All Customizations**.

New icons might not display in Microsoft Dynamics CRM until you close and reopen the Microsoft Dynamics CRM client.

Note

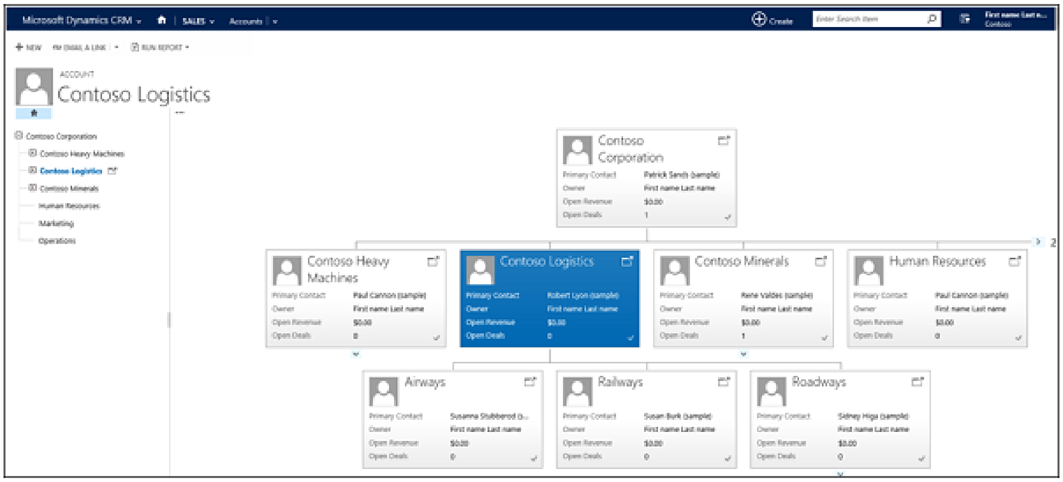
Publishing customizations can interfere with normal system operation. We recommend you schedule publishing when it's least disruptive to users.

See Also

[TechNet: Create and edit entities]

Enable an entity to display data as a hierarchy

You can gain valuable insights by visualizing your data as a hierarchy. For example, the following screenshot shows accounts displayed in Microsoft Dynamics CRM as a hierarchical visualization:



For some entities (record types), such as account and user, hierarchies are enabled by default. Other entities, including case, contact, opportunity, order, quote, campaign, and team can be enabled for a hierarchy, and all custom entities can be enabled for a hierarchy. For more information, see TechNet: Query and visualize hierarchical data.

Create or customize forms

[Change the color scheme or add a logo to match your organization's brand]()

[Create and configure forms- default solution]()

[Create or edit the main form for an entity]()

[Add a field to a form]()

[Edit form field properties]()

[Create or edit a drop-down list (option set) for a form]()

[Add or edit form navigation for related entities]()

[Add or edit a form web resource]()

[Create a team template and add to an entity form]()

[Test an event script]()

Change the color scheme or add a logo to match your organization's brand

horizontaltabbed

Overview

Personalize your Microsoft Dynamics CRM applications and create a uniform look and feel that matches your organization’s brand by creating a custom theme. For example, without writing any code, you can add a company logo or change default colors for the CRM masthead, menus, entities, or links. Preview your custom theme, and then publish it for the whole team when you’re ready.

For in-depth information on creating custom themes, see [TechNet: Change the color scheme or add a logo to match your organization’s brand]

Watch this video

Want to see themes in action? Watch this short video (2:45).

<iframe width="500" height="364" src="https://www.youtube.com/embed/MdT1yE9CW5U" frameborder="0" allowfullscreen></iframe>

To see video captions, choose the **Closed Caption (CC)** button in the lower-right corner of the YouTube window.

Video transcript

Have you ever wanted to add your logo or change the colors of the CRM interface to better fit your brand? Many companies use Microsoft Dynamics CRM in conjunction with other systems and want a uniform look and feel across all other business applications. Using the new theming feature, you can now style CRM for a more customized user interface that better suits your branding goals.

To get started with theming, navigate to the **Customization** area under **Settings**. You'll find **Themes** as an option there.

You'll see that the default color is the CRM blue theme.

To start setting up a customized theme, you can clone an existing theme or create one from scratch.

From the Theming record you can upload logos and set colors for many different areas.

We primarily allow customizations for accent colors in CRM. Some examples of accent colors are links, hover effects, and selected effects. Other items such as backgrounds, fonts, and icons can't be changed at this time.

Also note that legacy areas in the CRM application do not fully support theming.

A logo can also be set from the Theming record by selecting an existing web resource or uploading a logo from your local computer.

As you work on your custom theme, you may also want to take a look at the work in progress. To do that without affecting users, choose **Preview Theme**. This will refresh the page and reload your CRM system with the current theme and it will only apply to you. While previewing, you may realize some additional work needs to be done. If so, choose **Exit Preview** to revert to the original theme. Otherwise, we can publish the theme and push it out to all users.

Themes aren't solution aware, so to move themes across systems, a theme record needs to be exported, re-imported into the target system, and then published.

In addition to theming, customizers can now adjust entity colors. To do that, navigate to the **Customize the System** dialog box. From there, you'll see a new field per entity, allowing you to set the color. This entity color will be applied to areas such as the navigation bar.

We hope you like the new theming feature and look forward to seeing some creative and colorful CRM instances!

See Also

TechNet: Change the color scheme or add a logo to match your organization's brand

What's new in Microsoft Dynamics CRM

What's new for administrators and customizers in Microsoft Dynamics CRM

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're viewing a managed solution, you can't 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'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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. Under **Components**, choose **Entities**, and then expand the required entity.
5. Choose **Forms**, and then select the form.
6. On the command bar, choose **Managed Properties**.
7. In the **Set Managed Properties** dialog box, if **Customizable** is set to **True**, you can add or edit forms.

   Tip
   You can also navigate to the form editor from a list in the Sales, Marketing, or Service areas. For example, to edit an account form, go to **Accounts**, choose the **More** (…) button, and then choose **Customize Entity**.

See Also

Create or edit the main form for an entity

Assign security roles to a form

TechNet: Create and design forms

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, 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 composed 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 one, 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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. Under **Components**, expand **Entities**, expand the entity you want to modify the Main form for, and then click **Forms**.
5. To create a new form, on the command bar, click **New**.

   - OR -

   To edit an existing form, double-click or tap any form with a form type of Main.
6. Change the form design in any of the following ways, as needed:
   - Add a tab to a form
   - Add a section to a form
   - Add a field to a form
   - Add or edit a form IFRAME
   - Add or edit a sub-grid on a form
   - Add or edit a form web resource
   - Add or edit form navigation for related entities
   - Edit form headers and footers
   - Remove a tab section field or IFRAME
   - Enable or disable the Form Assistant

   For more information, see TechNet: Customize your CRM system.
7. Edit the properties for parts of the form, as needed:
   - Edit form properties
   - Edit form field properties
   - Edit tab properties
   - Edit section properties

   For more information, see the TechNet: Customize your CRM system.
8. Add event scripts, as needed.

9. Determine which security roles will be able to see the form. More information: [Assign security roles to a form]
10. Preview how the main form appears and how events function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form.**
    b. To close the **Preview** form, on the **File** menu, click **Close**.

11. When you finish editing the form, click **Save As**, enter a name for the form, and then click **OK**.
12. When your customizations are complete, publish them:
    - To publish customizations for only the component you are currently editing, under **Components**, click the entity you have been working on, and then click **Publish**.
    - To publish customizations for all unpublished components at one time, under **Components**, click **Entities**, and then on the command bar, click **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

TechNet: Customize your CRM system

TechNet: Create and design forms

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. Under **Components**, expand **Entities**, expand the entity you want to customize, and then click **Forms**.
5. In the list, find an entry with the form type of Main, and then double-click or tap to edit it.
6. In the form, click 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.
7. To preview how the form appears and how events function:
   a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.

To close the preview form, click **Close** .

   c. To publish customizations for the form that you're editing, with the form open, click **Publish**.
8. When you're done editing the form, click **Save and Close**.
9. To publish customizations for all unpublished components at one time, click **File**, and then click **Publish All Customizations**.

Note

Publishing customizations can interfere with normal system operation. We recommend that you publish when it's least disruptive to users.

See Also

Edit form field properties

TechNet: Create and design forms

Edit form field properties

1. Go to **Settings** > **Customizations**. [(How do I get there?)]

2. Choose **Customize the System**.
3. Under **Components**, expand **Entities**, expand the entity you want to work with, and then choose **Forms**.
4. In the list, locate an entry with the **Form Type** of **Main**, and then double-click or tap to edit it.
5. On the form body, double-click or tap the field you want to edit.
6. 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 JavaScript to define other behavior. In the web application, JavaScript 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. Choose **Edit** to modify them.
- **Events**. This tab includes two sections:
  - **Form Libraries**. In this section, you can add or remove the available JavaScript libraries for form or field events. You can edit the listed custom libraries if necessary.
  - **Event Handlers**. In this section, you can add a JavaScript library (a script web resource) authored by a developer and associate a function within that library to an event.

  i. In the **Events** list, choose **onChange**, and then choose **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. Choose **OK**.
- **Business Rules**. Use this tab to create or edit the process components of business rules.

7. When you finish modifying the properties for the field, in the **Field Properties** dialog box, choose **OK**.
8. To preview how the form appears and how events function:
   a. On the **Home** tab, choose **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the Preview form, on the **File** menu, choose **Close**.

9. When you finish editing the form, on the **Home** tab, choose **Save and Close** to close the form.
10. 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, choose the entity you have been working on, and then choose **Publish**.
    - To publish customizations for all unpublished components at one time, in the Navigation Pane, choose **Entities**, and then on the Actions toolbar, choose **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

Add a field to a form

TechNet: Create and design forms

Create or edit a drop-down list (option set) for a form

An option set is a type of field, included in a record type (entity), that defines a set of options. When an option set is displayed in a form, it uses a drop-down list control. When displayed in Advanced Find, it uses a picklist control. Sometimes option sets are called picklists by developers. For information on creating and editing option sets, see TechNet: Create and edit global option sets.

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. Under **Components**, expand **Entities**, expand the entity you want to work with, and then choose **Forms**.
5. In the list, locate an entry with the form type of Main, and then double-click or tap to edit it.
6. To add a link to a related entity, on **Home** tab, in the **Select** group, choose **Navigation**.

   The **Relationship Explorer** pane displays on the right side of the form editor.
7. 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.

8. Select the related entity you want to link to, drag it to the Navigation Pane, and then drop it where you want it to be displayed.

   Tip

   You can also create a new relationship by choosing **New 1:N** or **New N:N** in the **Relationship Explorer** pane. For more information, see [TechNet: Create and edit entity relationships]()

9. 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, choose **Change Properties**.
10. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
11. On the **Name** tab, choose **Edit** to view or edit the details associated with the relationship record.
12. Choose **OK**.
13. Preview how the main form will appear and how events will function:
    a. On the **Home** tab, choose **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, choose **Close**.

14. When you finish editing the form, choose **Save and Close** to close the form.
15. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, in the Navigation Pane, choose the entity you have been working on, and then choose **Publish**.
    - To publish customizations for all unpublished components at one time, in the Navigation Pane, choose **Entities**, and then on the command bar, choose **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

TechNet: Create and edit entity relationships

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.

Note
You can't include a web resource in a form header or footer.

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. Go to **Settings** > **Customizations**. [(How do I get there?)]()
3. Click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want to work with.
5. Click **Forms**, in the list locate a form of type **Main**, and then double-click or tap the entry to open and edit the form.
6. To add an existing web resource, click the tab (for example, **General** or **Notes**) you would like to insert it on, and then on the **Insert** tab, click **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 **Change Properties**.
7. 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.

8. 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 **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 the Add Selected Records button >> to move the selected fields to the **Dependent fields** list, and then click **OK** to close the dialog box.

10. When you finish editing the form, on the **Home** tab, click **Save and Close** to close the form.
11. To preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.

12. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, in the Navigation Pane, select the entity you have been working on, and then click **Publish**.
    - To publish customizations for all unpublished components at one time, in the Navigation Pane, click **Entities**, and then on the Actions toolbar, click **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

[TechNet: Create and edit web resources]

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.

On this page:

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. In the **Customization** window, choose **Customize the System**.
4. In the navigation pane, expand **Entities**, and then choose 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, choose **Save**.

Create a team template

1. Go to **Settings** > **Security**. (How do I get there?)
2. Choose **Access Team Templates**
3. On the **Actions** toolbar, choose **New**, complete the required fields, and then choose **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. Go to **Settings** > **Customizations**. (How do I get there?)
3. In the **Customization** window, choose **Customize the System**.
4. In the navigation pane, expand **Entities**, expand the entity you want to use in the team template, and then choose **Forms**.
5. In **System Forms**, select **Active Forms** > **Main** form.
6. On the **Main** form, open the **Insert** tab.
7. On the ribbon, choose **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 choose **Set**.

    The team template you selected now appears on the **Main** form.
13. On the **Actions** toolbar, click or tap **Save**, and then choose **Publish**.

See Also

TechNet: Manage teams

About team templates

Print leads, quotes, and other records

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. Go to **Settings** > **Customizations**. (How do I get there?)

3. Choose **Customize the System**.
4. Choose **Components** > **Entities**, and then expand the entity you want.
5. Choose **Forms**. In the list, choose a form to edit if it has a form type of Main.
6. On the **Home** tab, choose **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, choose **Simulate Form Save** and verify that your event executed as expected.
7. Choose **File** > **Close**.

Create or customize views

Create or edit views

Create or edit a public view for an entity

Edit the quick find view

Set the default view for an entity

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**, and then select the view.
6. On the Actions toolbar, click **More Actions**, and then select **Managed Properties**.
7. 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.
8. Click **Set**.

See Also

Create or edit a public view for an entity

Edit the quick find view

Understand security roles

TechNet: Create and edit views

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. Go to **Settings** > **Customizations**. (How do I get there?)

3. Click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. To create a new public view, on the Actions toolbar, click **New**. On the **View Properties** dialog box, in the **Name** box, type a name for the new view, and then click **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 a **Public View** in the list. The view type is specified in the **Type** column.
7. Modify the columns that are displayed.
   - Add a column:

   a. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**, or for other types of views, click **Add Columns**.

      - OR -

      For other types of views, click **Add Columns**.

   b. Select the check boxes for the columns you want to add, and then click **OK**.
   - Move a column:

   a. Select 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. Select the column you want to change.

   b. In the **Common Tasks** area, click **Change Properties**.

   c. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.
   - Remove a column:

   a. Select the column you want to remove.

   b. In the **Common Tasks** area, click **Remove**.

   c. In the confirmation message, click **OK**.
   - Change the sort order of a column:

   a. In the **Common Tasks** area, click **Configure Sorting**.

   b. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click **Ascending Order** or **Descending Order**, and then click **OK**.

- Enable online presence for instant messaging:

a. In the **View** form for the selected entity, select the column you want to change.
b. In the **Common Tasks** area, click **Change Properties**.
c. In the **Change Column Properties** dialog box, select the **Enable presence for this column**, and then click **OK**.

8. Click **Save and Close**.
9. 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 **More Actions**, and then click **Set Default**.

10. Click **Save and Close** to close the view.
11. 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 **Entities**, and select the entity. Then, on the Actions toolbar, click the **Publish** button.
- To publish all customizations you have made to any entities or components, on the Actions toolbar, click **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

TechNet: Create and edit 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 change 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.

   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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. Under **Components**, expand **Entities**, expand the entity you want to modify, and then click **Views**.
5. In the list of views, in the **Type** column, locate **Quick Find View**, and then double-click the view.
6. Modify the fields that are searched:
   a. In the **Common Tasks** pane, click **Add Find Columns**.
   b. Select the check boxes for the columns you want to add, and then click **OK**.
7. Change the columns that are displayed.
   - To add a column:
     i. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**.

     - OR -

    ii. Select the check boxes for the columns you want to add, and then click **OK**.

- To move a column:
    i. Click 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 the column that you want to change the width for.
    ii. In the **Common Tasks** area, click **Change Properties**.
    iii. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.

- To remove a column:
    i. Click the column that you want to remove.
    ii. In the **Common Tasks** area, click **Remove**.
    iii. In the confirmation message, click **OK**.

- To change the sort order of a column:
    i. In the **Common Tasks** area, click **Configure Sorting**.
    ii. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, click **Ascending Order** or **Descending Order**, and then click **OK**.

- To enable online presence for instant messaging:
    i. In the **View** form for the selected entity, click 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 **Change Properties**.
    iii. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click **OK**.

8. Click **Save** or **Save and Close**.
9. On the command bar, click **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.

Publishing customizations can interfere with normal system operation. We recommend publishing when it's least disruptive to users.

See Also

TechNet: Create and edit views

TechNet: Configure Quick Find options for the organization

Set the default view for an entity

In Microsoft Dynamics CRM, every entity, such as **Appointment**, **Account**, or **Contact**, 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 the **Appointment** entity 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 isn't 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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want to work with.
5. Choose **Views**, and then in the list, select the Public View you want to set as the default for that view.
6. On the command bar, choose **More Actions**, and then choose **Set Default**.

7. When your customizations are complete, publish them:
    - To publish customizations for only the component that you're currently editing, under **Components**, choose the entity you have been working on, and then choose **Publish**.
    - To publish customizations for all unpublished components at one time, under **Components**, choose **Entities**, and then on the command bar, choose **Publish All Customizations**.

Note

Publishing customizations can interfere with normal system operations. We recommend you publish customizations when it's least disruptive to your users.

See Also

Create and configure views

TechNet: Create and edit views

Export and import entity and field text for translation

Export customized entity and field text for translation

Import translated entity and field text

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. On the Actions toolbar, click or tap **Export Translations**.
5. After completing the export, open or save the compressed (.zip) file that contains the exported labels to your local computer or network.

6. Extract the XML file from the compressed (.zip) file and translate it.

See Also

Import translated entity and field text

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.
- Microsoft Dynamics CRM can't 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. Go to **Settings** > **Customizations**. (How do I get there?)

3. Click **Customize the System**.
4. In the solution explorer, on the Actions toolbar, click **Import Translations**.
5. In the **Import Translated Text** dialog box, specify the file that contains the translated text, and then click **Import**.
6. When Microsoft Dynamics CRM finishes importing the translated text, click **Close**.

Note

Publishing customizations can interfere with normal system operation. We recommend you schedule publishing when it's least disruptive to users.

See Also

Export customized entity and field text for translation

Create business processes and other processes

Guide staff through common tasks with processes

Create a new business process

Preview feature: Create a new task flow

Activate a business process or task flow

Assign a security role to a business process

Add ready-to-use business processes

Business process templates for CRM

Import business process templates from Microsoft PinPoint

Use a dialog to create an interactive process like a wizard

Create a business rule to apply logic in a form

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.

  You can also design a type of business process flow called a task flow in CRM for phones or CRM for tablets based on common tasks your users perform. For example, if they need to regularly perform a series of follow-up steps after client meetings, create a task flow. When users tap the new task in their mobile app, it will lead them through from start to finish so they don't forget an important step.

  Important
  Task flows are a preview feature in Microsoft Dynamics CRM Online 2016 Update. A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted

functionality. To use this feature, it must be turned on and the license terms must be accepted. Enable or disable Preview features. Microsoft doesn't provide support for this preview feature. Microsoft Dynamics CRM Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

More information:

- Create a new business process
- Preview feature: Create a new task flow
- Activate a business process or task flow
- Add ready-to-use business processes
- Import business process templates from Microsoft PinPoint
- Assign a security role to a business process

- eBook: Intro to business processes
- eBook: Customize 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: TechNet: 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: TechNet: Workflow processes

- **Action.** Use when you want to automate a series of commands in the system.

  More information: TechNet: Actions

See Also

TechNet: Create and edit processes

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 in Microsoft Dynamics CRM. 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.

CRM comes with several ready-to-use business processes for common business scenarios. All you have to do is add them to your system. To find out how to add ready-to-use business processes to CRM, see 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. Go to **Settings** > **Processes**. (How do I get there?)
3. On the **Actions** toolbar, click **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. Choose **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 the **Plus/Minus** button , 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 the **Add** button , 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 the **Add** button 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 **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 **Activate**.

See Also

Activate a business process or task flow

Assign a security role to a business process

Add ready-to-use business processes

Customize a business process

Preview feature: Create a new task flow

Design a flow in Microsoft Dynamics CRM for phones or Microsoft Dynamics CRM for tablets based on common tasks your users perform. For example, if they need to regularly perform a series of follow-up steps after client meetings, create a task flow. When users tap the new task in their mobile app, it will lead them through from start to finish so they don't forget an important step.

Task flows can use multi-entity forms and logic, and can have form logic that runs across the task flow pages.

Important

Task flows are a preview feature in Microsoft Dynamics CRM Online 2016 Update. A preview feature is a feature that is not complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features aren't meant for production use and may have limited or restricted functionality. To use this feature, it must be turned on and the license terms must be accepted. Enable or disable Preview features. Microsoft doesn't provide support for this preview feature. Microsoft Dynamics CRM Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

Check your security role

1. Follow the steps in View your user profile.
2. Don't have the correct permissions? Contact your system administrator.

3. Go to **Settings** > **Processes**. (How do I get there?)
4. On the **Actions** toolbar, click **New**.
5. In **Process Name**, enter a name for your task flow
6. For the **Category**, select **Business Process Flow** from the drop-down list.
7. Select **Run process as a task flow (Mobile only)**.
8. For the **Entity**, select the type of record from the drop-down list.
9. Click **OK**.
10. Type a description for your task flow. You can use up to 2000 characters.
11. To set an image to use as the task flow's launch icon and background image, click **Set image**. In the pop-up window, either upload a picture or select the default image and click **OK**.
12. Fill in the information for the first page in your task flow:
    - Type a name for the page.
    - Select the entity to base it on.
    - For each item on the page, enter a label and select the source and field. Also select whether that item is required or not.
13. Continue editing your task flow:
    - To add another page in your task flow, click **Insert page**.

- To add a branch in your task flow, click **Add branch**, set the conditions for when you want the branch to appear, and click the checkmark. Then click **Insert page** to add a page in the branch.
- To set business rules for this task flow, click **Business Rules**. For more information about using business rules, see TechNet: Create and edit business rules.

14. When you're done editing your task flow, click **Save**.
15. When you're ready to make your task flow available for use, click **Activate**.

See Also

Activate a business process or task flow

Assign a security role to a business process

Activate a business process or task flow

Before people can follow the stages and steps in a business process or task flow, you need to activate it.

Note

If the business process includes workflows or portable business logic rules, you'll need to activate those separately. For more information about business processes, see TechNet: Create and edit processes.

Important

Task flows are a preview feature. To use this feature, it must be turned on and the license terms must be accepted. Enable or disable Preview features.

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. Go to **Settings** > **Processes**. (How do I get there?)
3. On the list of processes, select the process or task flow you want to activate.
4. Click **Activate**.

See Also

Create a new business process

Preview feature: Create a new task flow

Assign a security role to a business process

Add ready-to-use business processes

eBook: Customize a business process

Assign a security role to a business process

After you create a business process, you need to enable the security roles of those who are going to use it. This allows people with the security role to assign the process to new and existing 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. Go to **Settings** > **Processes**. (How do I get there?)
3. On the list of your processes, choose the process name.
4. Click **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 **OK**.

See Also

Activate a business process or task flow

Create a new business process

Add ready-to-use business processes

eBook: Customize a business process

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. For more information about business processes, see Create and edit processes.

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. Go to **Settings > Data Management**.
3. Select **Add Ready-to-Use Business Processes**.
4. Choose **Add**.

See Also

Create a new business process

Assign a security role to a business process

Guide staff through common tasks with processes

eBook: Customize a business process

Business process templates for CRM

Check out Microsoft Dynamics Labs for business process templates that help organizations like yours follow best practices for common scenarios in your industry. These templates help you save time by giving you a great starting point for creating business processes that match the way you do business. They were developed by Microsoft employees from Research & Development, Support, Microsoft Consulting Services, and other teams within Microsoft.

You can find additional business process templates offered by Microsoft Partners on Microsoft PinPoint.

Before you can use these processes, you need to download them from the Microsoft Dynamics Marketplace, and then import the template into your Microsoft Dynamics CRM system. Many templates include demo data so that you can experiment with them and see how they work. To find out how to import business process templates and demo data, see Import business process templates from Microsoft PinPoint.

Important

Please note that these templates aren't supported by Microsoft. The global community facilitated by the Microsoft Dynamics Marketplace provides a place for you to discuss and exchange ideas and questions.

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. For more information about how to import templates, see Import, update, and export solutions on TechNet.

Industry	Business process template	Description
Financial Services	Deal, On-boarding, and Account Planning Process	Follow best practices through the complete client lifecycle for new and existing customers, from initial data gathering and on-boarding to account planning and running.
	Life Insurance Sales Template	Helps insurance companies sell life insurance policies from start to finish, including from prospecting for clients to quote, application, underwriting, and policy issuance. Helps agents, customer service reps (CSRs), and district managers capture information from prospects, convert leads into opportunities, send price quotes, and create the policy. Customer service reps can also follow the process to cross-sell insurance products during service calls. Doesn't include demo data.
	Coming Soon: Property and Casualty (P&C) Insurance Template	Help property and casualty insurers and agents uncover new opportunities, streamline the sales process, manage claims, and more effectively serve customers.
	Coming Soon: Retail Banking Template	Manage and leverage customer interactions, provide the right products and services, and streamline processes across the branch.
	Wealth Management Process	Gather required information from clients, develop investment proposals, and close transactions

Industry	Business process template	Description
		successfully. Doesn't include demo data.
Manufacturing and Distribution	Coming Soon: Automotive Lead Qualification and Management Template	Improve the lead qualification and nurturing process to increase the quality of leads passed from OEM to dealer.
	Automotive Warranty Claims Management Template	Simplify handling of warranty claims, including capturing key information from the customer, creating work orders for repairs, coordinating OEM review and approval of claims, and submitting required documentation.
	Connected Marketing, Sales, and Service Template	View information from a 360 degree view, make impactful decisions, and act effectively on those decisions across multiple industry channels (Manufacturing, Distribution, and Retail).
	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.
	Service Call—Repair and Return Template	Standardize how customer service reps (CSRs) assist customers with product fixes by phone, and manage product returns, replacements, and repairs.
Nonprofit Organizations	Donor and Volunteer Management Template for	Manage the donor management process in

Industry	Business process template	Description
	Large Organizations	collecting contributions by volunteers.
	Coming Soon: Donor and Volunteer Management Template for Small Organizations	Manage and improve interactions with donors and volunteers using the power of CRM combined with Microsoft Office applications.
Professional Services	Event Management Template	Plan, manage, and review events. Track event venues and sessions, internal and external team members, event packages, and group allocations. The web portal handles web registrations for events.
	Government Contractor Capture Management Template	Helps contractors for the United States federal government apply rigorous business development practices, scoping, estimation methods, and proactive risk management protocols to pursue and win the right contracts at the right price.
	Service Appointment Booking Template	Provide services by booking appointment for standardizing how customer service reps (CSRs) handle service appointment booking through phone. This template helps CSRs provide customers discounts and specialized services based on their profile while booking a service appointment.
	Service Offering Innovation and Sales Template	Turn innovation challenges to craft new service offering ideas using a CRM-based variant of the Microsoft Innovation

Industry	Business process template	Description
		Management Framework. Guide development and marketing of top-rated ideas. Coordinate every step of the pursuit process from opportunity identification to proposal creation, risks assessment, and escalation for go/no-go decisions. Develop, test, and drive new revenue and growth initiatives.
	Sports Management Template	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.
Public Sector	Citizen Services Template	Manage incoming service requests from citizens. Local, regional, or state governments can prioritize and assign service requests, estimate time and costs, and track progress until resolution.
	Elected Official Transition Template	Manage the recruiting and hiring process of staff by the transition team. Guides transition staff through standardized steps to help in the review, vetting, and investigation of new applicants. Dashboards provide visual status of applicants and where they are in the process.
	Grant Management Template	Manage and track grant awards to individuals, businesses, or other

Industry	Business process template	Description
		governments from application to the allocation of funds.
	Healthcare Management Process	Screen patients, provide appropriate counseling, and schedule follow-up appointments for patients. Doesn't include demo data.
	Health Plan Sales Template	Designed for organizations that sell health insurance, this template helps agents, customer service reps, and district managers capture information from a campaign response, convert leads into opportunities, send price quotes, and create the policy. Customer service reps can also follow the process to cross-sell insurance products during service calls. 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.
	Coming Soon: Patient Relationship Management Template	Healthcare providers track and manage their patient engagement lifecycle. With a patient data model and business processes, staff can store patient information, communicate via email, track these communications and set up automated workflows, for

Industry	Business process template	Description
		targeted outreach.
	Public Sector Case Management Template	Follow standardized steps to assess cases, define and approve mitigation plans, provide management reports, and ensure all required activities are completed to close a case.
	Tax, Permitting, and License Compliance Template	Oversee the collection of licensing and permitting fees from businesses and citizens.
Retail	Coming Soon: Retail Customer Service Template	Gives retail organizations the ability to have a scripted workflow of activity when dealing with retail problem scenarios. Helps retail customer support operations to effectively walk through customer transactional problems in a structured, repeatable way.
	Coming Soon: Selling to Business Accounts Template	Use salesforce automation to manage retail business customer accounts, expand on their footprint, and sell new or additional products.
Sales & Service Methodology	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

Industry	Business process template	Description
		call" sales cycle. Covers inbound and outbound calling scenarios.
	Integrated Sales and Service Template	Cross sell and upsell product and service offers through your customer service channel. Standardize how customer service representatives provide customers with product and service offers based on their interest and profile, and create leads for their sales team.
	Service Appointment Booking Template	Standardize how customer service representatives handle service appointment bookings. Provide customers with discounts and specialized services based on their profile during the booking process.
	Service Management with Entitlements Template	Provide differentiated services to customers based on their entitlements levels. This template provides a step–by–step visualization of the process to be followed by customer service representatives and helps customer service organizations provide premium service to their customers based on their entitlements.
Other	Cable and Telco Customer Service Template	Respond to customer inquiries with more contextually relevant and insightful answers that nurture the customer relationship and proactively introduce upsell and cross-sell conversations that boost

Industry	Business process template	Description
		revenue growth.
	Coming Soon: Connected Devices (IoT) Template	The Internet of Things (IoT) with the ability to connect computing devices to offer advanced machine communications and learnings, is changing the way organizations think about engaging with customers and partners. This template takes the Connected Marketing, Sales, and Service template to the next level by enhancing it with machine network integration and enabling CRM users to leverage machine data that is proactively sent from sensors to engage in rich marketing, sales, and customer service scenarios.
	Customer Portal	Deliver portal capabilities to customers while tracking and managing interactions. Includes lead generation, service scheduling, case management, event calendar, product registration, self-help knowledge base, and content management.
	Partner Relationship Management Portal	Distribute sales leads and centrally manage sales opportunities across channel partners.

See Also

TechNet: Create and edit processes

Activate a business process or task flow

Create a new business process

Assign a security role to a business process

Import business process templates from Microsoft PinPoint

eBook: Customize a business process

Import business process templates from Microsoft PinPoint

Get innovative solutions for your Microsoft Dynamics CRM system from the Microsoft Dynamics Marketplace. These include business process solutions from Microsoft Partners, as well as Microsoft Dynamics Labs solutions developed by Microsoft employees from Research & Development, Support, Microsoft Consulting Services, and other teams within Microsoft.

If your solution is from a Microsoft Partner, you'll need to work with the Partner to purchase and get the files you need to download.

Important

Please note that these solutions aren't supported by Microsoft. The global community facilitated by the Microsoft Dynamics Marketplace provides a place for you to discuss and exchange ideas and questions.

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. For more information about how to import solutions, see Import, update, and export solutions on TechNet.

Download your industry template

1. Select your industry template from Microsoft Dynamics Labs.
2. Choose **Try It**, choose **I agree**, and then save the file to the location you want.
3. Right-click the cabinet (.cab) file you just downloaded, choose **Extract**, and save the extracted file to the same folder.
4. Right-click the compressed (.zip) file you just extracted, choose **Extract**, and save the extracted file to the same folder.
5. Open the folder you just extracted, open the **PackageDeployer** folder, and double-click **PackageDeployer.exe**.
6. Choose **Continue** to start Package Deployer for Microsoft Dynamics CRM.
7. On the next screen, select your deployment type and region, type in your credentials, and choose **Login**.
8. Choose **Next** on the next four screens, then choose **Finish** on the last screen.

See Also

Create a new business process

Activate a business process or task flow

Add ready-to-use business processes

Assign a security role to a business process

Business process templates for CRM

eBook: Customize a business process

Use a dialog to create an interactive process like a wizard

Dialogs are a type of process in Microsoft Dynamics CRM. A dialog is an input form, similar to a wizard, that prompts users for information. You can use dialogs to help users follow complex processes. A dialog can include branching logic that's based on input from the person stepping through a case, phone call, or other customer interaction. Dialogs are frequently used in call centers to provide scripts that allow customer-facing staff to apply consistent interactions with customers.

For more information, see TechNet: Dialogs.

See Also

Create a new business process

Create a business rule to apply logic in a form

Not every organization has a developer readily available to apply changes when the rules in an organization change. With Microsoft Dynamics CRM, you can create business rules to apply form logic without writing JavaScript code.

Business rules provide a simple interface to implement and maintain fast-changing and commonly used rules. Business rules can be applied to Main and Quick Create forms for both the web application and Microsoft Dynamics CRM for tablets.

To learn more about business rules, see TechNet: Create and edit business rules

See Also

TechNet: Create and edit processes

Create and manage a product catalog

Set up a product catalog: Walkthrough

Classify products and bundles into product families

Product lifecycle--publish to retire

Translate product names and properties into multiple languages

Set up a product catalog: Walkthrough

Make it easier for your sales reps to increase their sales by creating a product catalog. The product catalog is a collection of products and their pricing information. To set up pricing, you need to define the units in which your products are sold, the amount to charge for each unit, and the discounts you want to offer based on volume purchased.

Other than setting up the pricing for products, product catalog also supports product taxonomy that lets you create a rich classification of products. This helps ensure that your customers receive the most appropriate and complete solution. More information: Classify products and bundles into product families

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

Because of how units, discounts, and prices are tied together, it's important that you create each of these components in a product catalog in the following sequence:

Step	Description	Related topics
1	Create discount lists to offer your products and services at different prices, depending on the quantity purchased.	Set up a discount list
2	Define the measurements or quantities your products will be available in.	Create a unit group and add units to that group
3	Create products for the items you sell. You can create a standalone product or a product inside a family depending on how you want to organize and classify your products. Each product you create will be linked to a unit group and default unit. You can also create a standalone bundle or a bundle inside a product family.	Classify products and bundles into product families
4	Define pricing for your products.	Create price lists and price list items to define pricing of products
5	Add price list items. A price list item defines the price per unit of a product. Add each new product to one or more price lists as price list items. You can do this either from the product form or the price list form.	Classify products and bundles into product families **- OR -** Create price lists and price list items to define pricing of products
6	Select one of the price lists to which you added the product as	Classify products and bundles into product families

Step	Description	Related topics
	the default price list for the product. Microsoft Dynamics CRM uses the default price list for calculations when the associated price list in the opportunity or order for the product doesn't contain a price definition of the product.	

Set up a discount list

Motivate customers to buy more by offering them discounts on bulk purchases. To offer discounts, you need to set up a discount list.

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

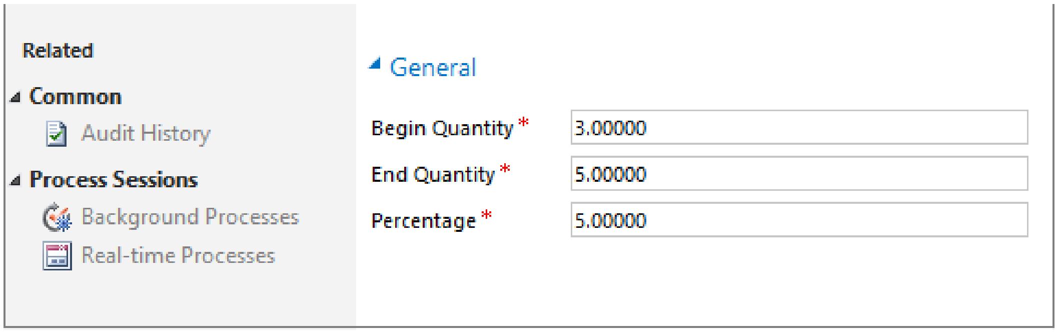
   Check your security role

   a. Follow the steps in View your user profile.
   b. Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. Choose **Discount Lists**.
4. To create a new discount list, choose **New**.

   -OR-

   To edit a discount list, open it.
5. Fill in the information:
   - **Name**. Type a name that provides a good description of the kind of discount this list will include.
   - **Type**. To calculate the discount as a percentage of the price of the item, choose **Percentage** or to give discount as a fixed amount, choose **Amount**.
   - **Currency**. If you chose to give discount as a fixed amount, select the currency.



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This discount list will offer a discount of 5% whenever the customer purchases between 3 – 5 boxes.

9. Choose **Save** or **Save and Close**.

Typical next steps

Create a unit group and add units to that group

Set up a product catalog: Walkthrough

See Also

System Settings dialog box - Sales tab

Create a unit group and add units to that group

Units are the quantities or measurements that you sell your products or services in. For example, if you sell gardening supplies, you might sell seeds in units of packets, boxes, and pallets. A unit group is a collection of these different units.

In CRM, you first create a unit group and then create units within that group. Let’s look at both of these tasks, using seeds as our example.

On this page:

Step 1: Create a unit group

Step 2: Create units in a unit group

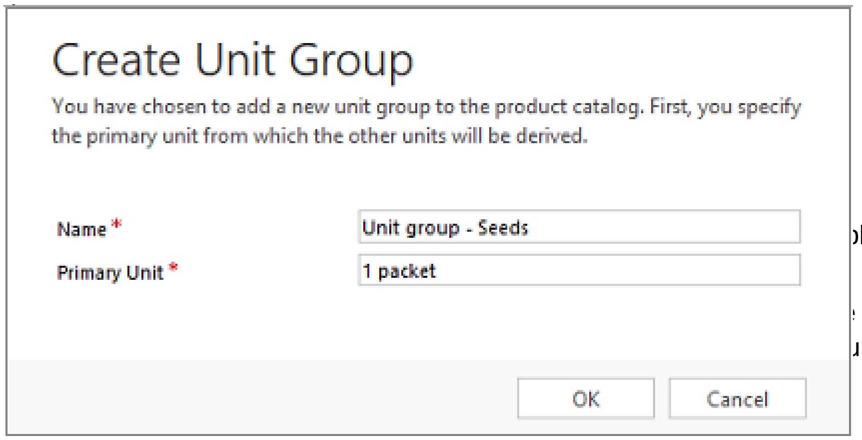
Step 1: Create a unit group

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. Choose **Unit Groups**.



ple, you would type

product will be sold
uld include ounces,

6. Choose **OK**.

Note

You cannot delete the primary unit in a unit group.

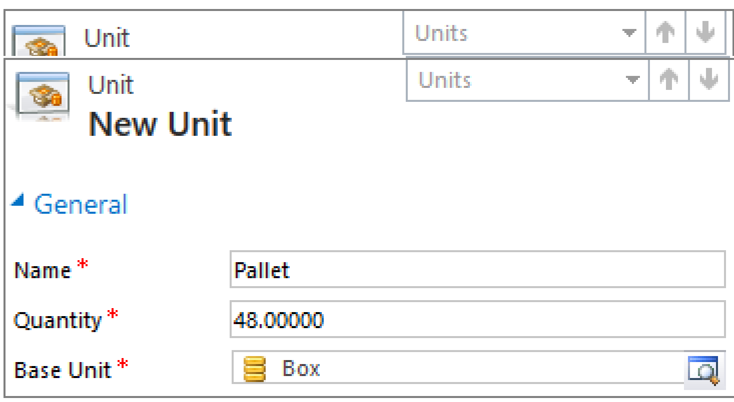
Step 2: Create units in a unit group

1. In the unit group you want to add the units to, in the left pane, under **Common**, choose **Units**, and then on the **Units** tab, in the **Records** group, choose **Add New Unit**.

   The unit that you specified as the primary unit earlier is already in the list of units.

2. Fill in your information:

   a. **Name**. Type a meaningful name for the unit. In our example, you would type "box."



For example, if a box contains

lish the lowest unit of
ample, you would select

contains 48 boxes, you would

3. Choose **Save** or **Save and Close**.

Typical next steps

[Create a product](#)

\- OR -

[Create product bundles to sell multiple items together](#)

[Set up a product catalog: Walkthrough](#)

Create price lists and price list items to define pricing of products

Price lists tell your sales agents what to charge for your products or services. You can create multiple price lists so that you can maintain separate price structures for different regions you sell your products in or for different sales channels.

Price lists tie the unit, product, and pricing details together, so before you create a price list, make sure the units and products are in place.

On this page:

- Step 1: Create a price list
- Step 2: Add items to the price list
- Step 3: Define default price list for territories

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the **Product Catalog** area, click **Price Lists**.
4. To create a new price list, click **New**.

   -OR-

   To edit a price list, open a price list from the list.
5. Fill in your information. Use the handy tooltips as a guide.
6. Click **Save**.

Note

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. You can add price list items from the product form also.

In the price list record, in the **Price List Items** section, click the **Add Record** button.

2. Fill in your information. Use the handy tooltips as a guide.
   - In the Product and Unit box, select the product and unit for which you're creating this price list item.
   - To offer a discount on the combination of the product and unit, select a discount list.
   - In the **Quantity Selling Option** drop-down box, select 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.

   - In the **Pricing Method** drop-down box, select an option that determines how the pricing will be calculated. It could be a certain amount, or a percentage of the current or standard cost.
   - If you selected **Currency Amount** as the pricing method, in the **Amount** box, type the amount at which the product will be sold.

     -OR-

     If you selected any value other than **Currency Amount** as the pricing method, type the percentage for the pricing method that you want.
   - If you selected a pricing method other than **Currency Amount**, you can set up a rounding policy. For example, if you want per unit prices to be in the form of $0.99, you can select a rounding policy where all prices per unit automatically have a price that ends in 99 cents. To do this, you select the rounding policy to round the price up, and then set the price to end in a certain amount, such as 99 cents.
     - **None**. Prices are not rounded.
     - **Up**. Prices are rounded up to the nearest rounding amount.
     - **Down**. Prices are rounded down to the nearest rounding amount.
     - **To Nearest**. Prices are rounded to the nearest rounding amount.
   - In the **Rounding Option** drop-down box, select **Ends in** or **Multiple of** if you want the price to end in a certain amount or multiples of a certain amount.
   - In the **Rounding Amount** box, enter the amount.
3. Click **Save**.

Step 3: Define default price list for territories

Make sales agents' job easier by adding default pricelists for territories or customer segments the agents are managing. When sales agents are working on opportunities, they see the default price list. Sales agents can later select other price list that they've permission on. You can have one price list as the default for multiple territories.

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]

In the price list record, in the **Territory Relationships** section, click the **Add Record** button .

2. In the **Connection** form, in **Name**, click the **Lookup** button, and select a territory.
3. Click **Save & Close**.

In the price list form, click the **Auto Save** button .

When the sales agents set or change the customer for an opportunity, if a default price list is added to their territory (customer segment), it is shown.

Typical next steps

[Publish a product or bundle to make it available for selling]

[Set up a product catalog: Walkthrough]

See Also

[System Settings dialog box - Sales tab]

[Classify products and bundles into product families]

Classify products and bundles into product families

A product catalog is a collection of products and their pricing information.

The product catalog in Microsoft Dynamics CRM also supports product taxonomy that lets sales managers:

- Hierarchically organize products and product bundles into product families.
- Define configurable properties for products to reduce the number of individual product records or stock keeping unit (SKUs) they would need to manage. The sales people can pick from these properties when they're working on opportunities, quotes, orders, or invoices.
- Group products and services into bundles to create attractive packages for customers
- Define product relationships such as upsell and cross-sell products so sales people can see these products as recommendations at the time of building orders.

All these capabilities will help your sales agents quickly find products, see their properties, and also suggest other products to the customers, and consequently increase sales.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]

Follow these links to learn more:

- [Create a product family]
- [Create a product]
- [Create product bundles to sell multiple items together]
- [Use properties to describe a product]
- [Define related products to increase chances of sales]
- [Publish a product or bundle to make it available for selling]
- [View product hierarchy]
- [Translate product names and properties into multiple languages]
- [Clone a product]
- [Delete a family, product, or bundle]

See Also

Set up a product catalog: Walkthrough

Create a product family

Make it easier for sales agents to find products and services in a product catalog by creating a product family and classifying similar products in it. A product family lets you group and categorize products, making it easier for you to manage them.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

With product families, you can:

- Categorize your products in whichever way is most meaningful for your organization.
- Create child products and product bundles within a product family. Product bundles allow you to sell multiple items together.
- Create as many levels of product families as you want by creating a family within a family.

Note

The product family that you use for creating a product, bundle, or another product family becomes the parent family. You can’t change the parent family for the child products, bundles, or families. In the preceding example, “Televisions” is the parent family for “LED TVs” and “Plasma TVs,” and you can’t change these to have a different parent family.

1. Make sure that you have one of the following security roles or equivalent permissions: System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice

President of Marketing, or CEO-Business Manager.

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the **Product Catalog** area, click **Families & Products**.
4. To create a family, click **Add Family**.

   -OR-

   To create a child product family under an existing family, select the family, and click **Add Family**. The selected family becomes the parent family of the new family you're creating.

   If you want to see your current product family levels, see View product hierarchy.
5. Fill in your information. Use the handy tooltips as a guide.

   Note
   The **Valid From** and **Valid To** fields define the duration that a product is valid for. There's no business logic associated with these fields except that the **Valid To** date must be later than the **Valid From** date. If required, you can implement your own business logic in these fields with a workflow, plug-in, or by using the Microsoft Dynamics CRM SDK. For example, you could run a scheduled job to automatically retire last season's products using the date selected in the **Valid To** field.
6. Click **Save**.
7. In the list of products, families, and bundles, open the family that you just created.

In the **Product Properties** section, click the **Add Properties** button, and add the required properties. More information: Use properties to describe a product

Typical next steps

Use properties to describe a product

Create a product

Classify products and bundles into product families

See Also

Set up a product catalog: Walkthrough

Clone a product

Create a product

Products are the backbone of your business. They can be physical products or services—whatever your organization sells. Your sales reps use the products you create in Microsoft

Dynamics CRM to generate sales quotes, marketing campaigns, orders, and invoices. Your customer service reps might also use them when they create customer service cases.

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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

   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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the **Product Catalog** area, click **Families & Products**.
4. If you want to create a child product to an existing product family, select the family in the list, and then click **Add Product**. The selected family becomes the parent family of the new product you're creating. You can't change the parent of a product after the product is created. More information: Create a product family

   -OR-

   If you want to create an independent product, simply click **Add Product**.
5. Fill in your information:
   - **Unit Group**. Select a unit group. A unit group is a collection of various units a product is sold in and defines how individual items are grouped into larger quantities. For example, if you're adding seeds as a product, you may have created a unit group called "Seeds," and defined its primary unit as "packet."
   - **Unit**. Select the most common unit in which the product will be sold. Units are the quantities or measurements that you sell your products in. For example, if you're adding seeds as a product, you can sell it in packets, boxes or pallets. Each of these becomes a unit of the product. If seeds are mostly sold in packets, select that as the unit.

     More information: Create a unit group and add units to that group

   Note

   The **Valid From** and **Valid To** fields define how long a product is valid for. There's no business logic associated with these fields except that the **Valid To** date must be later than the **Valid From** date. If required, you can implement your own business logic in these fields with a workflow, plug-in, or by using the Microsoft Dynamics CRM SDK. For example, run a scheduled job to automatically retire last season's products using the date selected in the **Valid To** field.

6. Click **Save**.

In the **Price List Items** section, click the **Add a Record** button, and create a price list item for each unit the product is available in. More information: Create price lists and price list items to define pricing of products

8. In the **Default price list** box, select a default price list. Microsoft Dynamics CRM uses this price list for calculations when the associated price list in the opportunity or order for the product does not contain a price definition of the product.

   Note
   A price list will be available for selection only when the product you're creating is added to it as a price list item (as described in **Step 7**).

9. If you're creating this product under a family, the product will inherit the properties from its parent family. To change a product's property, in the Product Properties section, open the property by clicking the name, and click **Override**. More information: Use properties to describe a product

   Note
   You can't add properties to an independent product.

In the **Product Relationships** section, click the **Add a Record** button, and select a related product. More information: Define related products to increase chances of sales

11. Click the **Save** button in the bottom-right corner.

12. After you're done adding all the details, make sure to review everything and ensure it's correct. On the command bar, click **Preview**. The **Properties Preview** dialog box lets you verify how the product properties will appear to sales agents when they're selling the product or bundle.

    After you're done verifying, click **Done**.

Typical next steps

Create price lists and price list items to define pricing of products

Classify products and bundles into product families

See Also

Set up a product catalog: Walkthrough

Create product bundles to sell multiple items together

Encourage customers to buy more products instead of a single product by combining products in a bundle. Bundles replace the older kit functionality in Microsoft Dynamics CRM. Kits have been deprecated, so we recommend that you start using bundles instead.

This list highlights the differences between kits and bundles:

- You can't sell the products in a kit individually or separately, but you can mark certain products in a bundle as optional, and sell them individually.
- You can't see individual products added in a kit when you create an opportunity or order, but you can see the products in a bundle.
- You can create nested kits (kits within a kit), but you can only add products to a bundle; you cannot add product families, kits, or other bundles to a bundle.

Similar to a kit, a bundle is a collection of products that is sold as single unit. Product bundling is useful in cases like:

- Pairing a top-selling product with a less popular product
- Grouping products in a way that customers get more benefit from the full line of products, for example Microsoft Office Suite or a digital camera with lenses

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

On this page:

Create a product bundle

Pricing of bundles

Create a product bundle

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. Click **Families & Products**.
4. To add a standalone product bundle, click **Add Bundle**.

   -OR-

   To add product to an existing family, select the family in the list, and then click **Add Bundle**.
5. Enter information, noting any restrictions or requirements as needed.
6. Click **Save**.

In the **Bundle Products** section, click , and select products that you want to add to the bundle.

The **Product Association** page opens.

8. Fill in your information. Use the handy tooltips as a guide.
   - **Bundle**. The bundle you're adding the products to is selected by default.
   - **Product**. Click the **Lookup** button and select a product you want to add to the bundle.
   - **Quantity**. Specify the quantity of product you want to add to the bundle.
   - **Required**. Specify whether this product is required or optional. If you select a product as optional, you can sell the bundle without the product.
   - **Unit**. Select the unit in which you want to sell the product.

   Note
   The **Valid From** and **Valid To** fields define the duration for which a product is valid. There's no business logic associated with these fields except that the **Valid To** date must be later than the **Valid From** date. If required, you can implement your own business logic in these fields with a workflow, plug-in or Microsoft Dynamics CRM SDK. For example, run a scheduled job to automatically retire last season's products using the date selected in the **Valid To** field.
9. Click **Save and Close**.
10. To change properties of an individual product in the bundle, click **Customize** corresponding to the product, and change the values as required.
11. If you've added this bundle to a family, the bundle will inherit the properties from its parent family. To change the bundle's property, open the property and click **Override**. More information: Use properties to describe a product

In the **Additional Details** section, click +, and add a price list item. More information: Create price lists and price list items to define pricing of products

In the **Product Relationships** section, click +, and select a related product. More information: Define related products to increase chances of sales

Pricing of bundles

Typically, the pricing of products in bundles is different than the individual products. You can set a total and potentially discounted price for the bundle or if the bundle has optional products, add those products to the price list as price list items. Then the total for a bundle in an opportunity is calculated by adding up the prices for each price list item, including optional bundle products that your customer selects. If you don't add an optional product in the price list, its price will be considered as zero.

Tip
- After you're done adding all the details, click **Preview** on the command bar to look through the properties of the product bundle.
- To create a new product bundle based on an existing one, on the command bar, click **Clone**. This opens a new product bundle record with the same information as the original product bundle record, except for the name and ID.

Typical next steps:

Create price lists and price list items to define pricing of products

Classify products and bundles into product families

See Also

Set up a product catalog: Walkthrough

System Settings dialog box - Sales tab

Use properties to describe a product

Simplify product management and classification by adding properties that help distinguish products from one another. Adding well-defined properties to products cuts down on the time spent by your agents trying to find products with the right specifications or properties for your customers when they're building orders.

A property of a product could be its size, color, or component and so on. Properties are added at the family level. You can add properties only to a family, and only when it is in a draft or under revision state. The child products, bundles, and families inherit the properties from their parent family.

Important
You can't set different prices for the different properties you define for a product unless you're using a custom pricing engine.

Note
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

On this page:

Add properties to product families

Change properties of product family, products, or bundles

Product versioning

Add properties to product families

1. Go to **Settings** > **Product Catalog**. (How do I get there?)
2. Click **Families & Products**.
3. Click the product family you want to add properties for.

In the product form, in the **Product Properties** section, click +.

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

   Note
   You can hide a property by setting **Hidden** to **Yes**. When you hide a property, you block the child families or products from inheriting that property.

The following table shows a list of properties that you might want to add for a shirt product family:

Property name	Data type	Values
Color	Option Set	red, blue, yellow, green
Size	Option Set	small, medium, large

6. Click the **Save** button in the bottom right corner, and close the form.

Repeat the steps to add multiple properties.

Change properties of product family, products, or bundles

You can make changes to the inherited properties of an individual product or family by overriding its properties. For example, for a shirt family, the size can vary between small, medium, and large. A product inside this family will inherit the same property. You can override the property to define the actual size of an individual shirt to medium.

1. Open the product you want to override the property of.
2. Click the property you want to override.
3. In the **Product Properties** form, on the command bar, click **Override**.
4. Change the details as required, and save the properties record.

Note

You can override properties only for products and families that have inherited properties from the parent family.

In the following cases, you'll see the **Overwrite** option instead of the **Override** option:

- You're trying to change non-inherited properties of a product family that's in the **Under Revision** status.
- You're trying to change the inherited and already overridden properties of a child product family or product. If the inherited properties of the child product or family weren't overridden, you'll see the Override option.

Note

Child families can have their own properties in addition to inherited ones.

Product versioning

At times, opportunities run for extended period. During this period, the associated product may change or retire. In such cases, the opportunity must still be taken through to completion.

When you revise a product and change the properties, CRM automatically creates a new version of the product and copies the product details from the existing product to the newer version. The new product version has all the details including price lists, product relationships, and properties. The already-created opportunities with the older version of product can continue to refer to the older version of the product. The opportunities that are created after the product is revised or retired will refer to the current (newer) version.

See Also

[Set up a product catalog: Walkthrough]

[System Settings dialog box - Sales tab]

[Classify products and bundles into product families]

Define related products to increase chances of sales

Improve your opportunities to increase sales by adding related products as suggestions for up-sell, cross-sell, accessories, or substitutes. Defining related products will help your sales agents with their recommendations to customers. You can add related products to a product or product bundle, but not to product families.

The related products are displayed as suggestions to your sales agents during opportunity or order management. These suggestions help your sales agents recommend related products and bundles/kits to the customers, and increase product sales. You can define the following relationships for a product: Accessory, cross-sell, substitute, and up-sell. For example, for a Microsoft Surface RT product, you can add Microsoft Surface Pro as an up-sell product so that when your sales agent is adding Surface RT to any opportunity, quote, order, or invoice, Surface Pro is suggested as the up-sell option.

Note

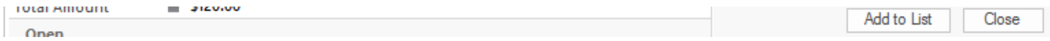
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]

1. Go to **Settings** > **Product Catalog**. [(How do I get there?)]
2. Click **Families & Product**.
3. Open a product you want to define related products for. The product must be in the **Draft**, **Active** or **Under Revision** state.

In the **Product Relationships** section, click the **Add Product Relationship** button .

5. In the quick form, enter the following details:
   - **Related Product**. Select a product that you want to add as a related product to the existing product record you're working on.
   - **Sales Relation Type**. Select whether you want to add the product as an up-sell, cross-sell, accessory, or substitute product.
   - **Direction**. Select whether the relationship between the products will be uni-directional or bi-directional. When you select **Uni-Directional**, the product that you select in **Related Product** will be shown as a recommendation for the existing product but not vice-versa.
6. Click **Save**.

When you add a product to an opportunity, the sales agents can see the related product as suggestions for an opportunity. The **Suggestions** dialog box on the opportunity record suggests only those products that are related to the main product and have the same price list as the one associated with the opportunity.



Typical next steps

[Publish a product or bundle to make it available for selling]

[Set up a product catalog: Walkthrough]

See Also

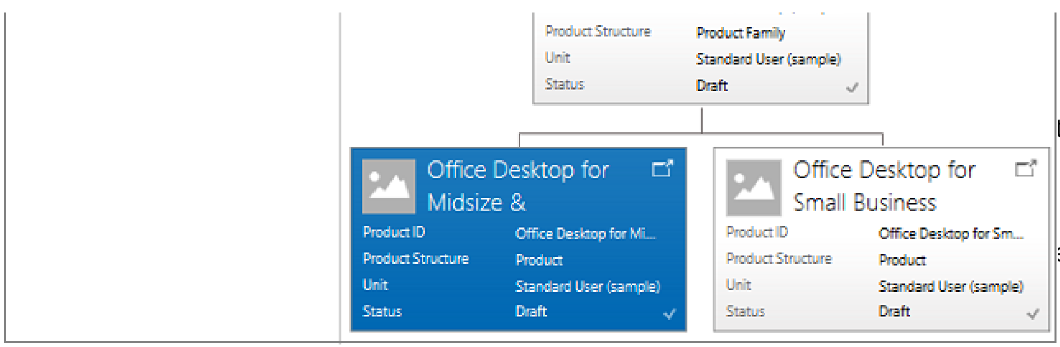
[Classify products and bundles into product families]

View product hierarchy

A product hierarchy gives you a visual snapshot of the products your organization sells. It makes it easy to see what products are available to sell and how they are connected. With this information at your fingertips, you can take whatever actions you need to on any product from a single place and improve your chances of a sale.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? [Find your CRM administrator or support person.]



3. To find out more about a product, family, or bundle, click its corresponding **Open this record** button.

   Tip

   You can also select a product and use one of the common command bar actions on the product, family, or bundle such as **Email a link** or **Edit**.

See Also

Set up a product catalog: Walkthrough

Classify products and bundles into product families

Product lifecycle--publish to retire

It is important to understand the complete cycle a product goes through. First you create a product and add details to it in the Draft state. When the product is ready for selling, you publish it, which puts the product in the Active state. Then, if the product changes for any reason, you can revise it so that sales agents see updated product information. When you do this, the product is set to **Under Revision** status. After you've made the required changes, publish the product again. When your organization decides to stop selling a certain product, you retire it.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

You can also activate a product or a kit. More information:: MSDN: Publish, revise, revert, retire, and activate products (product lifecycle)

Typical next steps

Publish a product or bundle to make it available for selling

Revise a product

Retire a product

Set up a product catalog: Walkthrough

See Also

Classify products and bundles into product families

Publish a product or bundle to make it available for selling

When you're ready to sell a product or bundle, publish it to make it available to the sales agents so they can build orders or create opportunities orders for customers. By default, product records are created in a draft state, and are available to your sales agents only after you publish it. For products that don't have a parent product family, you can create them directly in an active state using a system setting, so that you don't have to publish them after creation. More information: System Settings dialog box - Sales tab

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

1. Make sure that you have one of the following security roles or equivalent permissions: System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice

President of Marketing, or CEO-Business Manager.

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the Product Catalog area, click **Families & Products**.
4. Open the product, bundle, or family you want to publish, and on the command bar, click **Publish**.

   This will change the product status to **Active** and make it available for selling.

Tip

You can't publish multiple product records at the same time. To publish all child products and families of a parent family at once, open the family, and choose **Publish** > **Publish Hierarchy**. For product records that don't belong to a product family, publish them individually after creating or editing them to make them available to your sales agents.

Note

You can only publish a product or bundle with a parent family if the parent product family is active.

Typical next steps

Revise a product

Retire a product

Product lifecycle--publish to retire

See Also

Set up a product catalog: Walkthrough

Revise a product

Keep the product inventory updated by quickly revising properties for the products as required, and republishing the information so that your sales agents can see the latest changes to the inventory.

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the Product Catalog area, click **Families & Products**.
4. Open an active product, bundle, or family you want to change, and on the command bar, click **Revise**.

   This will change the product status to **Under Revision**.
5. Change the product properties, as required. More information: Use properties to describe a product
6. Once you're done making the changes, on the command bar, click **Publish** or **Publish Hierarchy**.

   Tip
   If some of the information that you changed doesn't align with the customer or business needs, revert the changes and continue with the last active version of the product. To do this, click **Revert**. This changes the status of the product back to **Active**.

Revising a family sets all the products and bundles under it to the **Under Revision** state.

Typical next steps

Retire a product

Product lifecycle--publish to retire

See Also

Set up a product catalog: Walkthrough

Clone a product

When you're creating a new product, family or bundle, save time by cloning an existing one. This creates a copy of the original record with all the details except for the name and ID. If the product, bundle or family has any properties, they're also copied to the cloned record.

Note
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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

   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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the **Product Catalog** area, click **Families & Products**.
4. Select a product family, product, or bundle record that you want to clone, and on the command bar, click **Clone**. A new product record will open with the same details as the original one except for the name and ID.

   The new record is created under the same parent node as the original one.

See Also

Set up a product catalog: Walkthrough

Classify products and bundles into product families

Retire a product

If your organization doesn’t sell a product anymore, retire it so that the product is no longer available to your sales agents.

Note

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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

   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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. Click **Families & Products**.
4. Open an active product, bundle, or family that you want to retire, and on the command bar, click **Retire**.

Typical next steps

Product lifecycle--publish to retire

See Also

Set up a product catalog: Walkthrough

Delete a family, product, or bundle

To stop selling a product, delete it. If you delete a parent family, its child products, families, and bundles are also deleted.

Warning
You can’t recover a deleted record.

Important
This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

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

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. Go to **Settings** > **Product Catalog**. (How do I get there?)
3. In the **Product Catalog** area, click **Families & Products**.
4. Select a product family, product, or bundle record you want to delete, and on the command bar, click **Delete**.

See Also

Set up a product catalog: Walkthrough

Classify products and bundles into product families

Translate product names and properties into multiple languages

When you sell your products in different regions, it is important that you translate significant product details into multiple languages. Help sales agents find things they need easily by making all the relevant details like cross-sell or upsell suggestions, or properties, available to them in their preferred language.

Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises). Interested in getting this feature? Find your CRM administrator or support person.

On this page:

- Step 1: Export data for translation
- Step 2: Import translated data
- Selection of language in different scenarios

Step 1: Export data for translation

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

   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. Go to **Settings** > **Data Management**. (How do I get there?)
3. Click **Export Field Translations**.
4. In the **Export Field Translations** dialog box, click **OK**.

   All product fields that are marked as localizable by default will be exported. Your internal developers can mark the fields as localizable. More information: Work with localizable attributes.

5. Save the .zip file to your local computer.

   Exported text is saved as a compressed file that contains a CrmFieldTranslations.xml that you can open by using Microsoft Excel. You can send this file to a linguistic expert, translation agency, or localization firm.

Step 2: Import translated data

When you get the localized data back from translation, import it into Microsoft Dynamics CRM.

Important
It is important to provision the language packs first. If you import translated values for languages that aren't provisioned in the organization, they'll be discarded. More information: TechNet: Install or upgrade Language Packs for Microsoft Dynamics CRM

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. Go to **Settings** > **Data Management**. (How do I get there?)
3. Click **Import Field Translations**.
4. In the **Field Translation Import Jobs** page, on the Action toolbar, click **Import Field Translations**.
5. In the **Import Translated Text** dialog box, click **Browse**, and select the file that you've received from your translation agency.
6. Click **Import**.

   This starts the import job. You can check the status to see if the import has succeeded or failed.

After you've imported the translated text, users in your organization will see the data in their preferred language. If a value for the preferred language does not exist, the results will be shown in the user's base language.

Selection of language in different scenarios

This section explains how the duplicate detection and workflow logic affect translation in Microsoft Dynamics CRM:

- Calculated fields logic, including conditional clauses, uses only the base language. The behavior of workflows and portable business logic is similar to Microsoft Dynamics CRM SDK. The label for the user's preferred language (user interface language) is used if present. Otherwise, the base language is used.
- When a record is created or updated, duplicates are detected from the localizable fields (attributes) that are in the base language. Creating or updating a localizable field is not applicable in a non-base language.
- During data import,
    - For updating or creating records through import, when import is executed in base language, only the labels in the base language are used for duplication detection.

- When import is executed in non-base language, import fails because update can’t be performed in a non-base language.

- When you run duplicate detection in the base language, only the base language is used in conditional clauses.
- When you run duplicate detection job in the preferred language, label in the preferred language is used first. When preferred language is not available, it uses the base language.

See Also

Set up a product catalog: Walkthrough

Set up duplicate detection rules to keep your data clean

Work with templates

Save time by creating templates for commons tasks like email, KB articles, and contracts. Templates contain prefilled data that you specify, so you don’t have to re-enter the same information.

Create templates for articles

Create templates for contracts

Create templates for email

Work with mail merge templates

Create or edit a campaign template in the CRM marketing work area

Set up entitlements quickly with templates

Analyze your data with Excel templates

Using Word templates in CRM

Create Word and Excel templates from CRM data

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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Click or tap **Article Templates**.
4. To create a new article template, choose **New**.
5. In the **Article Template Properties** dialog box, type the new article title, select the language, and then click **OK**.
6. To add a section, in the **Common Tasks** area, choose **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.

7. 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.
8. To remove the section, select the section you want to remove, and in the **Common Tasks** area, click **Remove a Section**.
9. 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.
10. 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.
11. When you're done, choose **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. Go to **Settings** > **Service Management**. [(How do I get there?)]

3. Choose **Contract Templates**.
4. To create a new contract template, choose **New**.
5. 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**.

6. Choose **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. Go to **Settings** > **Templates**. (How do I get there?)
3. Choose **Email Templates**.
4. On the Actions toolbar, click or tap **New**.
5. 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.

6. On the **Email Templates** form, enter a **Title** and **Subject**.
7. You can type a description of the template. This is not displayed to the recipient.
8. 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 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**.
9. To insert data fields to display information such as a customer's name or data from a quote, from a Microsoft Dynamics CRM record, click or tap **Insert/Update**, and then in the **Data Field Values** dialog box, click or tap **Add**.
10. In the **Add Data Value** dialog box, select the **Record type** and **Field**, and then click or tap **OK**.
11. Click or tap **OK** again to insert the data.
12. 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.
13. 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 Word, but can be uploaded to Microsoft Dynamics CRM to use with mail merge and share with other users. Only Word .xml documents can be used as templates. To learn more about how to create mail merge templates, see the online Help 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. Go to **Settings** > **Templates**. (How do I get there?)
3. Click **Mail Merge Templates**.
4. To create a new mail merge template, click **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 **Browse**, search for the template on your computer, and then click **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

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. Go to **Marketing** > **Campaigns**. (How do I get there?)
2. Click **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 **Save** or **Save and Close**.

Copy an existing campaign as a template

- Open the campaign that you want to copy. Click **Copy as Template**, type a name for the template, and click **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

Note

This topic applies to the Marketing work area within Microsoft Dynamics CRM. The Dynamics 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 Dynamics CRM, you might be looking for a similar topic for that product. Dynamics Marketing provides a full-scale set of functionality, automation, and analytical insights for multistage and multichannel campaigns. More information: Microsoft Dynamics Marketing Help Center

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 was introduced in CRM Online Spring '14 update and in CRM 2013 Service Pack 1 (on-premises).

Interested in getting this feature? More information: Find your CRM administrator or support person

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. Go to **Settings** > **Service Management**. (How do I get there?)
3. Choose **Entitlement Templates**.
4. To create a new entitlement template, choose **+ New**.

   -OR-

   To edit an entitlement template, in the list of records, select the template, and on the command bar, choose **Edit**.
5. 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.

6. Click **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, choose **+**.
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, choose **+**.
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, choose **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]

Analyze your data with Excel templates

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? [Find your CRM administrator or support person.]

Microsoft Excel provides powerful ways to analyze and present your CRM data. With Excel templates, you can easily create and share your customized analysis with others in your organization.

Use Excel templates for:

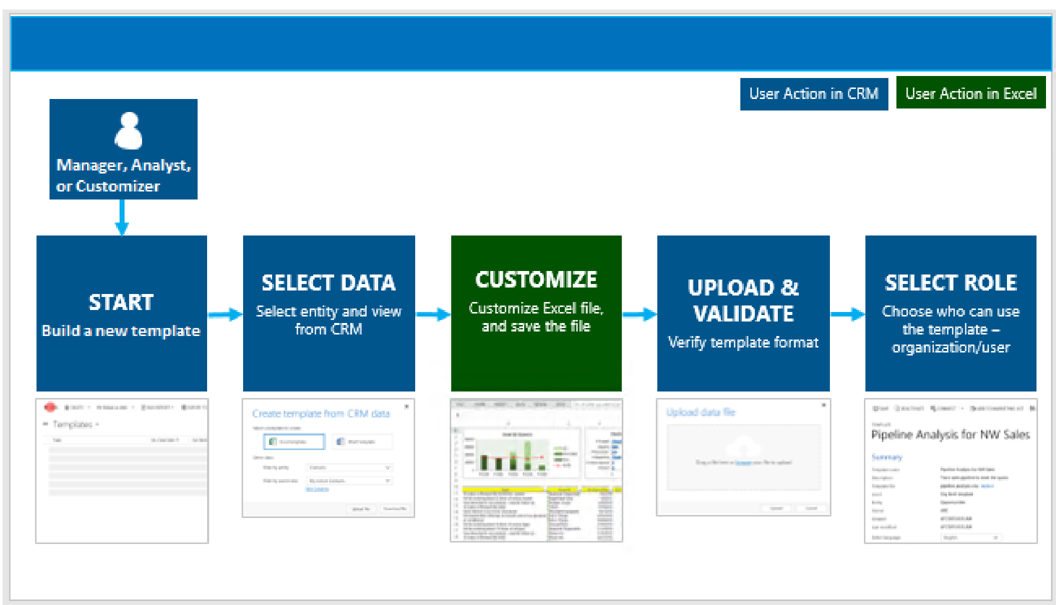
- Sales Forecasting
- Pipeline Management
- Leads Scoring
- Territory Planning
- And much more…

You can try out the Excel templates included with CRM 2016 to get a quick view of what kind of analysis is possible.

3470efe5-88ad-4d33-9401-82af06fa063e

Create a new Excel template

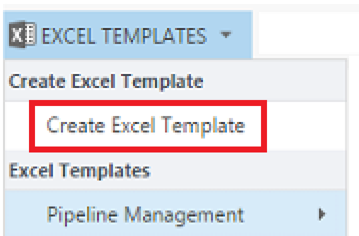
The process for creating an Excel template is as follows:



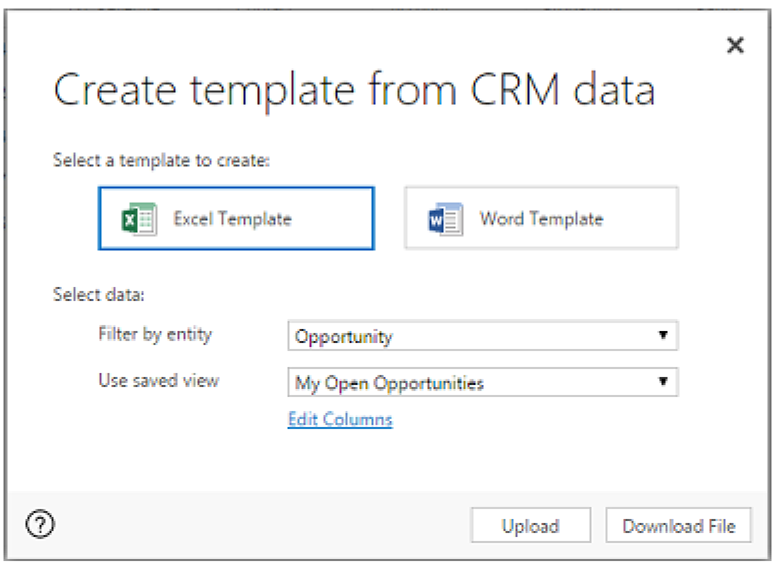
Step 1: Create a new template from existing data

There are two places in CRM where you can create an Excel template:

- **From the Settings page**. Go to **Settings** > **Templates** > **Document Templates** > **New** (+). You must have sufficient permissions to access to the Settings page, such as System Administrator or System Customizer.
  - **From a list of records**. For example, go to **Sales** > **Opportunities** > **My Open Opportunities**. On the menu bar, click **Excel Templates** > **Create Excel Template**.



The **Create template from CRM data** page appears.



Select the data to include in the template

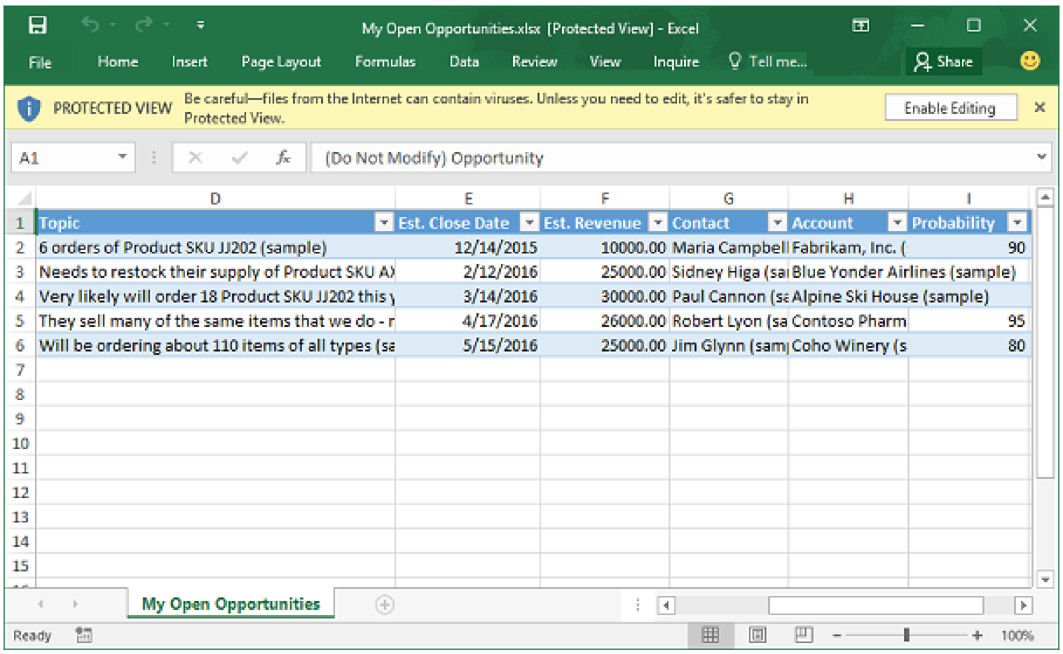
1. Select an entity (record type) to include that CRM data. The views you can select in the next field depend on the entity you select.
2. Select a view.
3. Click **Edit Columns** to add, remove, and adjust properties for the columns to be included in the template.
4. Click **Download File** to create the template file.

Warning

You can also download a template containing no data except for the columns associated with the record type (entity) using **Settings** > **Data Management** > **Templates for Data Import**. For more information, see: [Download a template for data import](#).

Step 2: Customize the data in Excel

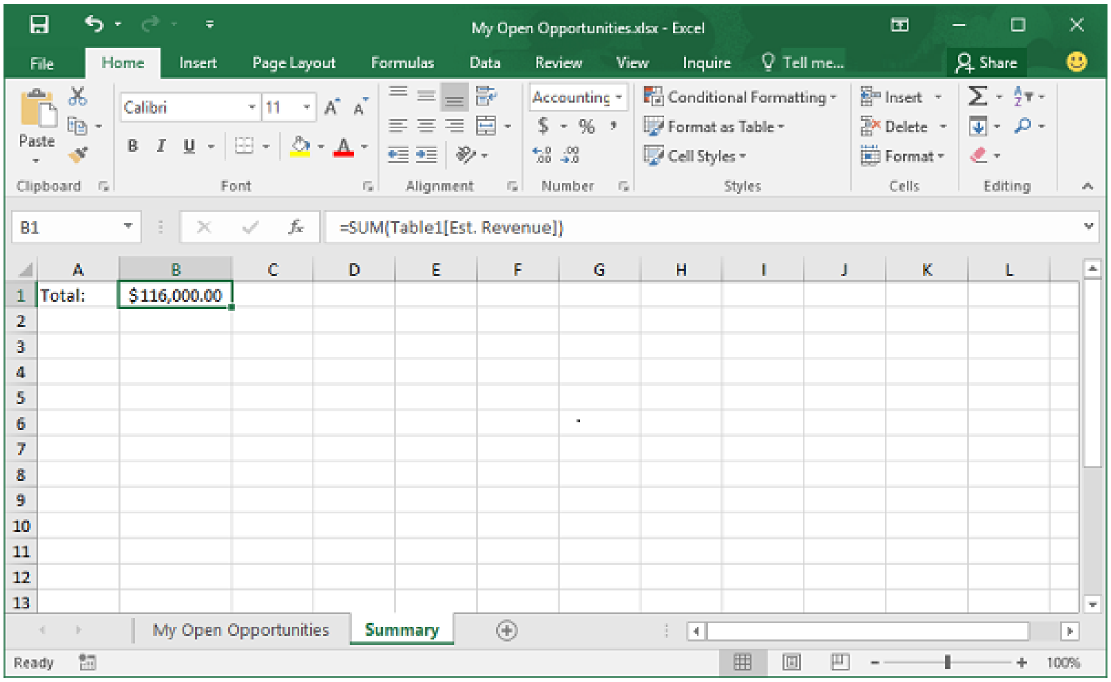
Open the newly created template in Excel to customize the data.



Let's walk through a simple example of customizing an Excel template using CRM sample data.

Example customization of Opportunities data

1. Click **Enable Editing** to allow customization of the Excel spreadsheet.
2. Add a new column and name it "Expected Revenue".



3. Create a formula for expected revenue. Don't refer to cells using their addresses; define and use names instead.

   9777a950-a39e-4c33-bdee-137e89def532

4. Create a pivot table and chart. These and other demo steps will be covered in an upcoming document.

   User added content should be placed above or to the right of the existing data table. This will prevent the content being overwritten if you add new data in CRM later and you create a new Excel template. For more information, see: Best practices and considerations for using Excel templates

   3eaba552-a2b5-4d81-973c-cc81cb0ae74b

5. Save the spreadsheet.

You're now ready to upload the Excel template into CRM.

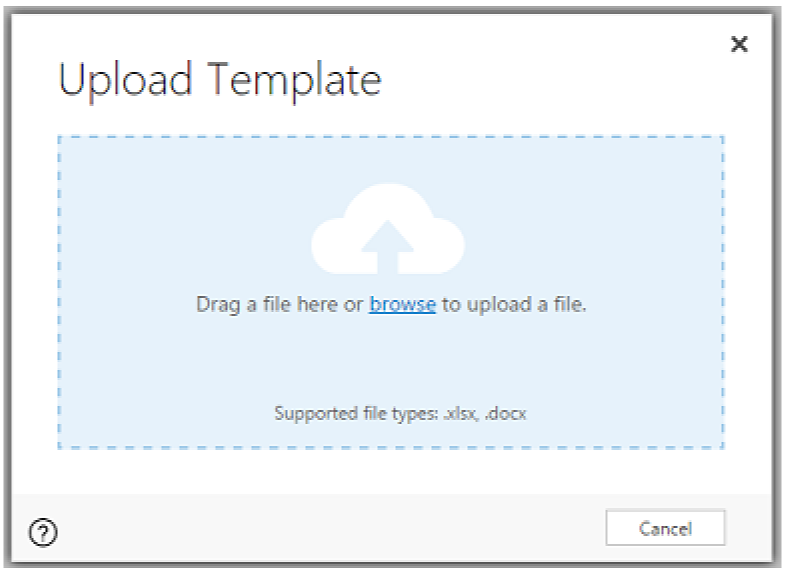
Step 3: Upload the template and share with others

Once you have your Excel template customized the way you want, you can upload it into CRM. Where the template is uploaded determines its availability.

CRM administrators can use the Settings page to upload the Excel template into CRM. A template uploaded in Settings is available to all users in your CRM organization.

For admins: Upload the Excel template into CRM

1. In CRM, go to **Settings** > **Templates** > **Document Templates**.
2. Click **Upload Template**.
3. Drag the Excel file in the dialog box or browse to the file.

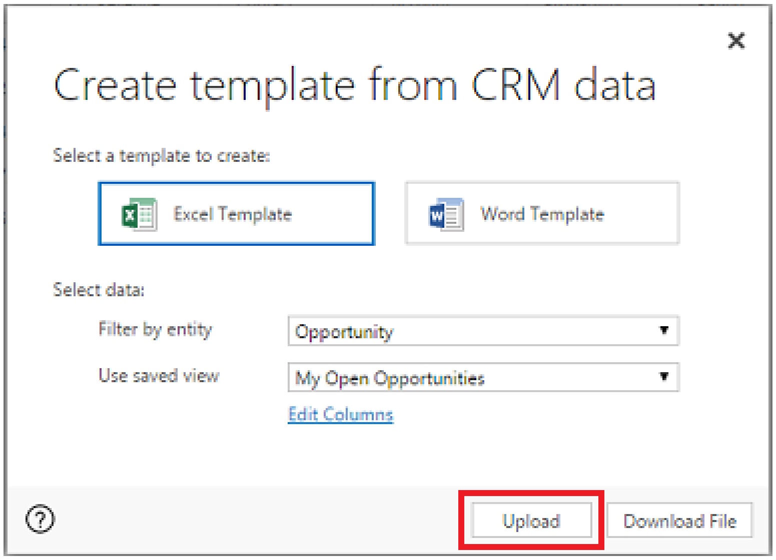


4. Click **Upload**.

Non-admin users can upload a template for their own use from a list of records.

For non-admins or admins wanting to create a personal template: Upload the Excel template into CRM

1. In CRM, open a page with a list of records, for example, the list of Sales Opportunities. Go to **Sales** > **Opportunities** > **My Open Opportunities**.
2. On the menu bar, click **Excel Templates** > **Create Excel Template**.
3. Click **Excel Template** > **Upload**



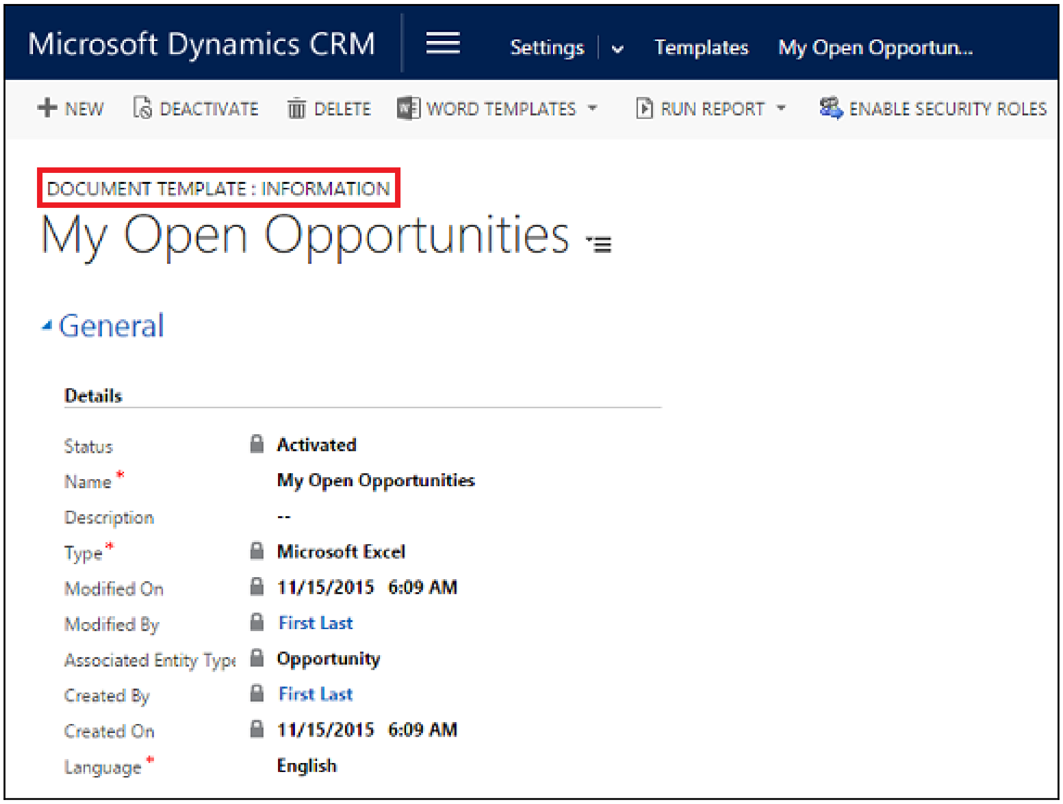
4. Drag the file in the dialog box or browse to the file.
5. Click **Upload**.

Step 4: Choose who can use the new template

Access to the newly created Excel template depends on how you uploaded it and to the access granted to the security role. Be sure to check out Use Security Roles to control access to templates.

If you uploaded the template using the Settings page

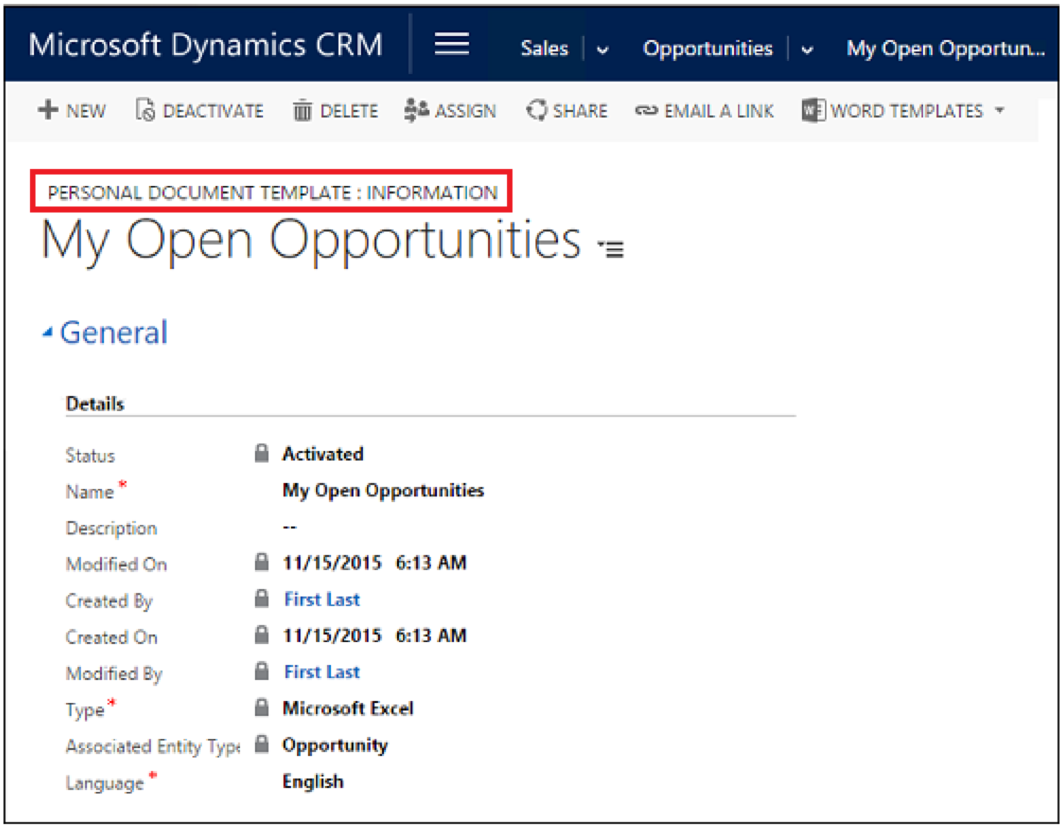
The Information page for the uploaded Excel template will look like the following:



Templates uploaded from the Settings page are available to all users in your CRM organization. You don't need to take any further action.

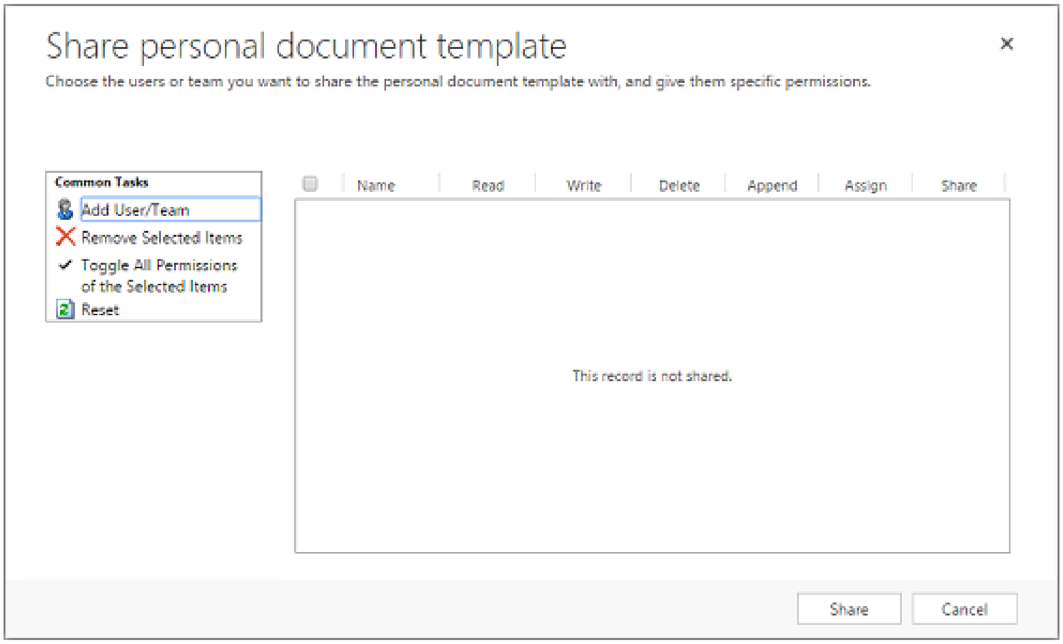
If you uploaded the template from a list of records

The Information page for the uploaded Excel template will look like the following:



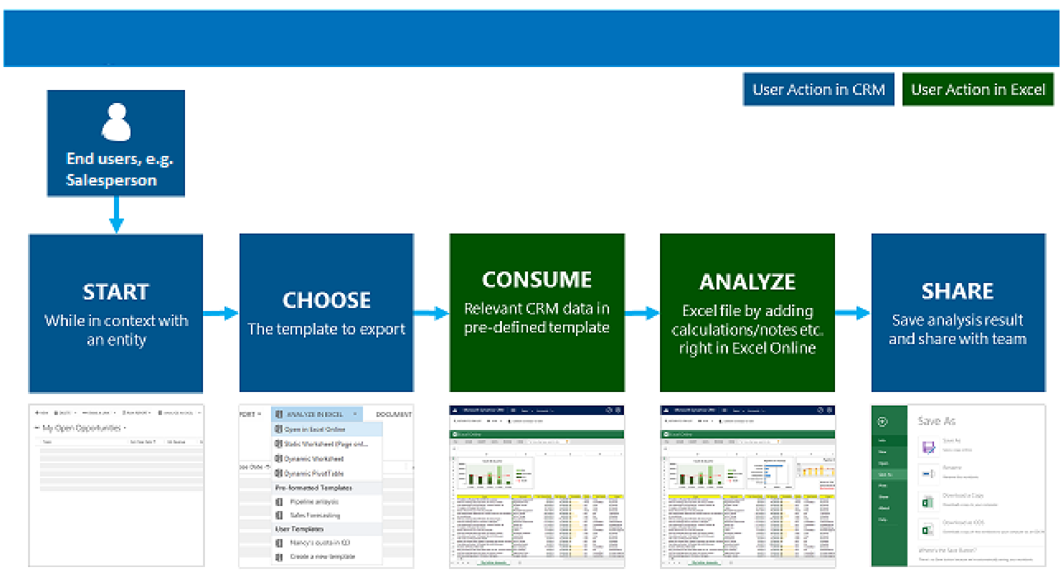
Templates uploaded from a list of records are available to the user who uploaded the template. To share the template with others, do the following:

1. From the template Information page, click **Share**.
2. Use the **Share personal document template** page to share the Excel template with others and to set permissions.



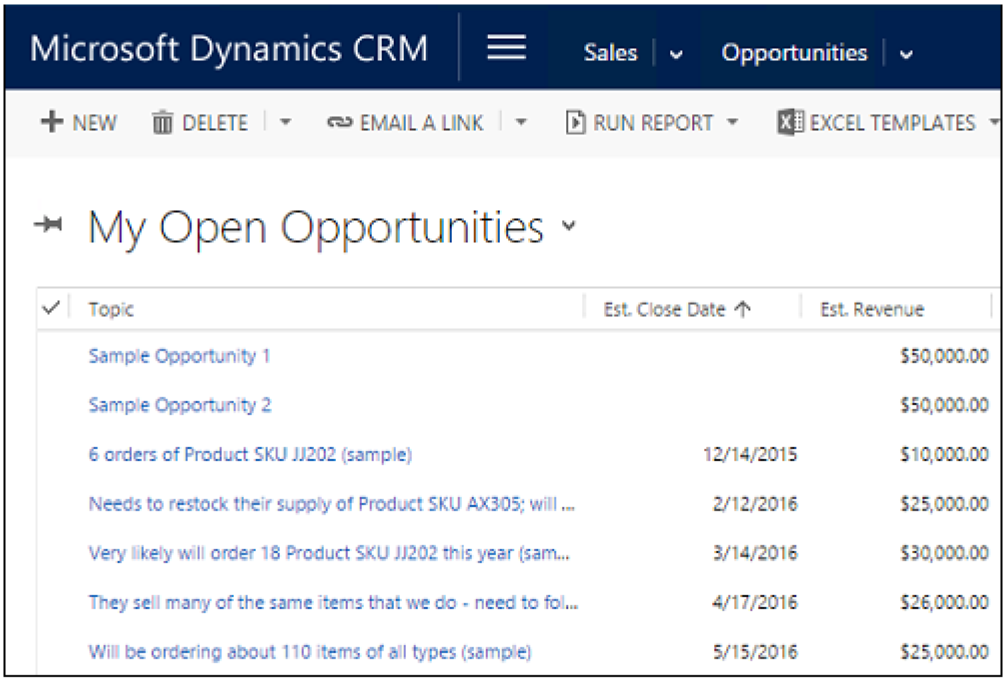
Export and analyze data using the new template

The process for using an Excel template is as follows:



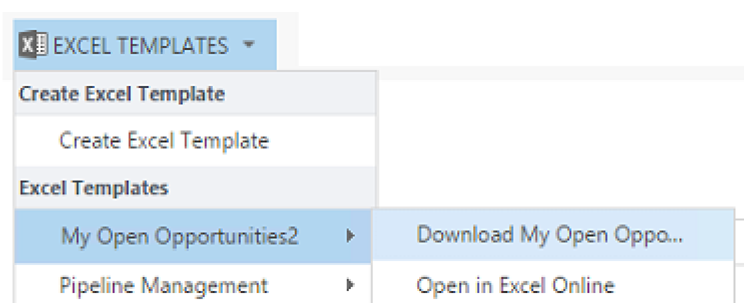
Step 1: Select an entity to analyze

In CRM, select an entity (record type) to analyze with the Excel template you created. For example, go to **Sales** > **Opportunities** > **My Open Opportunities**. Two new opportunities were added since the template was created.



Step 2: Export CRM data using your new Excel template

Choose the Excel template you created.



This template was created from the Settings page so it will appear on the menu under **Excel Templates**. If it had been created from a records list, it would appear under **Personal Excel Templates**.

If you have Excel Online, you can choose to view the data in place in an Excel window in CRM. If not, or if you'd rather create the Excel file, click **Download <the template name>**.

Step 3: Analyze your CRM data in Excel

What you see in the Excel spreadsheet is based on two things:

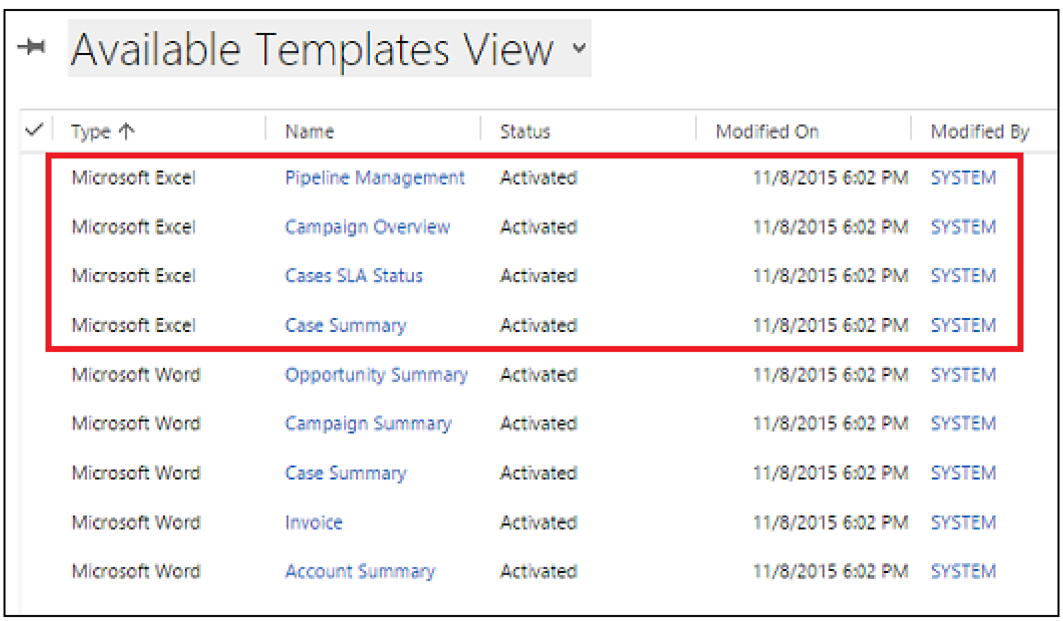
- **CRM records**: The view you choose to do the export from determines what CRM records you see in the exported Excel file. For example, if you the view you selected was Closed Opportunities, you will see those records even if you used the template created with My Open Opportunities.
- **Columns**: The template you used determines what columns appear in the table in the exported Excel file. For example, the Closed Opportunities view has: Potential Customer, Status, Actual Revenue, and Actual Close Date. But if the template you used was based on My Open Opportunities, you'd see columns associated with that view and any column filtering done when you created the template.

Step 4: Share the results with others

If you're using Excel Online, save a copy either online or to your computer. Send the file to others for their review and input.

Try out the sample Excel templates

There are four Excel templates included with CRM 2016.


Available Templates View

Type	Name	Status	Modified On	Modified By
Microsoft Excel	Pipeline Management	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Excel	Campaign Overview	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Excel	Cases SLA Status	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Excel	Case Summary	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Word	Opportunity Summary	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Word	Campaign Summary	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Word	Case Summary	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Word	Invoice	Activated	11/8/2015 6:02 PM	SYSTEM
Microsoft Word	Account Summary	Activated	11/8/2015 6:02 PM	SYSTEM

The sample Excel templates were created with a particular record type (entity). You'll only be able to apply the template to records of the same record type.

Name	**Entity**
Pipeline Management	Opportunity (Sales area)

Name	Entity
Campaign Overview	Campaign (Marketing area)
Cases SLA Status	Case (Service area)
Case Summary	Case (Service area)

To apply a sample Excel template

1. Open a list of records with information with the entity type that matches the sample template. For example, open a list of Sales opportunities to apply the Pipeline Management template.
2. Click **> Excel Templates**, and then under **Excel Templates** select the sample template.
3. Download the template or open it in place in Excel Online.

Tip

You can export the templates that are included in CRM 2016, modify them, and then reimport them as new templates. This could give you a running start on creating your own custom Excel templates.

Best practices and considerations for using Excel templates

Here are things you need to be aware of to create and make best use of Excel templates in CRM.

Test your Excel templates

Excel has lots of features. It's a good idea to test your customizations to see that all Excel features work as expected in your templates.

Privacy and Pivot Charts

By default Pivot Charts do not update their data when a spreadsheet is opened. This can create a security issue if certain Pivot Chart data should not be seen by users with insufficient permissions.

Consider the following scenario:

- A CRM administrator creates a template with sensitive data in Pivot Charts and uploads the template into CRM.
- A salesperson who should not have access to the sensitive data in the Pivot Charts uses the template to create an Excel file to do some data analysis.

The outcome: The salesperson might be able to see the Pivot Chart data as uploaded by the CRM administrator including access to views the salesperson does not have permissions.

In addition: iOS does not support updating Pivot Data and Pivot Charts when using the Microsoft Excel app on iOS devices.

Recommendation: Sensitive data should not be included in Pivot Tables and Pivot Charts.

Set Pivot Chart data to automatically refresh

Be default, Pivot Chart data does not automatically refresh when you open the spreadsheet. Regular charts automatically update.

In Excel, right-click the Pivot Chart, and then click **PivotChart Options** > **Refresh data when opening the file**.

7765e801-6bb2-4c7b-bb1c-b2355375cff0

Placing new data

If you want to add content to the Excel template, place your data above or to the right of the existing data. A second option is to place your new content on a second sheet.

Excel templates with images may cause an error

If you attempt to analyze CRM data with an Excel template that has an image saved in it, you may receive the following error: “An error occurred while attempting to save your workbook. As a result, the workbook was not saved.” Try removing the image from the template and reloading it into CRM.

Excel templates and Office Mobile app in Windows 8.1

Excel templates will not open in Windows 8.1 devices with Office Mobile app. You’ll get the following error message: “We’ve recovered as much of your document as we could, but you can’t edit it. Try to open and repair the document on your PC to fix the problem.”

This is a known issue.

Use table column names and range names in formulas

When you create Excel formulas, don’t use column titles or cell numbers. Instead, use the table column names, and define names for cells or cell ranges.

Use Security Roles to control access to templates

CRM administrators can control access to Excel templates with some granularity. For example, you can give salespeople Read but not Write access to an Excel template.

1. In CRM, click **Settings** > **Security** > **Security Roles**.
2. Select a role, and then click the Business Management tab.
3. Select **Document Template** to set access for templates available to the entire organization. Select **Personal Document Template** for templates shared to individual users.
4. Click the circles to adjust the level of access.

ff722ebd-b1d2-44f8-90b2-68de5de622f4

To view and delete personal document templates:

To delete personal document templates, do the following:

1. Click Advanced Find ().
2. For **Look for**, select **Personal Document Templates**.
3. Click **Results (!)**.

4. Select the personal document template to delete and then click Delete ( ).

Excel template does not upload in Microsoft Edge

If your Excel template does upload in CRM when using Microsoft Edge as your browser, update Microsoft Edge and try again.

Privacy notice

If you use Microsoft Dynamics CRM Online, exporting data to a *static* worksheet creates a local copy of the exported data and stores it on your computer. The data is transferred from CRM Online to your computer by using a secure SSL connection, and no connection is maintained between this local copy and CRM Online.

When you export to a *dynamic* worksheet or PivotTable, a link is maintained between the Excel worksheet and CRM Online. Every time a dynamic worksheet or PivotTable is refreshed, you'll be authenticated with CRM Online using your credentials. You'll be able to see the data that you have permissions to view.

An administrator determines whether or not an organization's users are permitted to export data to Excel by using security roles.

See Also

Download a template for data import

Using Word templates in CRM

Using Word templates in CRM

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person.

After you create and import Microsoft Office Word templates into Microsoft Dynamics CRM, with one click users can generate standardized documents automatically populated with CRM data. This feature has some special considerations you should know about to successfully create Word templates.

Warning

There is a known issue when creating templates in Word. This topic contains information on how to prevent interactions that could potentially destabilize Word. See: Important! A known issue and how to avoid it

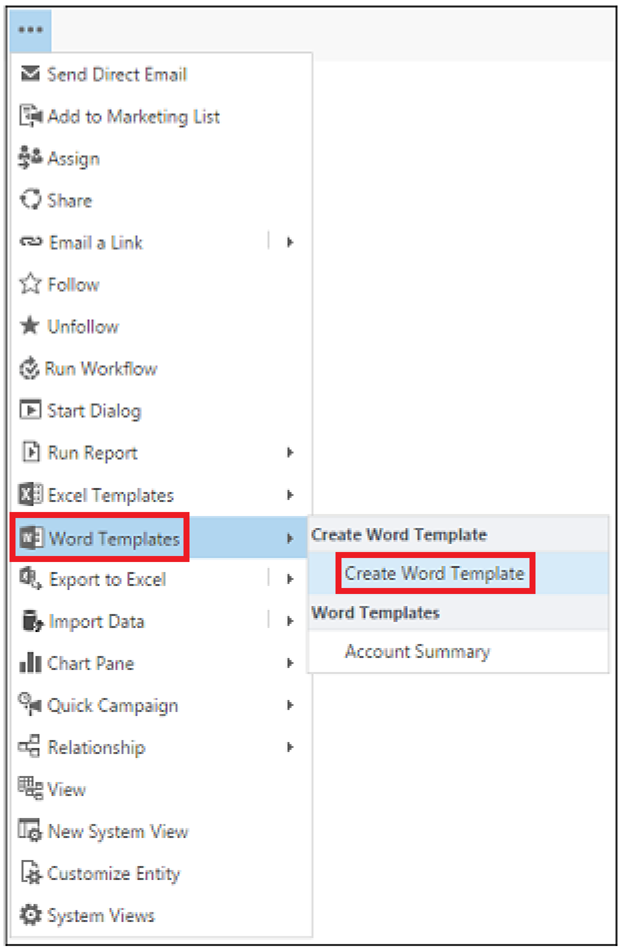
Follow the steps in this topic to successfully create and use Word templates in CRM.

Step 1: Create a Word template

Where you can create a template

There are three places in CRM where you can create a Word template:

- **From the Settings page**. Go to **Settings** > **Templates** > **Document Templates** > **New**(+). You'll need sufficient permissions to access to the Settings page, such as System Administrator or System Customizer.
  - **From a record**. Open a record such as an account in Sales. Go to **Sales** > **Client_Accounts** > **My Active Accounts**. Click an account to open it, and then click **More** (**…**) > **Word Templates** > **Create Word Template**. Templates created here are personal and available only to the user creating the template.
  - **From a list of records**. For example, go to **Sales** > **Client_Accounts** > **My Active Accounts**. Select a single account, and then click **More** (**…**) > **Word Templates** > **Create Word Template**.



Tip

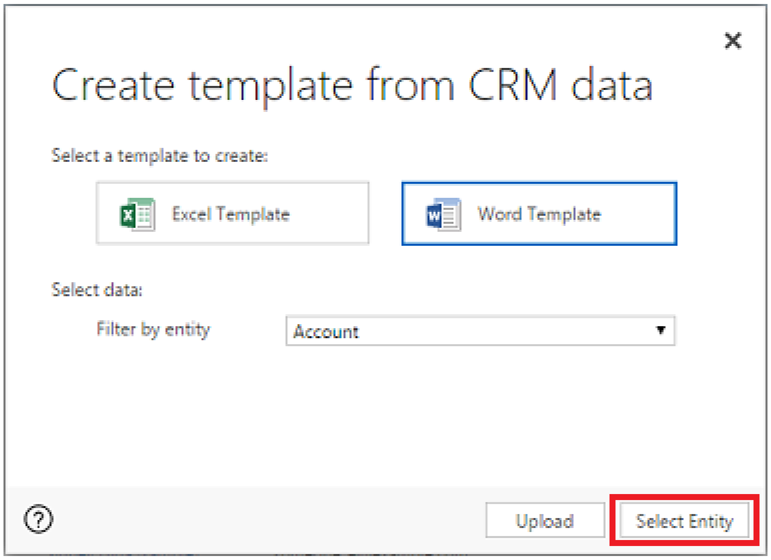
To delete personal document templates, do the following:

1. Click Advanced Find ( ).
2. For **Look for**, select **Personal Document Templates**.

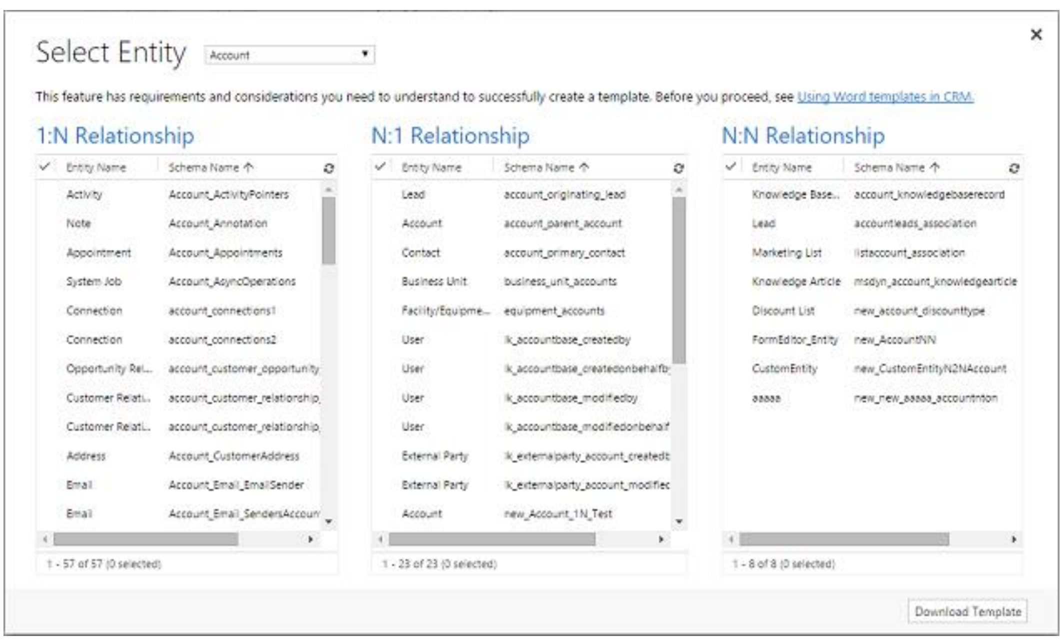
3. Click **Results** (!).

4. Select the personal document template to delete and then click Delete ( ).

After clicking **Create Word Template**, select an entity to filter with, and then click **Word Template** > **Select Entity**.



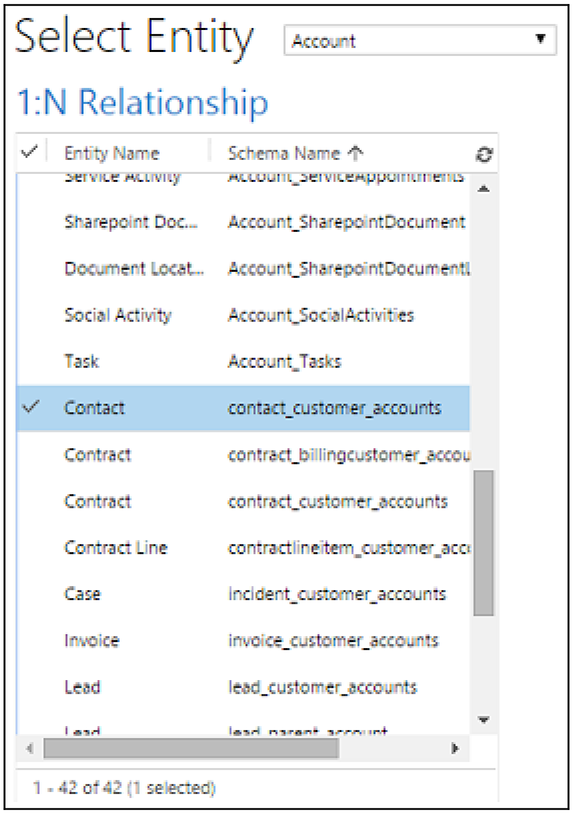
The relationship selection page appears.

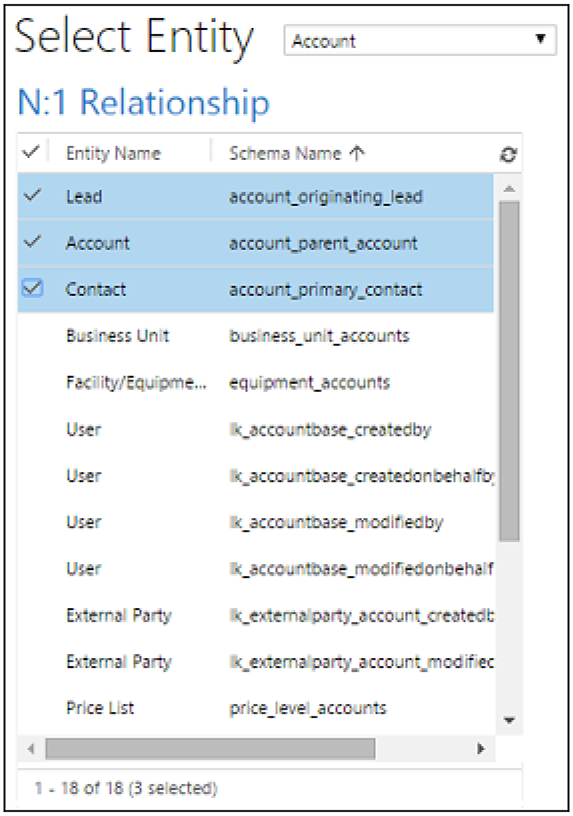


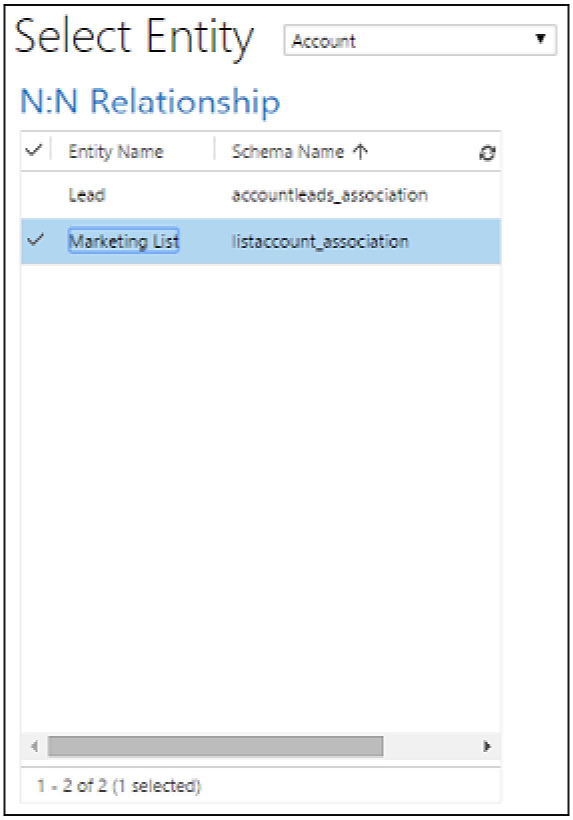
What are 1:N, N:1, and N:N relationships?

This screen requires an understanding of your CRM data structure. Your CRM administrator or customizer can provide information about entity relationships. For admin content, see: TechNet: Create and edit entity relationships.

Here are some example relationships for the Account entity.

Relationship	Description
	An account can have multiple contacts.

Relationship	Description
	A lead, account, or contact can have multiple accounts.

<table>
<tr><th>Relationship</th><th>Description</th></tr>
<tr><td>
</td><td>An account can have multiple marketing lists.
A marketing list can have multiple accounts.</td></tr>
</table>

The relationships you select on this screen determine what entities and fields are available later when you define the Word template. Only select relationships you need to add CRM data to the Word template.

Note

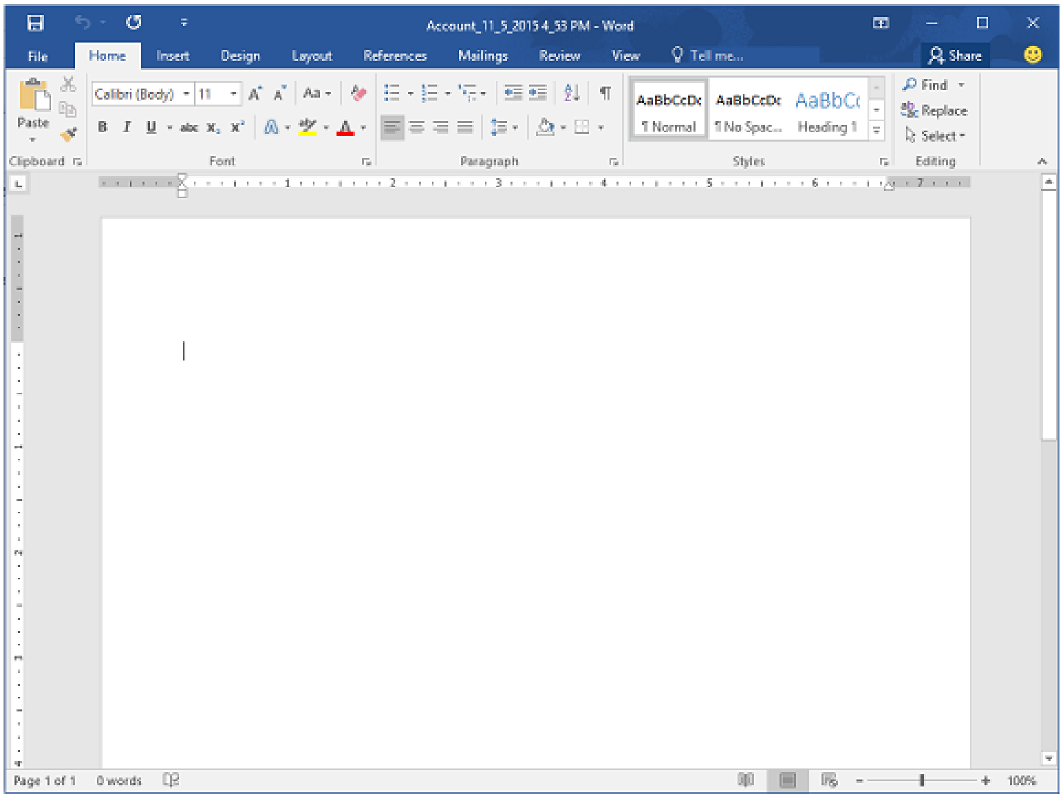
To ensure documents download in a timely matter, there is an upper limit of 100 for the number of related records returned for each relationship. For example, if you're exporting a template for an account, and you want to include a list of its contacts, the document will return at most 100 of the account's contacts.

Download the template

Click **Download Template** on the **Select Entity** page to create a Word file on your local computer with the exported entity included as XML data.

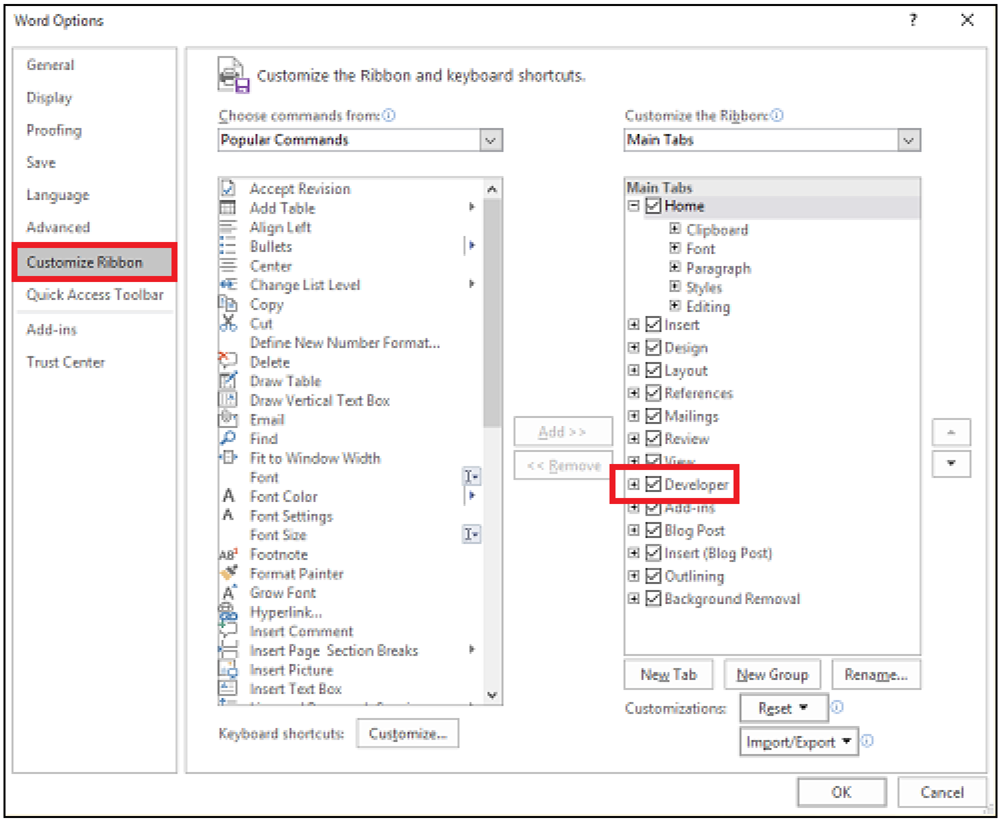
Step 2: Enable the Developer tab

Open the Word template file. At this point, the document appears to be blank.



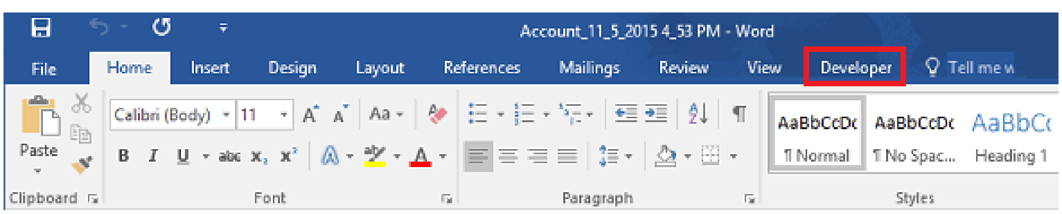
To see and add CRM XML data, you need to enable the Word Developer tab.

1. Go to **File** > **Options** > **Customize Ribbon**, and then enable **Developer**.



2. Click **OK**.

Developer now appears in the Word ribbon.



Important! A known issue and how to avoid it

There's a known issue with CRM-generated Word templates and Microsoft Office Word. In the next section, you'll be adding XML content control fields to the Word template.

Warning

A few things can cause Word to freeze, requiring you to use Task Manager to stop Word:

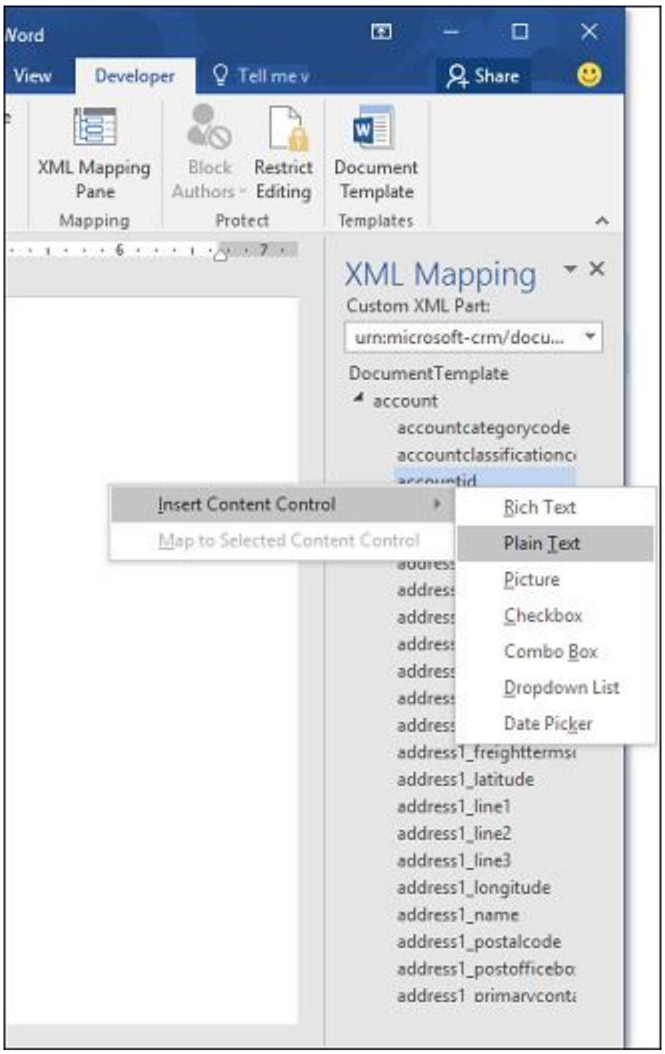
- You insert a content control other than **Picture** or **Plain Text**.
- You make a textual change, such as changing the capitalization or adding text, to a content control. These changes can occur through AutoCorrect as well as user edits. By default,

Microsoft Word AutoCorrect capitalizes sentences. When you add a content control field, Word sees it as a new sentence and will capitalize it when focus shifts away from the field.

To prevent issues with control fields, do the following:

Only add fields as Plain Text or Picture

1. You use the XML Mapping Pane to add CRM entity fields to your Word template. Be sure to only add fields as **Plain Text** or **Picture**.



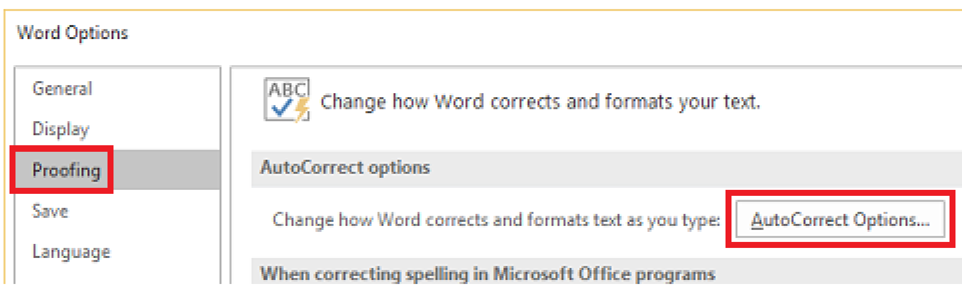
Do not make any textual changes to the added content control

1. You can make formatting changes to content control fields, such as bolding the text, but no other textual changes, including capitalization changes.

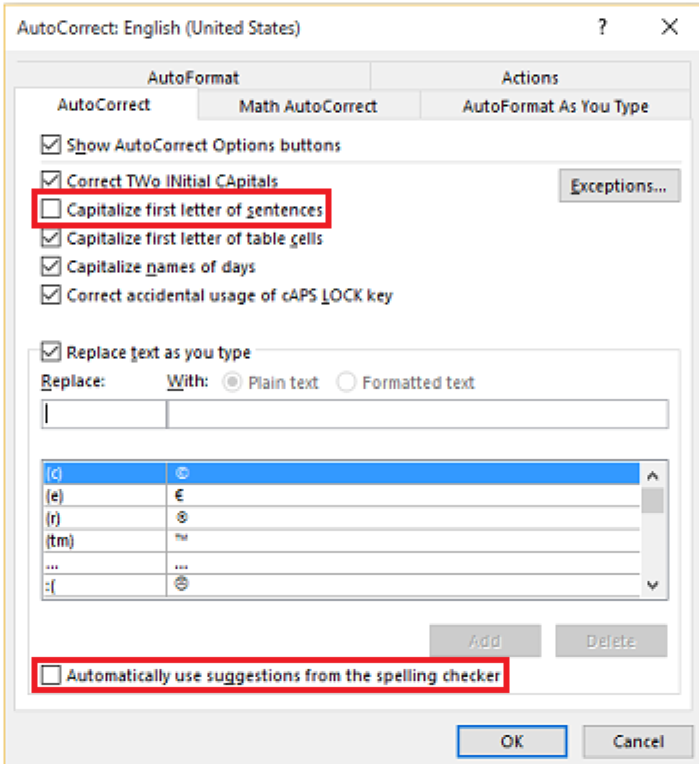
If you experience Word freezing or performance degradation, try turning off AutoCorrect.

Turn off AutoCorrect

1. With the template file open in Word, go to **File** > **Options** > **Proofing** > **AutoCorrect Options**.



2. Deselect **Capitalize first letter of sentences** and **Automatically use suggestions from the spelling checker**.



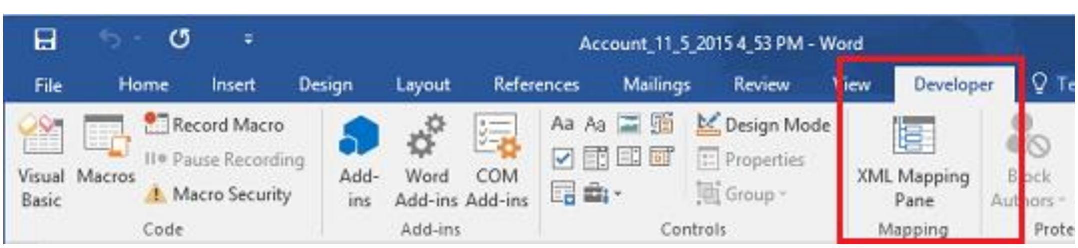
3. Deselect **Hyphens (--) with dash (-)** on the **AutoFormat** and **AutoFormat as You Type** tabs.
4. Click **OK**.

If you followed the above recommendations, you're ready to define the Word template.

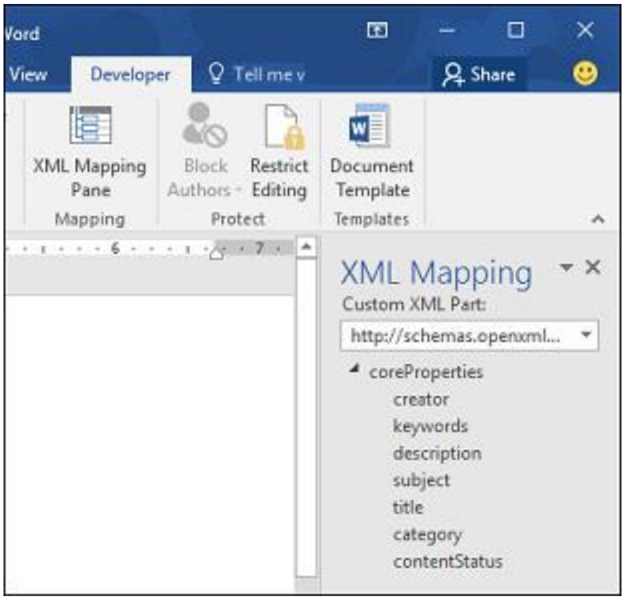
Step 3: Define the Word template

Use the XML Mapping Pane to define the Word template with CRM entity fields.

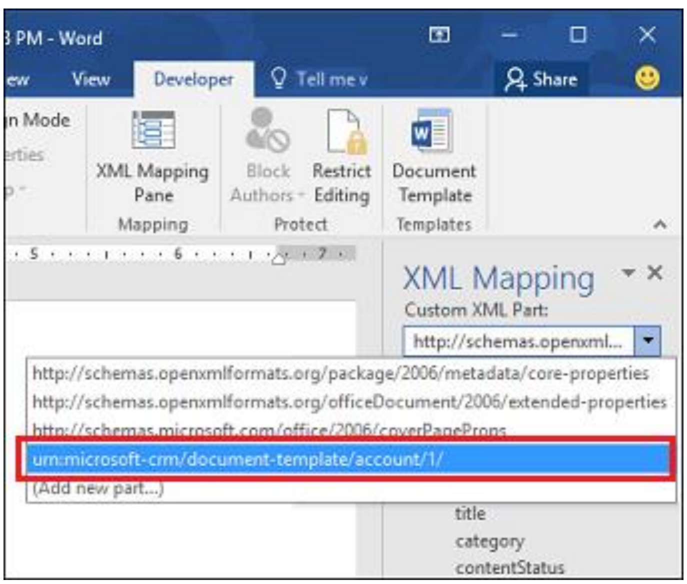
5. 0.1. In your Word template, click **Developer** > **XML Mapping Pane**.



The default XML schema is selected.

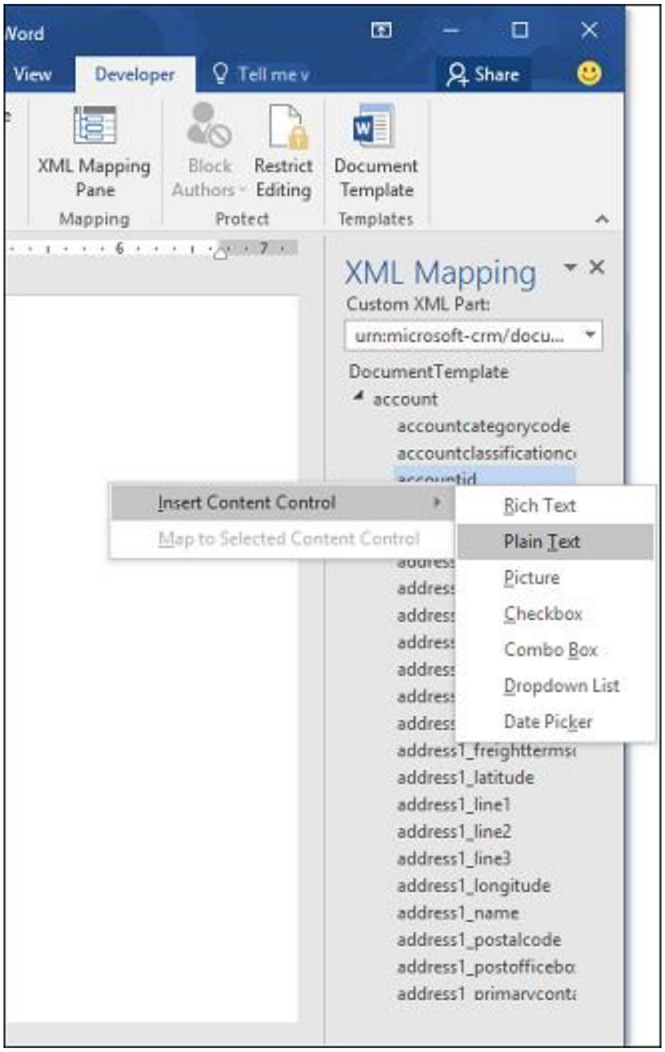


2. Select the CRM XML schema. It will begin with “urn:microsoft-crm/document-template/”.

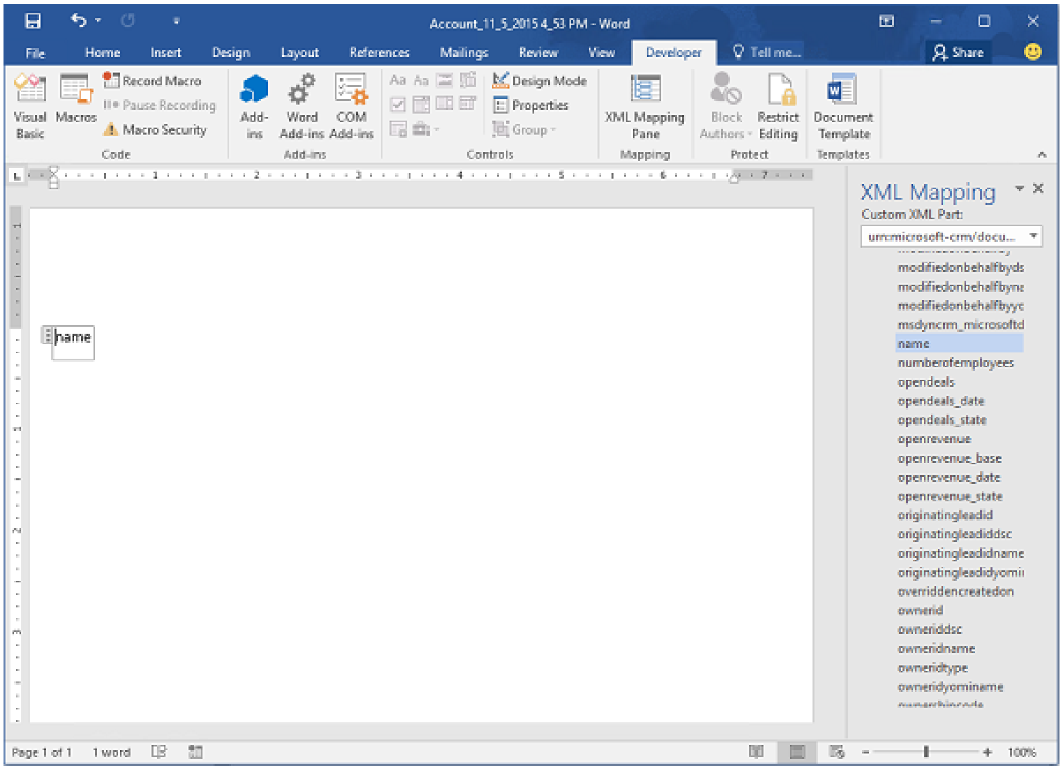


Important
If you have frequent accidental edits that cause Word to freeze or have performance degradation, be sure to turn off the AutoCorrect options according to the section: “A known issue and how to avoid it”.

3. Expand the CRM entity, right-click the entity field, and then click **Insert Content Control** > **Plain Text**.

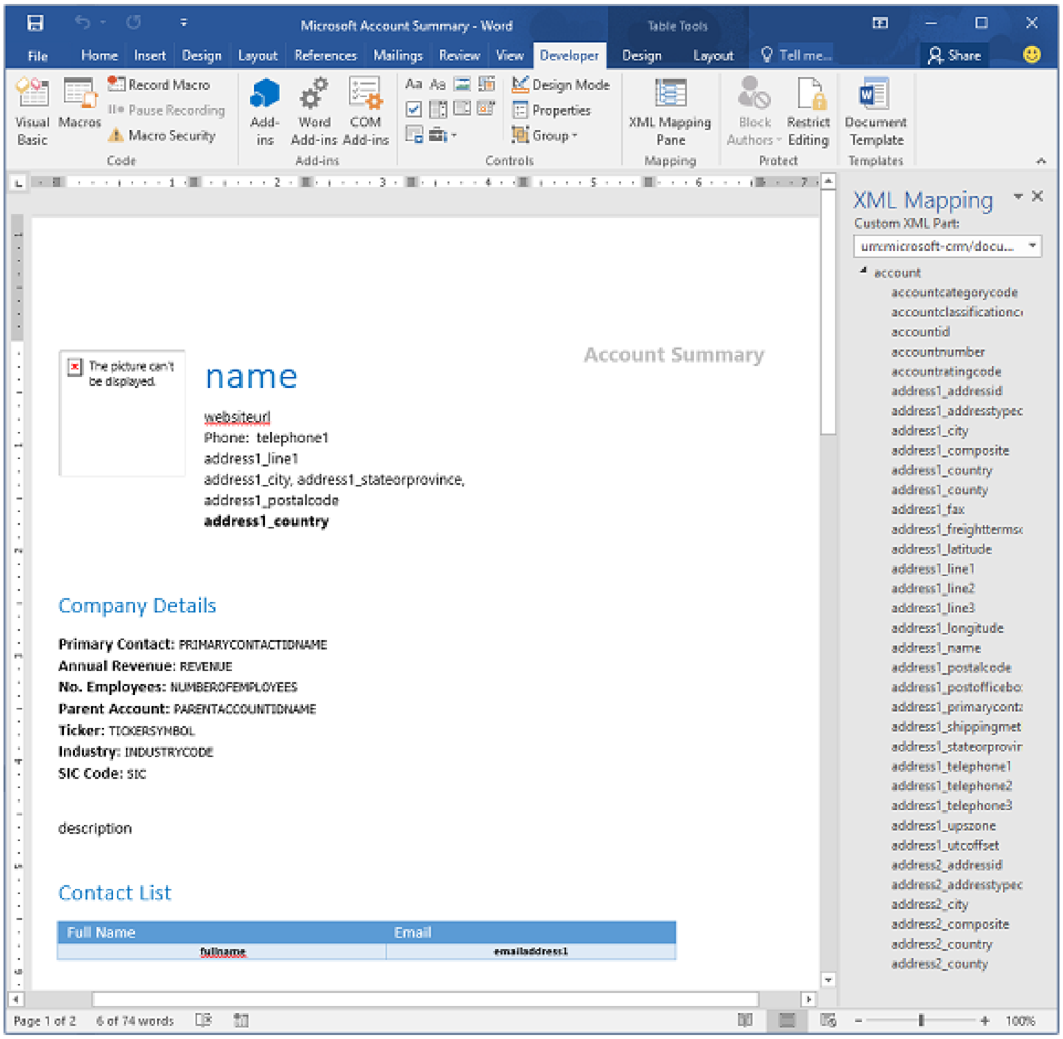


The CRM entity field is added to the Word template.



Add additional entity fields, add descriptive labels and text, and format the document.

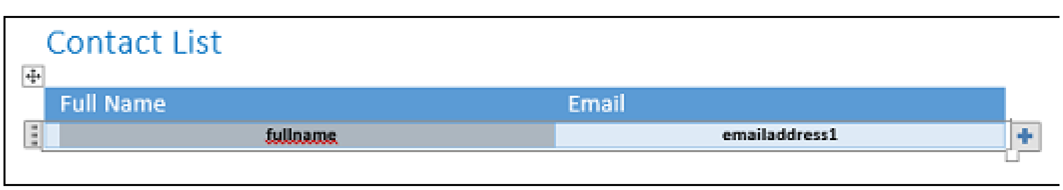
A completed template might look like this:



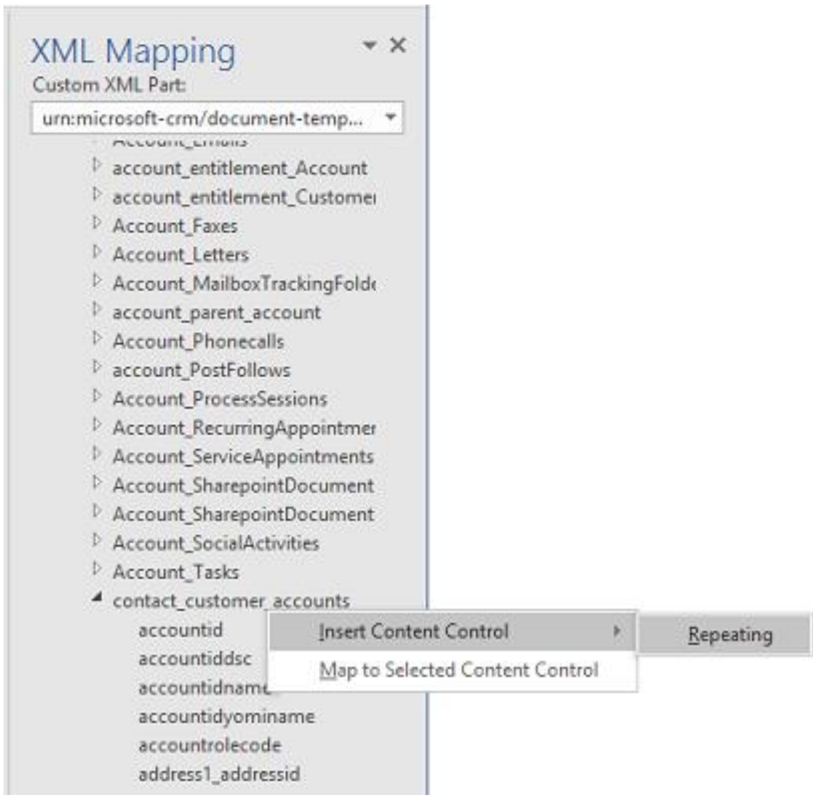
Some content control fields you entered likely have multiple lines of data. For example, accounts have more than one contact. To include all the data in your Word template, set the content control field to repeat.

Set content control fields to repeat

1. Put fields with repeating data in a table row.
2. Select the entire table row in the template.



3. In the XML Mapping Pane, right-click the relationship containing the content control fields, and then click **Repeating**.



When you use the Word template in CRM to create a document, the table will populate with multiple rows of data.

When the template has the fields and formatting you want, save it and upload it into CRM.

Step 4: Upload the Word template back into CRM

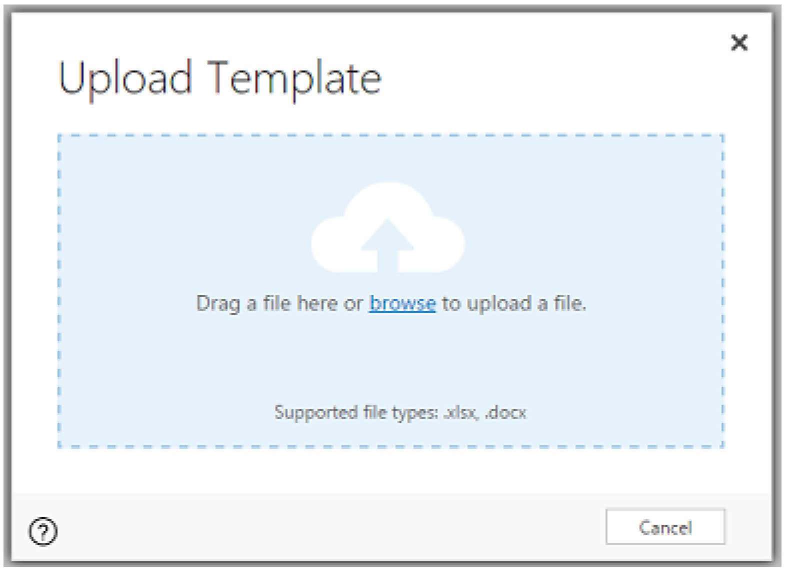
'When you have your Word template built the way you want, save it so you can upload it into CRM.

Access to the newly created Word template depends on how you uploaded it and to the access granted to the security role. Be sure to check out [Use Security Roles to control access to templates](#).

CRM administrators can use the Settings page to upload the Word template into CRM. A template uploaded in Settings is available to all users in your CRM organization.

For admins: Upload the Word template into CRM

1. In CRM, go to **Settings** > **Templates** > **Document Templates**.
2. Click **Upload Template**.
3. Drag the Word file in the dialog box or browse to the file.

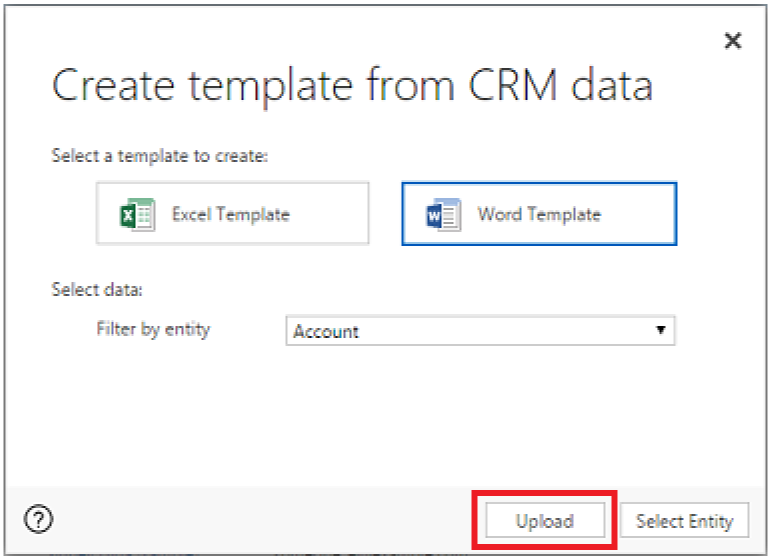


4. Click **Upload**.

Non-admin users can upload a template for their own use from a list of records.

For non-admins or admins wanting to create a personal template: Upload the Word template into CRM

1. In CRM, open a page with a list of records, for example, the list of customer accounts in Sales.
2. Select a single item such as an account, click **More** (**…**) > **Word Templates** > **Create Word Template**.
3. Click **Word Template** > **Upload**.



4. Drag the Word file in the dialog box or browse to the file.
5. Click **Upload**.

Step 5: Generate a document from the Word template

To use the Word template you've created, do the following:

1. Open a record with information you want to create a document. For example, open a customer account record in Sales.
2. Click **More** (**…**) **> Word Templates**, and then under **Word Templates** select the template you created.

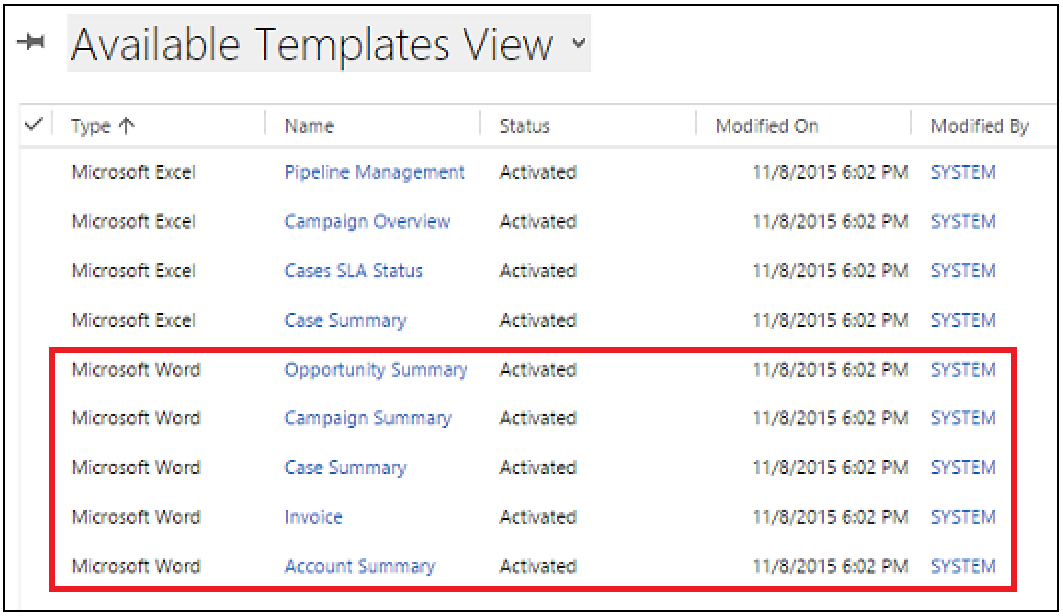
   If the template you created is not visible, there are two possibilities:

   a. Only templates built for the selected record type (entity) will be displayed. For example, if you open an opportunity record, you will not see a template you created with the Account entity.
   b. You need to refresh CRM to see the template. Either refresh your browser or close and reopen CRM.

After you select your Word template, CRM creates a Word document from the record you selected.

Try out the sample Word templates

There are five Word templates included with Microsoft Dynamics CRM 2016.



The sample Word templates were created with a particular record type (entity). You'll only be able to apply the template to records of the same record type.

Name	Entity
Opportunity Summary	Opportunity (Sales area)
Campaign Summary	Campaign (Marketing area)
Case Summary	Case (Service area)
Invoice	Invoice (Sales area)
Account Summary	Client_Account (Sales, Service, and Marketing areas)

To apply a sample Word template

1. Open a record with information with the entity type that matches the sample template. For example, open a customer account record in Sales to apply the Account Summary template.
2. Click **More** (**…**) **> Word Templates**, and then under **Word Templates** select the sample template.

Open the newly-created Word template and give it a look.

Note

You can review but not edit templates that are included in Microsoft Dynamics CRM 2016.

Additional considerations

Use Security Roles to control access to templates

CRM administrators can control access to Word templates with some granularity. For example, you can give salespeople Read but not Write access to a Word template.

1. In CRM, click **Settings** > **Security** > **Security Roles**.
2. Select a role, and then click the Business Management tab.
3. Select **Document Template** to set access for templates available to the entire organization. Select **Personal Document Template** for templates shared to individual users.
4. Click the circles to adjust the level of access.

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See Also

Analyze your data with Excel templates

Create Word and Excel templates from CRM data

You can take CRM data and create Word and Excel templates to provide standardized documents or customized data analysis for your organization

For more information, see:

1. Using Word templates in CRM
2. Analyze your data with Excel templates

Create or edit a solution

Customize your system

Create, edit, and delete solutions

Edit a solution publisher

View or edit default solution components

Add a solution component

Create a managed solution

Edit or view managed properties

Import a solution

Export your customizations as a solution

Customize your system

The way your organization works is unique. For example, you may need to create your own custom record types (entities) forms, and views, or set up new workflows or other business processes. With Microsoft Dynamics CRM, you can customize your system to fit the needs of your business. To understand what's possible, and how to customize your system, see TechNet: Customize your CRM system.

Create, edit, and delete solutions

If you want to share or transport customizations from one organization to another, you can use solutions. For more information on creating, editing, and deleting solutions, see TechNet: Use solutions for your customizations.

Edit a solution publisher

Every solution has a publisher. Information about the publisher (for example, address and support contact info) is stored in a record. Each solution has a look-up field that associates the solution with the appropriate publisher record for that solution.

The default solution has a publisher named "Default Publisher for <your organization name>". The publisher record contains a prefix value. The default value of this prefix is "new". When you create a new solution component, this prefix is appended to the name. This is a quick way to indicate the solution that the components belong to. Before you start customizing your system, we recommend that you change the prefix value for the default publisher to something that identifies your company.

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. Go to **Settings** > **Customizations**. (How do I get there?)

3. Choose **Publishers**.
4. In the list, double-click the row for the publisher record that you want to edit.
5. 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 is created with the record and can't be edited.
6. 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**.
7. 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.
8. Choose **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.

See Also

[TechNet: Use solutions for your customizations]()

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. More information: [TechNet: Use solutions for your customizations]()

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 import is complete, you can check the import log to see which components were imported successfully.

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 role

   a. Follow the steps in View your user profile.
   b. Don't have the correct permissions? Contact your system administrator.

2. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Solutions**.

Edit a customizable component for the default solution or an unmanaged solution

1. Go to **Settings** > **Customizations**. (How do I get there?)
2. Click **Solutions**.
3. In the Solution window, click **Components** to see a list of all default solution components in the main pane. To see components for an individual type, select 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, you must remove the dependencies before you can delete the component. See **Show Dependencies**.
Remove	Remove a component from the solution. The component will still be available in the default solution after you remove it 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, dialogs, and SDK message processing steps.
Show Dependencies	Open a dialog box that lists the other components that are dependent on this component. If you want to delete this component, you must remove the dependencies first.
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.

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

TechNet: Use solutions for your customizations

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: MSDN: 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. Go to **Settings** > **Solutions**. (How do I get there?)
3. On the command bar, choose **New**.
4. Complete the required fields, and then choose **Save**.

   By default, this saves an unmanaged solution.
5. To add a new or existing component to a solution, in the **Component Type** list, choose the type you want to add, and then, on the command bar choose **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, choose **Save** and close the window, or choose **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 command bar, choose **Managed Properties**. More information: Edit or view managed properties
8. Choose **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, choose the entity you've been working on, and then choose **Publish**.

- To publish customizations for all unpublished components at one time, choose **Entities**, and then on the command bar, choose **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

MSDN: Introduction to Solutions

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. 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. Go to **Settings** > **Solutions**. (How do I get there?)

On the Actions toolbar, click the **New** icon .

4. Complete the required fields, and then on the **File** menu, click **Save**.

   By default, this saves an unmanaged solution.

5. To add a new or existing component to your solution, in the **Component Type** list, select

the type you want to add, and then click **New** or **Add Existing**.

6. If you create a new component, fill in the required information, and then click **Save** or **OK** (depending on the type of component you are creating) to save the component.
7. On the **File** menu, click **Save and Close**

   Your new unmanaged solution displays in the **Solutions** list.
8. Choose the solution you want to export.

9. Select the options you want in the Export wizard. When you get to the **Package Type** page, select **Managed**.
10. Click **Export**.
11. In the **File Download** dialog box, click **Save**, specify a location for the solution .zip or .cab file, and then click **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

TechNet: Create, install, and update a managed solution

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 or 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 can't 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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. Under **Components**, select the component and the record that you want to edit or view managed properties for.
5. On the command bar, click **Managed Properties**.

   Note

   If **Managed Properties** doesn't appear on the command bar, you can't edit or view the managed properties for that component and record.
6. 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 previously.
7. Click **Set** to save the settings.

See Also

TechNet: Customization concepts

Import a solution

To learn how to import solutions, see TechNet: Use solutions for your 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.

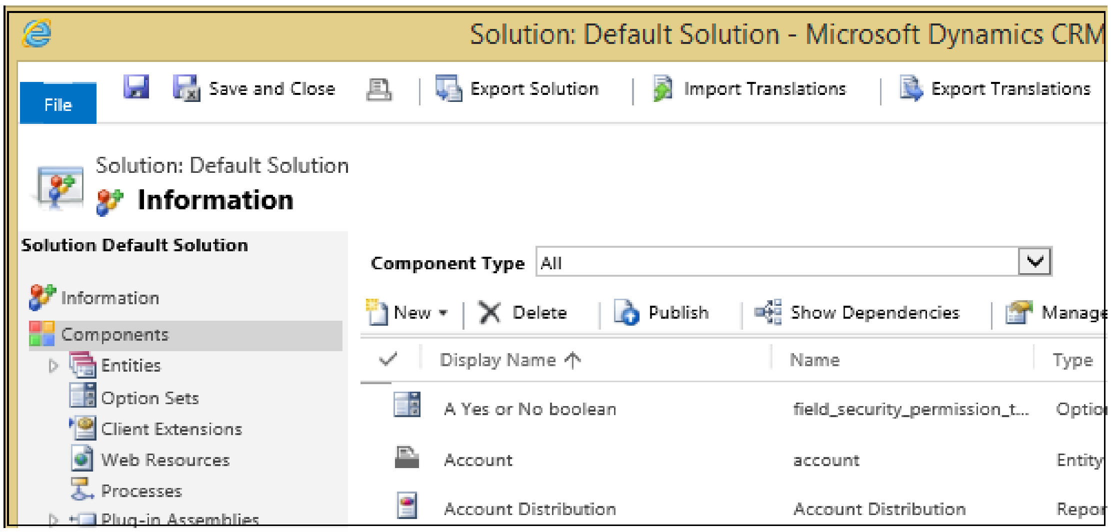
Export the Default Solution to create a backup

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Click **Customize the System**.
4. In the solution explorer, click **Export Solution**.



5. When you're prompted to open or save Default_1_0.zip, click **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. Go to **Settings** > **Solutions**. (How do I get there?)
3. In the list, select the solution you want to export, and then click **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 **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. More information: MSDN: Managed and unmanaged solutions.
6. In the **Export System Settings (Advanced)** step, you can specify 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 **Next**. More information: TechNet: Settings options for solution export.
7. In the **Package Type** step, specify whether to export the solution as an **Unmanaged** or **Managed** solution, and then click **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. More information: MSDN: 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 install Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) (version 6.1), and you specify version 6.0 as the target for your solution export, solution components dependent on features added in Microsoft Dynamics CRM 2013 Service Pack 1 (SP1) will be removed. More information: MSDN: Exporting a solution for a specific CRM version.
9. Click **Export** to download the solution file.
10. When prompted to open or save the compressed (.zip) file, click **Save As**.
11. Specify a location to save your solution, and then click **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.

Privacy notice

You can import and export solutions to and from Microsoft Dynamics CRM Online. When you do so, the solutions, which may contain personal information, are transferred over a Secure Sockets Layer (SSL) connection between your computer and Microsoft servers. In turn, third-party code imported to CRM Online could eventually transmit Customer Data to an external system (i.e. InsideView) or configure/expand entities that get synchronized (i.e. exported) to other external systems that are controlled by a party other than Microsoft.

If a solution to be imported is meant to transmit Customer Data outside of the security boundaries of CRM Online, Administrators are invited to verify the types of Customer Data that will be called by the service/software/application prior to uploading third-party code to their CRM Online instance.

Extraction of Customer Data by third party services/software/applications or solutions is controlled by the customer, not Microsoft. The final destiny and privacy policies applicable to the data points extracted by these external solutions are controlled by the Administrator; adequate review of the policies applicable by the third parties operating these services/software/apps is recommended.

See Also

MSDN: Introduction to solutions

MSDN: Package and distribute extensions with solutions

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.

Windows Azure AppFabric Issuer Certificate

This is the public certificate that is required to configure Microsoft Azure Active Directory Access Control Service (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 the developer resources page, see MSDN: Download the endpoints using the Microsoft Dynamics CRM Developer resources page.

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.

See Also

MSDN: Write applications and server extensions

MSDN: Write client application extensions

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. Go to **Settings** > **Customizations**. (How do I get there?)
3. Choose **Customize the System**.
4. To create a new web resource, choose **Components** > **Web Resources**, and then on the Actions toolbar, choose **New**.
5. 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.

6. Choose **Browse** to select and upload the file from your local machine.
   - To preview an uploaded image web resource: Choose **Web Resource**>**Preview**.
   - To edit a text web resource: Choose **Text Editor**.
   - To preview a text web resource: Choose **Web Resource**> **Preview**.
7. When you're ready to save your data, choose **Save and Close**.
8. Publish your customization.
   - For only the edited component: Choose **Save** > **Publish** on the **Home**.
   - For all unpublished components at one time, choose **Publish All Customizations**.

Note

Publishing customizations can interfere with normal system operations. We recommend you publish customizations when it's least disruptive to users.

See Also

TechNet: Create and edit web resources

Training

Training & Adoption Kit for Microsoft Dynamics CRM

Microsoft Dynamics CRM User Guides

Check out these online help resources

Check out these online help resources

Microsoft Dynamics CRM Help & Training provides a central location where you can find help and videos to get the most out of Microsoft Dynamics CRM. Check out the Help & Training site whenever you need information about doing sales, service, or marketing tasks in Microsoft Dynamics CRM.

In addition to the Help & Training site, 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…
Get info about planning and deploying Microsoft Dynamics CRM	Deploying and Administering Microsoft Dynamics CRM
Find everything you need to know to manage the system every day	Administering CRM 2015
Customize Microsoft Dynamics CRM to match	Customize your CRM system

If you want to…	Go here…
your business needs	
Get info designed for people who administer Microsoft Dynamics CRM	CRM Setup & Administration
Get developer resources and see sample code	CRM Developer Center

Support and billing

Product Support

Contact product support for technical issues or questions about how to use the product.

For CRM Online

You have to be an Office 365 administrator to contact technical support. If you aren't an administrator, contact your local administrator.

- **Web support**: Sign in to your work or school account and then download this guide to learn how to submit a web ticket.
- **Phone**: 1-800-865-9408 in North America or find the number for your country/region.

For CRM on-premises

Microsoft Dynamics CRM Volume Licensing

Microsoft Dynamics CRM sold through Microsoft Dynamics

See Also

Billing and subscription support

[Troubleshoot sign-in problems]
[TechNet: Check the status of your CRM Online and Office 365 services]
[Office 365 Troubleshooter]

Support

Support

0fb5b855-1553-4711-97e9-3663caec0709 Product Support	For how-to questions or if you encounter technical issues or error messages, see this page: Product Support.
cad9f05e-ac79-48c9-8ceb-f5c6364c1869 Billing and subscription support	For trial extensions, account activation, subscription issues, license adjustments, charges or credits, and questions about your service level agreement (SLA), see this page: Billing and subscription support.

Contact Technical Support

You have to be a Microsoft Dynamics CRM administrator to contact technical support. If you are not an administrator, contact your local administrator.

For Microsoft Dynamics CRM Online, Microsoft Social Engagement, Microsoft Dynamics Marketing, and Parature, from Microsoft	**For on-premises CRM**
Web support (recommended): Sign in to your work or school account and then submit a web ticket. **Phone**: 1-800-865-9408 (North America) or Other countries/regions Important: You have to be a CRM administrator to contact technical support. If you are not an administrator, contact your local administrator. Learn more about working with Microsoft support for Dynamics CRM Online.	Microsoft Dynamics CRM Volume Licensing Microsoft Dynamics CRM sold through Microsoft Dynamics

For trial extensions, account activation, subscription issues, license adjustments, charges or credits, and questions about your service level agreement (SLA) see, [Billing and subscription support].

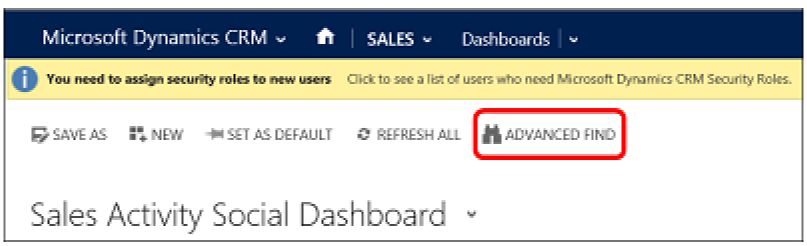
Find your CRM administrator or support person

You may occasionally run across issues that require consultation with your Microsoft Dynamics CRM administrator. If you don't know who your administrator is, you can use the Advanced Find feature to find your administrator.

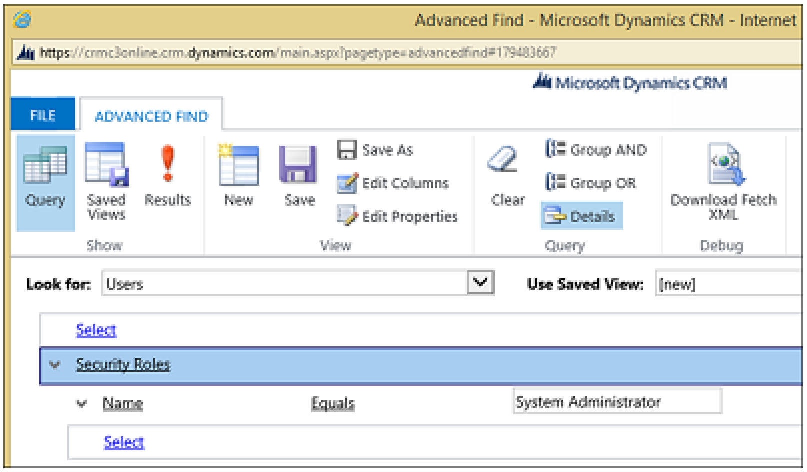
1. Sign in to your CRM organization.
2. Do one of the following:

   In the latest version of Microsoft Dynamics CRM, on the global nav bar, choose the **Advanced Find** button .

   - In earlier versions of Microsoft Dynamics CRM, go to a work area (Sales, Service, or Marketing), and then choose **Advanced Find** on the command bar.



3. On the Advanced Find page, in the **Look for** list, select **Users**.
4. Point to **Select**, and then select **Security Roles** from the list.
5. Under **Fields**, select **Names**.
6. Enter **System Administrator** in the box that says **Enter Text**. At this point, your screen should look like this:



7. Choose the **Results** button on the ribbon.

You should see a list of one or more system administrators.

See Also

[Product Support]

[Get Help from the Microsoft Dynamics CRM Community]

Non-profit pricing

Your service relies on support from a variety of contributors and you need to make the most of donations and time. Microsoft Dynamics CRM Online is a cost-effective solution that's easy to customize and use. Qualified non-profit organizations can obtain a Microsoft Dynamics CRM Online license at non-profit pricing.

Non-profit pricing for Microsoft Dynamics CRM Online

As a non-profit organization, you may be entitled to Microsoft Dynamics CRM Online non-profit pricing. In order for Microsoft to validate and approve your organization as non-profit, please follow the guidelines outlined here.

1. Please review the non-profit guidelines in advance and make sure your organization meets the criteria.
2. Start a FREE CRM Online trial.
3. Once your trial commences, please contact the Billing Support Team to provide them with the required information to validate you as a non-profit organization.
4. During your 30-day free trial, your company will be reviewed to see if it can be validated as a non-profit organization. Microsoft may contact your organization during your trial for further information.

5. You will need to provide the following information when you contact Billing support:
   - Company, domain, and contact name.
   - Address including city, state, zip code, and country/region.
   - Phone number and email address.
6. After your organization has been validated, Microsoft will inform you by email and you can convert your trial to a paid subscription.
7. Microsoft Dynamics CRM Online non-profit pricing is available only in Australia, Canada, Germany, Hong Kong SAR, India, Japan, Korea, Malaysia, New Zealand, Singapore, United Kingdom and United States Any customers outside of these countries/regions need to work through a local Microsoft representative for specific pricing.

See Also

Billing and subscription support

Volume licensing FAQ for Microsoft Dynamics CRM Online

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Do you offer volume discounts to businesses?

Yes. Discounts are available for Microsoft Dynamics enterprise agreement customers (typically 250+ licenses) who want to purchase through volume licensing. A Microsoft expert can help you explore the purchasing options for large enterprises and help you determine which is best for you. More information: Enterprise Agreements

Which volume licensing programs apply to Microsoft Dynamics CRM Online?

Microsoft Dynamics CRM Online is available through the Enterprise Agreement, Enterprise Subscription Agreement, and Campus and School Agreement volume licensing programs. The agreement you select will be on the same billing and contract schedule as any existing volume licensing agreements that you might have.

Can I move existing licenses from a direct purchase subscription to an enterprise agreement?

Yes. If you who purchased Microsoft Dynamics CRM Online with a credit card or through invoicing, you can move to an enterprise agreement by following these steps:

1. Place an order through a Microsoft Licensing Solutions Partner for Microsoft Dynamics CRM Online licenses.

   Important

   It is important to order (at minimum) the same number of licenses and add-ons that you currently have to ensure that you do not lose data. For example, if you have 50

Professional licenses, 3 additional production instances, and 5 GB of storage, be sure to order the same number of licenses and add-ons (or more).

2. Once the order has been invoiced, the Online Service Manager (OSM) identified on the enterprise agreement will receive an activation email, which allows the OSM to sign in to the existing CRM Online account and associate the new licenses to it. The new order will pool with your existing licenses, but does not cancel the direct purchase subscription.

   Note

   If the purchase was made on an enterprise agreement that already includes Microsoft Online Services licenses, for example Microsoft Office 365 or Intune, then the CRM Online licenses will automatically attach to that Microsoft Online Services account and cannot be associated to your existing CRM Online account. If the licenses need to be separated, this requires a special amendment from your Microsoft Licensing Sales Specialist.

3. To cancel the direct purchase subscription, open a Service Request through the Admin Portal to contact Billing Support and inform them that you have purchased a license through volume licensing and request them to cancel the direct purchase subscription. This step is required in order to discontinue the credit card or invoice billing.

How can I have the activation email resent?

The activation email is sent to the Online Services Manager (OSM), who is a participant identified on the enterprise agreement. If the activation email needs to be resent, call Billing Support to make the request. Please be prepared to provide company information to verify personally identifiable information (PII).

Warning

The activation email can only be resent to the OSM. If the OSM is unavailable and the email needs to be sent to a different contact, please contact your Microsoft Licensing Solutions Partner to request that the OSM information be changed. Once the information is changed, you will need to make a new request to Billing Support to resend the activation email to the new OSM.

How do I add more licenses or add-ons, such as additional instances or storage when I have purchased through volume licensing?

Microsoft Dynamics CRM Online customers that purchased their subscription through volume licensing have two options to add more licenses or purchase add-ons:

- Add them through the Volume Licensing Service Center using the License Reservation feature, which allows you to immediately add licenses or add-ons and then pay for them at the agreement anniversary time as a True-Up. Licenses are accessible within hours.
- Place an order through the standard Purchase Order process through the Microsoft Licensing Solutions Partner. Licenses are accessible in up to 12 hours after the order is processed by Microsoft.

If I accidentally attach the volume licensing licenses by signing in to the wrong account, how can I move the licenses to the correct account?

To reassign the account to which your volume licensing agreement licenses are attached, contact Billing Support and request to have your agreement remapped to a new account.

Note

The licenses cannot be remapped to a different account if you already own Microsoft Online Services licenses (Office 365 or Intune) on the same agreement, because all Microsoft Online Services licenses are attached to the same account.

Where do I find support for my CRM Online volume licensing invoice?

For assistance with a volume licensing invoice, contact your Microsoft Licensing Solutions Partner.

See Also

Enterprise Agreements

Frequently Asked Questions About Product Licensing

CRM Online Fall '13 FAQs

Billing and subscription support

verticaltabbed

450

Hot topics

Billing FAQs for CRM Online

Platform transitions for CRM Online

Microsoft Online service portal how-to tasks

Microsoft Commerce transaction platform how-to tasks

CRM on-premises

Your support options depend on how you purchased Microsoft Dynamics CRM (on-premises):

- If you purchased through volume licensing, see Volume licensing.
- If you purchased through Microsoft Dynamics, see Microsoft Dynamics.

CRM Online

For billing support for Microsoft Dynamics CRM Online:

- Find your local Microsoft Dynamics CRM Online billing support number.
- Or, sign in to your work or school account and submit a web ticket.

Note

If you still have to transition from CTP to the Microsoft Online Services environment, visit the Transition Center.

Social Engagement

For billing support for Microsoft Social Engagement:

- Find your local Microsoft Dynamics CRM Online billing support number.
- Or, sign in to your work or school account and submit a web ticket.

Microsoft Dynamics Marketing

For billing support for Microsoft Dynamics Marketing:

- Find your local Microsoft Dynamics CRM Online billing support number.
- Or, sign in to your work or school account and submit a web ticket.

Parature, from Microsoft

For billing support for Microsoft Dynamics Marketing:

- Find your local Microsoft Dynamics CRM Online billing support number.
- Or, sign in to your work or school account and submit a web ticket.

Product support

If you have questions on how to use or technical issues using Microsoft Dynamics CRM, Microsoft Social Engagement, or Microsoft Dynamics Marketing, see: Product Support.

Community forum	Support blog	Contact technical support

Billing FAQs for CRM Online

Billing support agents for Microsoft Dynamics CRM often hear similar questions from our customers. To help answer your billing and subscription management questions as quickly as possible, we’ve put together this list of the most frequently asked questions.

How do I find the correct CRM Online billing and subscription support team?

Before contacting Microsoft Dynamics CRM Online services billing support, you'll need to determine which platform your CRM Online account is hosted on because each platform has its own billing and subscription management support team. The simplest way to do this is to match your CRM Online account sign-in to one of the formats listed here:

Microsoft online services platform

If you sign in to your CRM Online account with a user name that follows this format, *email@contoso.onmicrosoft.com*, you're on the Microsoft Online Services environment. To find a contact in billing and subscription support, you can:

- Find your local CRM Online billing support number.
- Or, submit a billing support query.

Microsoft commerce transaction platform

If you sign in to your CRM Online account with a user name that follows this format, *email@live.com*, you're on the Microsoft commerce transaction platform. To find a contact in billing and subscription support, you can submit a query to CRMAOC@microsoft.com.

What billing activities do I need to contact CRM Online Billing Support to manage?

The instructions in this section apply equally to subscriptions purchased for Microsoft Dynamics CRM Online, Microsoft Dynamics Marketing, Microsoft Social Engagement, Parature, from Microsoftas well as Microsoft Office 365.

You can resolve many billing-related issues by yourself, but there are some requests that only billing support can resolve. Please refer to the **CRM Online** tab on the Billing and subscription support page if you want to do any of the following:

1. Make a change to billing frequency.
2. Make a change to payment method, that is, change from invoicing to credit card payments outside of subscription renewal. If you want to change your payment method during subscription renewal, see the next question for more information.
3. Reactivate an expired account.
4. Cancel a subscription or reduce the number of seats on a subscription. This can also be managed in the Office 365 admin portal, without having to contact Support.
5. Dispute a charge or clarify a subscription discrepancy.
6. Request a service level agreement (SLA) billing credit.
7. Correct or change a Partner of Record attachment. This can also now be self-managed through the Office 365 admin portal.

When I renew my subscription, can I change my payment method?

During subscription renewal, you can move from credit card to invoice payment, but not from invoice to credit card. Please refer to the **CRM Online** tab on the Billing and subscription support page if you wish to change from invoice to credit card payments at subscription renewal time.

How do I purchase CRM Online through Volume Licensing?

If you're interested in placing an order for Microsoft Dynamics CRM Online through Volume Licensing, you can find more information on what the best option is for you by reviewing How Volume Licensing Works. For detailed information, see Purchase Microsoft Dynamics CRM through Volume Licensing.

How do I extend my CRM Online trial?

You can now extend your free trial on a self-serve extension on the Admin portal for a one-time extension of 30 days. Alternatively, you can submit a service request via the portal or call the Billing Support toll free numbers. Please note that for self-serve extensions you're required to enter your credit card information, but your credit card won't be charged for trial extensions.

How do I migrate from CRM Online to the on-premises version of CRM?

If your organization is considering changing from Microsoft Dynamics CRM Online to the on-premises (server-based) version of Microsoft Dynamics CRM, you will need to work with Technical support.

How do I cancel my CRM Online subscription?

The instructions in this section apply to subscriptions made through Microsoft Dynamics CRM Online as well as through Microsoft Office 365.

You'll need to contact billing support to cancel your subscription. To contact billing support, please refer to the **CRM Online** tab on the Billing and subscription support page.

Before you call, have the following information ready:

1. Billing administrator's Microsoft account and password.
2. Organization URL and name.
3. The day that you want your subscription to CRM Online terminated.

You should have also made the following decisions:

1. Do you want to keep your existing data? If so, you can export it to Microsoft Office Excel. For more information, see Export Data to Excel.
2. Do you want to keep any Internet Marketing service campaigns running? If you're not the person who signed up for the marketing service, you must work with that person to cancel or maintain it.

   In addition, you can now do a self-serve cancellation of your subscription form the Admin portal.

Important

If you cancel today, this subscription will remain active until the end of the billing cycle.

How do I reactivate my expired CRM Online account?

The instructions in this section apply to subscriptions made through Microsoft Dynamics CRM Online as well as through Microsoft Office 365.

To reactivate an expired Microsoft Dynamics CRM Online account, you'll need to contact billing and subscription support. Please refer to the **CRM Online** tab on the Billing and subscription support page.

If you saved your data to a Microsoft Office Excel workbook before canceling your CRM Online account, you should be able to import the saved data.

How do I apply for a credit due to a CRM Online service outage?

The instructions in this section are common for subscriptions made through Microsoft Dynamics CRM Online as well as through Microsoft Office 365.

You may be eligible for a billing credit if your online service level falls below 99.9% availability. For complete details, including a critical list of exclusions, see the Microsoft Dynamics CRM Service Level Agreement.

Submit a claim by contacting Billing and subscription support. To contact billing support, please refer to the **CRM Online** tab on the Billing and subscription support page.

How do I apply for non-profit pricing?

Please refer to the Non-profit pricing page for more information on how to apply.

How to change the Bill to country/region

You need to create a new tenant and the desired bill-to-country/region and purchase the desired offer on the new tenant. You'll have to manually export data from the old tenant and import into the new tenant. Finally, you'll contact Billing Support to cancel your subscription. To contact billing support, please refer to the **CRM Online** tab on the Billing and subscription support page. If you require assistance with migrating the data, contact Technical support.

I'm a CRM Online customer and I have learned there is a minimum of 5 Professional users that I need to purchase. What if I only require 3 Professional users?

That is correct. Microsoft Dynamics CRM Online customers need to buy a minimum of 5 paid Professional users. The Microsoft Online Services environment enforces this for new customers.

See Also

Billing and subscription support

Non-profit pricing

Find your CRM administrator or support person

For partners -- Get the credit when your customers subscribe to CRM

As a Microsoft Dynamics CRM partner, you can help your customer sign up for a Microsoft Dynamics CRM Online subscription. You can customize and set up their organization for them, and reduce their effort to get started. After signing up, you can designate your company as the customer's partner of record. As the partner of record, you can help to ensure that your customer has a great trial experience and start them down the path toward success with Microsoft Dynamics CRM.

This document describes in detail the tasks you must complete to sign up for Microsoft Dynamics CRM on behalf of your customer. It also describes the tasks a customer must do to remove your administrative privileges from the customer's company to ensure that they won't be charged for your access after the trial is complete.

Sign up for a free trial subscription

Using a Microsoft account, which can be your ID or your customer's, sign up for a free trial of Microsoft Dynamics CRM. The free 30-day trial subscription includes 20 user licenses and 5 gigabytes (GB) of storage. You can activate your customer's trial subscription as a paying subscription at any time during the first 30 days. If you sign up for the trial subscription using your customer's Microsoft account, you won't need to worry about transferring ownership of the account later on.

Important

When signing up for the free trial, note the following:

Make sure to select the correct country/region for your customer. The country/region is important for setting up your customer's billing.

If the customer doesn't have a billing address in the country/region you select, their account can't be activated later.

When you accept the terms of service, youre accepting it on behalf of your customer and representing their agreement to our terms.

1. Go to Microsoft Dynamics CRM.

   – OR -

   If you received an email with the customer's invitation, click the link.
2. Click **Take the TestDrive** and then fill in the information to start a TestDrive.

Soon after you complete the sign up, you'll be notified by email that the Microsoft Dynamics CRM trial subscription is ready. You'll also receive email messages that provide help for new organizations during the first 30 days of their subscription. Forward these email messages to your customer.

Designate yourself as the partner of record

After completing the trial sign up, designate your company as the partner of record who is responsible for the customer. As the partner of record, you can help Microsoft provide our partners and customers with the best service and support. After the trial subscription becomes a paid subscription, your partner company can also claim the CRM Software Advisor (CSA) fee for the subscription. For information about the CSA fee program, visit the Microsoft Partner Network site, where you can download the Microsoft Dynamics CRM Software Advisor Operations Guide and FAQ, which provides detailed instructions for the fee claim process.

If your customer has already signed up for a Microsoft Dynamics CRM Online subscription, or prefers to sign up for the trial subscription themselves, they can still designate your company as the partner of record.

1. Go to the Partner of Record Designation page in CustomerSource.
2. Sign in with the same Microsoft account that you used to sign up for the trial subscription.

   If this Microsoft account is associated with more than one Microsoft Dynamics CRM Online subscription, select your customer's organization.
3. Search for your partner company's account, and then select **Microsoft Dynamics CRM** as the product line from the drop-down list.

   Tip

   You can search for your partner company by company name, phone number, or their 10-digit partner MBS authorization number.
4. Select your company from the search results, and then click **Associate**.

Transfer ownership after completing the trial

After the trial period is complete and your customer is ready to start their subscription, there are a few steps you need to complete in order to transfer ownership of the Microsoft Dynamics CRM instance. If you signed up for the Microsoft Dynamics CRM Online subscription on behalf of the customer by using a Microsoft account other than your customer's, call Microsoft Dynamics CRM Customer Service and Support to request a transfer of ownership of the subscription to your customer and designate him or her as the billing administrator of the customer's Microsoft Dynamics CRM organization. The billing administrator can take actions that have financial implications to the Microsoft Dynamics CRM Online subscription, such as:

- Upgrading to a different subscription

- Upgrading to a different release
- Purchasing additional licenses
- Purchasing additional storage

> **Tip**
> If you used a Microsoft account that belongs to someone in your customer's organization, or that can be transferred to your customer, skip this task. Give the email address and its password to your customer.

To transfer the ownership of the Microsoft Dynamics CRM trial subscription, you'll need the following:

- The email address of the person from your customer's organization who will act as a system administrator and the billing administrator for the subscription.

  > **Important**
  > Each organization must have a billing administrator.

- The Microsoft account that was used to sign up for the subscription.
- The name of the company used to create the trial subscription.

  You'll need this name to identify your customer's company if there is more than one account registered at the Microsoft Billing and Account Management site.

- If the free trial subscription has already been activated to a paying subscription, you'll also need the credit card number used to pay for the subscription.

Add a system administrator

1. Sign in to Microsoft Dynamics CRM using the Microsoft account that you used to sign up for the trial.
2. Follow the steps in TechNet: Create users and assign Microsoft Dynamics CRM Online security roles to create a user and assign the system administrator security role. This user will also function as the billing administrator.
3. Make sure the new billing administrator has successfully signed in to your organization before transferring ownership.

Add an account delegate

1. Go to the Microsoft Billing and Account Management site.
2. Sign in with the same Microsoft account that you used to sign up your customer for the trial subscription.
3. Under **Billing account overview**, select the company account where you want to add a delegate.
4. Click **View or add account delegates**.
5. On the **Manage account delegates** page:
   a. Click **Add an account delegate**.
   b. Enter the Microsoft account of the new billing administrator.

c. Click **Add delegate**.

Request an ownership transfer

1. Contact Microsoft Dynamics CRM Customer Service and Support.
2. Give the customer service representative the Microsoft account that was used to sign up for the subscription and the account ID number.
3. Give the customer service representative the Microsoft account of the new billing administrator.
4. Ask the customer service representative to promote the new billing administrator to initial user, and primary administrator.

    Important
    Make sure that the new billing administrator has accepted the invitation to become a system administrator. The Microsoft account that was used to sign up for the trial subscription will be demoted to an account delegate.

Remove the partner's administrative privileges

These tasks are optional. After you sign up your customer and register yourself as the partner of record, you will have access to your customer's subscription and billing account for the subscription. The following tasks are performed by the customer.

Important
If you or your customer do not remove your privileges, the customer will be charged the standard monthly user fee for your access.

If your customer wants to remove your access to the billing account for the subscription, they must complete the following steps:

Remove partner access to the billing account

1. Go to the Microsoft Billing and Account Management site.
2. Sign in with the Microsoft account you use for the billing administrator at your company.
3. If the service name displayed under **Billing account overview** is not Microsoft Dynamics CRM, select the account from the menu that corresponds to the Microsoft Dynamics CRM Online subscription.
4. Click **View or add account delegates**.
5. Next to the names of account delegates you want to remove, click **Remove**.
6. In the next window, click **Yes** to confirm the removal.

    Important
    We strongly recommend that at least two people in the organization have access to the Billing and Account Management site. To add someone, click **Add an account delegate**, and then follow the online instructions.

Tip
To verify that the information on the personal information page is correct, click **Go to Account Information**.

If your customer wants to disable your access to the subscription, they must complete the following steps in Microsoft Dynamics CRM:

Disable partner access to the Microsoft Dynamics CRM Online subscription

1. Sign in to the Microsoft Dynamics CRM Online subscription with the Microsoft account you use for the billing administrator at your company.
2. Follow the steps in Create users and assign Microsoft Dynamics CRM Online security roles to disable the user from the partner company.

Troubleshoot sign-in problems

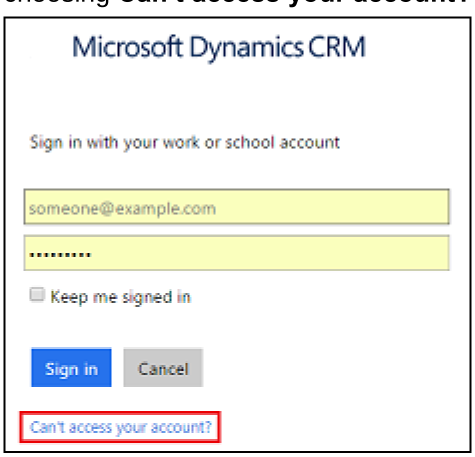
Having trouble signing in to Microsoft Dynamics CRM Online or another CRM Online service, such as Microsoft Dynamics Marketing or Microsoft Social Engagement? Here's what you need to know about passwords, signing in, and common error messages.

Important
If you're an administrator, make sure to check the Service Health Dashboard for maintenance issues.

Password issues

If you're an administrator

If you forget your administrator password, you can reset it by going to the sign-in page, and choosing **Can't access your account?** at the bottom of the page.



Tip

To enable your users to be able to reset their passwords themselves, you'll need to purchase an Azure Active Directory subscription and configure it for password self-service. More information: Self-service password reset in Azure AD: how to enable, configure, and test self-service password reset

To reset user passwords, you use the Office 365 admin center. More information: Reset a user's password

If you're not an administrator

If you're not an administrator, and you forgot your password, you'll need to contact your administrator and ask for a password reset. Once your administrator resets your password, you'll receive an email with instructions on how to sign in and enter a new password. More information: Find your CRM administrator or support person

Signing in

If you're an administrator

You can sign in by going to the Office 365 admin center at: https://portal.office.com. In the Office 365 admin center, you can sign in to all the online services associated with your account. You can also check service health, manage users, manage licenses, and more. More information: About the Office 365 admin center

If you're not an administrator

You can sign in directly to CRM Online, Microsoft Social Engagement, or Microsoft Dynamics Marketing. You can also sign in at https:/portal.office.com.

Sign in directly to CRM Online

Your CRM administrator provides the direct CRM Online URL in an email invitation. This URL will be in the following format: https://<yourorganization>.crm.dynamics.com. For example, enter https://contoso.crm.dynamics.com. If you can't find the email that contains the URL, contact your CRM administrator. More information: Find your CRM administrator or support person

Note

If you're in a region other than North America, substitute "*crm*" in the URL with:

- .crm2 for South America (LATAM/SAM)
- .crm4 for Europe, Middle East, Africa (EMEA)
- .crm5 for Asia Pacific (APAC)
- .crm6 for Oceania (OCE)
- .crm7 for Japan (JPN)
- .crm9 for United States of America Government

After entering your URL, you'll be prompted for your user name. Your user name will be in one of the following formats:

- username@contoso.onmicrosoft.com (standard Office 365 domain)
- username@contoso.com (custom domain)

What if I'm still using a Microsoft account to sign in to CRM Online?

Use the email address provided by your CRM administrator (sent in an email invitation). Verify that you're using the same Microsoft account email address that the email invitation was sent to. Note that you can't sign in to Microsoft Social Engagement or Microsoft Dynamics Marketing with a Microsoft account. Troubleshoot problems with your Microsoft account user name or password.

Sign in directly to Microsoft Social Engagement

Your administrator provides the direct URL for Microsoft Social Engagement in an email invitation. This URL will be in the following format: https://listening.microsoft.com/app/<appID>/. If you can't find the URL, contact your administrator.

After entering your URL, you'll be prompted for your user name. Your user name will be in one of the following formats:

- username@contoso.onmicrosoft.com (standard Office 365 domain)
- username@contoso.com (custom domain)

Sign in directly to Microsoft Dynamics Marketing

Use the following direct URL for Microsoft Dynamics Marketing: https://<yourorganization>.marketing.dynamics.com. Please contact your administrator if you have trouble signing in.

After entering your URL, you'll be prompted for your user name. Your user name will be in one of the following formats:

- username@contoso.onmicrosoft.com (standard Office 365 domain)
- username@contoso.com (custom domain)

Sign in at https://portal.office.com

You can also sign in to https://portal.office.com. What you see depends on what user account licenses you have.

In the following table, **X** indicates that the user has a license for that service.

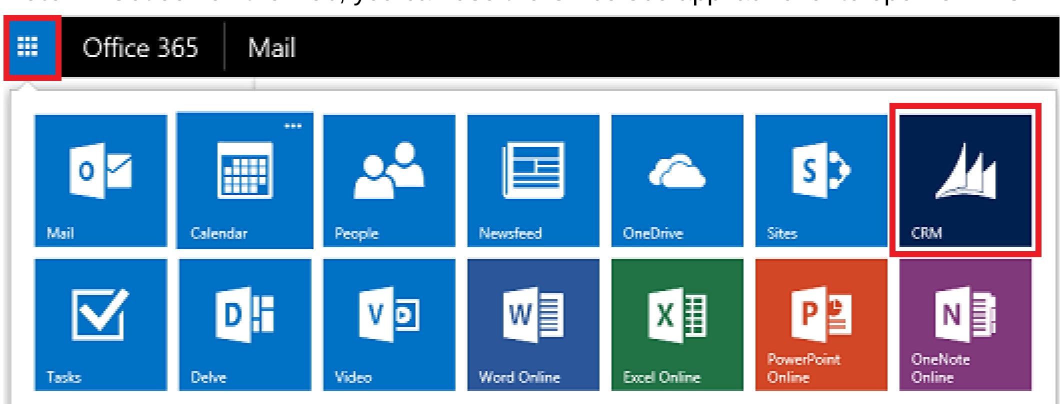
			User Licenses			
CRM Online	**X**	**X**	**X**	**X**		
Office 365	**X**	**X**			**X**	

			User Licenses			
Enterprise Plan						
Microsoft Social Engagement or Dynamics Marketing	**X**		**X**		**X**	**X**
Page that opens if you have this combination of licenses:	Get started with Office 365 page for 30 days, then Outlook on the web	Get started with Office 365 page for 30 days, then Outlook on the web	CRM Online	CRM Online	Get started with Office 365 page for 30 days, then Outlook on the web	Microsoft Social Engagement or Dynamics Marketing

For example:

- Users with only a CRM Online license will sign in to CRM Online.
- Users with an Office 365 license and any other service license will see the “Get started with Office 365” page for 30 days, and then Outlook on the web after 30 days.
- Users licensed for Microsoft Social Engagement or Microsoft Dynamics Marketing will sign in to CRM Online if they have a CRM Online license and no Office 365 license.

Note: In Outlook on the web, you can use the Office 365 app launcher to open CRM Online.



Common error messages

I receive this license error: “The selected user or the user trying to log on has not been assigned a security role, and does not have sufficient privileges for this action”

This error must be fixed by someone that has permissions to add security roles to users in Microsoft Dynamics CRM, such as your system administrator. To learn how to add security roles, see TechNet: Manage users.

When I try to sign in, Internet Explorer continues to redirect to another web page and gets into a loop until I choose the Internet Explorer window.

To avoid this error, add the URLs used for Microsoft Dynamics CRM to trusted sites in Internet Explorer:

1. In Internet Explorer, on the **Tools** menu, select **Internet Options**.
2. On the **Security** tab, in the **Select a zone to view or change security settings** section, click or tap **Trusted sites**.
3. Click or tap **Sites**.
4. In the **Trusted sites** dialog box, type the following URLs in the **Add this website to the zone** text box:
   - http://*.dynamics.com
   - http://*.live.com

   After you add each URL, click or tap the **Add** button.
5. If you receive a dialog box that states **Sites added to this zone must use the https:// prefix**, clear the **Require server verification (https:) for all sites in this zone** check box.
6. Click or tap **Close**, and then click or tap **OK**.

Why do I have to sign in again? Can I change the amount of time I'm signed in?

Microsoft Dynamics CRM keeps you signed in for 8 hours. When you've been signed in for 7 hours and 40 minutes, a message will appear warning that your session is about to expire, and you then have 20 minutes to respond. Click or tap **OK**, sign in again, and then click the back button on your browser to return to the area of CRM in which you were working. You can’t change the amount of time you’re signed in.

See Also

Service Health Dashboard

TechNet: Get started administering Microsoft Dynamics CRM Online

Product Support